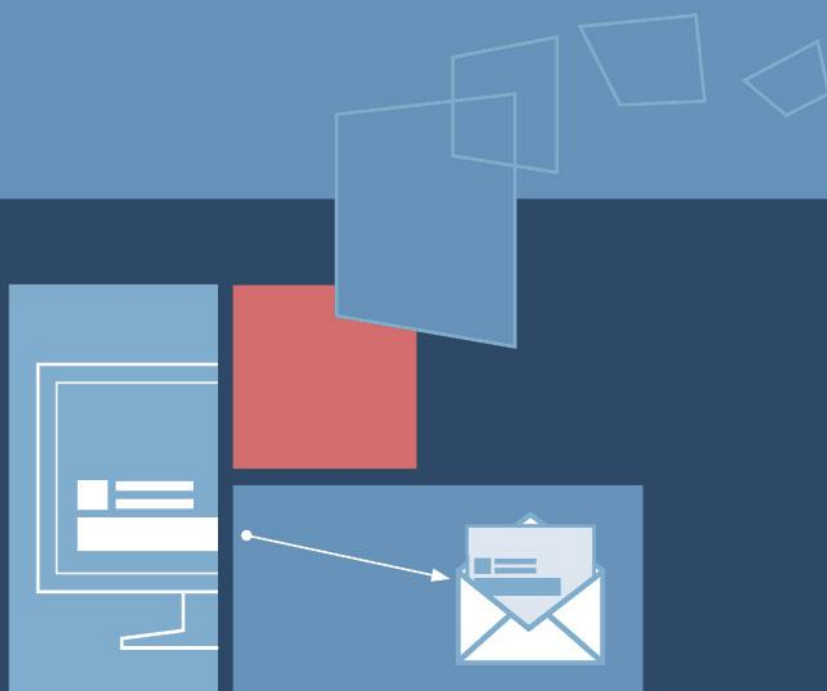
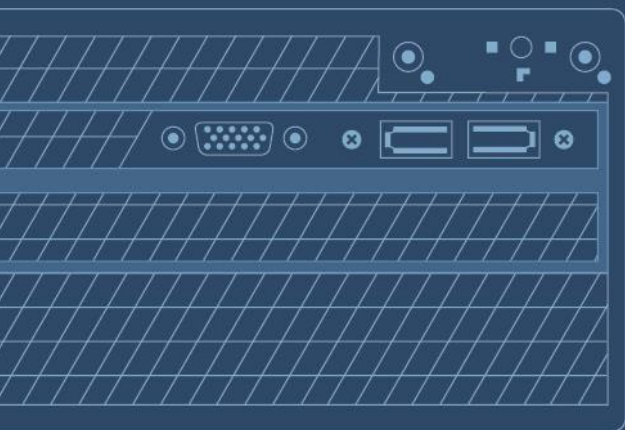




exclaimer™ signature manager  
outlook edition

# Exclaimer Signature Manager Outlook Edition User Manual



[www.exclaimer.com](http://www.exclaimer.com)

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# Chapter 1

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## Getting Started

# Exclaimer Signature Manager Outlook Edition Overview

Exclaimer Signature Manager Outlook Edition allows you to create great looking, professional signatures centrally (including company branding, legal disclaimers and promotional content) for use in all email messages sent from [Microsoft Outlook and Microsoft OWA](#) [pg.101].

## How does it work?

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

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

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

- The policy type - [signature](#) [pg.104], [campaign](#) [pg.108] or [disclaimer](#) [pg.110]
- The circumstances under which the policy should be triggered (using [conditions](#) [pg.124], [exceptions](#) [pg.129], [date range](#) [pg.132] and [next policy](#) [pg.134] options)
- Signature content (using [templates](#) [pg.189])
- How the signature should be [deployed](#) [pg.343]

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

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

When Exclaimer Signature Manager Outlook Edition is installed and [appropriate deployment options](#) [pg.343] have been set, it is running in the background all of the time. Any new or updated signatures are copied to a specified deployment folder (the [network share](#)) and then deployed to users automatically.

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

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

## But That's Not All...

[Exclaimer Signature Manager Outlook Edition](#) includes a library of professionally designed [signature](#), [campaign](#) and [disclaimer](#) templates which can be used as-is, or as a start point for creating your own versions. Templates are created and edited using an intuitive [template editor](#) [pg.208], which will be familiar to anyone who has worked with [Microsoft Outlook](#).

Versions are created in [HTML](#), [RTF](#) and [Plain Text](#) formats, with an [instant preview](#) [pg.197] feature so you can see how your template will be displayed in email messages, at a glance. With the ability to include tables, images, RSS feeds and dynamic Active Directory fields, you can be as creative as you want to be.

## And There's More...

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

[Exclaimer Signature Manager Outlook Edition](#) allows you to control Outlook [mail format settings](#) [pg.112] for all users so that every new, replied or forwarded email complies with your organization's house style. This is achieved with [Outlook mail format](#) policies; with this type of policy you can control:

- [Message format options](#) [pg.113] - control the default format for message composition and preferred editors to be used.
- [Message font options](#) [pg.114] - enforce your organization's house style by specifying default font settings for new messages, together with replies, forwarded messages and plain text email.
- [General Outlook options](#) [pg.114] - choose whether any signatures or stationery that a user might have set locally are retained or overwritten by [Exclaimer Signature Manager Outlook Edition](#).

Having defined your templates and policies, there's no need to worry about complicated testing processes, since [Exclaimer Signature Manager Outlook Edition](#) includes an intuitive [policy tester](#) [pg.180]. This simulates the generation of signatures for given Outlook users, so you can quickly see if policies are defined correctly.



# Closing Exclaimer Signature Manager Outlook Edition

The [Exclaimer Signature Manager Outlook Edition](#) application does not need to be running for policies to be processed. To close [Exclaimer Signature Manager Outlook Edition](#), select [exit](#) from the [file](#) menu at the top of the [Exclaimer console](#) [pg.66].

# Chapter 2

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## Installation & Deployment

# Installation Overview

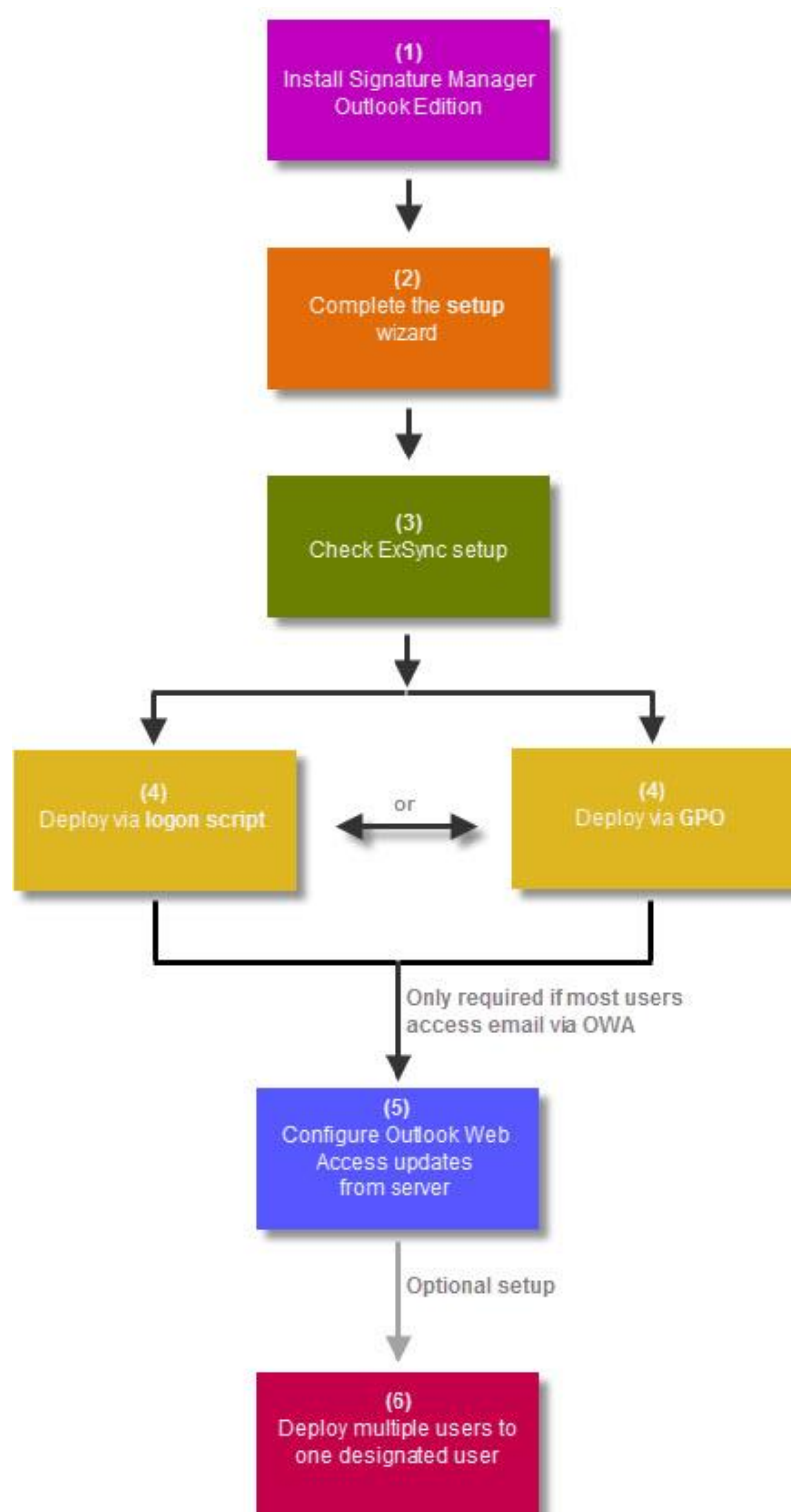
The installation process for [Exclaimer Signature Manager Outlook Edition](#) is very straightforward, using an installation wizard to copy required files and complete most setup behind the scenes.

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

- Within your organization most users log on to your domain via [Microsoft Outlook](#) but some occasionally use [OWA](#). In this situation, set deployment (via a [.BAT](#) or a [VBS](#) file) as a [logon script \[pg.29\]](#) or a [Group Policy Object \(GPO\) \[pg.31\]](#).
- or-
- Within your organization most users typically use [OWA](#) and rarely log on to your domain via [Microsoft Outlook](#). In this situation, set deployment (via a [.BAT](#) or [VBS](#) file) as a [logon script \[pg.29\]](#) or a [Group Policy Object \(GPO\) \[pg.31\]](#). This sets [ExSync](#) for the relatively few users who log on to your domain and you should then configure [OWA](#) settings to use server updates - see [updating OWA signatures from the server \[pg.33\]](#).

# The Installation Process

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



**NOTE**

If you have remote users (i.e. people who access your network using their own computers off site), you may also wish to configure signature deployment for remote users.

Here, **steps 1 to 4** are mandatory, irrespective of how most users access their email. Then, **step 5** is only required if most people use [OWA](#), or if you are using [Exchange 2013](#) or [Office 365](#). **Step 6** is entirely optional.

# Configuring OWA

If you wish to update [OWA](#) signatures, the machine used for the [Exclaimer Signature Manager Outlook Edition](#) installation should be one of the following:

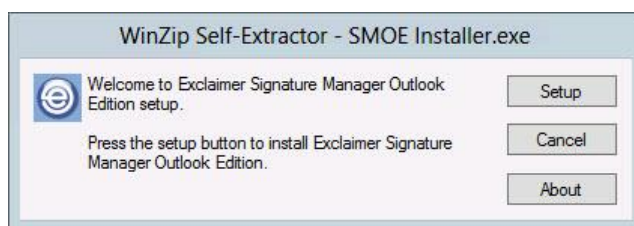
- A dedicated machine with [Microsoft Outlook](#) installed.
- A machine with the [Exchange Management Console](#) installed.
- An [Exchange 2003](#) server.
- An [Exchange 2007](#) server with a [MAPI Client](#) (such as [Microsoft Outlook](#)) or the [MAPI Collaboration Data Objects](#) installed.
- An [Exchange 2010](#) server.
- An [Exchange 2013](#) server.

# The Installation Wizard

The installation process for [Exclaimer Signature Manager Outlook Edition](#) is completed using a familiar 'wizard' approach to guide you through each process, step-by-step. This process includes the Exclaimer license agreement and copies files to your preferred destination folder. Once complete, you can use the application for five days, after which you must [register for a 30 day trial \[pg.73\]](#) to continue using [Exclaimer Signature Manager Outlook Edition](#).

To complete the installation wizard, follow the steps below:

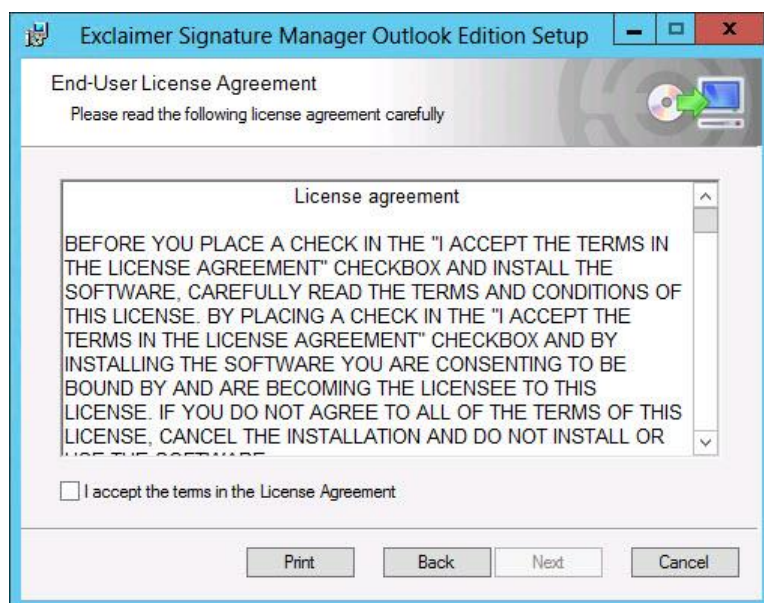
1. Double click the [setup](#) file to start the installation process:



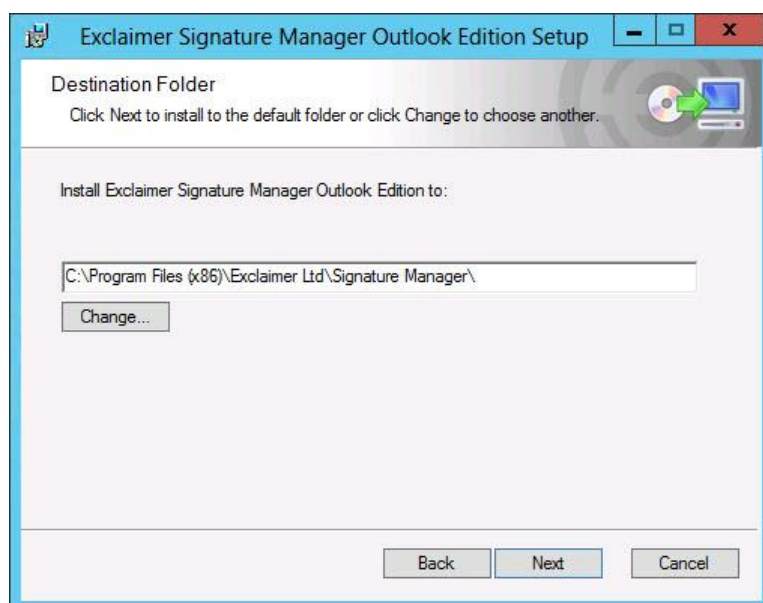
2. Click [setup](#) to display a welcome message:



3. Click the [next](#) button to view the [end-user license agreement](#):



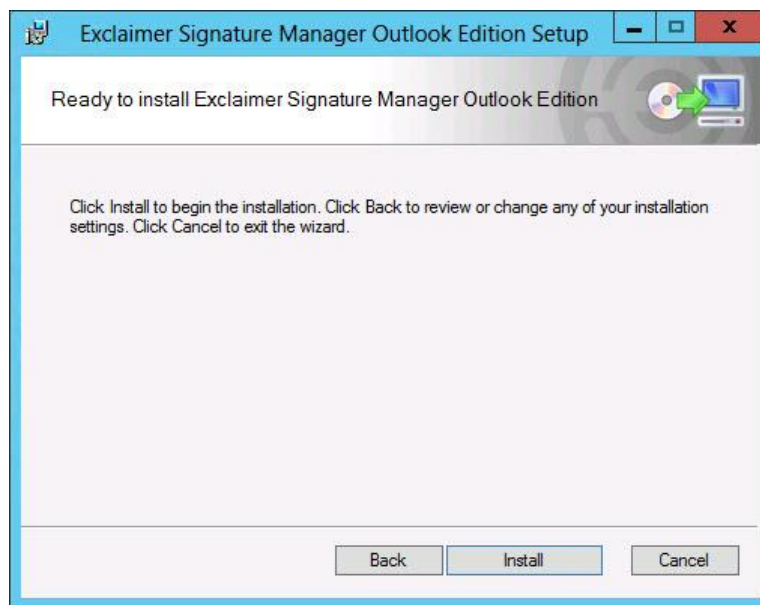
4. Having read the license agreement, check the [I accept the terms in the license agreement](#) box and click [next](#) to specify a [destination folder](#) for installed files:



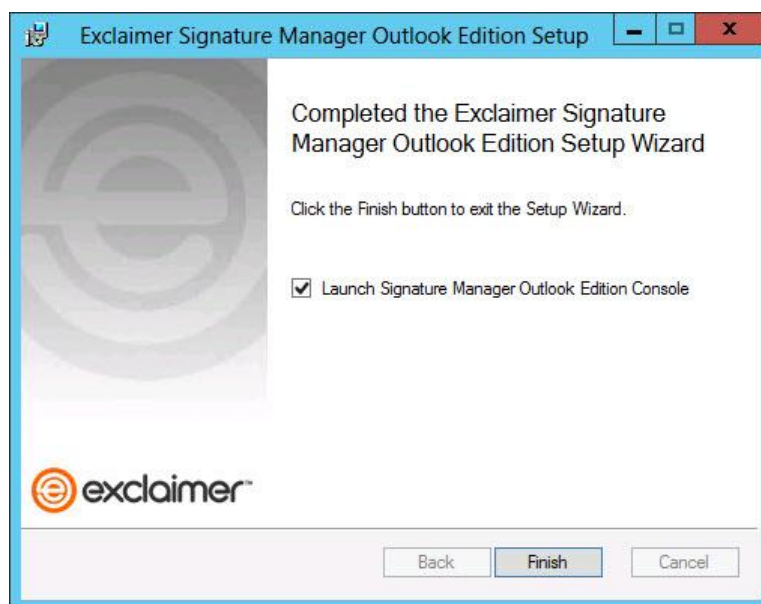
From here you can accept the default folder, or click to specify a new location.



5. Click [next](#) to review:



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



7. Click [finish](#) to close the wizard. If you are installing [Exclaimer Signature Manager Outlook Edition](#) for the first time, the [setup wizard](#) [pg.22] is launched. You should complete this wizard to create your first policy and get started with [Exclaimer Signature Manager Outlook Edition](#).

# The Setup Wizard

Having completed the [installation wizard \[pg.19\]](#) for the first time, the [setup](#) wizard is launched automatically. This wizard takes you through the basic setup required to create your first signature policy and get started with [Exclaimer Signature Manager Outlook Edition](#). To complete this wizard, follow the steps below:

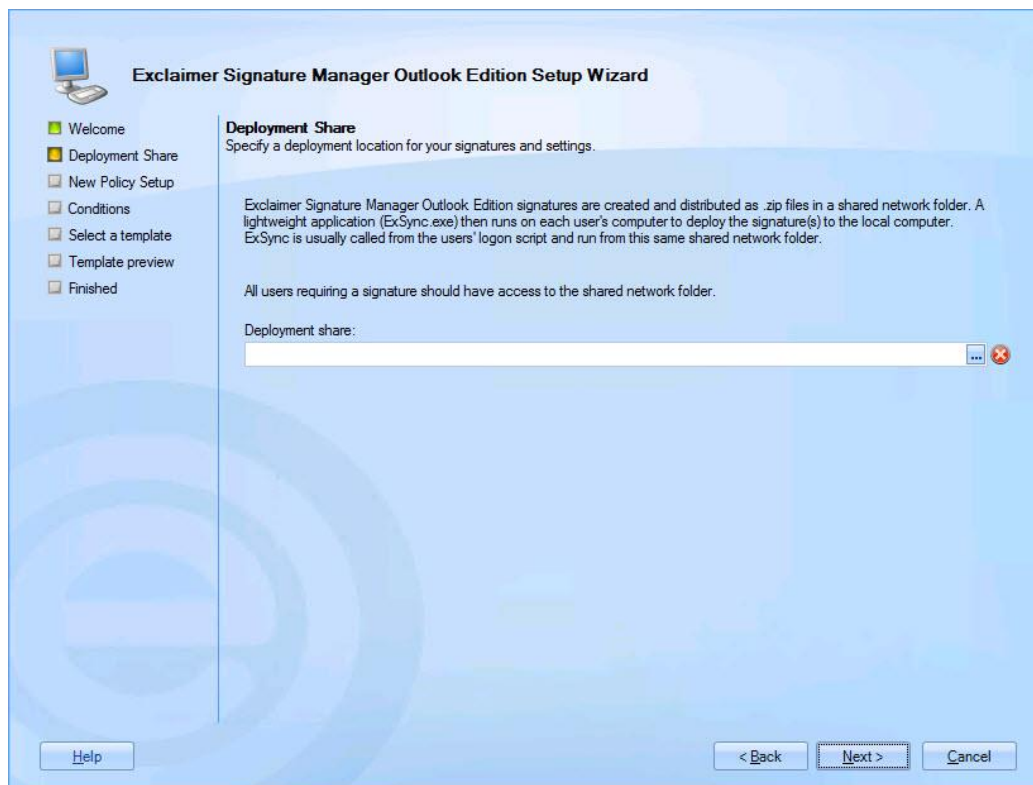
1. The first stage of the [setup](#) wizard displays summary information about the process:



2. Click [next](#) to move to the next stage and set a [deployment share](#). This folder is primarily used to store signatures (as generated by [Exclaimer Signature Manager Outlook Edition](#)) in the form of a zip file, and for users to access the [ExSync \[pg.27\]](#) agent.

When choosing a deployment share you should ensure that the specified drive has enough disk space to store signatures for all users in your organization. Signatures are generated according to a specified [update interval \[pg.350\]](#) and stored in the [deployment share](#).

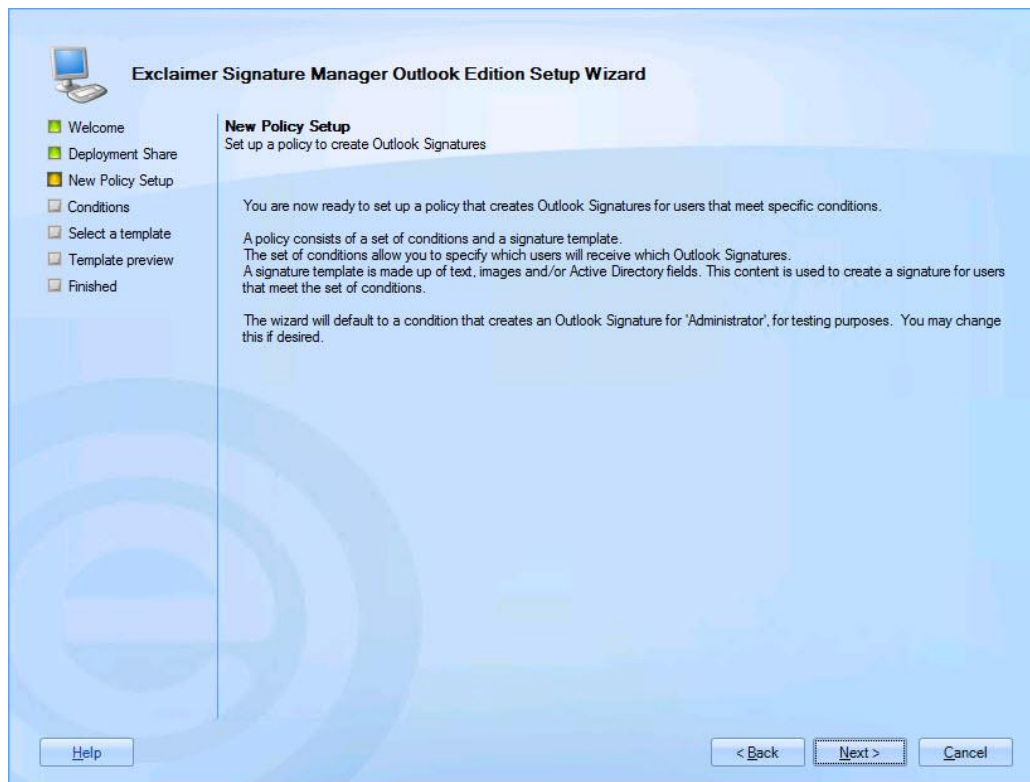
Therefore, if you have 1000 users, 1000 ZIP files will be created and stored:



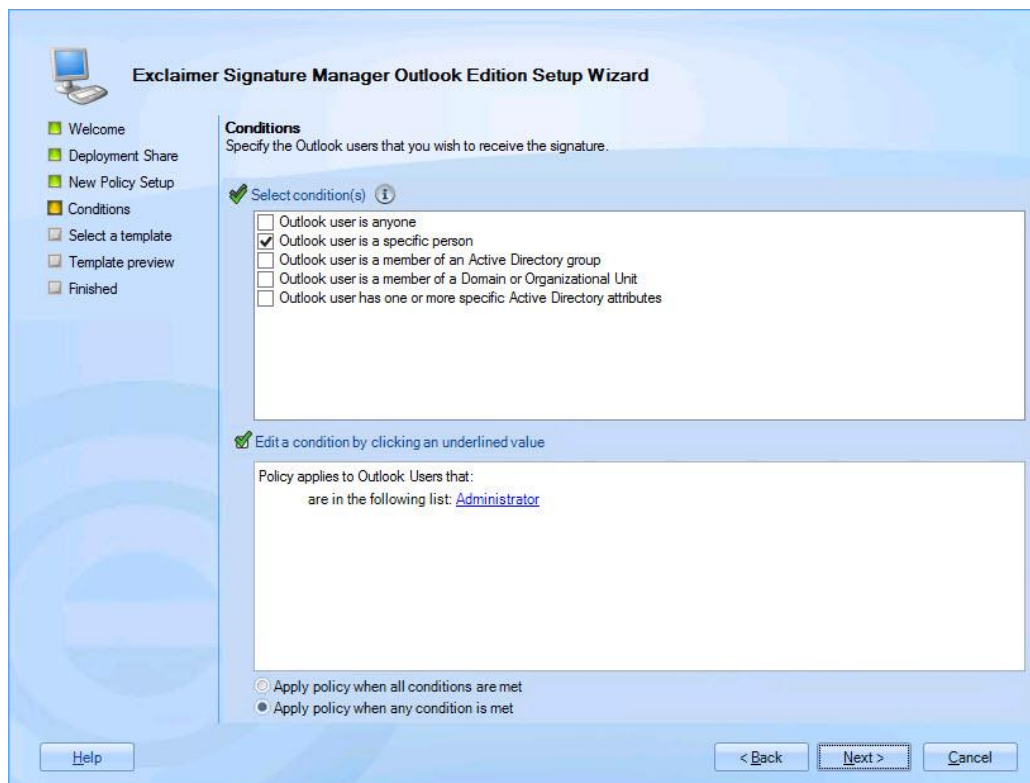
NOTE

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

- Click [next](#) to move to the next stage and review setup required for your first policy:



- Click [next](#) to set [conditions](#) [pg.124] for your first policy. You can update this policy at any time after the installation, so if you are not sure what to set now, simply accept default conditions and continue:



5. Click [next](#) to move to the next stage and select a [template \[pg.189\]](#) to associate with your first policy. A number of standard templates are provided but you can update your selection at any time after the installation. If you are not sure what to select at this point, simply accept the default and continue:



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





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

7. Click [next](#) to review key settings:



8. Click [finish](#) to exit and launch [Exclaimer Signature Manager Outlook Edition](#). From here, you may wish to check / set additional deployment options (see [setting up ExSync](#) [pg.27], [deploying via a logon script](#) [pg.29], [deploying via GPO](#) [pg.31], [configuring OWA updates from server](#) [pg.33] and [deploying multiple user's signatures to one user](#) [pg.43]).

#### NOTE

Once setup is completed, a [signature deployment policy](#) [pg.343] is automatically created. This policy determines how signatures are updated, where they are shared (the **deployment folder** specified in step 2 above) and for which users. By default, this **signature deployment policy** applies to **all** users, but you can [add further policies](#) [pg.360] if you have more complex requirements.

# Setting up ExSync

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

You can automate the process of running [ExSync](#) on client machines using a [Group Policy Object \(GPO\)](#) [pg.31] or a [logon script](#) [pg.29]. Users will not be aware of the agent running during the normal operation of their machine.

## NOTE

For more information on creating or amending Group Policy Objects go to the [Microsoft Technet website](#) and search for **Group Policy Object**.

## How Do I Obtain A Copy Of ExSync?

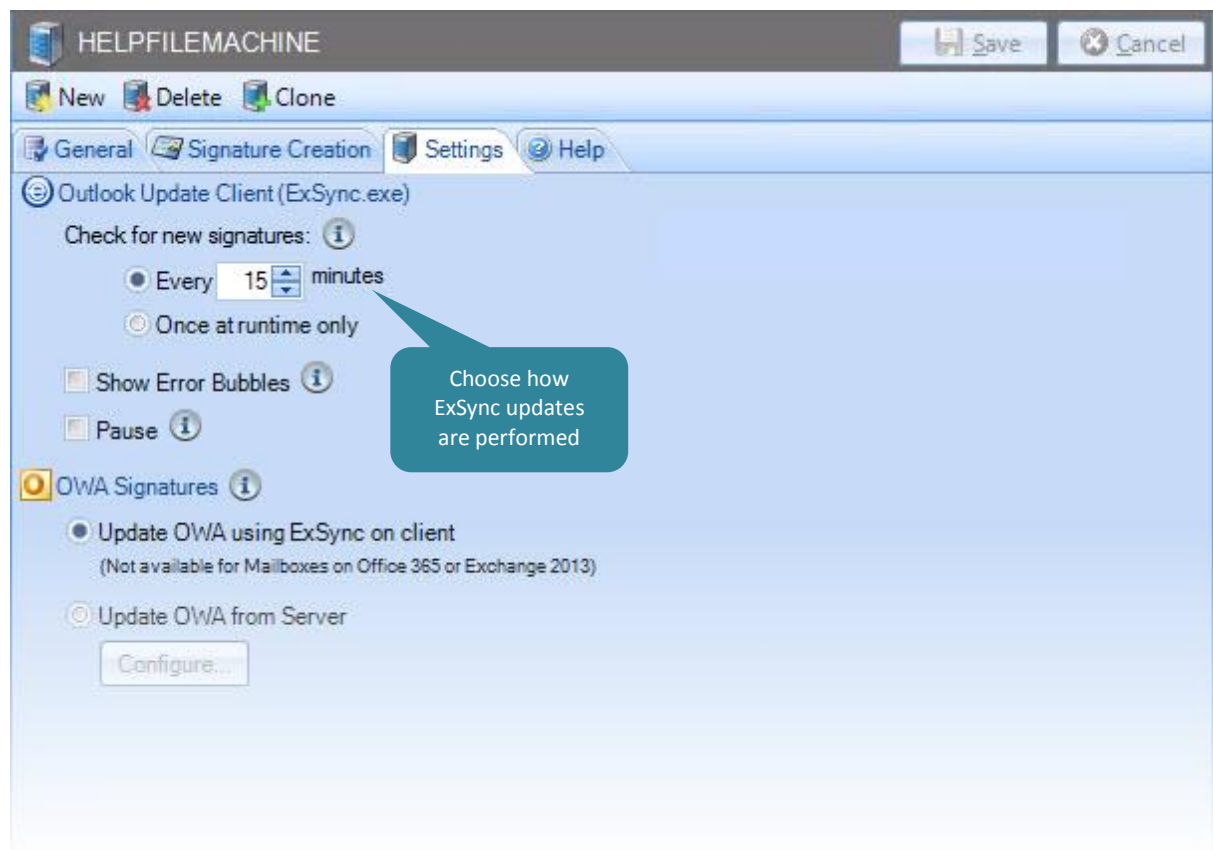
Having completed the [installation process](#) [pg.19] and the [setup wizard](#) [pg.22], the [ExSync](#) agent is automatically copied to your specified deployment share, from where it is run. However, to use [ExSync](#), you need to:

- [Set the update mode for ExSync](#) [pg.28]
- [Ensure that ExSync runs automatically on all client computers](#) [pg.29]

# Setting the Update Mode for ExSync

Using [Exclaimer Signature Manager Outlook Edition](#) settings, you can set the mode in which [Outlook policies](#) [pg.94] are applied to user computers via [ExSync](#) [pg.27]. To do this, follow the steps below:

1. Within the Exclaimer console, select the [signature deployment policies](#) [pg.343] branch of the console tree.
2. From here, select the required [deployment policy](#). A default [deployment policy](#) is created automatically when [Exclaimer Signature Manager Outlook Edition](#) is installed and a [deployment share is specified in the setup wizard](#) [pg.22], but additional deployment policies can also be added.
3. Select the [settings](#) tab to view settings for the selected deployment policy:



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



# Ensuring that ExSync Runs Automatically

Once [ExSync](#) has been deployed to client machines, you need to ensure that it runs automatically. To do this, you can use a [logon script](#) [pg.29] or [GPO](#) [pg.31].

## Deploying Via a Logon Script

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

- [Stage 1: Create new or update existing logon.bat](#) [pg.29]
- [Stage 2: Set login.bat as the login script for required users](#) [pg.30]
- [Stage 3: Ask users to log out and log back in](#) [pg.30]

### Stage 1: Create New or Update Existing Logon.Bat

If you do not already have a [logon.bat](#) file, you should create one now. To do this:

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

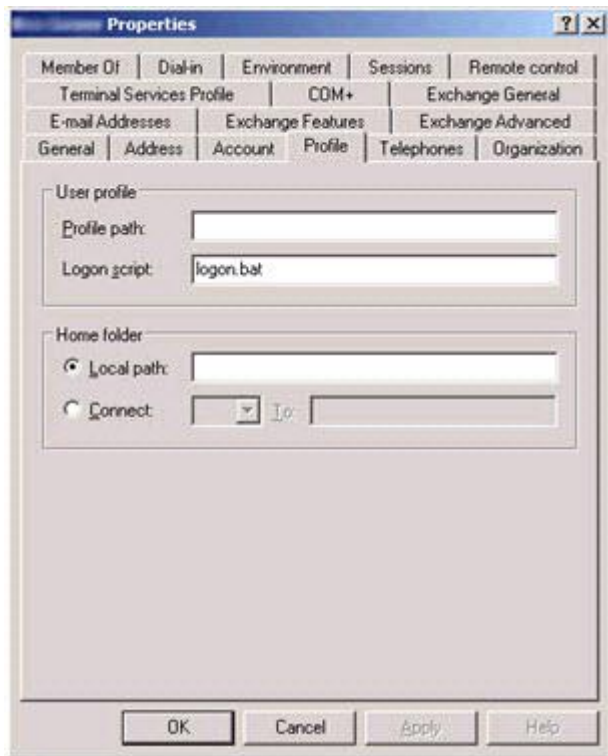
#### NOTE

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

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

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

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



4. Select the appropriate tab, in this case [profile](#).
5. Enter `logon.bat` into the [logon script](#) attribute and click [OK](#).

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

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

## Deploying via Group Policy Object (GPO)

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

- [Stage 1: Create new or update existing logon.bat / logon.vbs \[pg.32\]](#)
- [Stage 2: Propagate the new GPO \[pg.32\]](#)

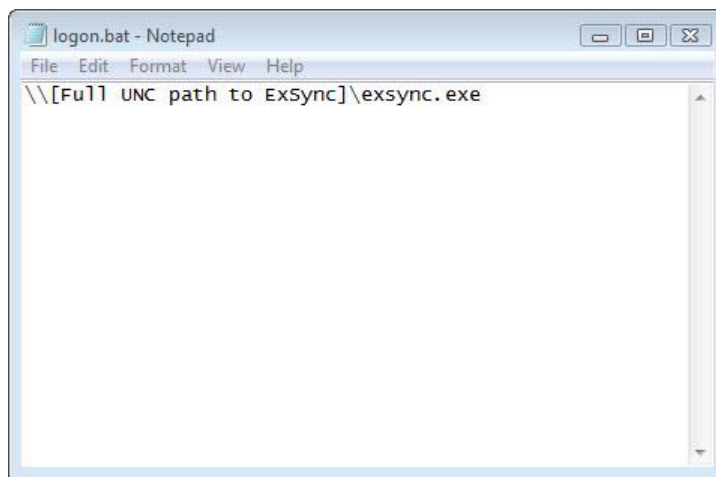
## Stage 1: Create New or Update Existing Logon.Bat / Logon.VBS

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

NOTE

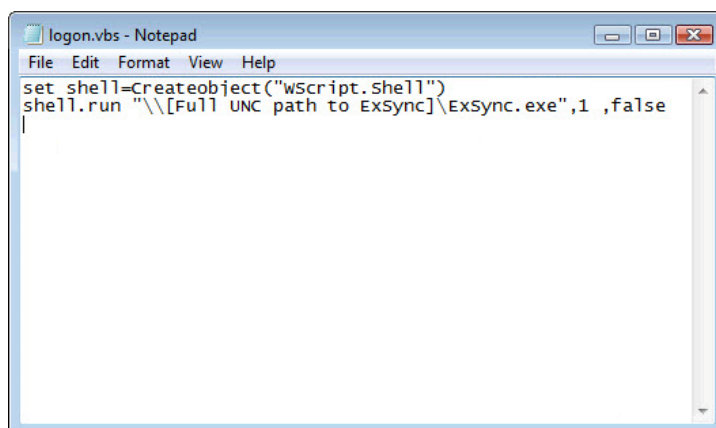
The login script needs to be applied to the user configuration of a GPO and not the computer configuration.

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



-or-

Add the script shown below into the `VBS` file:



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

## Stage 2: Propagate the New GPO

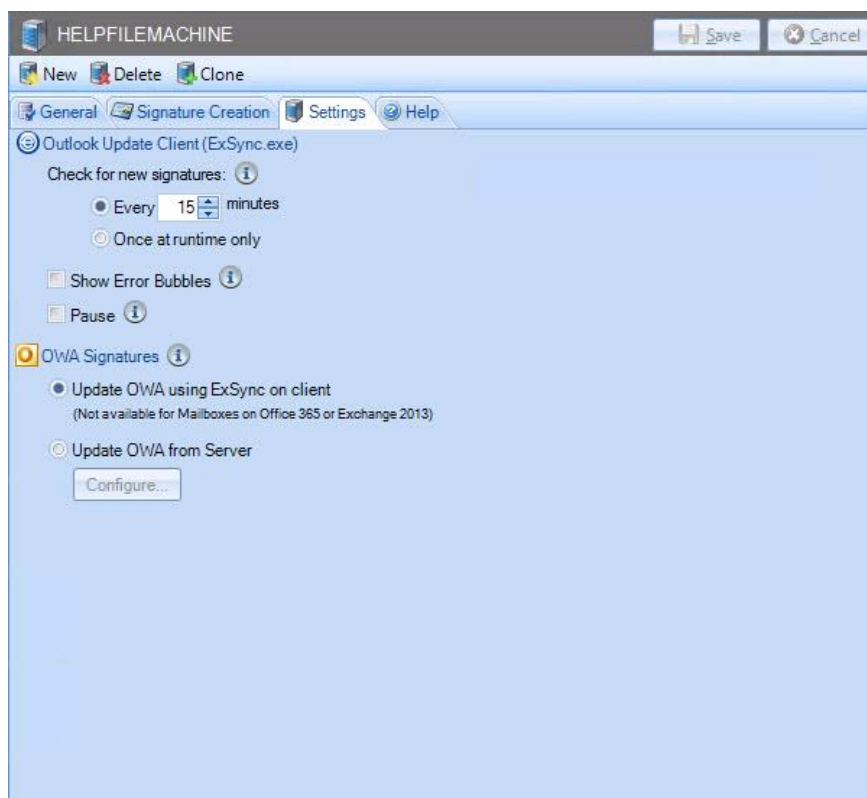
The new `GPO` is updated for each user when they log off and back on. If you need to propagate the change before this is possible, type `gpupdate` in the Windows `run` field on that user's computer.

# Configuring OWA Updates from Server

As an alternative to using [ExSync](#) to update [OWA](#) signatures, updates can be made to [OWA](#) from the server. **This method of signature deployment should only be implemented if you have users who access their email only by [OWA](#) and rarely log on to your domain, or if you have mailboxes on [Office 365](#) or [Exchange 2013](#).**

When this method is used, deployment of [OWA](#) signatures is actioned by the server rather than the [ExSync](#) client. As such it uses processing and memory resources on your server every time [OWA](#) signatures are updated. If you are at all concerned about the impact of updating [OWA](#) signatures from the server (and you do not have mailboxes on [Office 365](#) or [Exchange 2013](#)) you should consider the [ExSync deployment](#) [pg.27] method instead. To ensure that [OWA](#) signatures are always up-to-date, follow the steps below:

1. Within the Exclaimer console, select the [signature deployment policies](#) [pg.343] branch of the tree.
2. From here, select the required [deployment policy](#). A default [deployment policy](#) is created automatically when [Exclaimer Signature Manager Outlook Edition](#) is installed and a [deployment share is specified in the setup wizard](#) [pg.22], but additional deployment policies can also be added.
3. Select the [settings](#) tab to view [settings](#) [pg.354] for the selected deployment policy:



4. In the [OWA signatures](#) section (at the bottom of the tab), select the [update OWA from server](#) option and then click the [configure](#) button to display configuration options:

**Update OWA from Server - Configuration**

Specify an account with impersonation or full access rights to users' mailboxes

Account:

Password:

CA Server:  Only required in an Exchange DAG environment

Connectivity

(Used for Exchange 2003 and 2007)

(Used for Office 365, Exchange 2010 and above)

EWS settings

☒ Autodiscover the Exchange Web Services URL (Recommended)

☐ Use this URL for Exchange Web Services

5. Configure server updates using the table below as a guide:

Option	Summary
Specify an account with impersonation or full access rights...	
Account / Password	<a href="#">Exclaimer Signature Manager Outlook Edition</a> needs authority to access <a href="#">Exchange</a> mailboxes for all users - this is known as <a href="#">Exchange Impersonation</a> . The account configured here will be used to run the <a href="#">Exclaimer Signature Manager Outlook Edition</a> service which has impersonation rights for everyone in the organization, so all mailboxes can be accessed.
CA Server	This is the name of the mailbox server where the account mailbox is hosted. If this field is left blank, <a href="#">Exclaimer Signature Manager Outlook Edition</a> attempts to detect the relevant server but this is not possible in certain environments - for example, <a href="#">Exchange 2010 Database Availability Groups</a> where you should supply the name of the <a href="#">Client Access Server (CAS)</a> .
Connectivity	
Test MAPI connectivity	If you have chosen to <a href="#">update OWA signatures from the server</a> , use the <a href="#">test MAPI connectivity</a> button to check account settings. This option attempts to connect through <a href="#">MAPI</a> using the details that you have specified and any errors will be reported to you for further investigation. Note that this test is only required for <a href="#">Exchange 2003</a> and <a href="#">Exchange 2007</a> .
Test EWS connectivity	If you have chosen to <a href="#">update OWA signatures from the server</a> , use the <a href="#">test EWS connectivity</a> button to check account settings. This option attempts to connect through <a href="#">EWS</a> using the details that you have specified and any errors will be reported to you for further investigation. Note that these settings are only required for <a href="#">Office 365</a> and <a href="#">Exchange 2010</a> or above.

.../continued

Option	Summary
EWS settings	<p>Autodiscover the Exchange Web Services URL (recommended)</p> <p>The <a href="#">Exchange Web Services URL</a> tells the system where to find required <a href="#">Exchange</a> data. On a correctly configured system, this URL is easily found using <a href="#">autodiscover</a> (a <a href="#">Microsoft</a> technology). However, for particularly complex or incorrectly configured systems, <a href="#">autodiscover</a> may not work and so details must be entered manually.</p> <p><a href="#">Use this URL for Exchange Web Services</a></p> <p>If the <a href="#">autodiscover</a> option fails to detect the correct URL for <a href="#">Exchange Web Services</a>, select this radio button and enter the required URL in the associated field.</p> <p>Note that these settings are only required for <a href="#">Office 365</a> and <a href="#">Exchange 2010</a> or above.</p>

6. Click [OK](#) to confirm any changes and exit back to the [settings](#) tab.
7. Click [save](#) to save all changes.

# Configuring Permissions to Update OWA Signatures and Settings

By default, [Exclaimer Signature Manager Outlook Edition](#) updates [OWA](#) signatures and settings from each client desktop computer using [ExSync](#) [pg.27]. However, if you have users who access their email only by [OWA](#) and rarely log on to your domain, you can choose to update signatures and settings from the server.

In this case, specific permissions are required for the [user account used to update the signatures & settings](#) [pg.34]. Required permissions will vary depending on the version of [Microsoft® Exchange](#) your mailbox server is using:

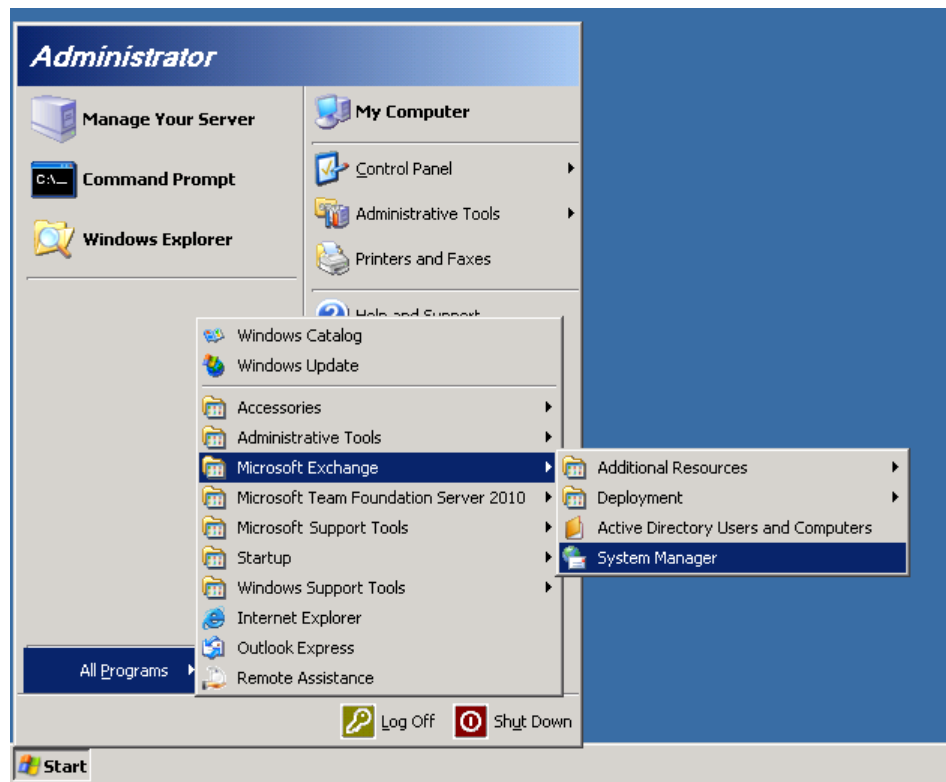
- [Microsoft® Exchange 2003 / Microsoft® Windows® Small Business Server 2003](#) [pg.37]
- [Microsoft® Exchange 2007 / Microsoft® Windows® Small Business Server 2008](#) [pg.40]
- [Microsoft® Exchange 2010 / Microsoft® Exchange 2013 / Microsoft® Windows® Small Business Server 2011](#) [pg.41]
- [Microsoft® Office 365](#) [pg.42]



# Microsoft® Exchange 2003 / Windows® Small Business Server 2003

The user account used must have the [Exchange Administrator](#) role. To achieve this, please follow the steps below on a [Microsoft® Exchange](#) server within your organization:

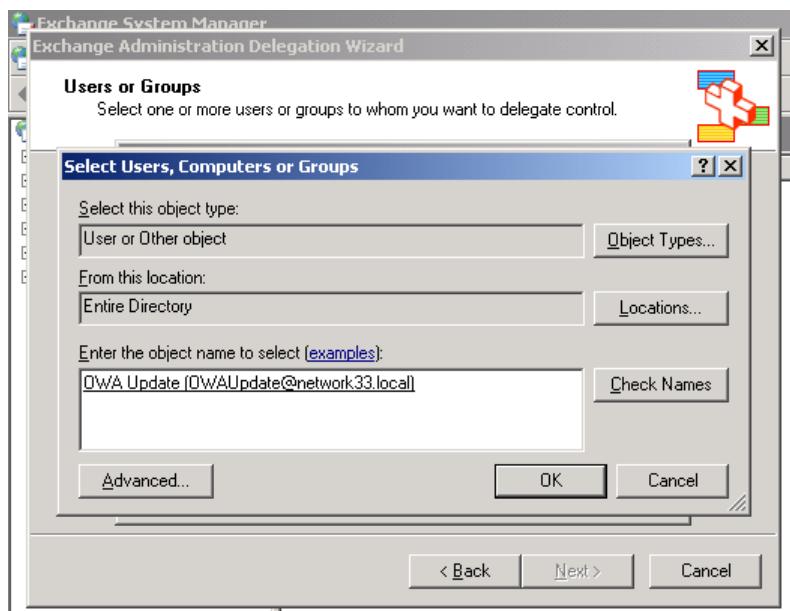
1. Click [Start](#) > [All Programs](#) > [Microsoft Exchange](#) > [System Manager](#):



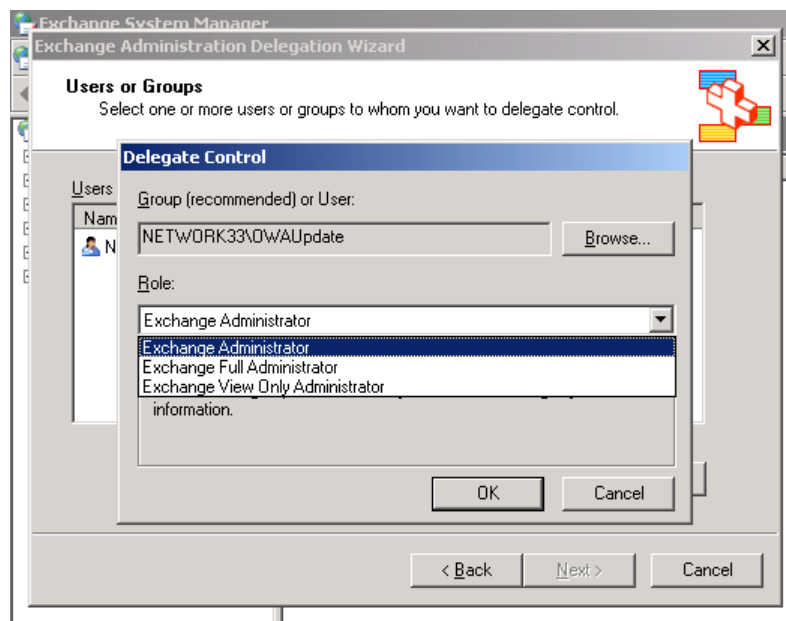
2. Right-click the organization or the [Administrative Group](#) where you want to delegate administrative permissions, and then click [Delegate control](#):



3. The [Exchange Administration Delegation Wizard](#) starts. Click [Next](#).
4. On the [Users or Groups](#) page, click [Add](#).
5. In the [Delegate Control](#) window, click [Browse](#).
6. In the [Select Users, Computers, or Groups](#) window, click the appropriate location in the [Look in](#) box and click the name of the user that you wish to use:



7. In the **Delegate Control** dialog box, choose **Exchange Administrator** as the **Role** and then click **OK**:



8. The user that you added is displayed in the **Users and Groups** list.
9. Click **Next**.
10. Click **Finish**. The user account you wish to use now has the required permission.

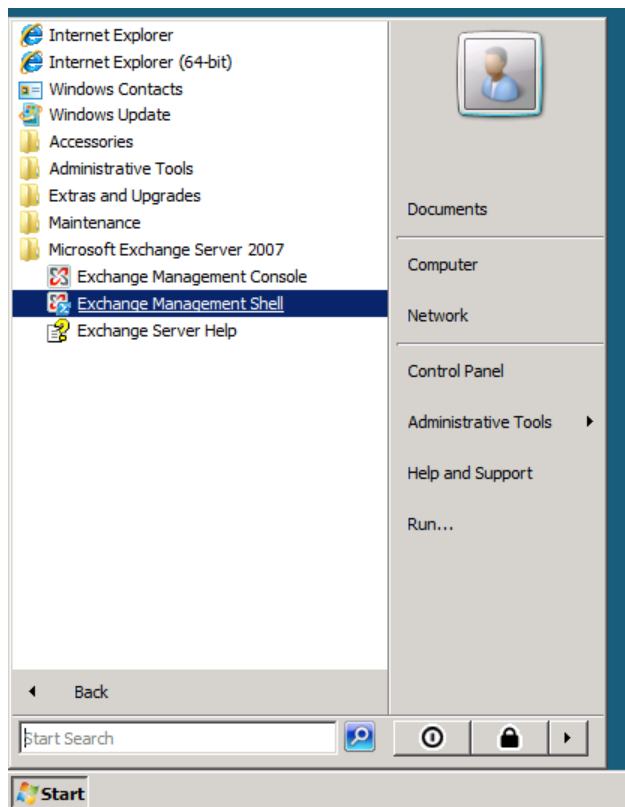
**NOTE**

If you have multiple **Administrative Groups** you will need to repeat the steps above for each one.

# Microsoft® Exchange 2007 / Windows® Small Business Server 2008

The specified user account must have the [Store Admin](#) permission. To achieve this, please follow the steps below.

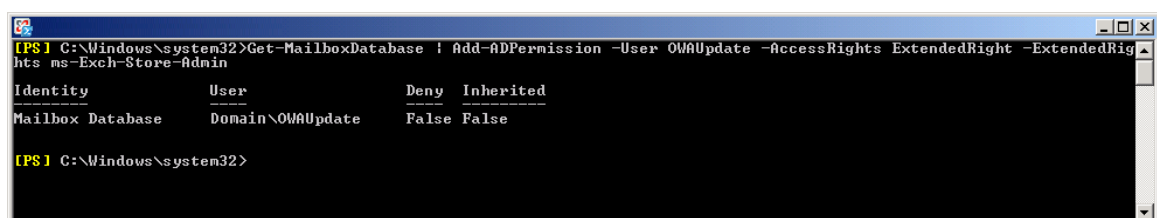
1. Click [Start > All Programs > Microsoft Exchange Server 2007 > Exchange Management Shell](#):



2. A black [PowerShell](#) window is displayed. Type the following command and press [ENTER](#):

```
Get-MailboxDatabase | Add-ADPermission -User <Username here> -AccessRights  
ExtendedRight -ExtendedRights ms-Exch-Store-Admin
```

*(Replacing <Username here> with the user account that you wish to use.)*

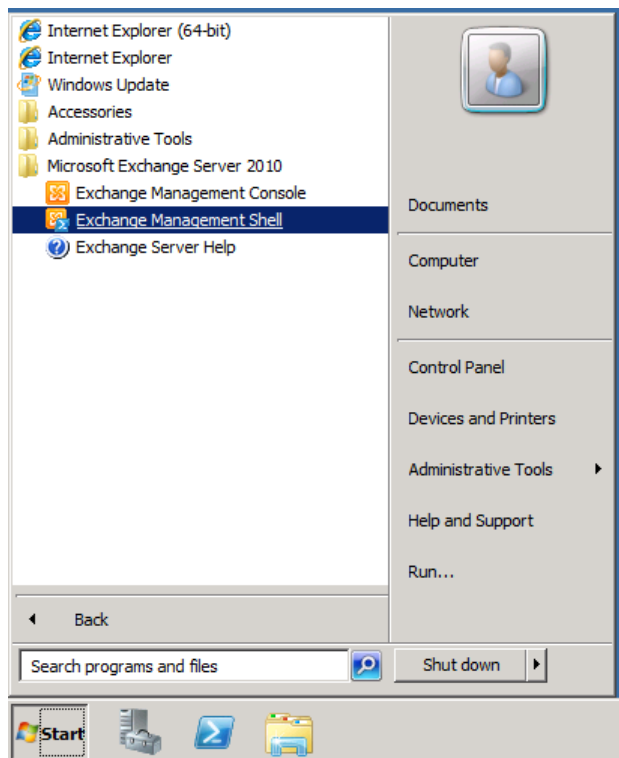


3. The user account you wish to use now has the required permission.

# Microsoft® Exchange 2010 / Exchange 2013 / Windows® Small Business Server 2011

The specified user account must have the [Store Admin](#) permission and also the [Application Impersonation](#) role. To achieve this, please follow the steps below.

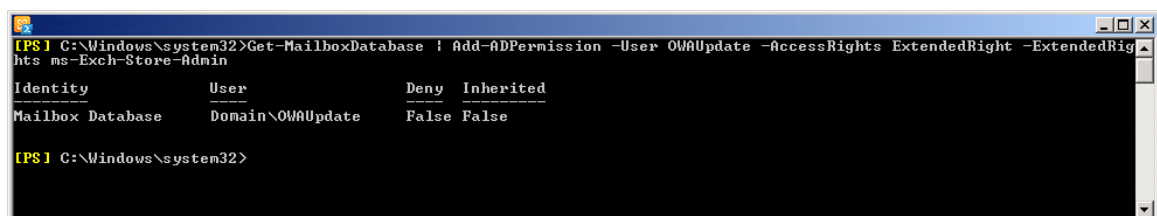
1. Click [Start](#) > [All Programs](#) > [Microsoft Exchange Server 2010](#) > [Exchange Management Shell](#):



2. A black [PowerShell](#) window is displayed. Type the following command and press [ENTER](#):

```
Get-MailboxDatabase | Add-ADPermission -User <Username here> -AccessRights  
ExtendedRight -ExtendedRights ms-Exch-Store-Admin
```

*(Replacing <Username here> with the user account you wish to use.)*



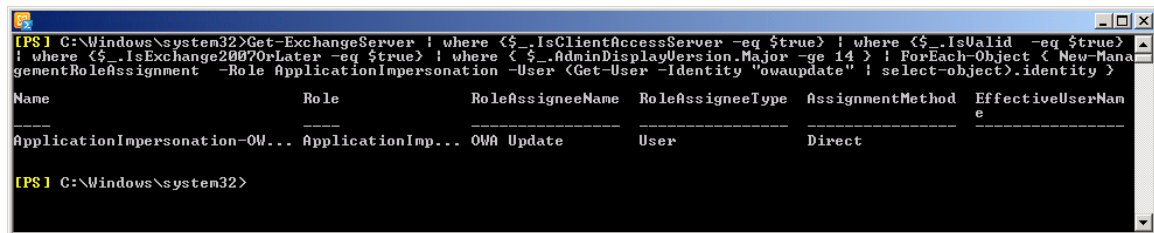
3. Type the following command and press **ENTER**:

```
$ExchangeServer = Get-ExchangeServer | where {$_.IsClientAccessServer -eq $true} | where {$_.IsValid -eq $true} | where {$_.IsExchange2007OrLater -eq $true} | where { $_.AdminDisplayVersion.Major -ge 14 }
```

4. Type the following command and press **ENTER**:

```
$ExchangeServer | ForEach-Object { New-ManagementRoleAssignment -Role ApplicationImpersonation -User (Get-User -Identity "<Username here>" | select-object).identity }
```

*(Replacing <Username here> with the user account you wish to use.)*



5. Close the **PowerShell** window.
6. The user account that you wish to use now has the required permission.

## Microsoft® Office 365

If your mailboxes are hosted on **Microsoft Office 365**, you need to grant permissions to allow a user to update the signature for everyone in your organization. To do this, follow the steps below on a computer within your organization with **Windows PowerShell**:

1. Open **Windows PowerShell**.
2. Enter the following command to connect to **Office 365**:
3. When prompted to enter credentials, type the email address and password for your **Office 365 Administrator** account.
4. Enter the following command to setup the required credentials, replacing "Username here" with the user account that you wish to use:

```
New-ManagementRoleAssignment -Role ApplicationImpersonation -User (Get-User -Identity "Username here" | Select-Object).Identity
```

### NOTE

If you receive an error reading: "New-ManagementRoleAssignment is not recognized as the name of a cmdlet, function, script file, or operable program" please contact Exclaimer Support for assistance.

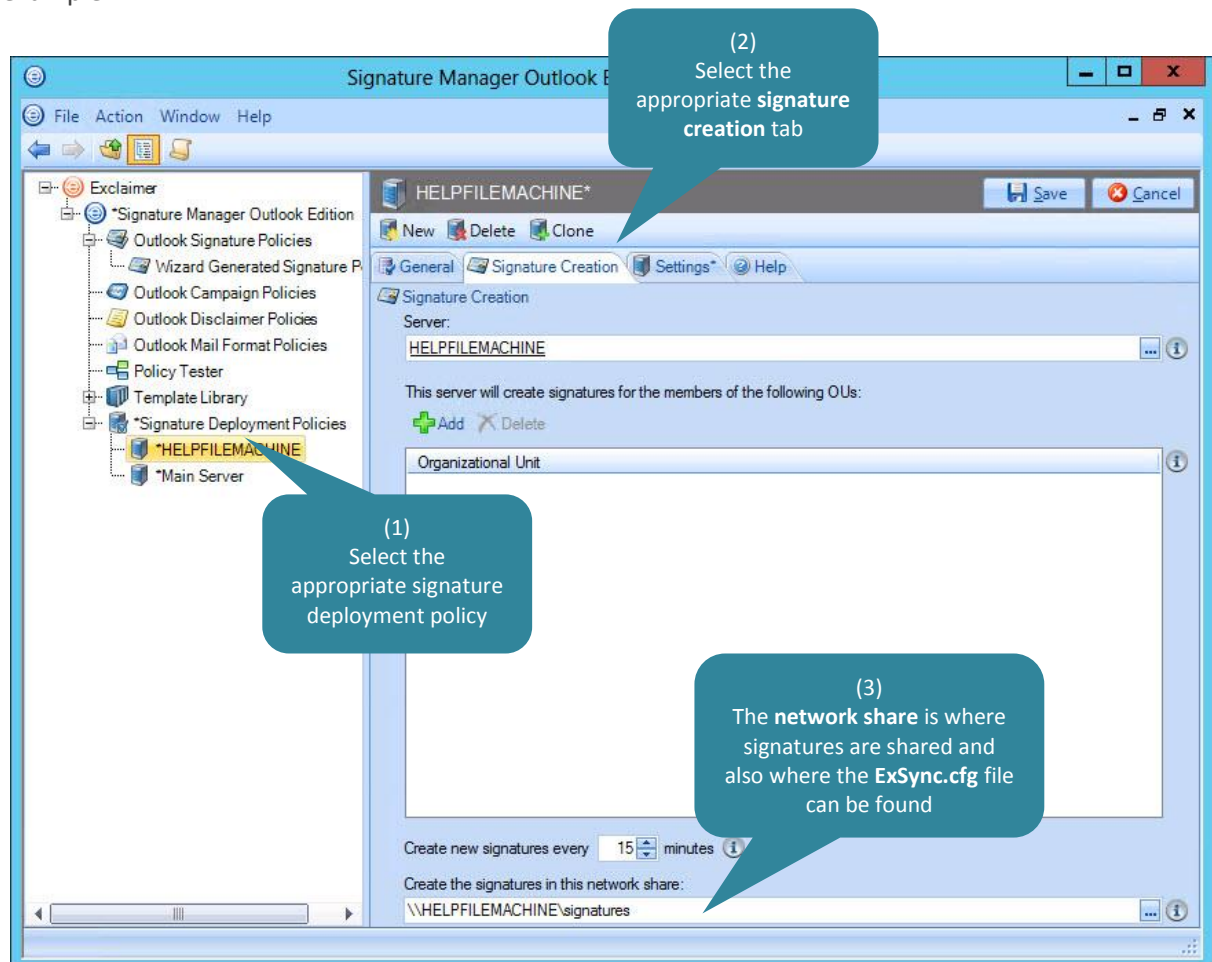
5. Close the **PowerShell** window. The user account you wish to use now has the required permission

# Deploying Multiple Users' Signatures to a Designated User

You may have users who send as, or send on behalf of, other email users - for example, a Personal Assistant might send messages on behalf of a Company Director. [Exclaimer Signature Manager Outlook Edition](#) can deploy multiple signatures to a single user with a simple change to the [ExSync](#) configuration file.

In this example we will be deploying multiple signatures to a single user (karen.green):

1. Locate and open the required [ExSync.cfg](#) file. This file can be found in the relevant [network share](#), as specified on the [settings](#) [pg.354] tab for the specific [signature deployment policy](#) [pg.343] - for example:



## NOTE

The number of **signature deployment policies** found will vary from one organization to another. Many organizations will only ever need the one **signature deployment policy** that is automatically created when **Exclaimer signature Manager Outlook Edition** is installed.

2. Add the following text to the **ExSync.cfg** file, making sure that there is a carriage return after the last email address:

[karen.green]

SignatureList=john.smith@greenorg.net;joe.bloggs@greenorg.net;karen.green@greenorg.net

Here, you specify the user to whom you wish to deploy multiple users' signatures using their logon user name in square brackets - [karen.green]. This is followed by the email addresses of users whose signatures are being deployed. So, the edited **ExSync.cfg** file looks like this:



NOTE

You must add the user's own email address last in the list of email addresses so that their signature is applied as the default for their Outlook installation.

3. The next time **ExSync** runs, users specified in the **ExSync.cfg** file will receive their additional signatures. For example, the user Karen Green will receive her own signature along with the signatures for john.smith and joe.bloggs.

NOTE

You can repeat the process if you have more users that require multiple signatures from different users - simply add another section to the **ExSync.cfg** file. Remember that if multiple signature deployment policies [pg.343] are defined, you may need to update multiple **ExSync.cfg** files (each **signature deployment policy** is associated with its own **ExSync.cfg** file).



# Deploying Signatures for Remote Users

You can configure your system to deploy signatures to users who work remotely, or use computers that are not joined to the [Active Directory](#) domain. To achieve this, you need to:

- [Deploy signatures for remote users to a given directory](#) [pg.45]
- [Configure an Internet facing Virtual Directory in IIS](#) [pg.50]
- [Install a copy of the Exclaimer Outlook Settings Update Client on the remote computer](#) [pg.58]

## Define a Deployment Directory for Remote Users

There are two options for setting a deployment directory for remote users:

- [Option 1 - configure each remote user separately](#) [pg.46]
- [Option 2 - have all users retrieve their signature from the same place](#) [pg.48]

The deployment directory can be:

- A UNC path. For example [\\DC1\Outlook Signatures](#)
- A local folder. For example [C:\Outlook Signatures](#)

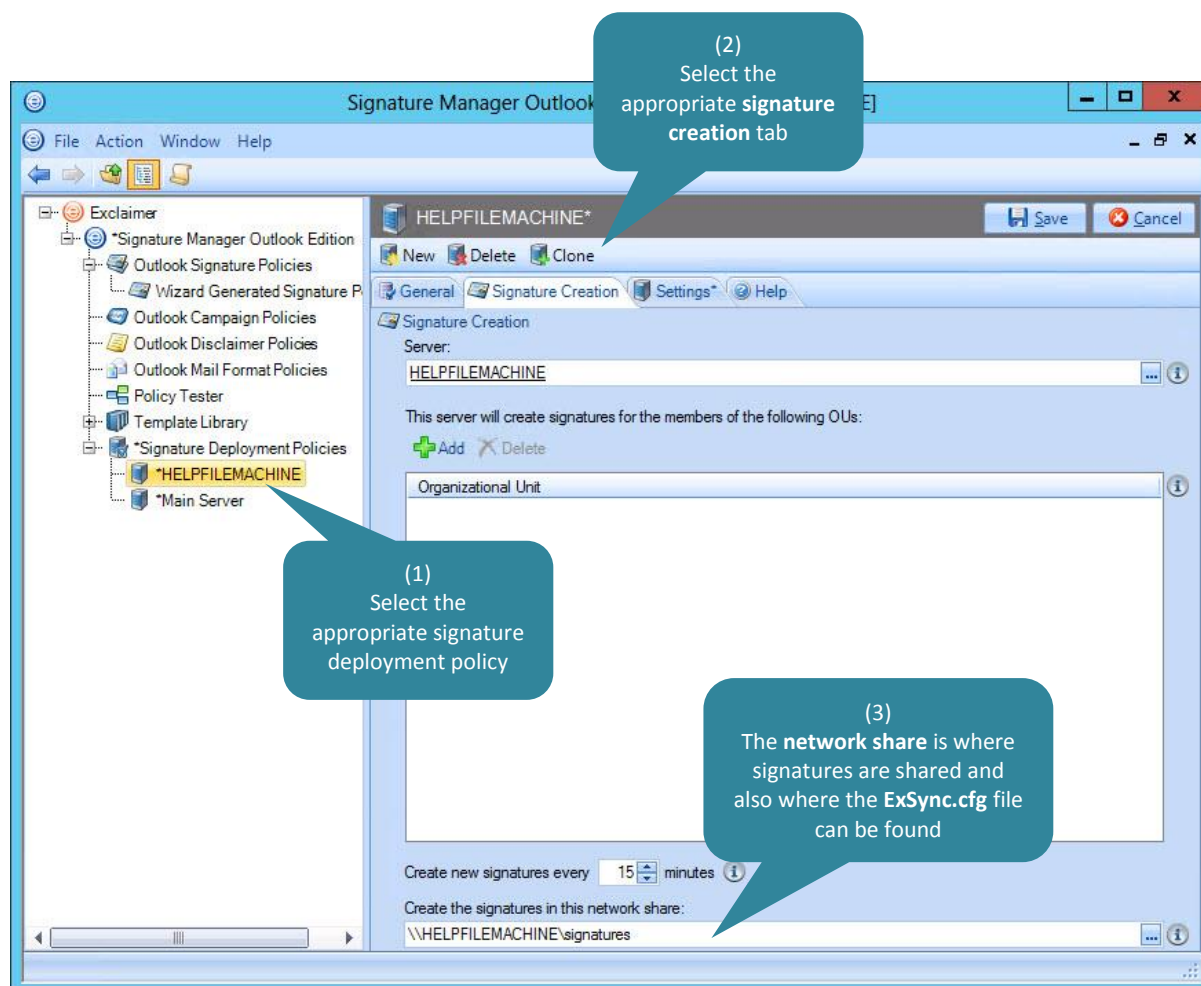
Network drives (for example [Z:\Outlook Signatures](#)) cannot be used. This is because the service that deploys signatures runs under the [LocalSystem](#) account by default. This account does not have access to the network drives of the logged-on user.

Procedures for both options are detailed in the following sections.

## Option 1 - Configure Each Remote User Separately

For each user requiring deployment of a remote signature, you must edit the configuration file for the network-based [ExSync](#) [pg.27] agent.

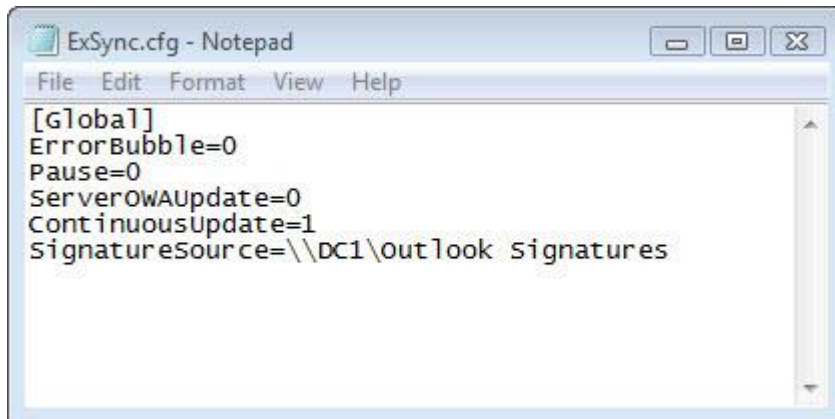
1. Locate and open the required [ExSync.cfg](#) file. This file can be found in the relevant [network share](#), as specified on the [settings](#) [pg.354] tab for the selected [signature deployment policy](#) [pg.343] - for example:



### NOTE

The number of **signature deployment policies** found will vary from one organization to another. Many organizations will only ever need the one **signature deployment policy** that is automatically created when Exclaimer Signature Manager Outlook Edition is installed.

2. Open the `ExSync.cfg` file in [Notepad](#) (or a similar text editing program). The content of this file should be similar to the example shown below:



3. Add the following lines to the configuration file:

```
[RemoteUsers]
{DefaultSMTPAddress}={RemoteSignatureLocation}
```

Where `{DefaultSMTPAddress}` is the [SMTP Address](#) of a remote user and `{RemoteSignatureLocation}` is the location to which you will point the virtual directory.

For example:

```
[RemoteUsers]
Peter.Jones@exclaimer.co.uk=C:\Signature Deployment
```

The final configuration file should look similar to the example below:



NOTE

These changes will not take effect until the next time signatures are generated. This can be triggered by saving the configuration in the console. Remember that if multiple [signature deployment policies](#) [pg.343] are defined, you may need to update multiple `ExSync.cfg` files (each **signature deployment policy** is associated with its own `ExSync.cfg` file).

## Option 2 - Configure the Product to Deploy All User Signatures to the Same Location

1. Open the relevant `ExSync.cfg` file in `Notepad` (or a similar text editing program). The content of this file should be similar to the example shown below:



2. Beneath the `[Global]` section, add the following line:

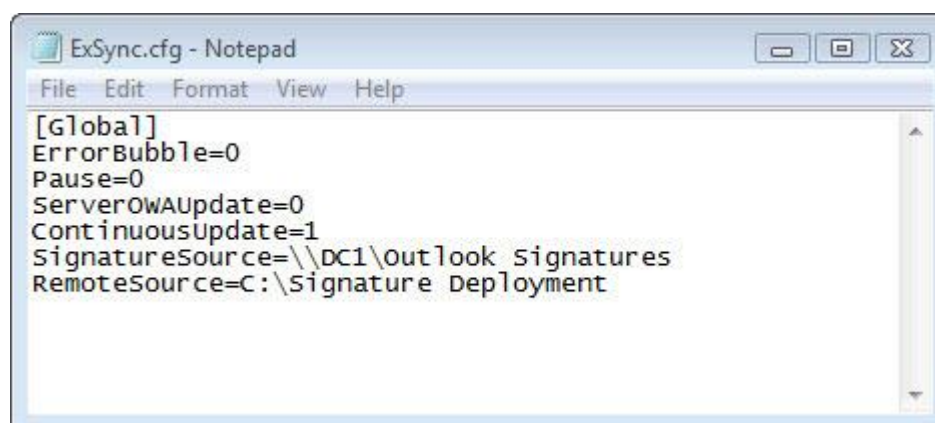
```
RemoteSource={RemoteSignatureLocation}
```

Where `{RemoteSignatureLocation}` is the location for the virtual directory.

For example:

```
RemoteSource=C:\Signature Deployment
```

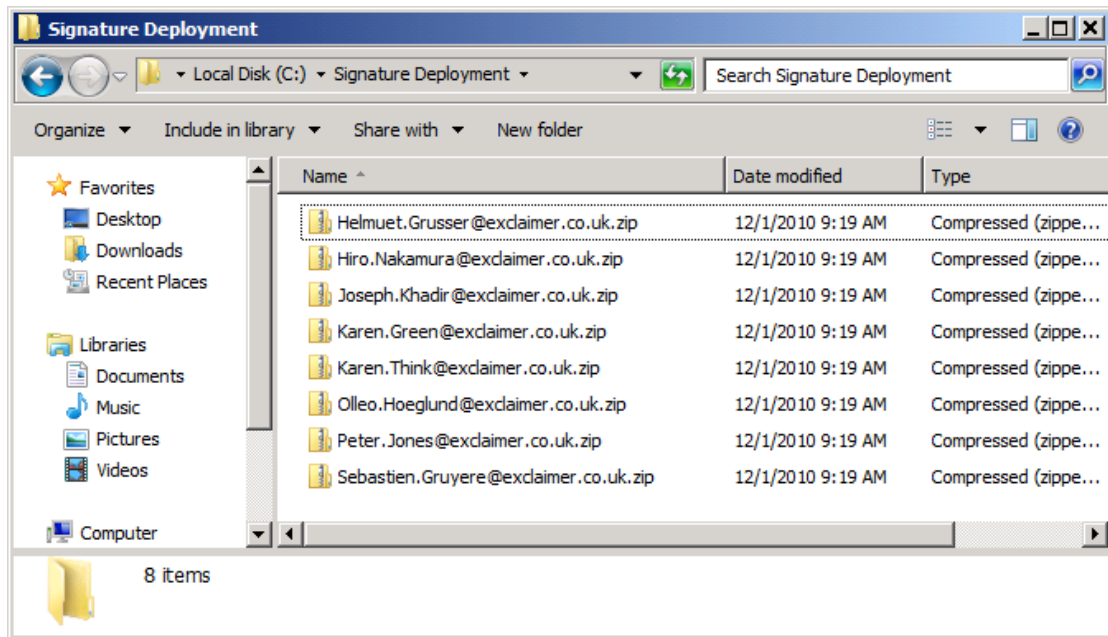
The final configuration file should look similar to the example below:



### NOTE

Remember that if multiple [signature deployment policies](#) [pg.343] are defined, you may need to update multiple **ExSync.cfg** files (each **signature deployment policy** is associated with its own **ExSync.cfg** file).

These changes will allow files to be generated in the specified folder, similar to the following image:

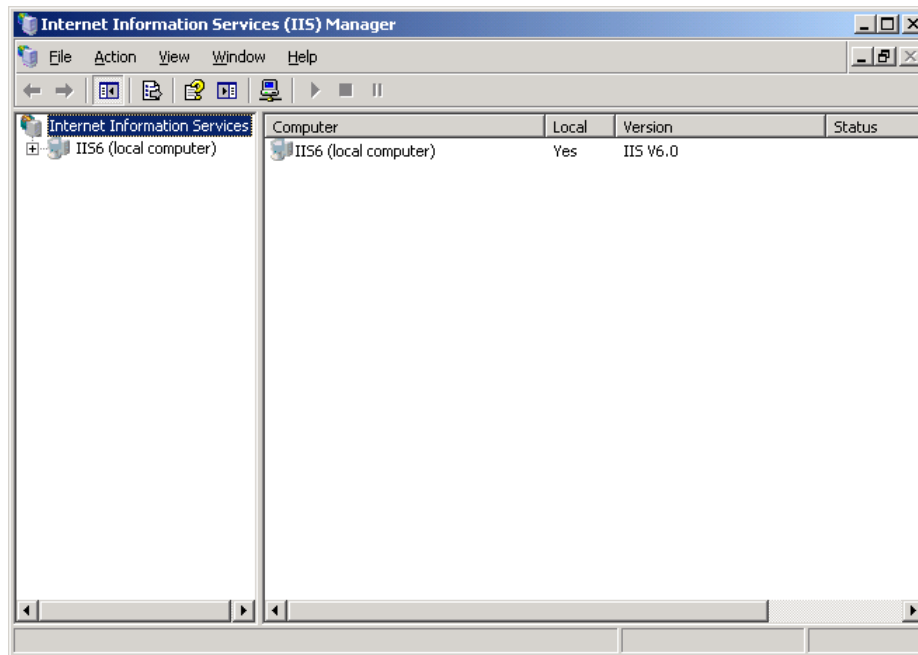


# Configuring an Internet Facing Virtual Directory in IIS

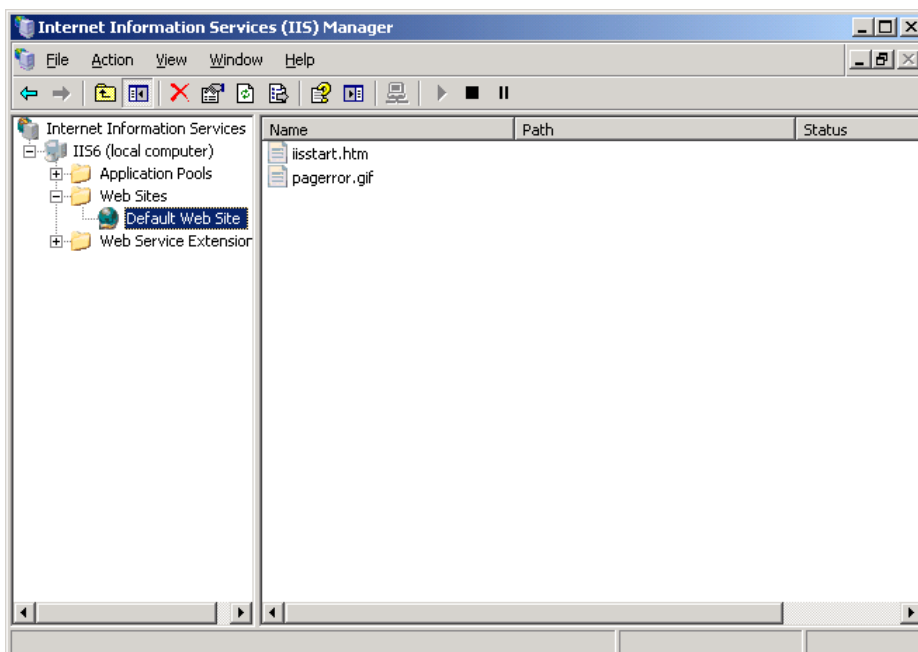
The configuration process for both [IIS 6 \[pg.50\]](#) and [IIS 7 \[pg.55\]](#) is detailed in the following sections.

## Configuring a Virtual Directory Using IIS 6

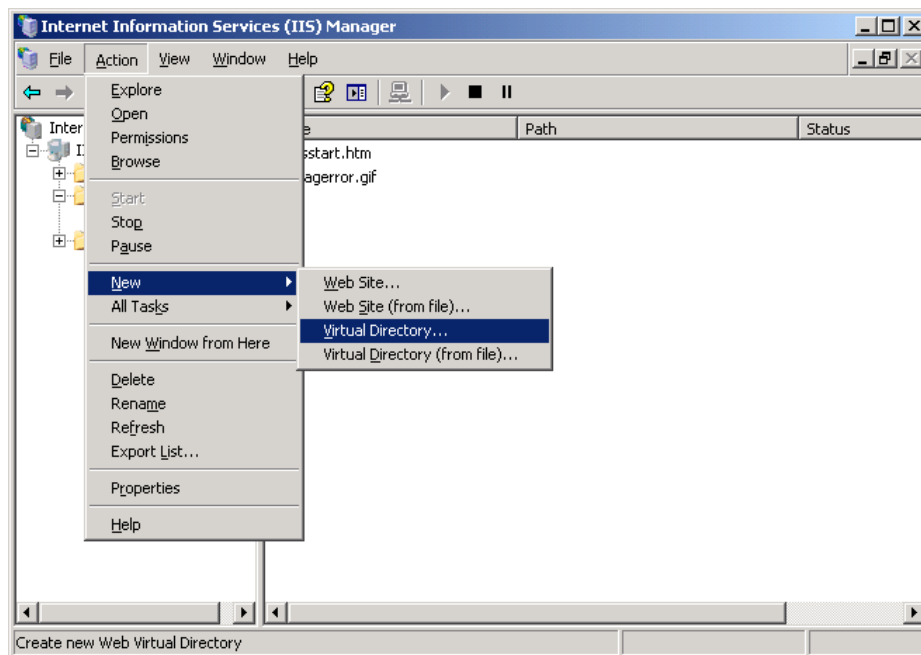
1. Open Internet Information Services Manager (inetmgr.exe):



2. Expand nodes and locate the Default Web Site entry:



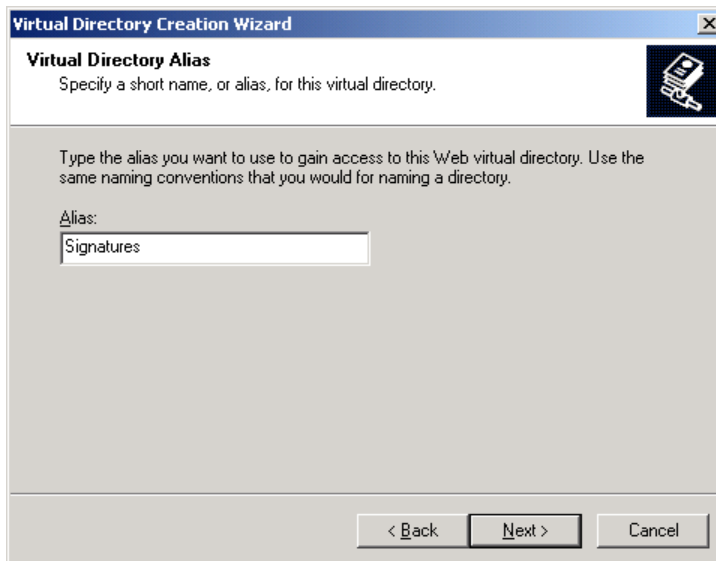
3. Create a new **Virtual Directory** (Action > New > Virtual Directory...):



4. Click next to launch the **Virtual Directory Creation Wizard**:

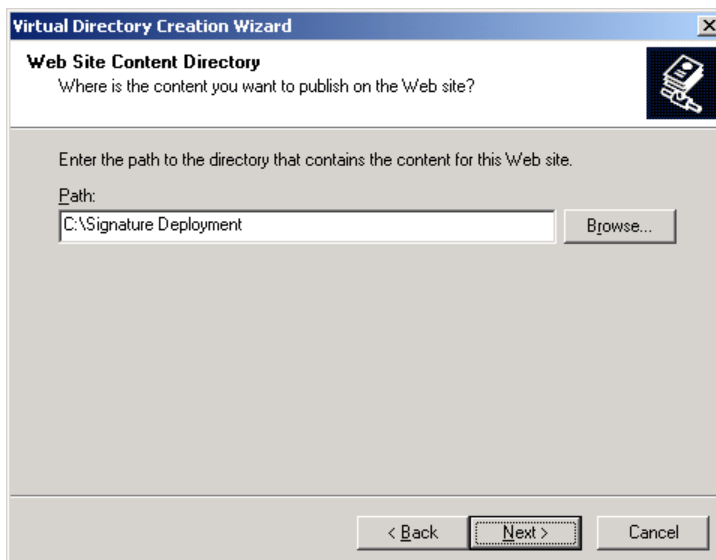


5. Click [next](#) and enter an [alias](#) (with which users will connect to this virtual directory):



The screenshot shows the 'Virtual Directory Creation Wizard' window. The title bar reads 'Virtual Directory Creation Wizard'. The main heading is 'Virtual Directory Alias'. Below the heading, it says 'Specify a short name, or alias, for this virtual directory.' There is a small icon of a floppy disk with a keyhole. The main text area contains the instruction: 'Type the alias you want to use to gain access to this Web virtual directory. Use the same naming conventions that you would for naming a directory.' Below this, there is a label 'Alias:' followed by a text input field containing the word 'Signatures'. At the bottom of the window, there are three buttons: '< Back', 'Next >', and 'Cancel'.

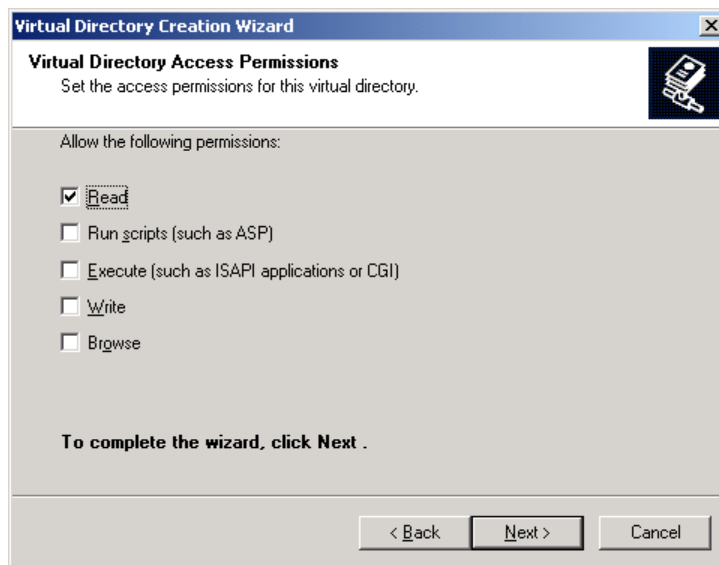
6. Click [next](#) and then [Browse](#) to navigate to the [Remote Deployment Location](#) (as described previously):



The screenshot shows the 'Virtual Directory Creation Wizard' window. The title bar reads 'Virtual Directory Creation Wizard'. The main heading is 'Web Site Content Directory'. Below the heading, it says 'Where is the content you want to publish on the Web site?' There is a small icon of a floppy disk with a keyhole. The main text area contains the instruction: 'Enter the path to the directory that contains the content for this Web site.' Below this, there is a label 'Path:' followed by a text input field containing the path 'C:\Signature Deployment'. To the right of the text input field is a button labeled 'Browse...'. At the bottom of the window, there are three buttons: '< Back', 'Next >', and 'Cancel'.



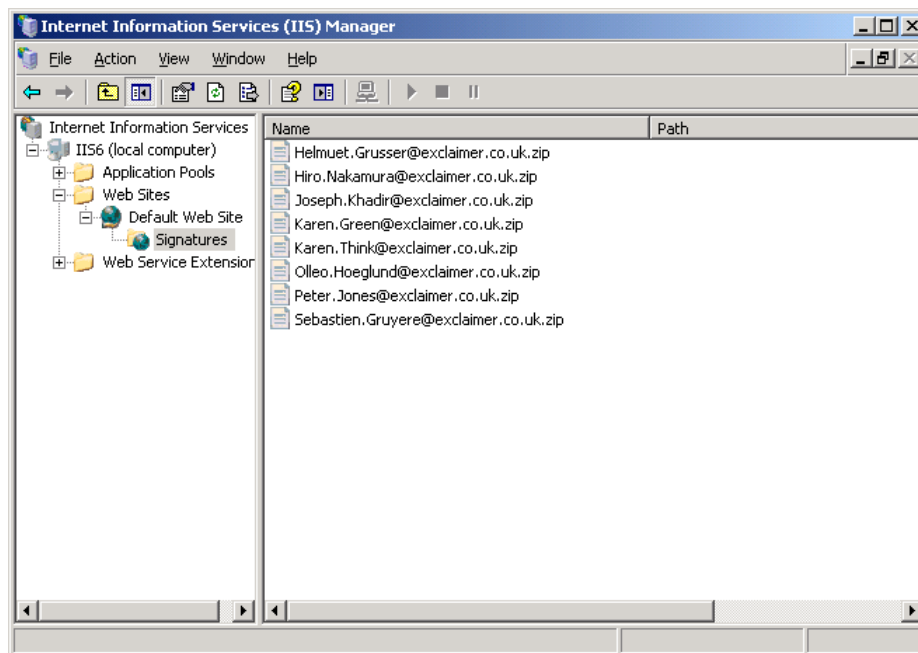
7. Click [next](#) to set permissions. Here you can accept default permissions however, only [Read](#) permissions are required:



8. Click [next](#) to confirm settings and then [finish](#) to exit from the wizard:

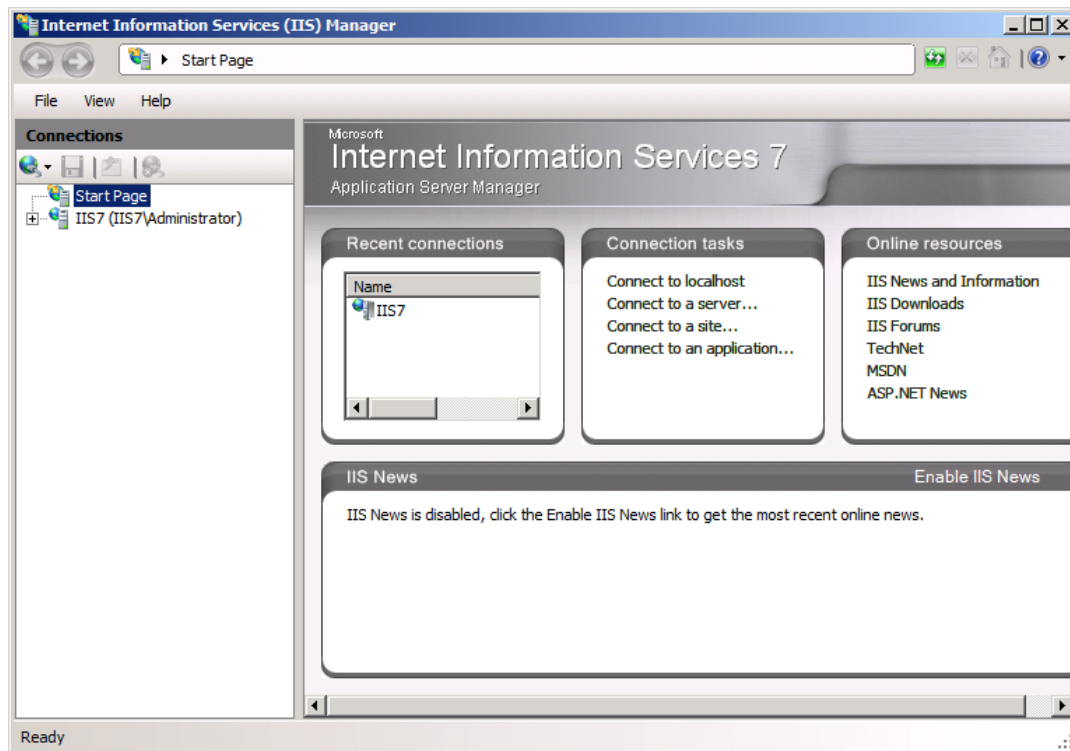


Now when you check the content of the virtual directory, you will see that deployed signatures are present:

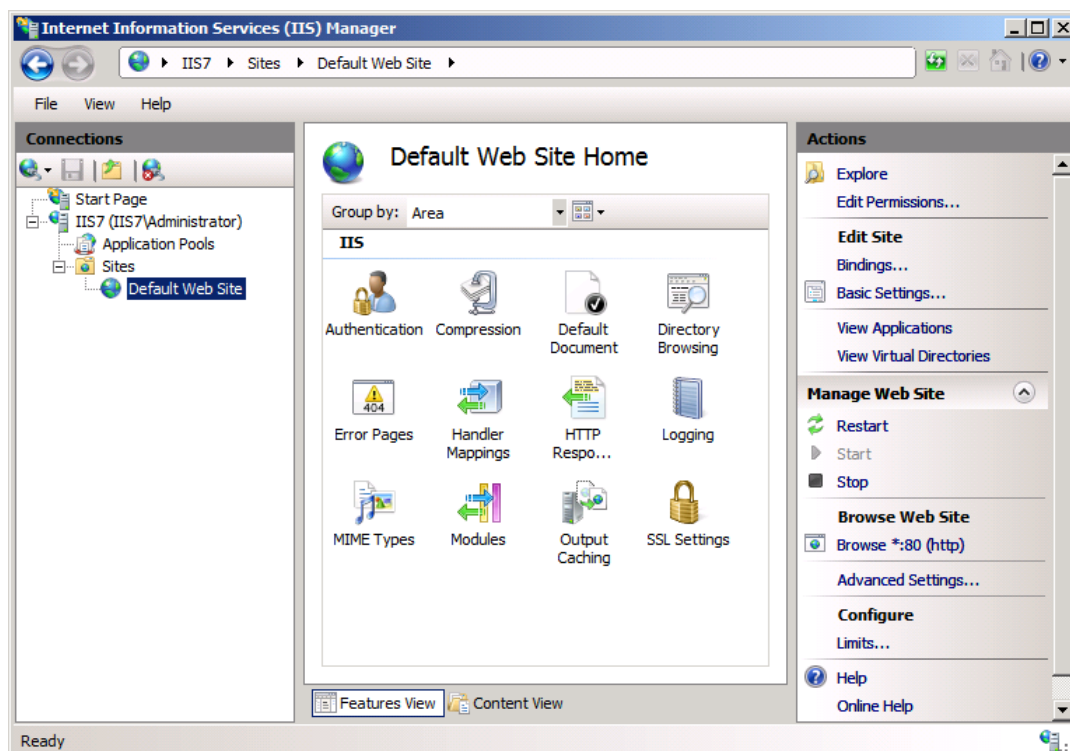


# Configuring a Virtual Directory Using IIS 7

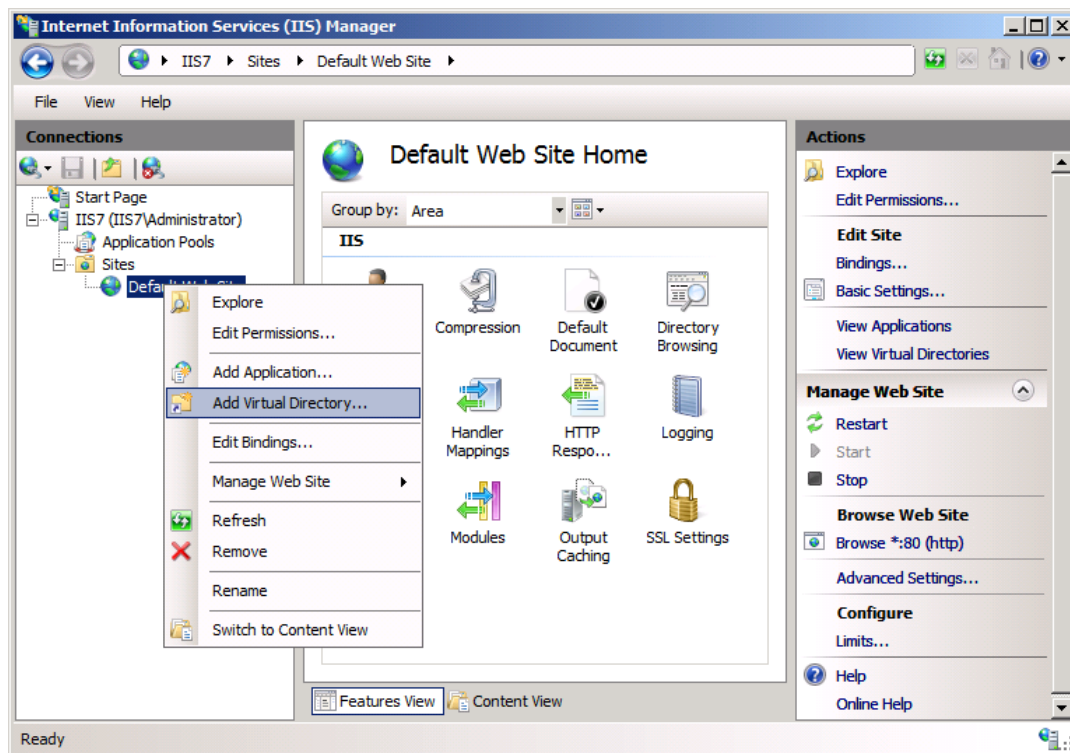
1. Open Internet Information Services Manager (inetmgr.exe):



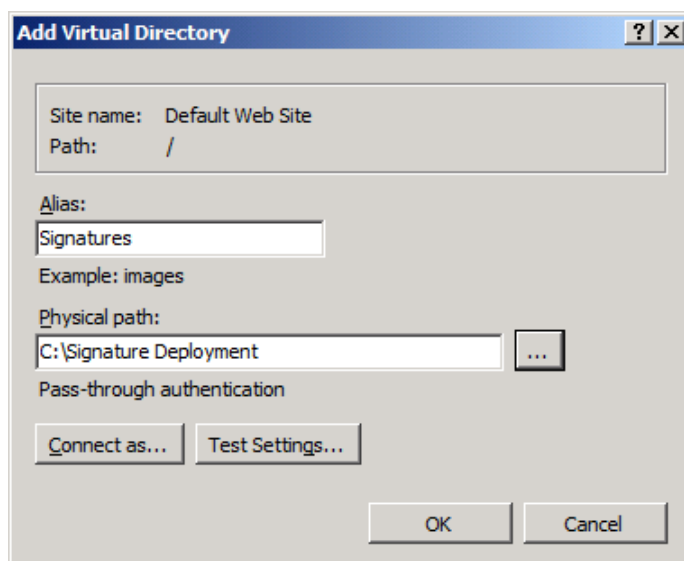
2. Expand nodes and locate the **Default Web Site** entry:



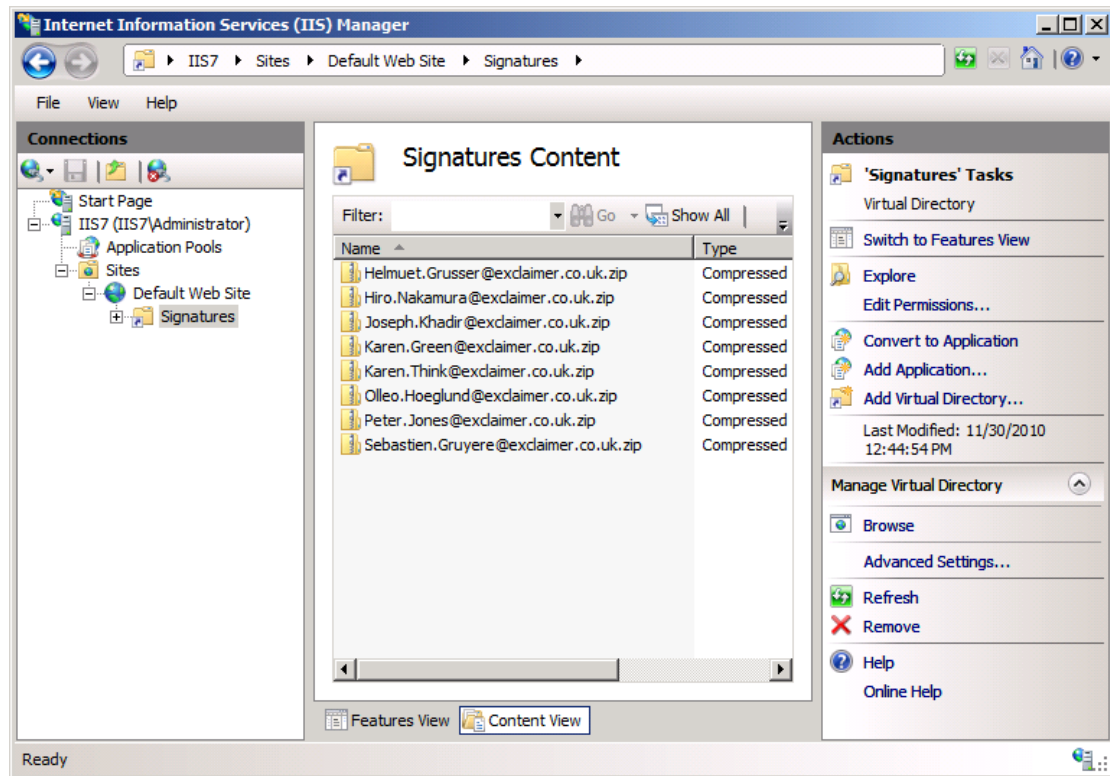
3. Right-click on the **Default Web Site** node and select **Add Virtual Directory...**:



4. Enter an **alias** and a **Deployment Folder Location**:



Now when you check the content of the virtual directory, you will see that deployed signatures are present:



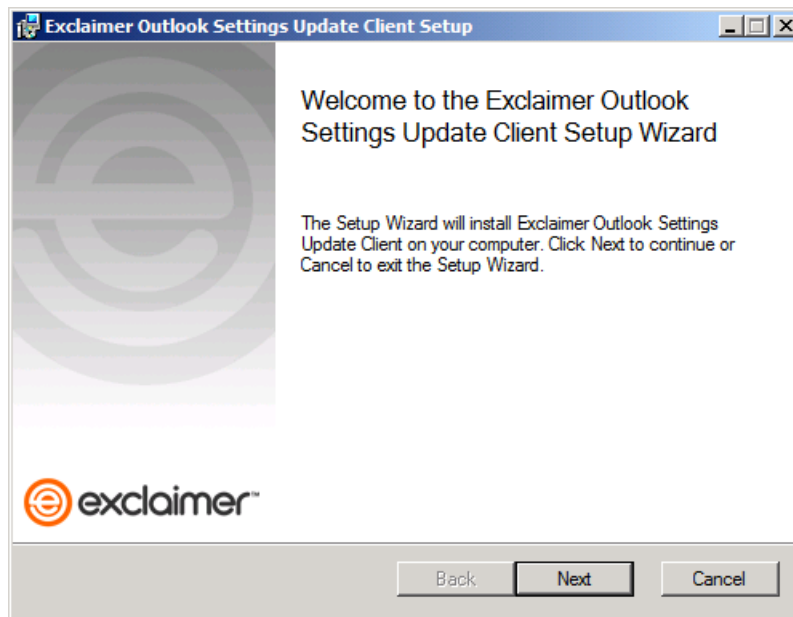
# Installing the Exclaimer Outlook Settings Update Client on Remote Computers

The [Exclaimer Outlook Settings Update Client](#) must be installed on each remote computer and on computers that are not joined to the [Active Directory](#) domain. To achieve this, the following preparation is required:

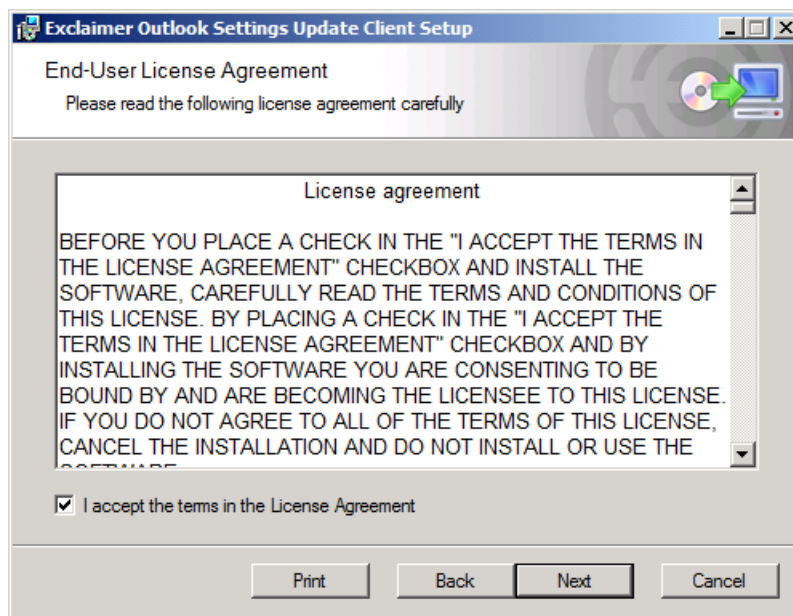
- Each end user should download the [Exclaimer Outlook Settings Update Client](#) (an [MSI](#) file) to their computer. This file is added to your [Exclaimer Signature Manager Outlook Edition](#) installation directory when the product is first installed. It can be copied from here and distributed to remote users, as required.
- You will need to know the URL of the [remote signature location](#) and the [SMTP Address](#) for each user's account (your network administrator should be able to provide this information).

## The client installation process

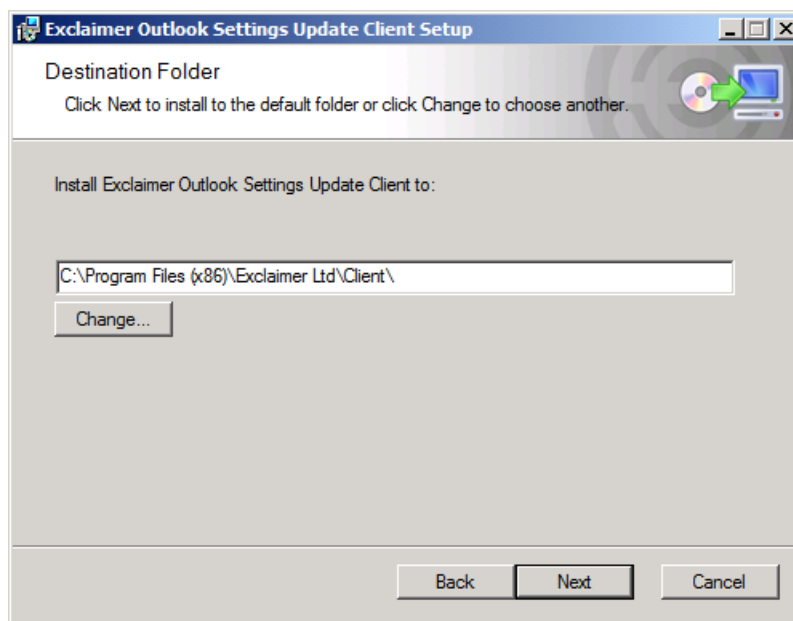
1. Double-click the [MSI](#) file to launch the [Exclaimer Outlook Settings Update Client Setup](#) wizard:



2. Click [next](#) to view and accept the [License Agreement](#):

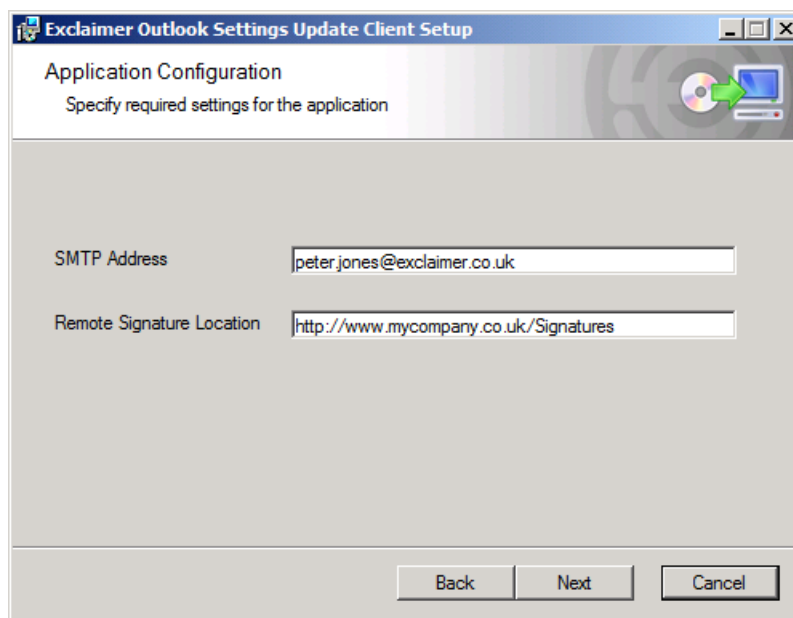


3. Click [next](#) to define an installation location. By default, this is set to [Program Files](#):



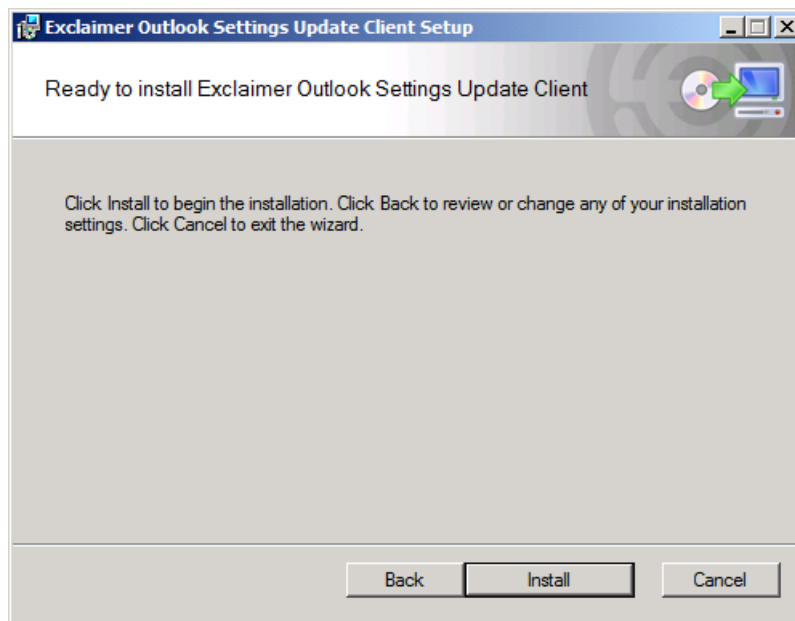
4. Click [next](#) to define user settings for the application. Here, the [SMTP Address](#) should be defined as the user's default email address and the [Remote Signature Location](#) should be defined as the external Web address of the deployment location for signatures. In our example this will be:

- [SMTP Address](#): 'peter.jones@exclaimer.co.uk'
- [Remote Signature Location](#): 'http://www.mycompany.co.uk/Signatures'

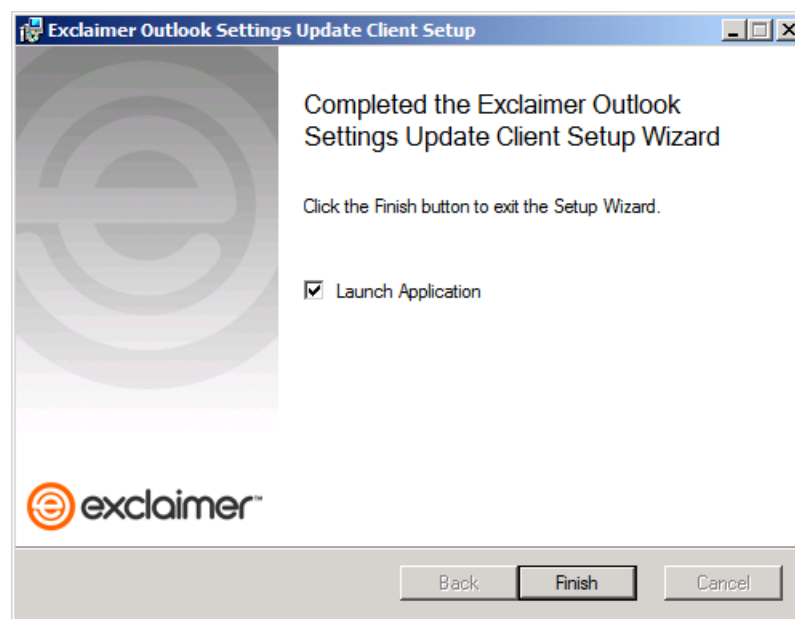




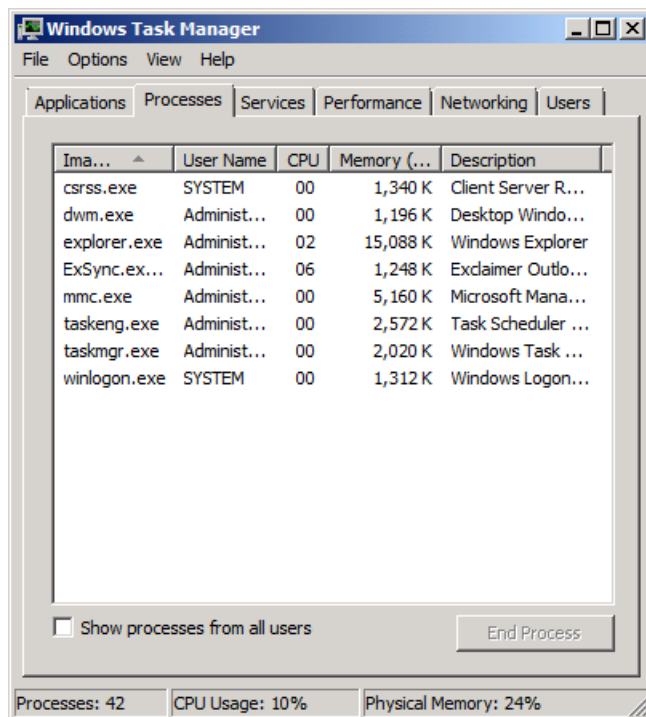
5. Click [next](#) to confirm settings:



6. Click [install](#) to perform the installation. Upon completion you have the option to immediately start the Remote Client, or it will be started the next time the user logs on to their computer:



7. You can check that [ExSync](#) is running by viewing [processes](#) in [Windows Task Manager](#):



8. Signatures are now deployed to this computer and can be seen in Microsoft Outlook. If any errors are encountered updating signatures, they will be shown in the [Application Event Log](#) of this computer.

# Configuring Required Permissions for the Deployment Share Folder

For [Exclaimer Signature Manager Outlook Edition](#) to deploy signatures correctly, the following permissions are required on the [security](#) and [share](#) properties of any folders which have been specified as the [deployment share](#):

- [Authenticated Users](#) - [Read](#)
- [Domain Admins](#) - [Full Control](#)

If the folder is located on the same computer where [Exclaimer Signature Manager Outlook Edition](#) has been installed:

- [SYSTEM](#) - [Full Control](#)

If the deployment folder is located on a different computer from where [Exclaimer Signature Manager Outlook Edition](#) has been installed:

- [Computer Object \[ComputerName\]](#) - [Full Control](#)  
([ComputerName](#) is the name of the computer where [Exclaimer Signature Manager Outlook Edition](#) has been installed)

To configure the permissions, please follow the steps below:

1. Log on to the computer where the folder you have specified as the [Deployment Share](#) is physically located. Ensure you log on with an account that has administrative privileges to that folder.
2. In [Windows Explorer](#), navigate to the folder specified as the [Deployment Share](#).
3. Right-click the folder, click [Properties](#), and then click the [Security](#) tab.
4. Click [Edit...](#) and then click [Add...](#) (There is no [Edit](#) button on [Windows XP](#) or [Windows 2003](#)).
5. Type [Authenticated Users](#). Click [OK](#).
6. In the [Permissions for Authenticated Users](#) box, ensure the [Read & Execute](#), [List Folder Contents](#) and [Read](#) permissions are set to [Allow](#).
7. Click [Add...](#)
8. Type [Domain Admins](#). Click [OK](#).
9. In the [Permissions for Domain Admins](#) box, ensure the [Full Control](#) permission is set to [Allow](#).
10. Click [Add...](#)

11. If the folder is located on the same computer where [Exclaimer Signature Manager Outlook Edition](#) has been installed, type [SYSTEM](#) then click [OK](#).

-or-

If the folder is located on a different computer from where [Exclaimer Signature Manager Outlook Edition](#) has been installed, click [Object Types](#), enable the [Computers](#) object type, click [OK](#), type [\[ComputerName\]](#) (where [ComputerName](#) is the name of the computer where [Exclaimer Signature Manager Outlook Edition](#) has been installed) then click [OK](#).

12. In the [Permissions for SYSTEM](#) or [Permissions for \[ComputerName\]](#) box, ensure the [Full Control](#) permission is set to [Allow](#). Click [OK](#).
13. Click the [Sharing](#) tab, click [Advanced Sharing...](#), ensure the [Share This Folder](#) option is enabled then click [Permissions](#) (There is no [Advanced Sharing](#) button on [Windows XP](#) or [Windows 2003](#)).
14. Click [Add...](#), type [Authenticated Users](#) then click [OK](#).
15. In the [Permissions for Authenticated Users](#) box, ensure the [Read](#) permission is set to [Allow](#).
16. Click [Add...](#), type [Domain Admins](#) then click [OK](#).
17. In the [Permissions for Domain Admins](#) box, ensure the [Full Control](#) permission is set to [Allow](#).
18. Click [Add...](#) If the folder is located on the same computer where [Exclaimer Signature Manager Outlook Edition](#) has been installed, type [SYSTEM](#) then click [OK](#).

-or-

If the folder is located on a different computer from where [Exclaimer Signature Manager Outlook Edition](#) has been installed, click [Object Types](#), enable the [Computers](#) object type, click [OK](#), type [\[ComputerName\]](#) (where [ComputerName](#) is the name of the computer where [Exclaimer Signature Manager Outlook Edition](#) has been installed) then click [OK](#).

19. In the [Permissions for SYSTEM](#) or [Permissions for \[ComputerName\]](#) box, ensure the [Full Control](#) permission is set to [Allow](#). Click [OK](#).
20. Click [OK](#) or [Close](#) on all remaining dialog boxes, until the main [Properties](#) window of the folder has been closed.

NOTE

If multiple [signature deployment policies](#) [pg.343] are defined for your organization, you will need to configure permissions for any deployment share folders which are used in these policies. To check which deployment share is specified for a **signature deployment policy**, check the bottom of the [settings](#) [pg.354] tab for each policy that is used.

# Chapter 3

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## The Exclaimer Console

# The Exclaimer Console

## Introduction

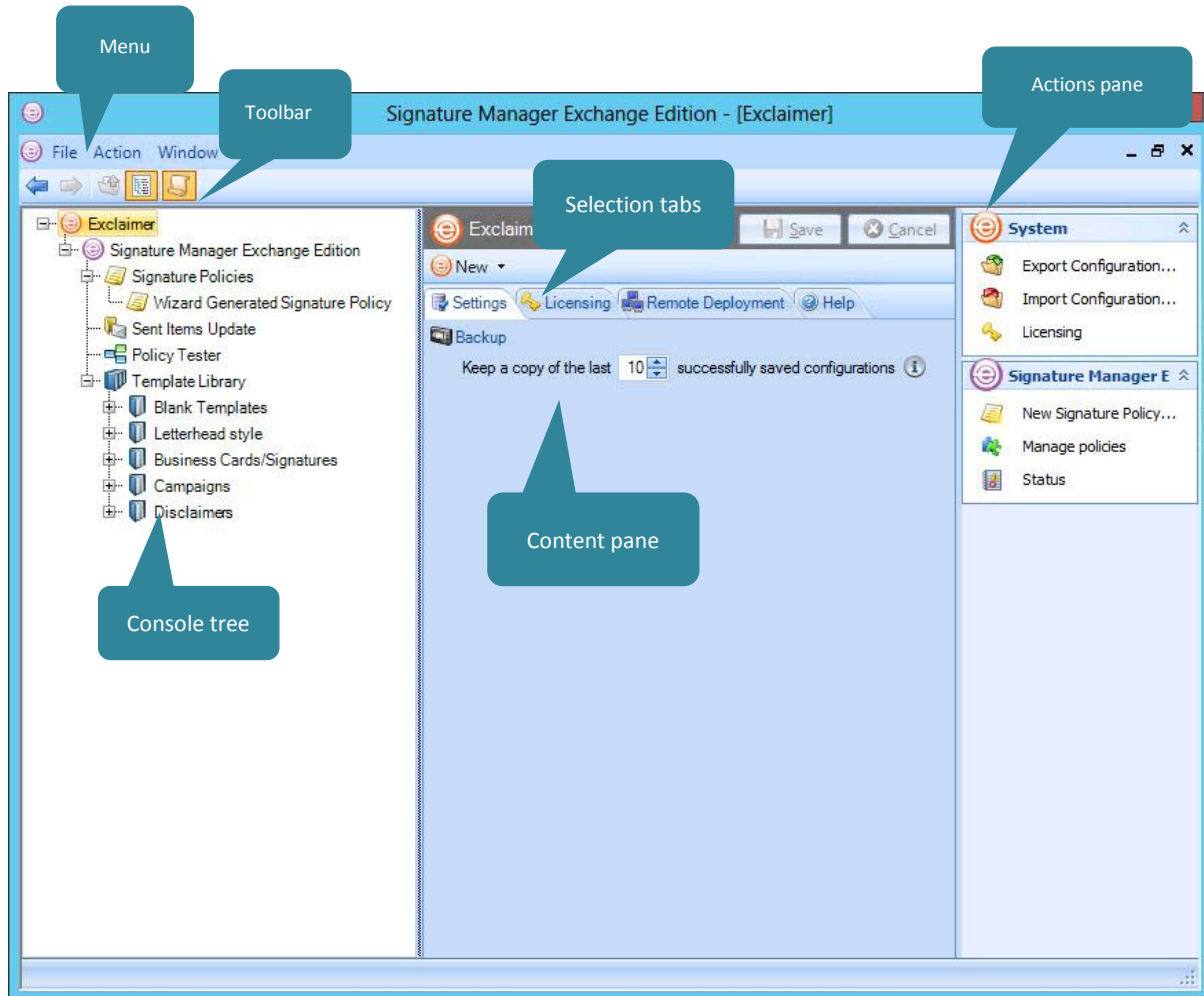
The [Exclaimer console](#) can be thought of as the 'control center' for [Exclaimer Signature Manager Outlook Edition](#). From here, you can define general settings which are applicable to the system as a whole, and access each section of the application. This section explains how the Exclaimer console is used, including:

- [Understanding the Exclaimer Console window](#) [pg.67]
- [Exclaimer console settings](#) [pg.72]
- [Exclaimer console licensing](#) [pg.73]
- [Exporting configuration settings](#) [pg.82]
- [Importing configuration settings](#) [pg.83]

If you already know about the console and wish to get started with [Exclaimer Signature Manager Outlook Edition](#), see the [Signature Manager Outlook Edition](#) [pg.85] section of this guide.

# Understanding the Exclaimer Console Window

The **Exclaimer console** window is split into three panes, as shown and [summarized](#) [pg.68] below:



# Exclaimer Console Summary

Available options in the Exclaimer console are summarized in the following sections:

- [Console menu](#) [pg.68]
- [Console toolbar](#) [pg.69]
- [Console tree](#) [pg.70]
- [Content pane](#) [pg.70]
- [Selection tabs](#) [pg.71]
- [Actions pane](#) [pg.71]

## Console Menu

The console menu provides access to key areas and tasks within the [Exclaimer Console](#). Available options are summarized below:






Menu	Summary
File	<b>Save</b>
	Use this option to save any changes made in the current <a href="#">content pane</a> [pg.70].
	<b>Exit</b>
	Use this option to close the console. If any unsaved changes are detected, you are prompted to save before exiting.
Action	Options on this menu vary, depending on which branch of the <a href="#">console tree</a> [pg.70] is currently selected. Those listed below are available when the top level ( <a href="#">Exclaimer</a> ) branch is selected.
	<b>New</b>
	Use this option to access the <a href="#">new Signature Manager Outlook Edition policy</a> option and <a href="#">create a new policy</a> [pg.136].
	<b>Export Configuration...</b>
	Use this option to <a href="#">export current configuration settings</a> [pg.82] for the console (for example, if you wish to use the same settings to set up another server within your organization).
	<b>Import Configuration...</b>
	Use this option to <a href="#">import current configuration settings</a> [pg.83] for the console (for example, if you are setting up a server using the settings from another server within your organization).
.../continued	



Menu	Summary
<b>Window</b>	<b>New Window</b>
	Use this option to open another instance of the console - for example, if you need to refer to settings made in one tab whilst updating another. All open windows are listed at the bottom of the <a href="#">window</a> menu, so you can easily switch between sessions. The new window option is also available from the <a href="#">actions</a> menu.
	<b>Cascade</b>
	If you have used the <a href="#">new window</a> option to open multiple instances of the console, use this option to display all windows in a 'cascade'.
	<b>Tile Horizontally</b>
	If you have used the <a href="#">new window</a> option to open multiple instances of the console, use this option to display all windows horizontally, across the screen.
<b>Help</b>	<b>Contents</b>
	Use this option to open the help system.
	<b>About</b>
	Use this option to display version information for the console.

## Console Toolbar

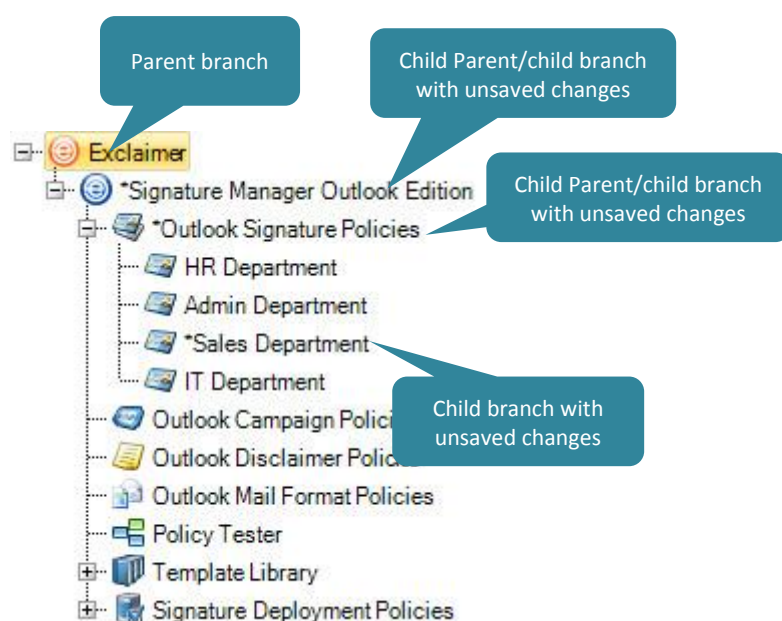
The console toolbar provides quick access to key tasks. These tasks are also available from the [console menu](#) [pg.68], but have been placed on the toolbar for faster access. Options on this toolbar vary, depending on which branch of the [console tree](#) [pg.70] is currently selected. Those listed below are available when the top level ([Exclaimer](#)) branch is selected:

Option	Function	Summary
	Back	Whilst navigating through the <a href="#">console tree</a> , use this option to go back one level.
	Forward	If you are navigating the <a href="#">console tree</a> and used the <a href="#">back</a> button, use this option to go forward again (i.e. to return to the point reached before you went back).
	Up	Whilst navigating through the <a href="#">console tree</a> , use this option to move up to the parent of the current branch.
	Show /Hide Console Tree	Use this toggle option to show the <a href="#">console tree</a> if it is currently hidden, or hide the <a href="#">console tree</a> if it is currently shown.
	Show /Hide Actions Pane	Use this toggle option to show the <a href="#">actions pane</a> if it is currently hidden, or hide the <a href="#">actions pane</a> if it is currently shown.

## Console Tree

To navigate the [Exclaimer console](#) (and all applications within it), a familiar tree structure is used. The [Exclaimer console](#) is always at the topmost level, from which any number of parent/ child branches (also known as [nodes](#)) is displayed. Having selected a node from the tree, the content pane displays information and options that are relevant for that node. Options on the [toolbar \[pg.69\]](#) can be used to quickly navigate between branches within the console tree.

When a branch is selected and changes are made but not saved, the branch is displayed with an asterisk (\*) symbol; you will see this at parent level (indicating that the branch contains child branches with unsaved changes) and also at child level:



The asterisk symbol is cleared from a branch once its settings have been saved.

### NOTE

The **console tree** can be hidden or shown using the [hide / show console tree \[pg.69\]](#) button on the toolbar. For quick navigation, use [back \[pg.69\]](#), [forward \[pg.69\]](#) and [up \[pg.69\]](#) buttons from the toolbar.

## Content Pane

Having selected a node in the [console tree](#), any information and settings associated with that node are displayed in the [content pane](#). These settings are accessed using a series of [content tabs \[pg.71\]](#) at the top of the pane.

## Selection Tabs

Information and settings are organized into a series of tabs, accessed from the top of the content pane. Available tabs vary, depending on which branch of the console tree is currently selected. Those shown here are available when the top level ([Exclaimer](#)) branch is selected ([settings \[pg.72\]](#), [licensing \[pg.73\]](#), [remote deployment \[pg.75\]](#) and [help](#)).

## Actions Pane

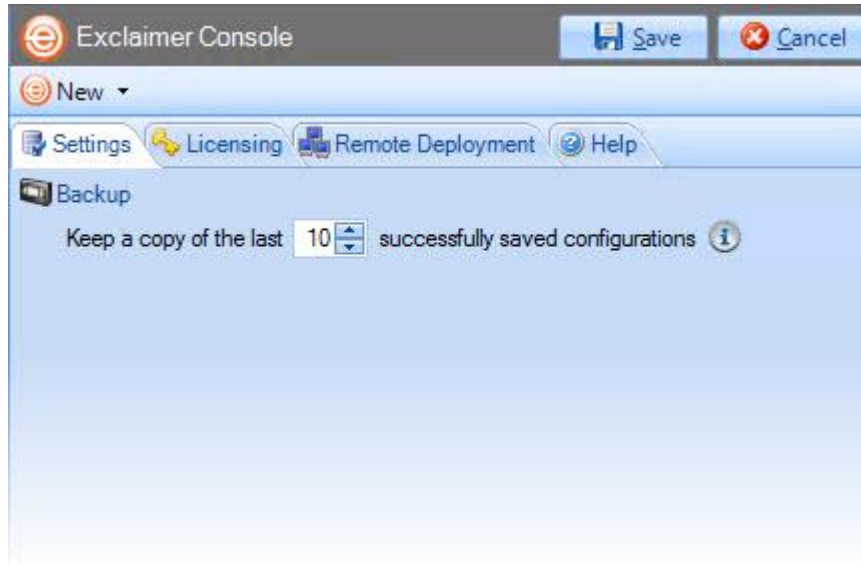
The [actions pane](#) displays quick access to common tasks for the selected node. Available actions vary, depending on which branch of the [console tree](#) is currently selected.

NOTE

The **actions pane** can be hidden or shown using the [hide / show actions pane \[pg.69\]](#) option on the toolbar.

# Exclaimer Console Settings

The [settings](#) tab contains options for the [Exclaimer console](#):



Each time that configuration changes are saved, a backup of the previous configuration is created and details of this are stored in the [Windows event log \[pg.81\]](#). The [keep a copy of the last...](#) option is used to specify the maximum number of backups that will be retained, or set this value to zero if you do not wish such backups to take place.

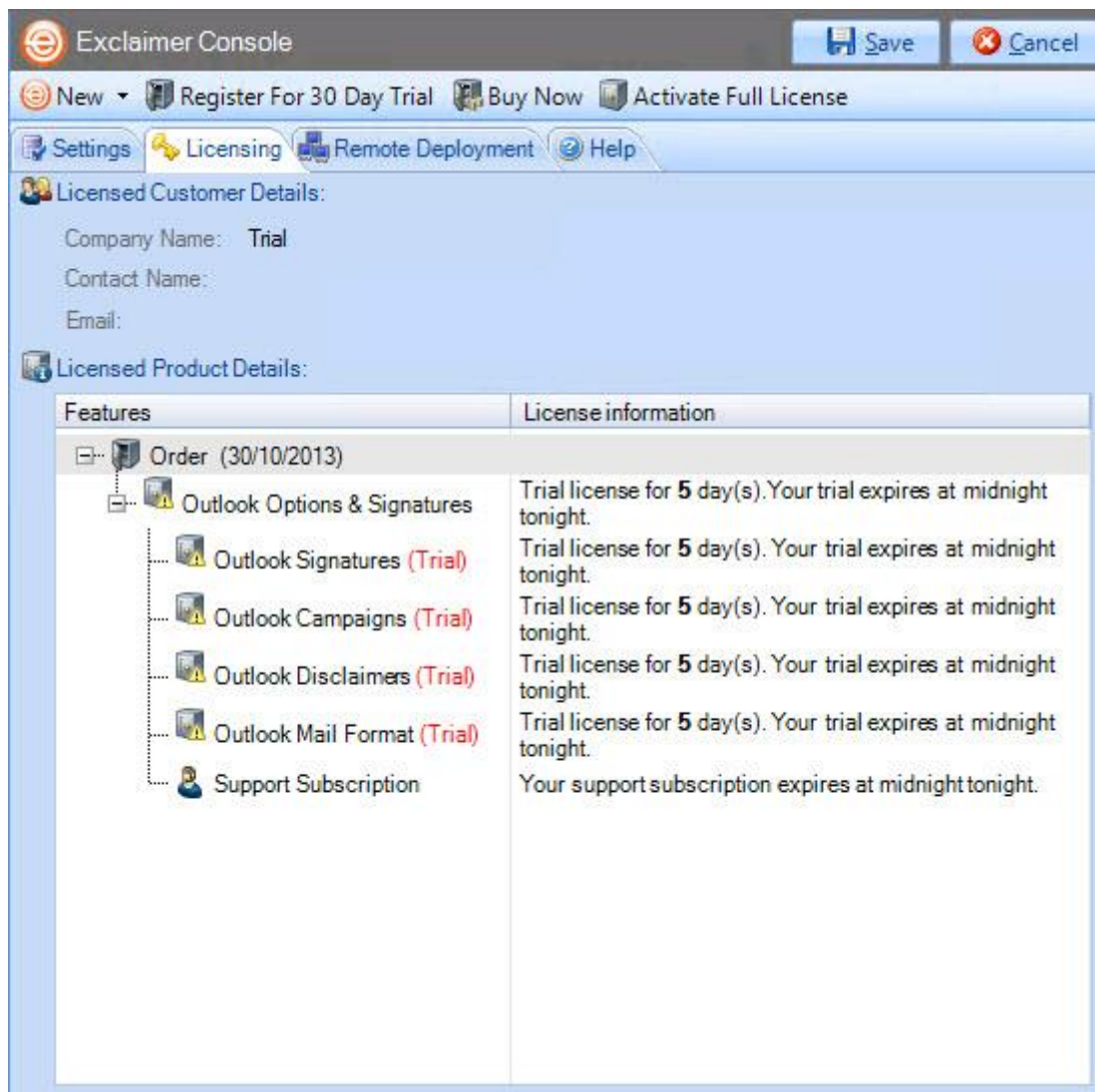
Specific [settings \[pg.86\]](#) for [Exclaimer Signature Manager Outlook Edition](#) are available when the [Signature Manager Outlook Edition](#) branch is selected in the console tree.

## NOTE

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to [save changes \[pg.79\]](#) across all tabs. Alternatively, use the **cancel** button to abandon all changes.

# Licensing

The [licensing](#) tab contains information and options regarding the license for [Exclaimer Signature Manager Outlook Edition](#):



Licensing information is summarized in the following sections:

- [The licensing process](#) [pg.74]
- [Licensing information](#) [pg.74]
- [The licensing toolbar](#) [pg.74]

## The Licensing Process

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

If you have installed Exclaimer software for the first time, you can use it for five days without any form of registration. After five days, you are prompted to register for a 30 day trial. During the trial period, all signatures are appended with the following text: *This Signature was created by Exclaimer Signature Manager Outlook Edition. This message is only added when the product is in trial.*

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

- Purchase the product from the [Exclaimer website](#) or by contacting the [Exclaimer sales team](#)
- Contact the [Exclaimer sales team](#) to extend your trial

## Licensing Information

The [licensing](#) tab shows any contact details associated with this Exclaimer license. You can also see the type of license that is currently in place and the license status (for example, the number of days remaining for a trial).

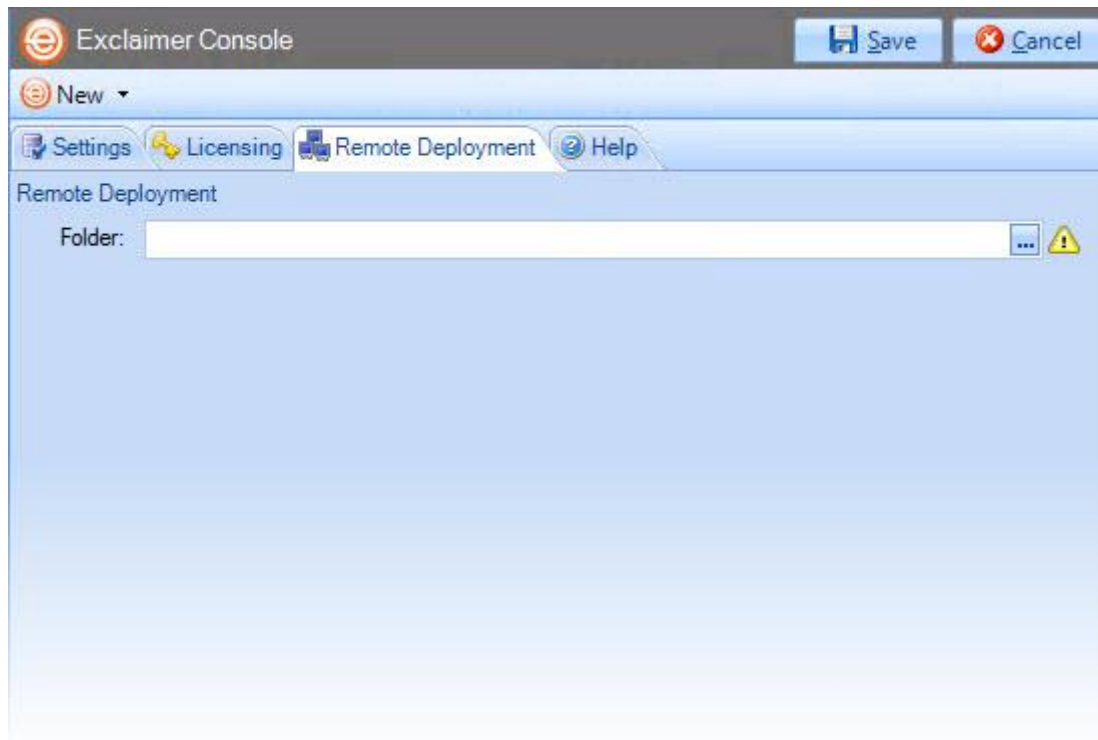
## The Licensing Toolbar

When the [licensing](#) tab is displayed, the [licensing](#) toolbar contains the following options:

Toolbar Option	Summary
New > Signature Manager Outlook Edition policy	See the <a href="#">adding a new Outlook policy [pg.136]</a> page.
Register for 30 day trial	Before using this software, you must register your installation of the Exclaimer Console and its associated products. Click this option to open the <a href="#">register for 30 day trial</a> wizard and follow on-screen instructions to register your trial.
Extend trial	This option is only displayed if you have registered for a 30 day trial. To extend a trial, you need to email the <a href="#">Exclaimer sales team</a> .
Buy now	Access the <a href="#">Exclaimer website products page</a> to purchase a license.
Activate full license	Having purchased a license, you will receive an email which includes a product activation key. Use the <a href="#">activate full license</a> option to activate your license.

# Remote Deployment

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



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

## NOTE

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

## How It Works

The remote deployment folder is defined using the [remote deployment](#) tab within the [Exclaimer Console](#).

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

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

## The Remote Deployment Folder

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

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

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

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

## Folder Permissions (Easy Method)

Allow the [Everyone](#) group to have [Read](#) permissions.

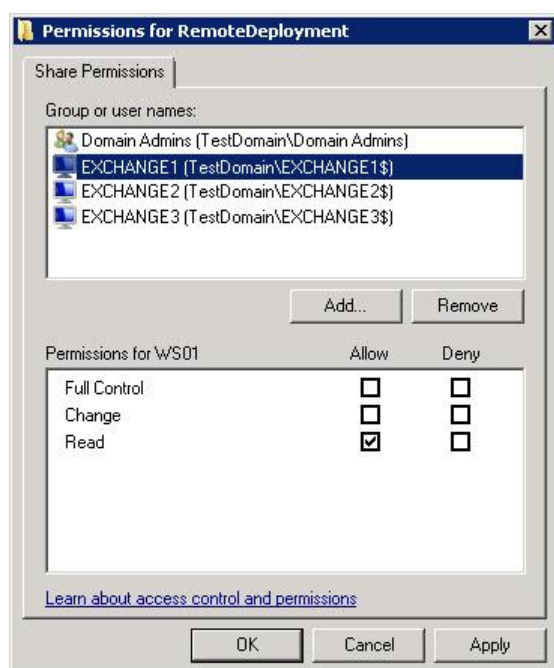


## Folder Permissions (Secure Method)

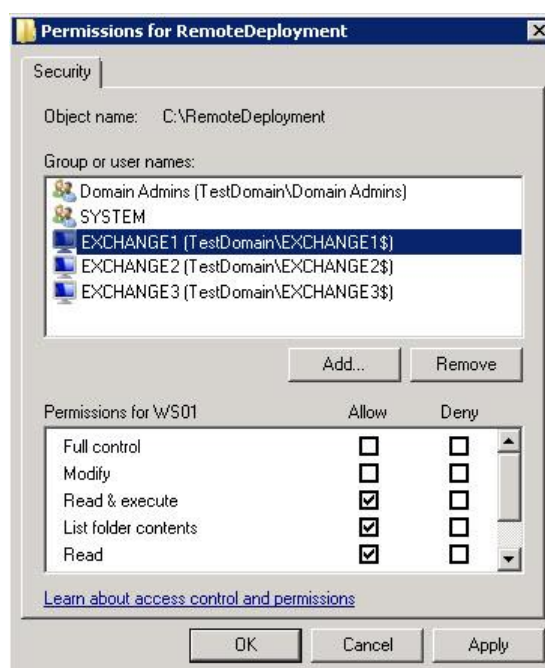
Allow **Read** permissions only for the computer account of each server with **Exclaimer Signature Manager Outlook Edition** installed upon it.

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

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



Share Permissions



Security Permissions

## Remote Deployment Timings

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

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

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

## Changing an Existing Remote Deployment Folder

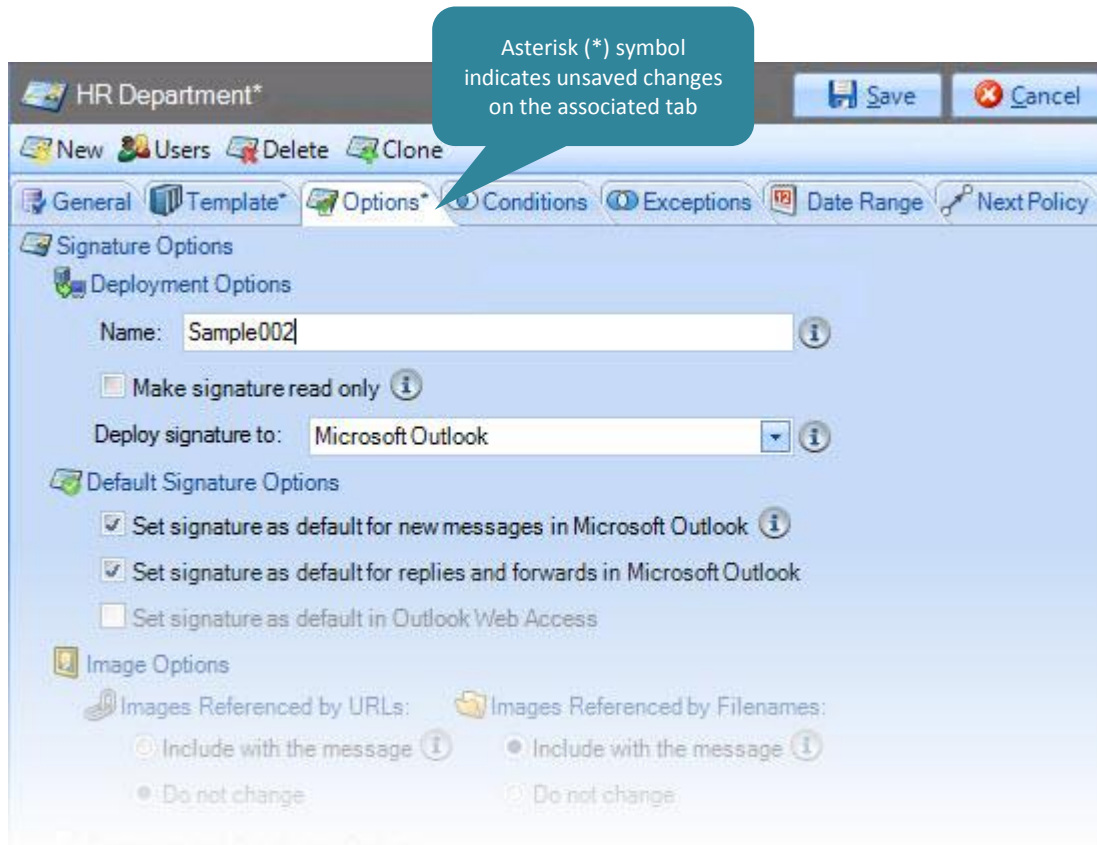
If all [Signature Manager Outlook Edition](#) installations are set to point to a specific remote deployment folder and you later decide to change that folder, there is no need to manually change every server to point to the new location.

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

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

# Saving changes in the Exclaimer console

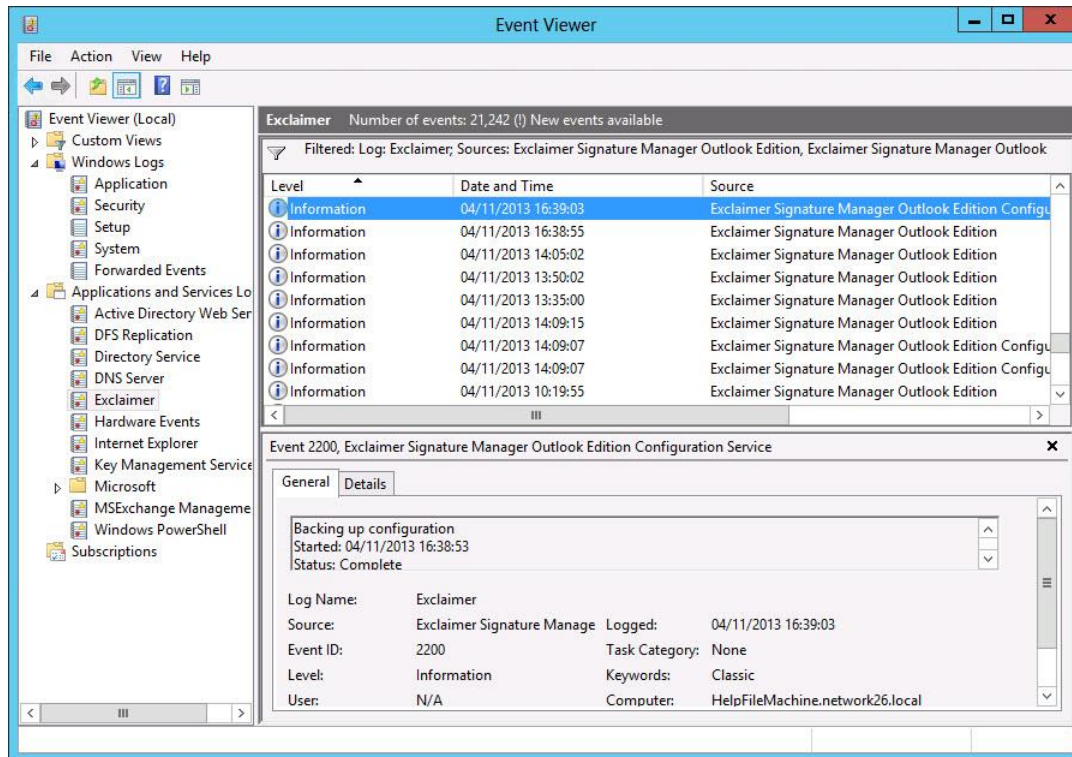
If a tab contains any unsaved changes (irrespective of which branch in the [console tree \[pg.67\]](#) is active), it is displayed with an asterisk (\*) symbol - for example:



Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the [save](#) button to save changes across all tabs. If you are unsure about any changes that have been made, use the [cancel](#) button to abandon all changes.

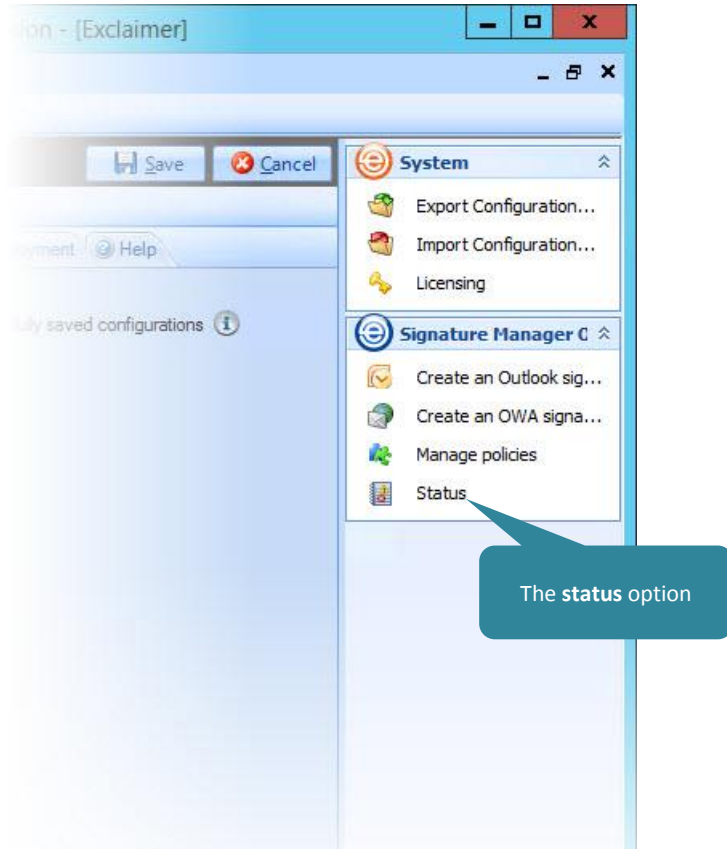
# Configuration Backups

Before changes are saved, existing configuration settings are automatically backed up. Details of any backups are written to the [Windows event log](#) - for example:



# Accessing the Windows Event Log

To access the [Windows event log](#) from within the Exclaimer console, simply select the status option from the actions pane:



Alternatively, you can access the [Windows event log](#) from Windows. To do this, follow the steps below:

1. On the appropriate computer, click [Start](#).
2. Select [administrative tools](#).
3. Select [event viewer](#).

# Exporting Configuration Settings

The [export current configuration settings](#) option is used to export all settings for the Exclaimer console, together with [settings](#) [pg.86], [policies](#) [pg.94] and [templates](#) [pg.189] for Exclaimer Signature Manager Outlook Edition.

The export process writes all settings to an [econfig](#) file; this is a proprietary file type for Exclaimer products and is required if you wish to import settings from a file. To export current settings, follow the steps below:

1. Ensure that [Exclaimer](#) is selected in the console tree (i.e. the topmost branch)
2. Select [export configuration](#) from the [actions pane](#), or from the [action](#) menu. The [export configuration](#) window is displayed.

## NOTE

Alternatively, you can select the topmost **Exclaimer** branch in the console tree and right-click to access the **export configuration** option.

3. Navigate to the required drive and folder, into which the export file should be saved.
4. Enter the required [file name](#) for the export file.
5. Click [save](#) to complete the export.

## NOTE

Note that configuration files can only be exported and imported between servers in the same **Active Directory** forest.

# Importing Configuration Settings

The [import current configuration settings](#) option is used to import all settings for the Exclaimer console. As such, the import will include all [settings](#) [pg.86], [policies](#) [pg.94] and [templates](#) [pg.189] for Exclaimer Signature Manager Outlook Edition.

NOTE

It is important to note that **all** settings will be imported, which means that your existing configuration will be overwritten. Before the import takes place, existing configuration settings are automatically backed up; you can find the location of this backup file by checking the [Windows Event Log](#) [pg.81].

Settings must be imported from an [econfig](#) file; this is a proprietary file type for Exclaimer products, and is created whenever the [export configuration settings](#) [pg.82] option is used. To import configuration settings, follow the steps below:

1. Ensure that you have backed up existing settings by [exporting the current configuration](#) [pg.82].
2. Ensure that **Exclaimer** is selected in the console tree (i.e. the topmost branch).
3. Select [import configuration](#) from the [actions](#) pane, or from the [action](#) menu. The [import configuration](#) window is displayed.

NOTE

Alternatively, you can select the topmost Exclaimer branch in the console tree and right-click to access the **import configuration** option.

4. Navigate drives and folders to select the [econfig](#) file to be imported.
5. Click [open](#) to complete the import.

NOTE

Note that configuration files can only be exported and imported between servers in the same **Active Directory** forest.

# Chapter 4

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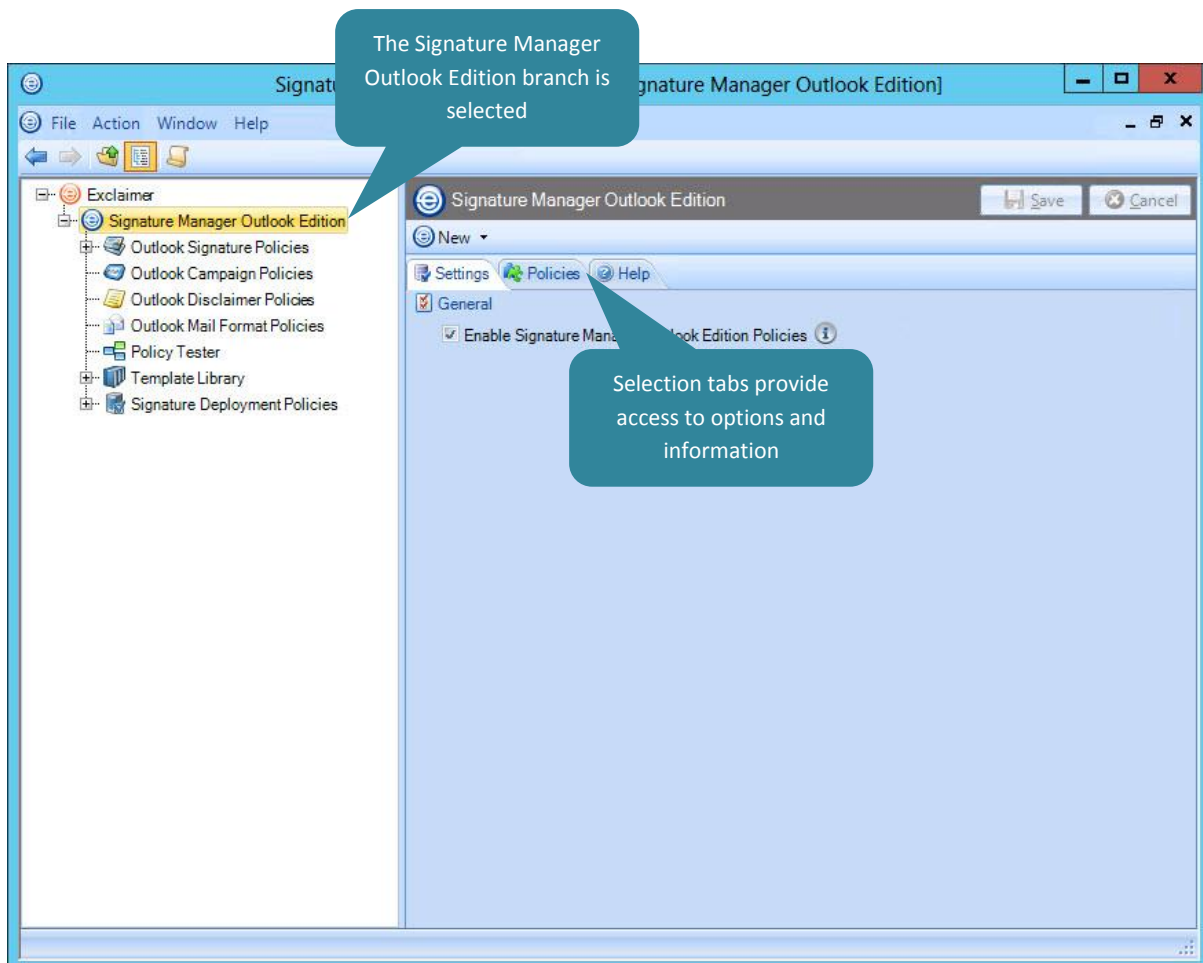
## General Settings & Information



# General Settings & Information

## Introduction

The [Signature Manager Outlook Edition](#) branch (within the [Exclaimer console](#) [pg.66] tree) is where all setup is completed. When the parent branch ([Signature Manager Outlook Edition](#)) is selected (within the [Exclaimer console](#) [pg.66]), general settings and information can be viewed and updated:



From here, you can:

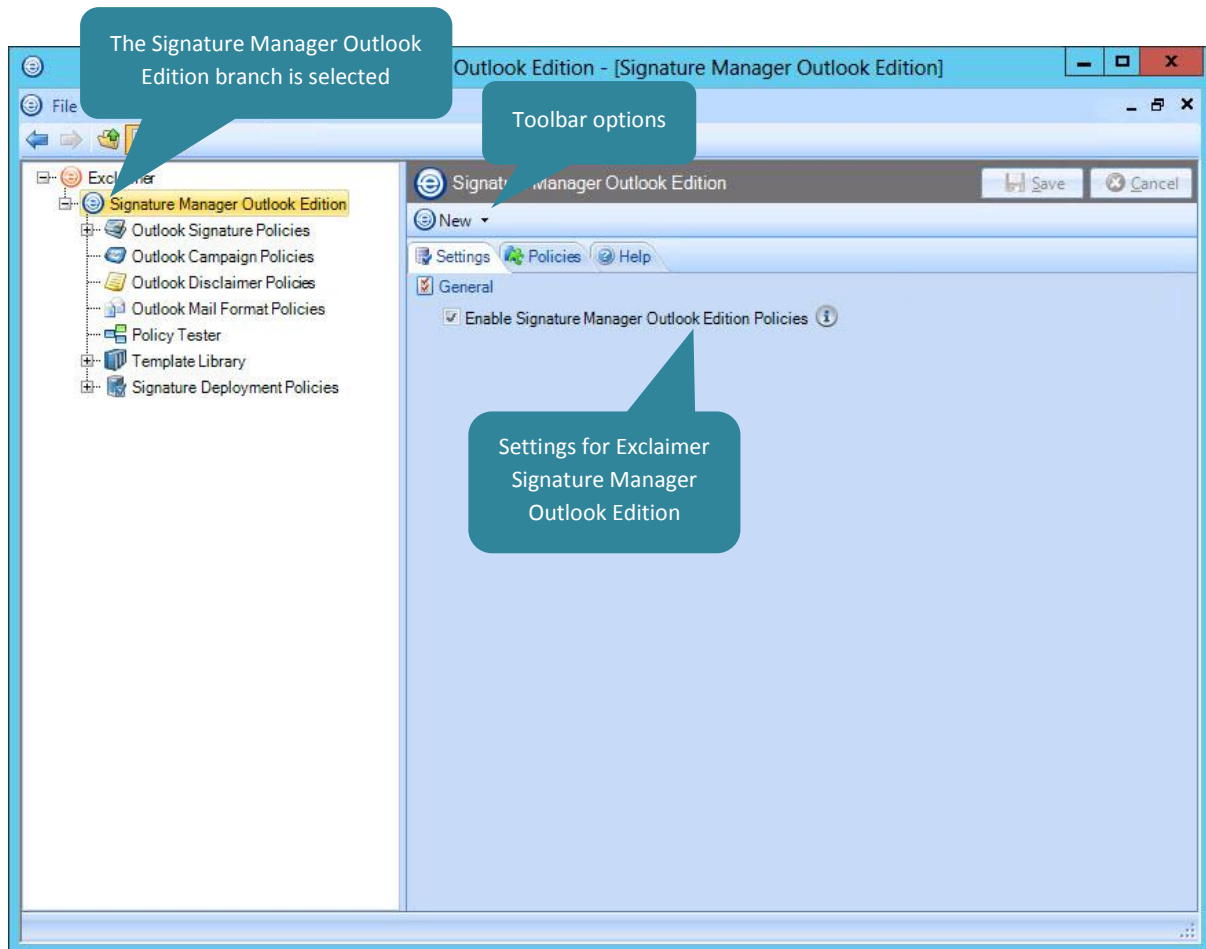
- Update [general settings](#) [pg.86] from the [settings](#) tab
- [View existing Outlook policies](#) [pg.87] from the [policies](#) tab
- [Add a new policy](#) [pg.136] via toolbar or [actions](#) pane options

### NOTE

For further information about the **Exclaimer console** (including the menu, toolbar and **actions** pane), see [understanding the Exclaimer console window](#) [pg.67].

# Signature Manager Outlook Edition Settings

The [settings](#) tab contains general settings for the [Exclaimer Signature Manager Outlook Edition](#) application:



From here, you can use the [enable Signature Manager Outlook Edition policies](#) option to enable or disable all [Signature Manager Outlook Edition](#) policies (including signatures, campaigns, disclaimers and mail format policies). If this option is not set to [enabled](#), [Exclaimer Signature Manager Outlook](#) policies will **not** be applied to any of your organization's email messages.

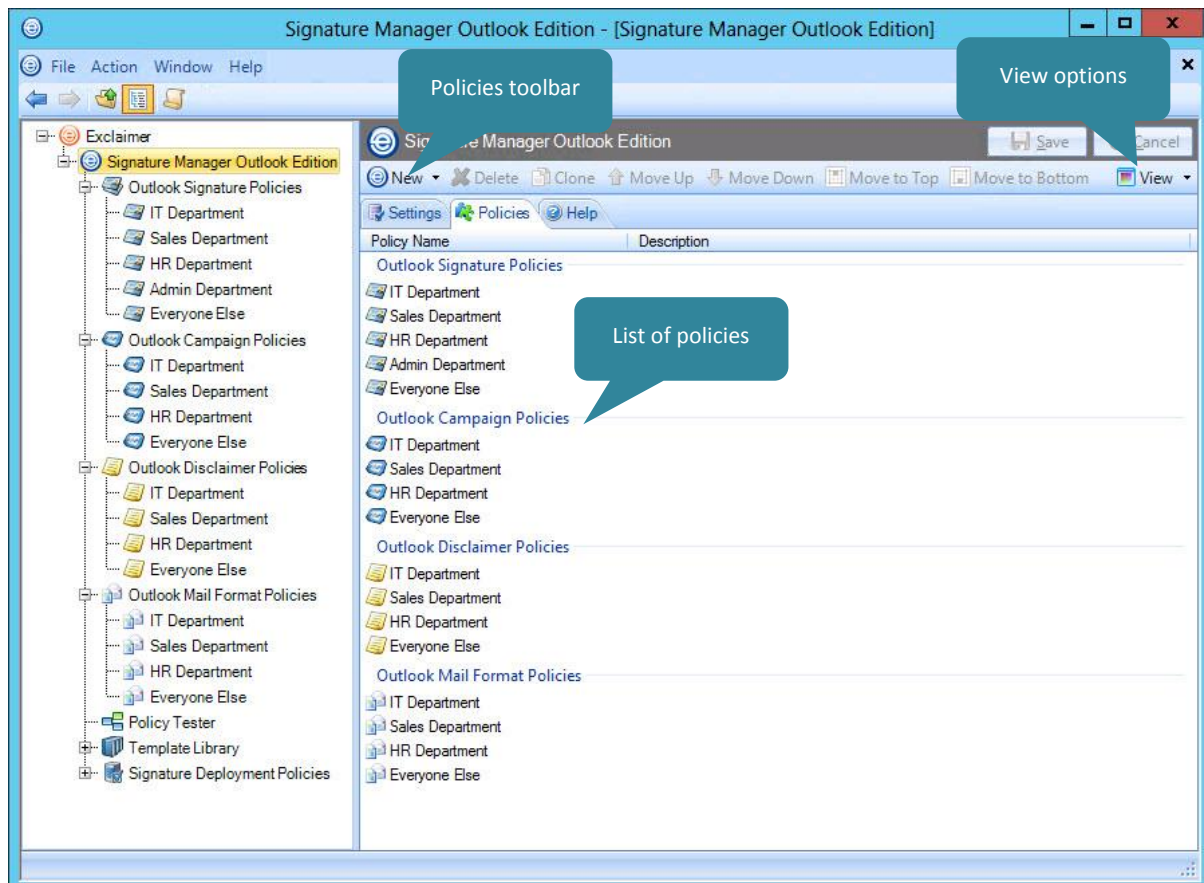
## NOTE

Additional settings to control the way in which signatures are updated and deployed are available via [signature deployment policies](#) [pg.343].

If required, you can also select the new option from the toolbar to access options for creating new [signature](#) [pg.104], [campaign](#) [pg.108], [disclaimer](#) [pg.110] or [mail format](#) [pg.112] Outlook policies.

# Signature Manager Outlook Edition Policies

The [policies](#) tab contains quick access to existing [Outlook](#) policies and options for completing key tasks relating to policies:



[Outlook](#) policies are processed in the order that they are listed here. The policy list is divided into four sections - [signature policies](#), [campaign policies](#), [disclaimer policies](#) and [mail format policies](#). You can use [move up / move down](#) [pg.90] options to change the sequence of policies within each section, and use [next policy](#) [pg.134] options for greater control over processing sequence.

Note that you can change the sequence that [policies](#) run within each [policy type](#) section, but [policy types](#) always run in the same sequence:



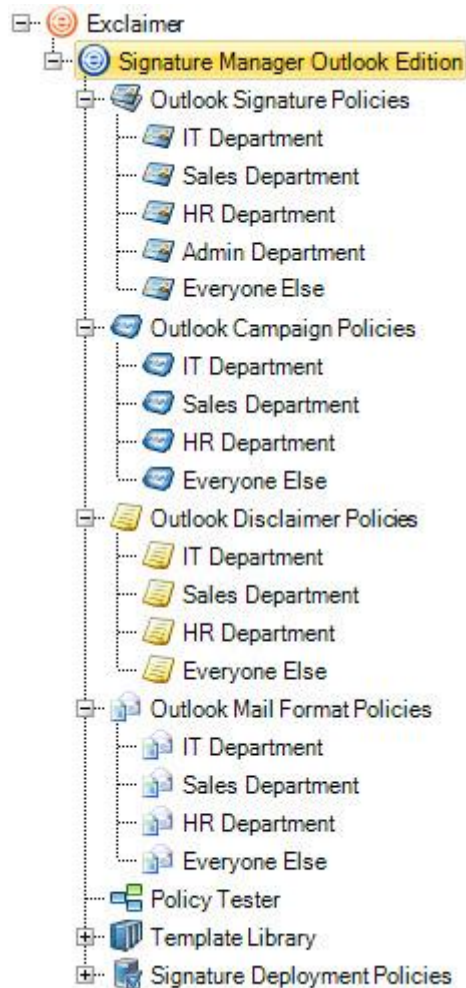
Once the signature has been constructed, any [mail format](#) policies are processed and applied **before** the final signature is deployed. For further information see [understanding how policies are processed](#) [pg.98].

Available options from the [policies](#) tab are summarized in the following sections:

- [The policy list](#) [pg.89]
- [The policies toolbar](#) [pg.90]
- [View options](#) [pg.91]

## The Policy List

All existing [Outlook](#) policies are listed in the upper section of the main content area; these are the same policies that you will see listed in the console tree:



You can double-click any [Outlook](#) policy from the list to [view and edit its settings \[pg.119\]](#). It does not matter if you access policies from the console tree, or from the policy list shown here - use whichever method is most convenient for the task in hand.

# The Policies Toolbar

When the [policies](#) tab is displayed, the [policies](#) toolbar contains the following options:

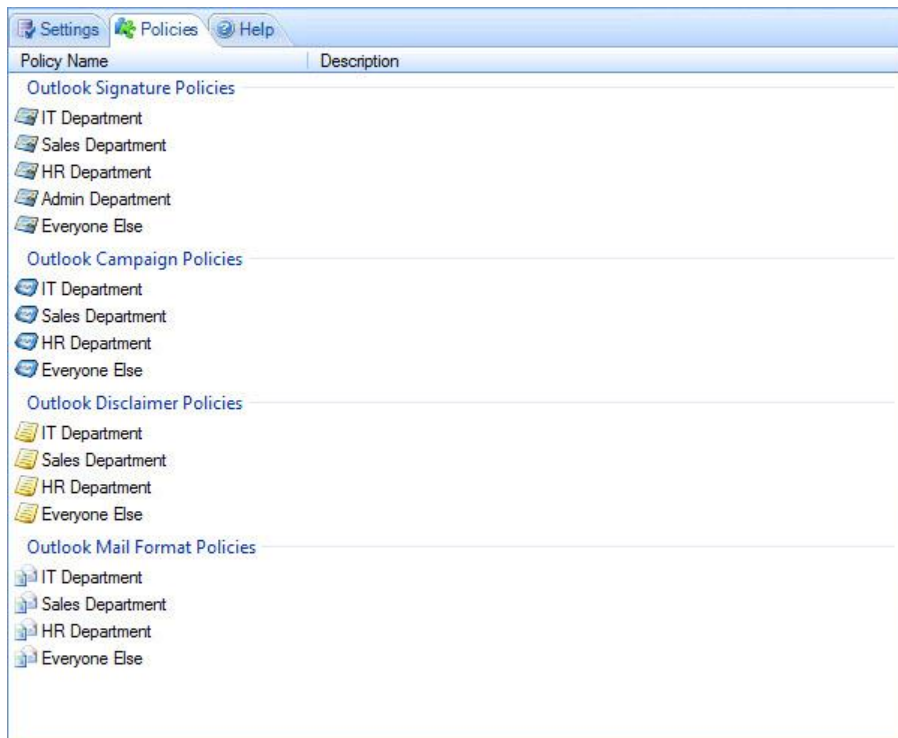
Toolbar Option	Summary
New	Select this option to access options for creating a new <a href="#">signature [pg.104]</a> , <a href="#">campaign [pg.108]</a> , <a href="#">disclaimer [pg.110]</a> or <a href="#">mail format [pg.112]</a> policy.
Delete	Use this option to <a href="#">remove [pg.148]</a> the currently selected policy. Select a policy from the list and use this option to delete it - the policy is removed from the list but is only permanently deleted when <a href="#">changes are saved [pg.79]</a> .
Clone	If you need to create a policy which is similar to an existing policy, use this option to <a href="#">clone [pg.143]</a> (duplicate) the existing policy and then <a href="#">edit [pg.144]</a> the duplicate version as required (this can be much quicker than creating a new policy from first principles).
Move Up / Move Down / Move to Top / Move to Bottom	Use these options to reorganize the policy list and determine the order in which policies are applied within each policy type section. Select a policy and click <a href="#">move up</a> or <a href="#">move down</a> as required, or use <a href="#">move to top</a> / <a href="#">move to bottom</a> options to quickly move to the start/end of a section. Note that if you select a section title (e.g. <a href="#">Outlook campaign policies</a> , all policies of that type are selected.

## NOTE

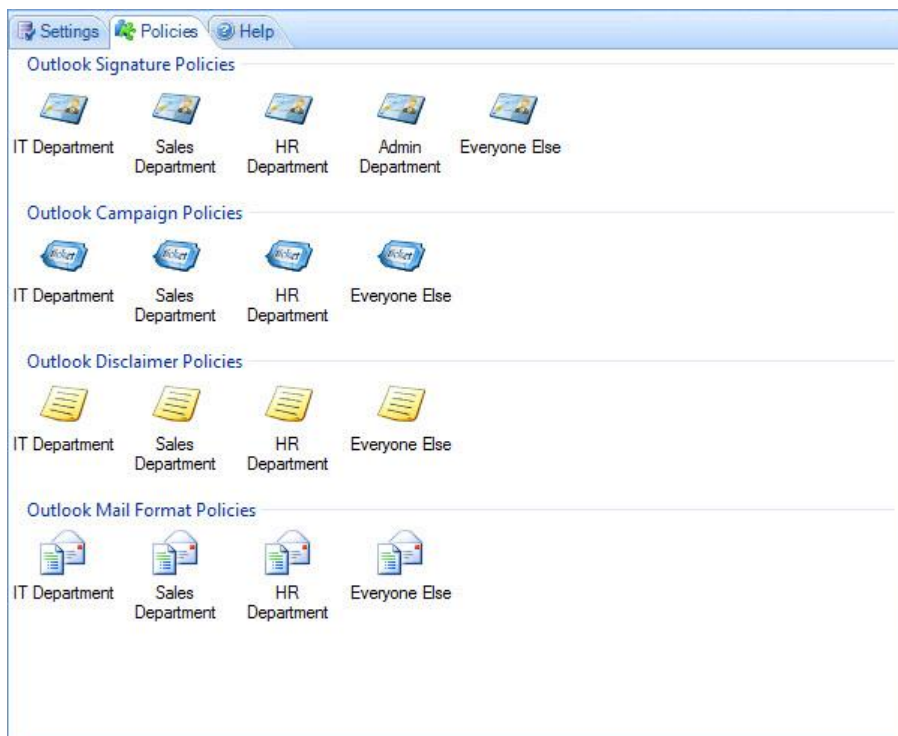
Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to [save changes \[pg.79\]](#) across all tabs. Alternatively, use the **cancel** button to abandon all changes.

# View Options

The [view](#) option can be used to determine whether policies are displayed in list ([details](#)) form...



... or as [large icons](#):



# Working With Encrypted and/or Signed Email

Exclaimer Signature Manager Outlook Edition adds Outlook signatures to email messages and configures mail format settings for your users - it does not affect encrypted and/or signed email messages.





# Chapter 5

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## Working with Outlook Policies

# Outlook Policies Introduction

Exclaimer Signature Manager Outlook Edition controls your signatures and mail format settings (for both Microsoft Outlook and [OWA \[pg.101\]](#)) using [Outlook policies](#) and associated [templates \[pg.189\]](#).

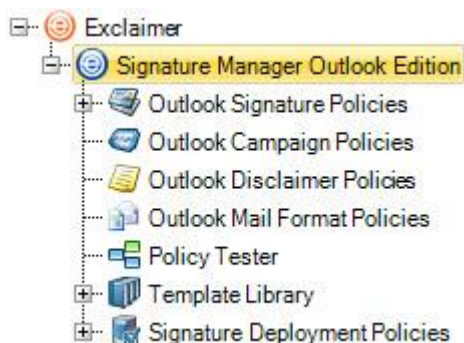
Exclaimer Signature Manager Outlook Edition allows you to define any number of [templates](#) which can include signatures, disclaimers, campaigns/branding and email formatting. However, 'one size' rarely fits all - for example, an organization may need a standard company signature for all messages but in addition to this:

- Each department within the organization may require supplementary disclaimers or sign-off messages
- Certain people within a department may require additional signature information
- At weekends, certain departments may need to apply alternative signature information
- At certain times of the year, email signatures may need to include campaign advertising

Using [Exclaimer Signature Manager Outlook Edition](#), you create [Outlook policies](#) to control the circumstances under which templates are applied. In short, an [Outlook policy](#) can be thought of as a set of rules or conditions that must be met for a template to be applied to email messages. Within [Signature Manager Outlook Edition](#), there are four distinct policy types:

- [Outlook signature policies \[pg.104\]](#)
- [Outlook campaign policies \[pg.108\]](#)
- [Outlook disclaimer policies \[pg.110\]](#)
- [Outlook mail format policies \[pg.112\]](#)

Within the Exclaimer console, all [Outlook policies](#) (and other key areas of the system) can be accessed by selecting the parent branch in the console tree ([Signature Manager Outlook Edition](#)):



This chapter contains topics for working with [Outlook](#) policies, including:

- [What is an Outlook policy?](#) [pg.96]
- [Understanding how Outlook policies are processed](#) [pg.98]
- [Understanding the difference between Outlook and OWA](#) [pg.101]
- [Policy types](#) [pg.103]
- [Accessing existing Outlook policies](#) [pg.115]
- [The anatomy of an Outlook policy](#) [pg.119]
- [Adding a new Outlook policy](#) [pg.136]
- [Cloning an existing Outlook policy](#) [pg.143]
- [Changing an existing Outlook policy](#) [pg.144]
- [Enabling and disabling an Outlook policy](#) [pg.145]
- [Viewing which users are associated with an Outlook policy](#) [pg.146]
- [Removing an Outlook policy](#) [pg.148]

You can also learn more about specific tasks, using the [how to](#) [pg.149] section for [Outlook policies](#).

# What is an Outlook Policy?

Within [Exclaimer Signature Manager Outlook Edition](#), a signature is constructed using three distinct parts - [signature](#) (business card content), [campaign](#) (sales / promotional content) and [disclaimer](#) (legal / corporate) content.

These parts are defined in separate [Outlook policies](#) and then combined (when given criteria are met) to form the final [Outlook](#) signature. For example:

The image shows an example of an Outlook signature. It is divided into three distinct sections, each with a callout box explaining its source:

- Signature Section:** Contains contact information for Karen Green, Marketing Manager. The callout box states: "This part of the signature was applied from an Outlook signature policy".
- Campaign Section:** Features a graphic of orange circles and the text "Orbit illustration". Below this is a red banner with the text "Orbit illustration Ltd. is a limited company registered in England and Wales. Registered number: 1234567. Registered office: Suite 1, Business Studios, 1 Example Rd, London." The callout box states: "This part of the signature was applied from an Outlook campaign policy".
- Disclaimer Section:** Contains a legal disclaimer. The callout box states: "This part of the signature was applied from an Outlook disclaimer policy".

To achieve this, the following policy types are used:

- [Outlook signature policy](#) [pg.104]
- [Outlook campaign policy](#) [pg.108]
- [Outlook disclaimer policy](#) [pg.110]

Additionally, you can define [mail format policies](#) [pg.112] to control the default composition font presented to users when they choose to create, reply to or forward an email message.

You can create as many policies of each type as required, and set criteria to determine how they are applied under given circumstances. For example, you might have different signatures, campaigns and disclaimers for different departments within your organization, or for different office locations, or for specific time periods, etc.

It is not mandatory for signatures to be comprised of all three parts. A signature might be as simple as applying the sender's contact details and a company logo, or you might only want to apply disclaimer text for a given set of circumstances - you can use the policy types in any way that suits your organizational requirements.

NOTE

**Outlook** policies are always processed in the same sequence - **signatures**, then **campaigns** and finally **disclaimers**. This means that the signature template is applied first, then the campaign template and then the disclaimer template (for further information see [understanding how policies are processed](#) [pg.98]).

Whilst you cannot change this processing sequence, you can add atypical content to policies. For example, if you wish to include a campaign image before a signature, you could associate a campaign template with a signature policy and a signature template to a campaign policy.

# Understanding How Outlook Policies are Processed

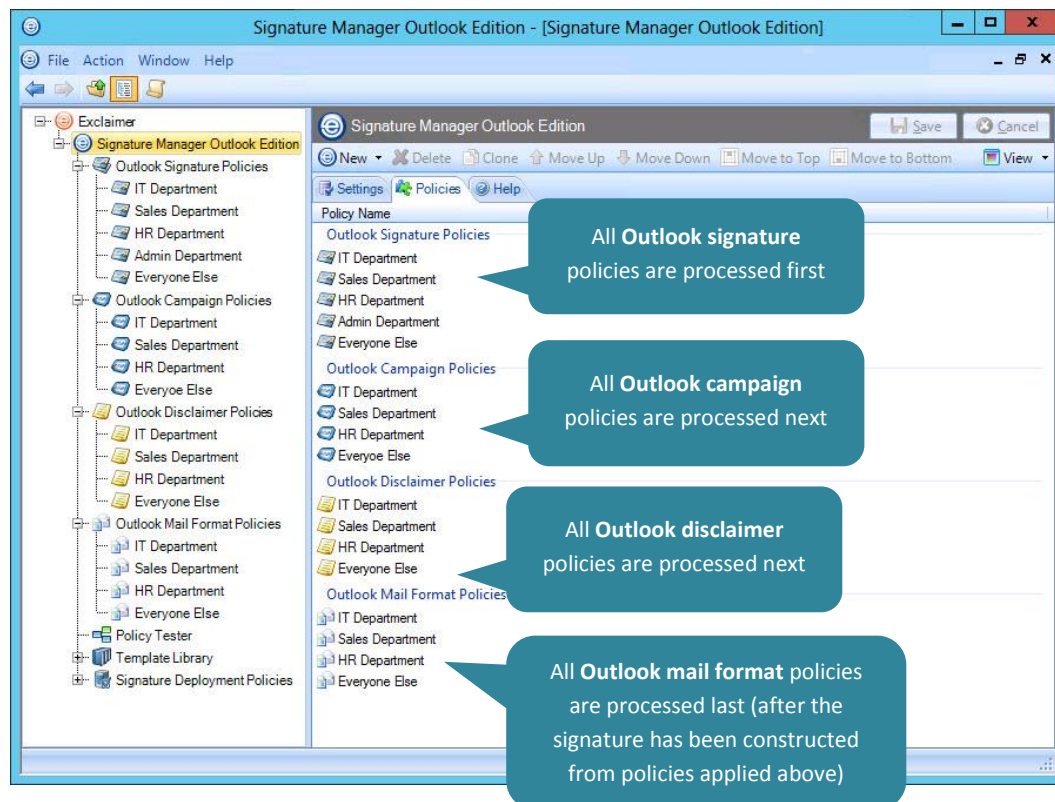
Within **Exclaimer Signature Manager Outlook Edition**, there are four distinct **Outlook** policy types:

- [Outlook signature policies](#) [pg.104]
- [Outlook campaign policies](#) [pg.108]
- [Outlook disclaimer policies](#) [pg.110]
- [Outlook mail format policies](#) [pg.112]

The first three types are used to construct the final signature and processing always takes place in the following sequence:



Once the signature has been constructed, any **mail format** policies are processed and applied before the final signature is deployed. You can see this sequence reflected in the **policies** tab (choose the **Signature Manager Outlook Edition** branch in the console tree and click the **policies** [pg.87] tab):



Within each policy type, policies are processed in the sequence that they are listed. You can use [move up](#) / [move down](#) / [move to top](#) / [move to bottom](#) options to change the sequence of policies within each section, and use [next policy](#) [pg.134] options for greater control over the processing sequence.

Thus, if an [Outlook signature policy](#) is applied, content from the associated template is added to the signature. Processing continues and if an [Outlook campaign policy](#) is applied, content from the associated template is appended to the signature content. Processing continues and if an [Outlook disclaimer policy](#) is applied, content from the associated template is appended to the combined signature/campaign content. When all processing is complete, the final signature is comprised of anything between one and three parts - for example:

The image shows an email signature template divided into three distinct sections, each with a callout box explaining its source:

- Top Section (Outlook signature policy):** Contains the name "Karen Green | Marketing Manager", email "KG@network26.local", phone "t: +44 (0) 1252 987 456", fax "f: +44 (0) 1252 987 456", and website "greenorg.net".
- Middle Section (Outlook campaign policy):** Features a red banner with "Orbit illustration", a small logo for "orbit illustration Ltd.", and a promotional message: "Download FREE whitepaper on designing email signatures www.exclaimer.com".
- Bottom Section (Outlook disclaimer policy):** Contains a standard legal disclaimer: "Any views or opinions presented in this email are solely those of Karen Green and do not necessarily represent those of Green Organization. Employees of Green Organization are expressly required not to make defamatory statements and not to infringe or authorize any infringement of copyright or any other legal right by email communications. Any such communication is contrary to company policy and outside the scope of the employment of the individual concerned. Green Organization will not accept any liability in respect of such communication, and the employee responsible will be personally liable for any damages or other liability arising."

Any number of policies can be applied to [Microsoft Outlook](#) emails. For example, your Sales department might have a standard signature comprised of an [Outlook signature policy](#) for contact details, an [Outlook campaign policy](#) for company branding and an [Outlook disclaimer policy](#) for a standard disclaimer. However, at different times of the year you may wish to apply a second [Outlook campaign policy](#) to promote specific products.

NOTE

If a policy is defined for **OWA**, only one **Outlook signature policy** will be applied (though multiple **campaign** and **disclaimer** policies may be applied). If more than one Outlook signature policy is applicable, the last one processed will be used. For this reason, it is very important that you check the sequence of any **OWA** policies and, if multiple **Outlook signature** policies might be applied, ensure that the most important one is processed last [pg.175].

## When Does Processing Take Place?

When [Exclaimer Signature Manager Outlook Edition](#) is enabled on a system, it is running in the background all of the time. When a user chooses to create a new email message in [Microsoft Outlook](#) (or if they choose to reply to / forward a message), they will see any applicable signatures, as determined by policies and associated templates. Users can amend the signature at this point, if required.

## Can I Change The Processing Sequence?

You cannot change the processing sequence but you can apply atypical templates to policies. For example, if you wish to include a campaign image before a signature, you could associate a [campaign template](#) with an [Outlook signature policy](#) and a [signature template](#) with an [Outlook campaign policy](#). This principle applies to any of the Outlook policies ([signature](#), [campaign](#) and [disclaimer](#)).

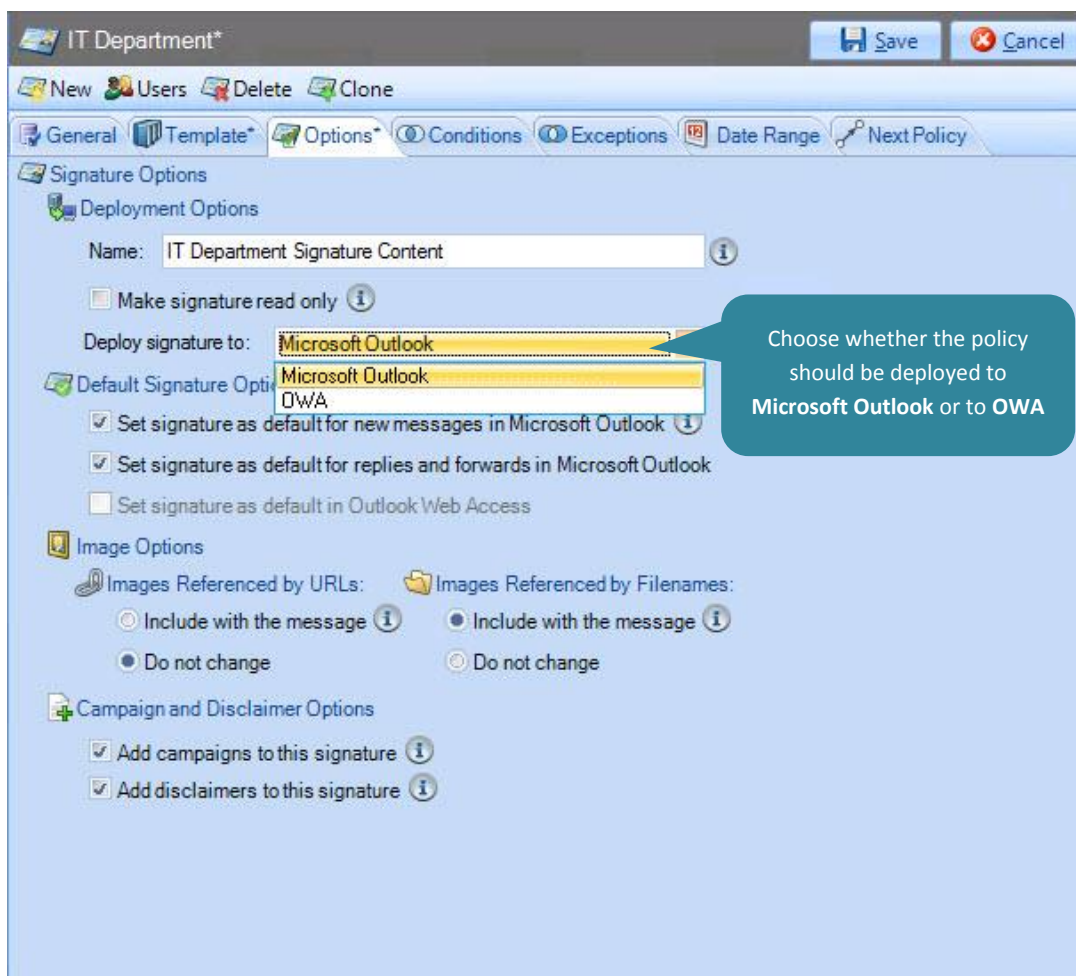


# Understanding the Difference between Outlook and OWA

Within [Exclaimer Signature Manager Outlook Edition](#), policies can be defined for emails sent via:

- [Microsoft Outlook](#) [pg.102]
- [OWA](#) [pg.102]

This is determined on the [options tab](#) [pg.123] for each policy, as shown below:



# Microsoft Outlook

Policies are applied to any emails that are sent from [Microsoft Outlook](#). Any number of policies can be applied to [Microsoft Outlook](#) emails. For example, your Sales department might have a standard signature comprised of a [signature policy](#) for contact details, a [campaign policy](#) for company branding and a [disclaimer policy](#) for a standard disclaimer. However, at different times of the year you may wish to apply a second [campaign policy](#) to promote specific products.

## OWA

OWA is a webmail service that is provided as part of [Microsoft Exchange Server](#) (Exchange 2003 onwards). For policies to work with [OWA](#), you must:

- Ensure that your system is [configured for OWA](#) [pg.18]
- Ensure that required policies are set for [OWA](#) and not [Microsoft Outlook](#)

When this is done, [Exclaimer Signature Manager Outlook Edition](#) will automatically update a user's [OWA](#) signature. Exactly how this is done depends upon how your installation is configured - please see [installation and deployment](#) [pg.15] and [configuring OWA updates from the server](#) [pg.33] for further information.

### NOTE

It is important to note that any images used in templates for OWA signatures **must be linked using a URL and not embedded**. For further information please see [how do I include images for an OWA signature?](#) [pg.340].

# Policy Types

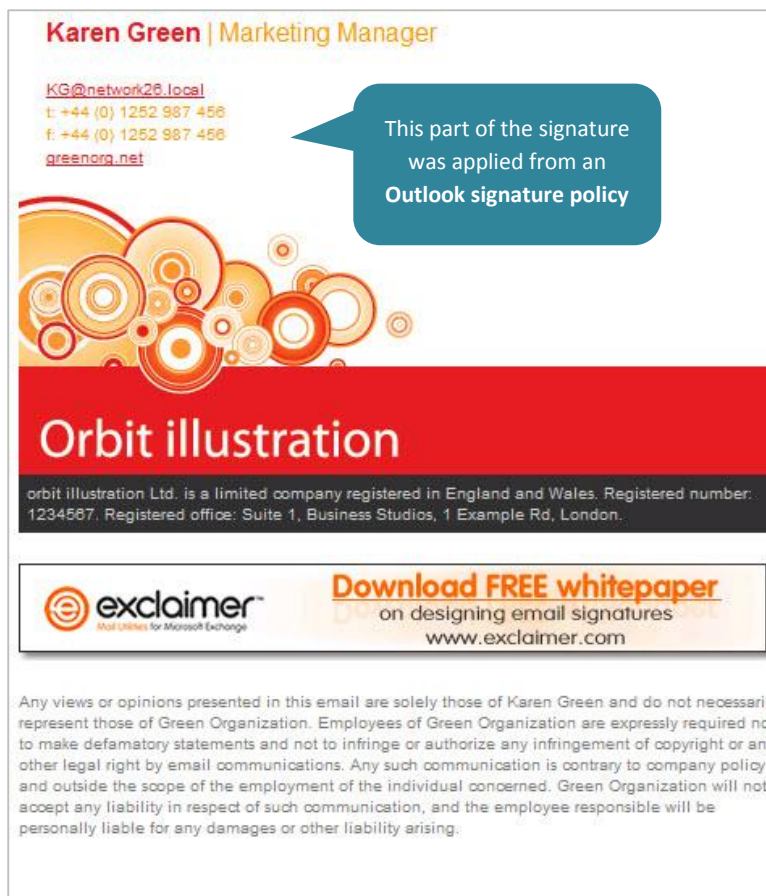
Within [Signature Manager Outlook Edition](#), there are four distinct [Outlook](#) policy types:

- [Outlook signature policies](#) [pg.104]
- [Outlook campaign policies](#) [pg.108]
- [Outlook disclaimer policies](#) [pg.110]
- [Outlook mail format policies](#) [pg.112]

The first three types are used to construct the final signature and the last ([mail format](#)) is used to apply general formatting options (for further information please refer to the [Outlook policies](#) [pg.94] section of this guide).

# Outlook Signature Policies

The content for an [Outlook signature policy](#) is determined by the template with which the policy is associated. Typically (though there may be exceptions), signature content includes a signature block - a section of text towards the end of an email that communicates who recipients are communicating with, and provides assurance that they are dealing with a real person rather than an electronically generated message. For example:



Exclaimer Signature Manager Outlook Edition contains a range of sample signatures in the [template library](#) [pg.189]. If required, you can [edit existing templates](#) [pg.202] or [create new ones](#) [pg.198] using an intuitive [template editor](#) [pg.208]. There are no rules as to what information can or cannot be included in a signature however, a signature might include:

- A complimentary sign off (Best regards, Many thanks, etc.)
- Contact information
- Something that gives the signature personality (for example, you might have your organization's tag line or other brand imagery in the signature block)


The behavior of a signature is set using the [policy options tab](#) [pg.105]. For example, you may want to apply a signature to new email messages only and not to replies or forwarded messages.

## Outlook Signature Policy Options

When an Outlook signature policy is [added](#) [pg.136] or [edited](#) [pg.144], all standard setup tabs are available ([general](#) [pg.120], [template](#) [pg.121], [options](#), [conditions](#) [pg.124], [exceptions](#) [pg.129], [date range](#) [pg.132] and [next policy](#) [pg.134]). The options tab contains settings which vary between policy types. Available options for an [Outlook signature policy type](#) [pg.104] are shown below:

The screenshot shows the 'Options' tab of the 'IT Department\*' Outlook signature policy configuration window. The window has a title bar with 'IT Department\*' and buttons for 'Save' and 'Cancel'. Below the title bar is a toolbar with 'New', 'Users', 'Delete', and 'Clone' icons. The 'Options' tab is selected, showing several sections: 'Signature Options' with 'Deployment Options' (Name: 'IT Department Signature Content', 'Make signature read only' checkbox, 'Deploy signature to: 'Microsoft Outlook' dropdown) and 'Default Signature Options' (checkboxes for 'Set signature as default for new messages in Microsoft Outlook', 'Set signature as default for replies and forwards in Microsoft Outlook', and 'Set signature as default in Outlook Web Access'). The 'Image Options' section has two columns: 'Images Referenced by URLs' and 'Images Referenced by Filenames', each with 'Include with the message' and 'Do not change' radio buttons. The 'Campaign and Disclaimer Options' section has checkboxes for 'Add campaigns to this signature' and 'Add disclaimers to this signature'. Information icons are present next to many fields and sections.

These options are summarized below:

Option	Summary
Deployment Options	
Name	<p>Specify the name of the policy. The name entered here will be displayed to users in Outlook - for example, right-clicking on a generated signature shows any other signatures that are available for selection:</p> 
Make signature read only	<p>Select this option to deploy signatures as read only on users' computers. This prevents signatures (deployed from <a href="#">Exclaimer Signature Manager Outlook Edition</a>) from being deleted, but it does not prevent users from changing signatures in their email messages.</p>
Deploy signature to	<p>Choose whether this signature should be used in <a href="#">Microsoft Outlook</a> or in <a href="#">OWA</a>. Note that <a href="#">OWA</a> only allows one signature per user so, if multiple signatures apply, the last one processed will be used.</p> <p>In this context, the term 'signature' refers to the signature as a whole - i.e. the signature element, the campaign element and the disclaimer element. Signatures may include any number of each element (for example, you might require two campaigns at certain times) however, there is a size limitation with <a href="#">OWA</a> signatures, as below:</p> <ul style="list-style-type: none"> <li>• Exchange 2003 - 4KB (configurable to 16KB via a registry key)</li> <li>• Exchange 2007 - 16KB (non-configurable)</li> <li>• Exchange 2010 - 8KB (non-configurable)</li> <li>• Exchange 2013 - 8KB (non-configurable)</li> </ul> <p>As long as the <b>total</b> size is within the relevant limit, you can have multiple campaigns and/or disclaimers applied to an <a href="#">OWA</a> signature in the same way that you can for an <a href="#">Outlook</a> signature. As such, you are advised to define dedicated policies for <a href="#">OWA</a> users. For further information please see <a href="#">understanding the difference between Outlook and OWA [pg.101]</a>.</p>
Default Signature Options	
Set signature as default for new messages in Microsoft Outlook	<p>Ensures that (if the policy is applied) this signature will be used by default when a user creates a new email using <a href="#">Microsoft Outlook</a>. If a user fulfils the criteria for more than one default signature, the last policy processed will be applied. This option is only available if deployment is set to <a href="#">Microsoft Outlook</a> (rather than <a href="#">OWA</a>).</p> <p style="text-align: right;">.../continued</p>

Option	Summary
Set signature as default for replies and forwards in Microsoft Outlook	Ensures that (if the policy is applied) this signature will be used by default when a user replies to or forwards an email using <a href="#">Microsoft Outlook</a> . This option is only available if deployment is set to <a href="#">Microsoft Outlook</a> (rather than <a href="#">OWA</a> ).
Set signature as default in OWA	Ensures that (if the policy is applied) this signature will be used by default when a user creates a new email using <a href="#">OWA</a> , and if they reply to or forward a message. This option is only available if deployment is set to <a href="#">OWA</a> (rather than <a href="#">Microsoft Outlook</a> ).
Image Options	
Images referenced by URLs > Include with the message	When this option is selected, any URL-referenced images are copied to the user's computer and included in the email message. An advantage of this option is that the image is always available on the local machine. A possible disadvantage is that, if the original image changes, local versions will not be updated until the next update cycle.
Images referenced by URLs > Do not change	Ensures that images referenced by a URL are not copied locally. An advantage of this option is that the latest version of the image will always be used. A possible disadvantage is that the specified image would not be included in signatures if there were to be a problem with the image location (for example, if the web server fails). It should also be noted that the way in which URL referenced images are handled depends upon the recipient - some email systems will not display this type of image.
Images referenced by filename > Include with the message	When this option is selected, any file-referenced images found are copied to the user's computer and included in the email message. An advantage of this option is that the image is always available on the local machine. A possible disadvantage is that, if the original image changes, local versions will not be updated until the next update cycle.
Images referenced by filename > Do not change	This option should only be used for cases where the image is on a shared location that all internal users can access. The sender's <a href="#">Outlook</a> reads the specified file each time that user chooses to create a new message, or replies to a message. If the user does not have access to the specified location, <a href="#">Outlook</a> will not be able to read the file and therefore the image will not appear to the sender or recipient of the email.
Campaign and Disclaimer Options	
Add campaigns to this signature	There may be times where you do not wish to append campaigns to a signature - for example, you might require shorter signatures for reply messages, or for <a href="#">OWA</a> signatures. Select this option if you wish to append campaign content to this signature, where a campaign policy applies. If this option is not selected, any applicable campaign policy content will be ignored.
Add disclaimers to this signature	Select this option if you wish to append disclaimer content to this signature, where a disclaimer policy applies. If this option is not selected, any applicable disclaimer policy content will be ignored.



# Outlook Campaign Policies

The content for an [Outlook campaign policy](#) is determined by the template with which the policy is associated. Typically (though there may be exceptions), campaign content includes promotional content - for example:

**Karen Green | Marketing Manager**

[KG@network26.local](mailto:KG@network26.local)  
t: +44 (0) 1252 987 456  
f: +44 (0) 1252 987 456  
[greenorg.net](http://greenorg.net)

**Orbit illustration**

orbit illustration Ltd. is a limited company registered in England and Wales. Registered number: 1234567. Registered office: Suite 1, Business Studios, 1 Example Rd, London.

**exclaimer™**  
Multiplatforms for Microsoft Exchange

**Download FREE whitepaper**  
on designing email signatures  
[www.exclaimer.com](http://www.exclaimer.com)

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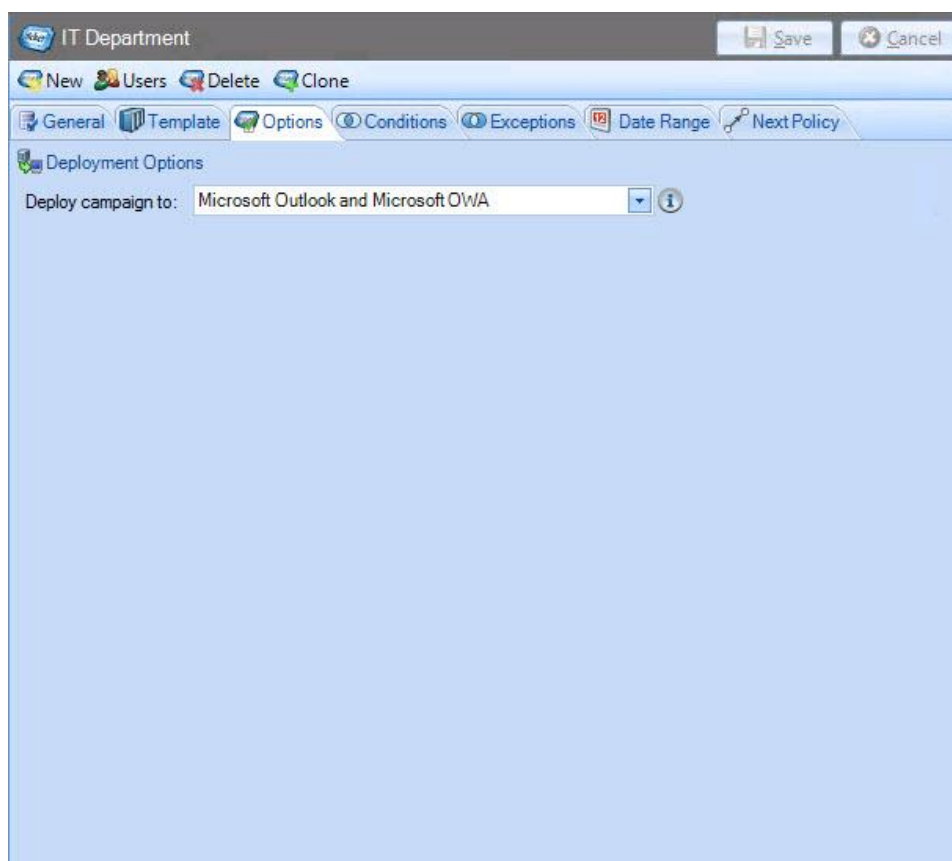
Exclaimer Signature Manager Outlook Edition contains a range of sample campaigns in the [template library](#) [pg.189]. If required, you can [edit existing templates](#) [pg.202] or [create new ones](#) [pg.198] using an intuitive [template editor](#) [pg.208]. There are no rules as to what information can or cannot be included in a campaign however, content often includes images (including [rotating banner ads](#) [pg.240]) and/or [RSS feeds](#) [pg.248].

The behavior of a campaign policy is set using the [policy options tab](#) [pg.109].



## Outlook Campaign Policy Options

When an Outlook campaign policy is [added](#) [pg.136] or [edited](#) [pg.144], all standard setup tabs are available ([general](#) [pg.120], [template](#) [pg.121], [options](#), [conditions](#) [pg.124], [exceptions](#) [pg.129], [date range](#) [pg.132] and [next policy](#) [pg.134]). The [options](#) tab contains settings which vary between policy types. Available options for an [Outlook campaign policy type](#) [pg.108] are shown below:



Here, you can choose to deploy the campaign policy to one of the following options:

- Microsoft Outlook
- OWA
- Microsoft Outlook and OWA

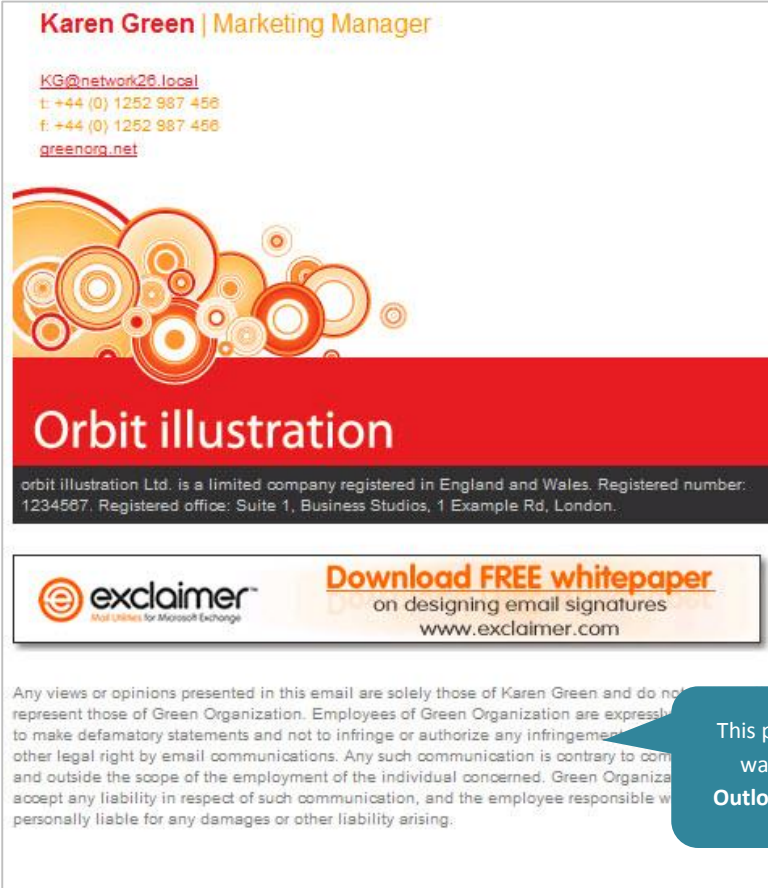
Note that [OWA](#) only allows one signature per user so, if multiple signatures apply, the last one processed will be used. In this context, the term 'signature' refers to the signature as a whole - i.e. the signature element, the campaign element and the disclaimer element. Signatures may include any number of each element (for example, you might require two campaigns at certain times) however, there is a size limitation with [OWA](#) signatures, as below:

- Exchange 2003 - 4KB (configurable to 16KB via a registry key)
- Exchange 2007 - 16KB (non-configurable)
- Exchange 2010 - 8KB (non-configurable)
- Exchange 2013 - 8KB (non-configurable)

As long as the **total** size is within the relevant limit, you can have multiple campaigns and/or disclaimers applied to an [OWA](#) signature in the same way that you can for an [Outlook](#) signature. As such, you are advised to define dedicated policies for [OWA](#) users. For further information please see [understanding the difference between Outlook and OWA \[pg.101\]](#).

## Outlook Disclaimer Policies

The content for an [Outlook disclaimer policy](#) is determined by the template with which the policy is associated. Typically (though there may be exceptions), disclaimer content includes corporate and legal disclaimer content - for example:



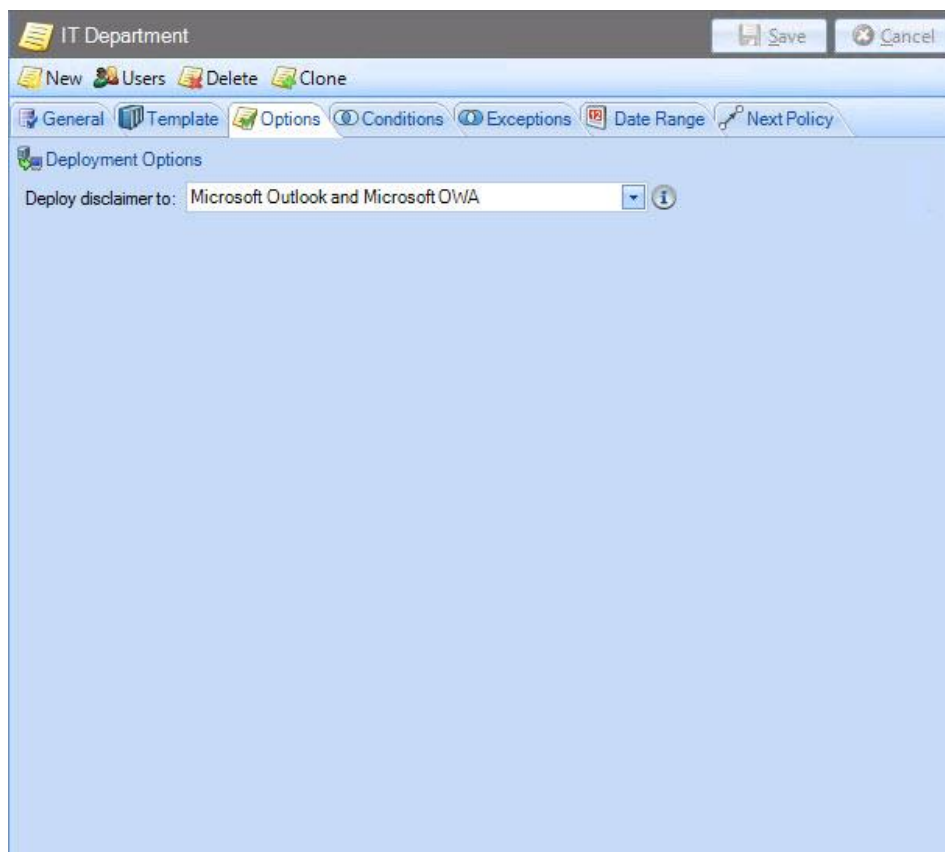
The image shows an example of an Outlook email signature. At the top, it displays the name 'Karen Green' and title 'Marketing Manager' in red and orange. Below this is contact information: email 'KG@network26.local', phone '+44 (0) 1252 987 456', and website 'greenorg.net'. A decorative graphic of orange and red circles is positioned above a red banner that reads 'Orbit illustration'. Below the banner, a small text block states: 'orbit illustration Ltd. is a limited company registered in England and Wales. Registered number: 1234567. Registered office: Suite 1, Business Studios, 1 Example Rd, London.' Below this is a white box containing the 'exclaimer' logo and a promotional message: 'Download FREE whitepaper on designing email signatures www.exclaimer.com'. At the bottom, a legal disclaimer is visible, starting with 'Any views or opinions presented in this email are solely those of Karen Green and do not represent those of Green Organization.' A blue callout box points to the disclaimer text, stating: 'This part of the signature was applied from an Outlook disclaimer policy'.

[Exclaimer Signature Manager Outlook Edition](#) contains a range of sample disclaimers in the [template library \[pg.189\]](#). If required, you can [edit existing templates \[pg.202\]](#) or [create new ones \[pg.198\]](#) using an intuitive [template editor \[pg.208\]](#). There are no rules as to what information can or cannot be included in a disclaimer.

The behavior of a disclaimer policy is set using the [policy options tab \[pg.111\]](#).

## Outlook Disclaimer Policy Options

When an Outlook disclaimer policy is [added](#) [pg.136] or [edited](#) [pg.144], all standard setup tabs are available ([general](#) [pg.120], [template](#) [pg.121], [options](#), [conditions](#) [pg.124], [exceptions](#) [pg.129], [date range](#) [pg.132] and [next policy](#) [pg.134]). However, the [options](#) tab contains settings which vary between policy types. Available options are shown below:



Here, you can choose to deploy the disclaimer policy to one of the following options:

- Microsoft Outlook
- OWA
- Microsoft Outlook and OWA

Note that [OWA](#) only allows one signature per user so, if multiple signatures apply, the last one processed will be used. In this context, the term 'signature' refers to the signature as a whole - i.e. the signature element, the campaign element and the disclaimer element. Signatures may include any number of each element (for example, you might require two campaigns at certain times) however, there is a size limitation with [OWA](#) signatures, as below:

- Exchange 2003 - 4KB (configurable to 16KB via a registry key)
- Exchange 2007 - 16KB (non-configurable)
- Exchange 2010 - 8KB (non-configurable)
- Exchange 2013 - 8KB (non-configurable)

As long as the **total** size is within the relevant limit, you can have multiple campaigns and/or disclaimers applied to an [OWA](#) signature in the same way that you can for an [Outlook](#) signature. As such, you are advised to define dedicated policies for [OWA](#) users. For further information please see [understanding the difference between Outlook and OWA \[pg.101\]](#).

## Outlook Mail Format Policies

It is not unusual for [Outlook](#) users to specify their own default fonts and font colors for new, replied and forwarded email messages, resulting in a range of email formats and therefore no consistent organizational / brand image.

[Exclaimer Signature Manager Outlook Edition](#) allows you to control [Outlook mail format settings \[pg.113\]](#) for all users so that every new, replied or forwarded email complies with your organization's house style. This is achieved with [Outlook mail format](#) policies; using this type of policy you can control:

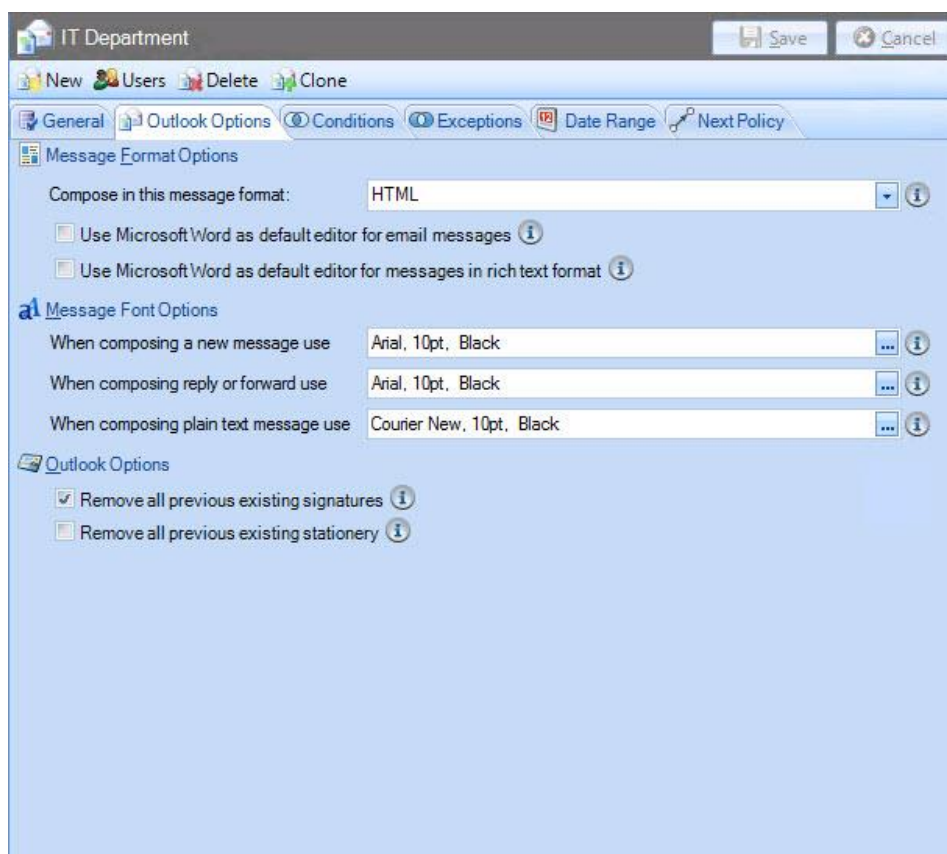
- [Message format options \[pg.113\]](#) - control the default format for message composition and preferred editors to be used.
- [Message font options \[pg.114\]](#) - enforce your organization's house style by specifying default font settings to be used for new messages, together with replies, forwarded messages and [Plain Text](#) email.
- [General Outlook options \[pg.114\]](#) - choose whether any signatures or stationery that a user might have set locally are retained or overwritten by [Exclaimer Signature Manager Outlook Edition](#).

### NOTE

**Outlook mail format** policies are applied (and local signatures deleted) before new signatures are deployed to users' computers.

## Outlook Mail Format Policy Options

When an Outlook mail format policy is [added](#) [pg.136] or [edited](#) [pg.144], setup tabs are available ([general](#) [pg.120], [options](#), [conditions](#) [pg.124], [exceptions](#) [pg.129], [date range](#) [pg.132] and [next policy](#) [pg.134]). The [options](#) tab contains settings which are specific to Outlook mail format policy types:



These options are summarized below:

Option	Summary
Message Format Options	
Compose in this message format	Choose the default composition format for emails that are composed in Microsoft Outlook - available options are <a href="#">HTML</a> , <a href="#">RTF</a> and <a href="#">Plain Text</a> .
Use Microsoft Word as default editor for email messages	Select this option to use Microsoft Word when composing new email messages from Microsoft Outlook. Note that this setting only applies for <a href="#">Microsoft Outlook 2003</a> .
Use Microsoft Word as default editor for email messages in rich text format	Select this option to use Microsoft Word when composing new email messages in rich text format, from Microsoft Outlook. Note that this setting only applies for <a href="#">Microsoft Outlook 2003</a> .
.../continued	

Option	Summary
Message Font Options	
When composing a new message use	Specify default font settings (type, style, size, effects and color) to be used when composing new email messages in <a href="#">Microsoft Outlook</a> .
When composing a reply or forward use	Specify default font settings (type, style, size, effects and color) to be used when replying to or forwarding email messages in <a href="#">Microsoft Outlook</a> .
When composing plain text message use	Specify default font settings for composing or viewing <a href="#">Plain Text</a> messages in <a href="#">Microsoft Outlook</a> . Note that this setting has no effect on messages received from outside of your organization.
Outlook Options	
Remove all previous existing signatures	Ensure that only <a href="#">Exclaimer Signature Manager Outlook Edition</a> signatures are used by removing any signatures from <a href="#">Microsoft Outlook</a> , which users have defined locally. Mail format policies are applied (and local signatures deleted) before new signatures are deployed to users' computers.
Remove all previous existing stationery	Ensure that extra, ad hoc formatting is avoided by removing any <a href="#">Microsoft Outlook</a> stationery that may be present on users' computers.

NOTE

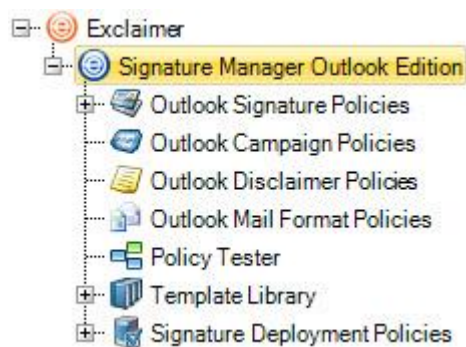
Any local changes to these settings in **Microsoft Outlook** will be overwritten each time the **Outlook mail format** policy is applied. Users must restart **Microsoft Outlook** before any changes to an **Outlook mail format** policy will be applied - they are prompted to restart if/when required.

# Accessing Existing Outlook Policies

Within [Exclaimer Signature Manager Outlook Edition](#), existing [Outlook](#) policies are accessed via the [Exclaimer console tree](#) [pg.115], or by using [policy tabs](#) [pg.118] from other branches of the console tree.

## Navigating policies using the console tree

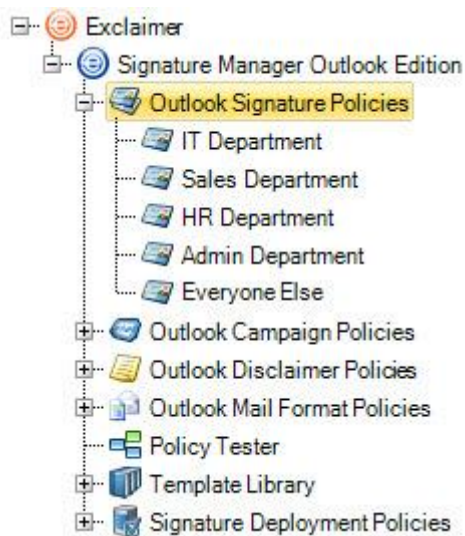
All work with [Outlook](#) policies is completed from the [Signature Manager Outlook Edition](#) branch of the [Exclaimer console tree](#) [pg.67]:



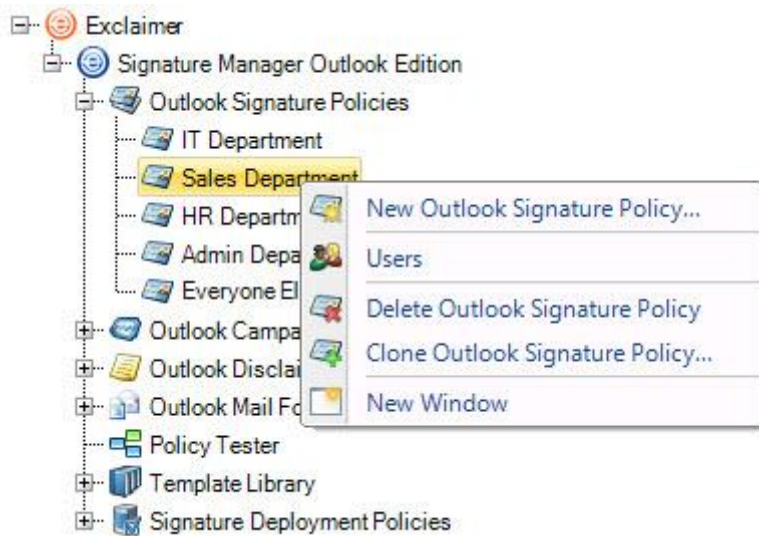
Existing [Outlook](#) policies are organized into child branches for each policy type:

- [Outlook signature policies](#) [pg.104]
- [Outlook campaign policies](#) [pg.108]
- [Outlook disclaimer policies](#) [pg.110]
- [Outlook mail format policies](#) [pg.112]

Select any of these branches to display existing [Outlook](#) policies of that type - for example:

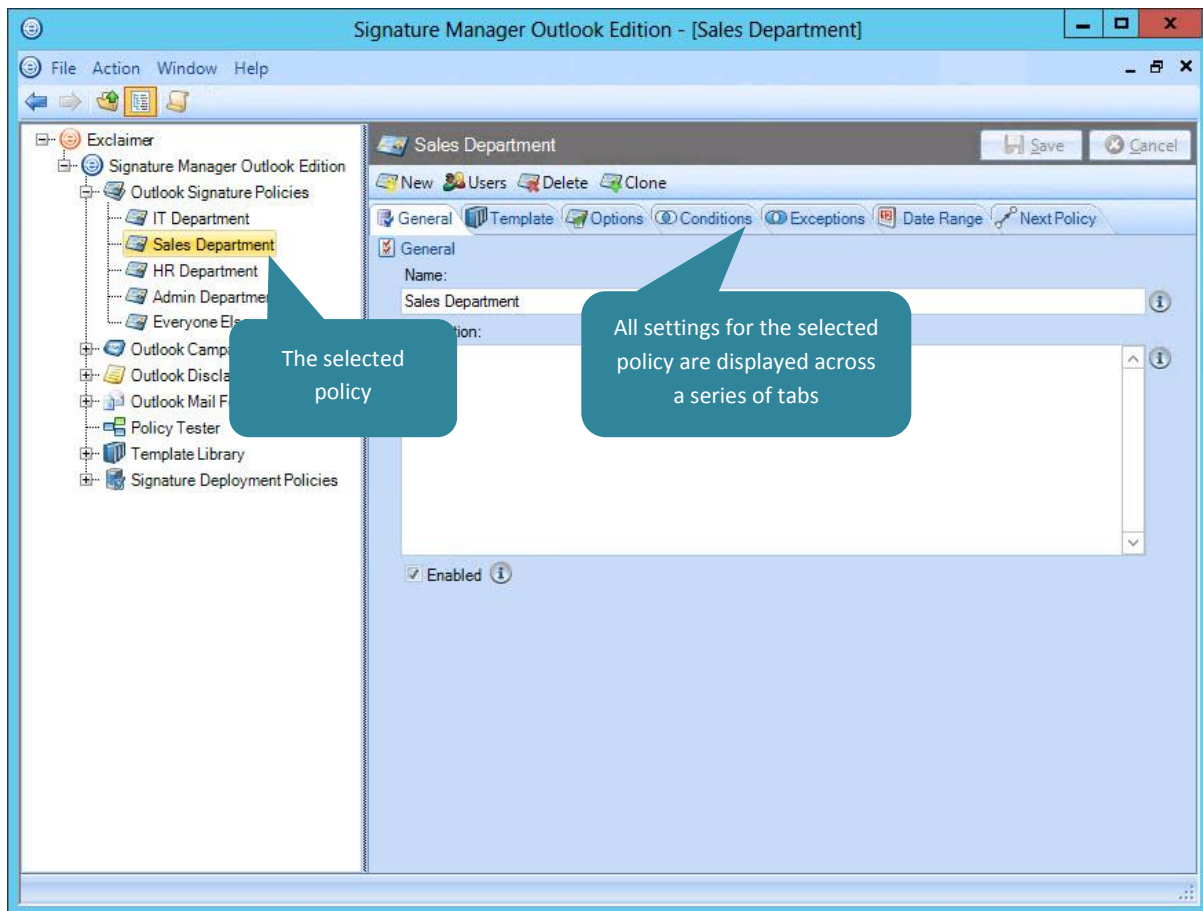


From here, select any **Outlook** policy from the tree and right-click to view actions that can be taken with that policy:





Having selected an **Outlook** policy from the tree, use the content pane to access all setup options and actions from the content pane:

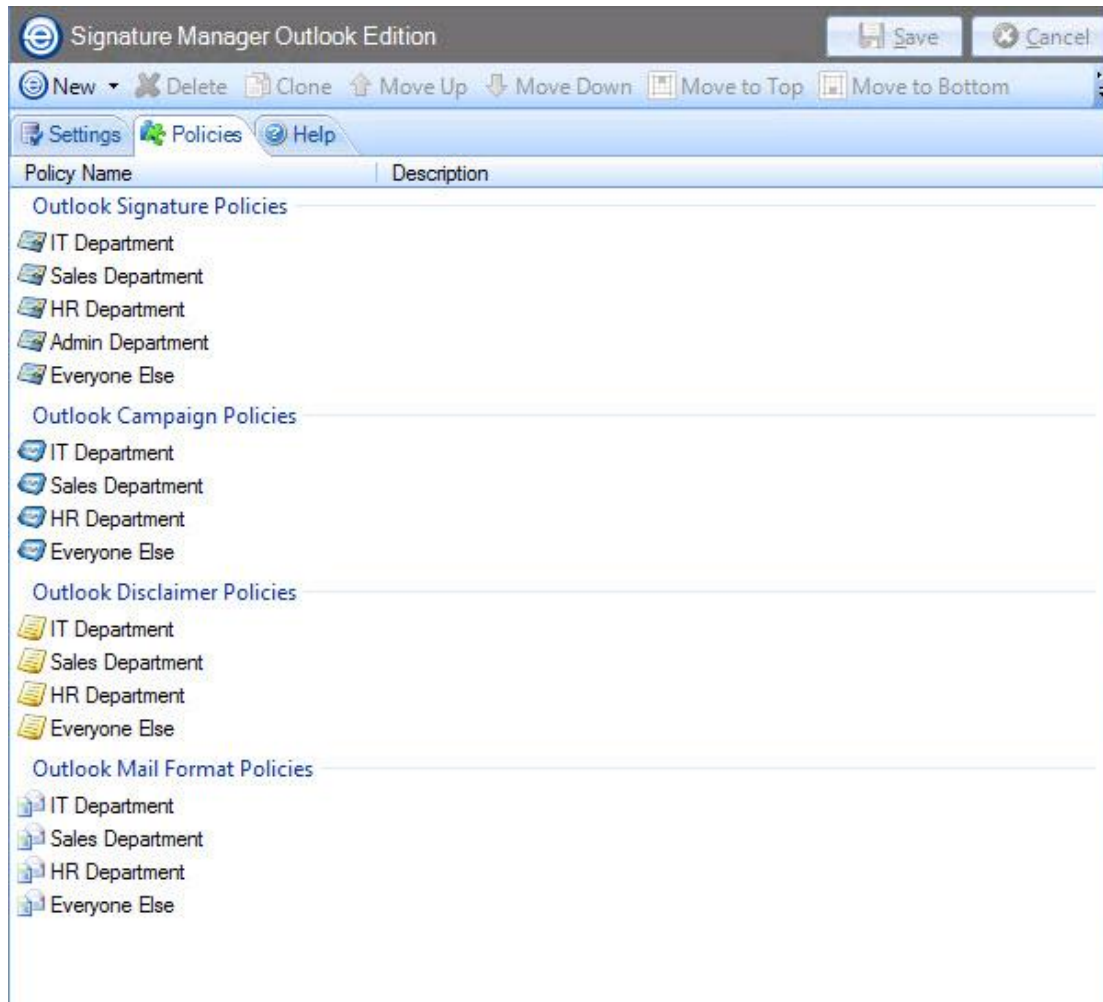


NOTE

See [the anatomy of a policy](#) [pg.119] for further information about policy setup options.

# Navigating Policies Using Policy Tabs

Existing Outlook policies can also be accessed from other branches of the console tree, via a [policies](#) tab:



The [policies](#) tab is available from the [Signature Manager Outlook Edition](#) branch, the [Outlook signature policies](#) branch, the [Outlook campaign policies](#) branch, the [Outlook disclaimer policies](#) branch and the [Outlook mail format policies](#) branch.

The sequence in which Outlook policies are listed in these tabs is the same as the sequence shown in the console tree. **It is important to note that policies are processed in the order that they are listed here.** You can use [move up](#) / [move down](#) / [move to top](#) / [move to bottom](#) options to change the sequence of this list. For further information please see [understanding how policies are processed \[pg.98\]](#).

# The Anatomy of an Outlook Policy

An [Outlook](#) policy includes a range of settings which control how policies are processed and what signature content should be applied. These settings are organized across a series of tabs, displayed in the content pane when a policy is selected:



Use links below to learn more about these options:

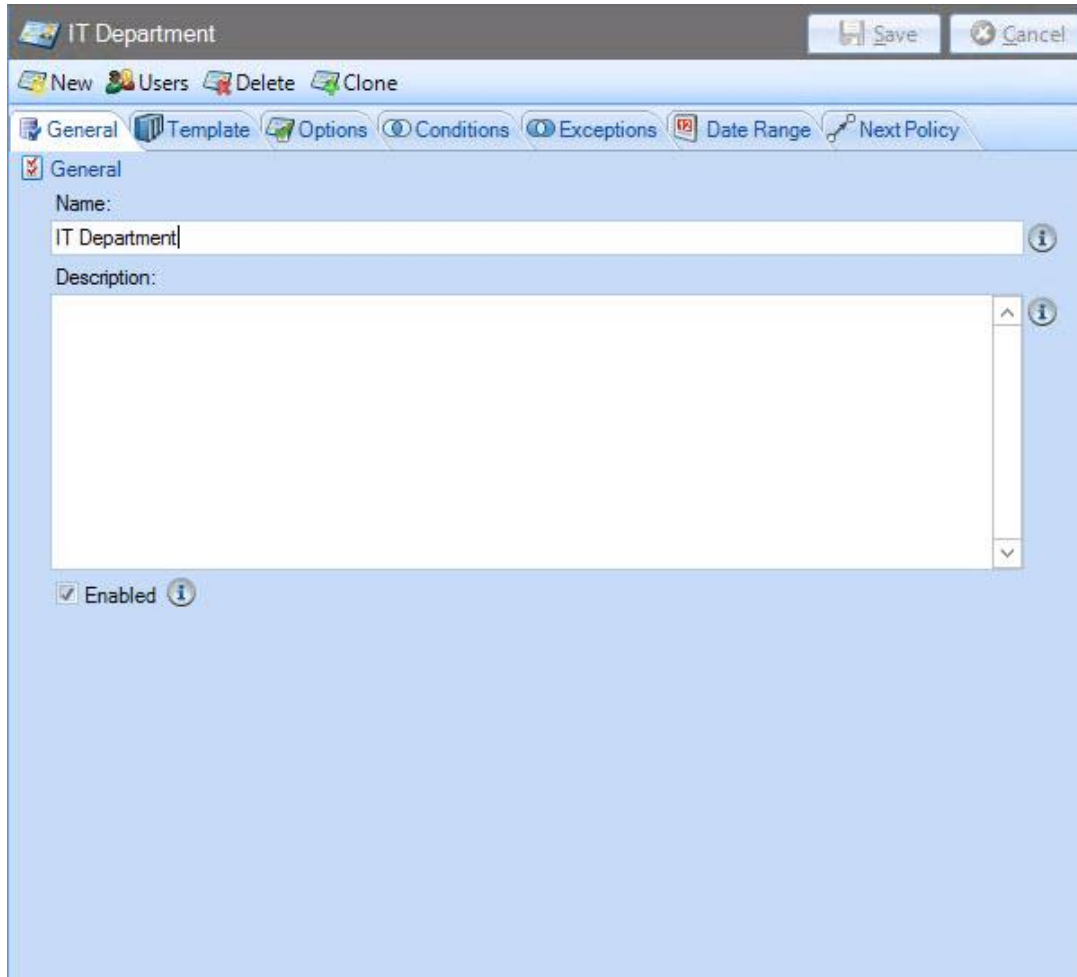
- [General](#) [pg.120]
- [Template](#) [pg.121]
- [Options](#) [pg.123]
- [Conditions](#) [pg.124]
- [Exceptions](#) [pg.129]
- [Date range](#) [pg.132]
- [Next policy](#) [pg.134]

## NOTE

Note that the template tab is available for [signature](#) [pg.104], [campaign](#) [pg.108] and [disclaimer](#) [pg.110] policies but not for [mail format](#) [pg.112] policies. Also note that settings on the [options](#) [pg.123] tab vary according to the [type of policy](#) [pg.103] selected.

## The Anatomy of an Outlook Policy - General

Options on the [general](#) tab are used to define basic information for an [Outlook](#) policy. These settings determine how the policy is displayed throughout the system, and whether or not the policy is active:

The screenshot shows a software window titled "IT Department" with a "Save" and "Cancel" button in the top right. Below the title bar is a menu bar with "New", "Users", "Delete", and "Clone". A ribbon contains tabs for "General", "Template", "Options", "Conditions", "Exceptions", "Date Range", and "Next Policy". The "General" tab is selected and contains a "Name:" text box with "IT Department" entered, a "Description:" text area, and an "Enabled" checkbox which is checked. Information icons (i) are present next to the Name, Description, and Enabled fields.

Options on this tab are summarized below:

Option	Summary
Name	Each <a href="#">Outlook</a> policy must have a unique name. The name entered here is displayed in the Exclaimer console tree, and on any other policy lists.
Description	This field can be used to add any useful information for the <a href="#">Outlook</a> policy - for example, usage notes, version history, background or explanatory information. The first line of description text is displayed in any <a href="#">policy lists</a> <a href="#">[pg.118]</a> (but not the console tree).
Enabled	Select this option to activate the <a href="#">Outlook</a> policy. If a policy is not enabled, it will not run.

## The Anatomy of an Outlook Policy - Template

The [template](#) tab shows which template is associated with the selected [Outlook](#) policy:



The associated template for [signature](#) [pg.104], [campaign](#) [pg.108] and [disclaimer](#) [pg.110] policies is previewed in the content pane. From here you can:

- Double click anywhere in the content pane to edit the template in the [template editor](#) [pg.208]
- Use the breadcrumb trail at the bottom of the window to open the [template library](#) [pg.189]

**NOTE**

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to [save changes](#) [pg.79] across all tabs. Alternatively, use the **cancel** button to abandon all changes.

## Right-Click Options

For quick access to key tasks that you may wish to complete for the template that is associated with an [Outlook](#) policy, simply right-click anywhere within the template tab. From here, you can choose to [edit \[pg.202\]](#) this template, open the [template library \[pg.190\]](#), [export the template \[pg.201\]](#) or view [template properties \[pg.204\]](#).

## The Template Breadcrumb Trail

At the bottom of the template preview, a breadcrumb trail displays the name of the template being used, together with its parent [category \[pg.193\]](#) in the template gallery. Click an entry in the breadcrumb trail to open the [template library \[pg.189\]](#) to view / select templates.

# The Anatomy of an Outlook Policy - Options

Settings on the [options](#) tab vary, depending upon the type of [Outlook](#) policy selected. For further information please select one of the following links:

- [Outlook signature policies](#) [pg.104]
- [Outlook campaign policies](#) [pg.108]
- [Outlook disclaimer policies](#) [pg.110]
- [Outlook mail format policies](#) [pg.112]

# The Anatomy of an Outlook Policy - Conditions

The **conditions** tab is used to set [criteria](#) [pg.125] which determine the circumstances under which an Outlook policy is applied to messages:

The screenshot shows the 'IT Department\*' window with the 'Conditions' tab selected. The 'Select condition(s)' section has a list of conditions, with 'Outlook user has one or more specific Active Directory attributes' selected. A callout bubble points to this selection with the text 'Select a condition'. Below this, the 'Edit a condition by clicking an underlined value' section shows the text 'Policy applies to Outlook Users that: have a combination of [Active Directory Attribute Values](#)'. A callout bubble points to this link with the text 'Use hyperlinks to set criteria for the condition'. At the bottom, there are two radio buttons: 'Apply policy when all conditions are met' (selected) and 'Apply policy when any condition is met'. A callout bubble points to these radio buttons with the text 'If multiple conditions are specified, choose whether ALL must be met in order to trigger this policy or if meeting just one is enough'.

Once a condition is selected, any [options](#) [pg.125] for that condition are displayed as hyperlinks in the lower pane - select these links to refine the condition. Each time a selection is made, any related [options](#) [pg.125] are displayed as hyperlinks in the lower pane - select these links to set / refine criteria for the associated condition.

## NOTE

At least one condition must be set to apply **Outlook** policies. If a condition is not selected, the default condition of **Outlook user is anyone** is used. Please see the [conditions - options summary](#) [pg.125] page for a summary of available conditions.



## Available Options for Setting Conditions

When working with [conditions](#) [pg.124] for a policy, the following options are available:

<input type="checkbox"/> Outlook user is anyone
<input type="checkbox"/> Outlook user is a specific person
<input type="checkbox"/> Outlook user is a member of an Active Directory group
<input type="checkbox"/> Outlook user is a member of a Domain or Organizational Unit
<input type="checkbox"/> Outlook user has one or more specific Active Directory attributes

When a [condition](#) is selected, further options are available, as summarized below:

- [Outlook user is anyone](#) [pg.126]
- [Outlook user is a specific person](#) [pg.126]
- [Outlook user is a member of an Active Directory group](#) [pg.126]
- [Outlook user is a member of a Domain or Organizational unit](#) [pg.126]
- [Outlook user has one or more specific Active Directory attributes](#) [pg.126]

## Outlook User Is Anyone

This is a blanket or 'wildcard' condition which will apply the policy for all users.

## Outlook User Is a Specific Person

Use the [mail users](#) link to browse and select a specific user from the user list.

## Outlook User Is a Member of an Active Directory Group

Use the [Active Directory group](#) link to browse and select the required group from a list of Active Directory groups.

## Outlook User Is a Member of a Domain or Organizational Unit

Use the [domain or organizational unit](#) link to browse and select the required domain(s) or unit(s) from a container list.

## Outlook User Has One or More Specific Active Directory Attributes

Use the [Active Directory attribute values](#) link to open the [configure attributes window](#) [pg.127] to define queries to be resolved for matching required users.

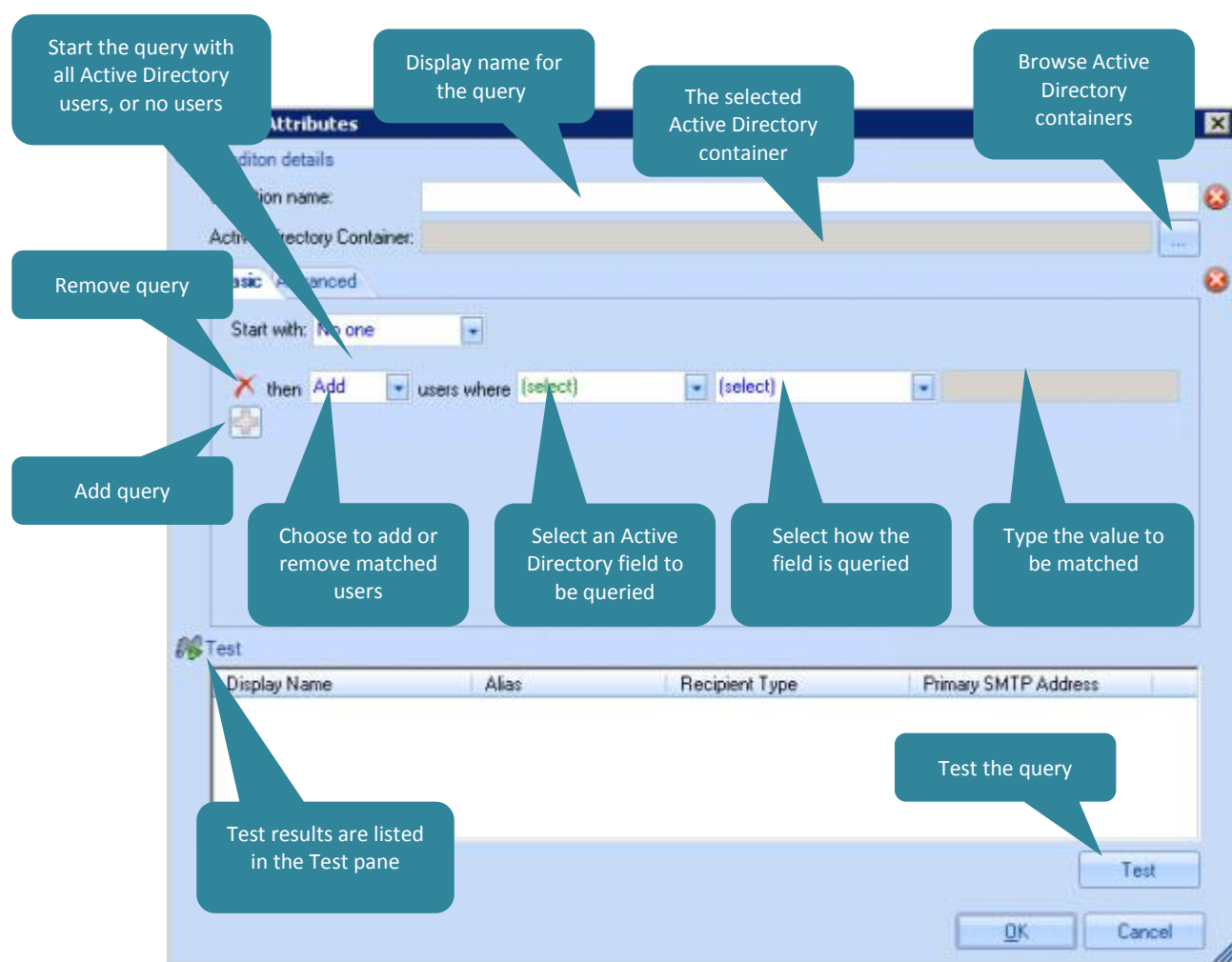
### NOTE

At least one condition must be set to apply policies. If a condition is not selected, the default condition of **Outlook user is anyone** is used.

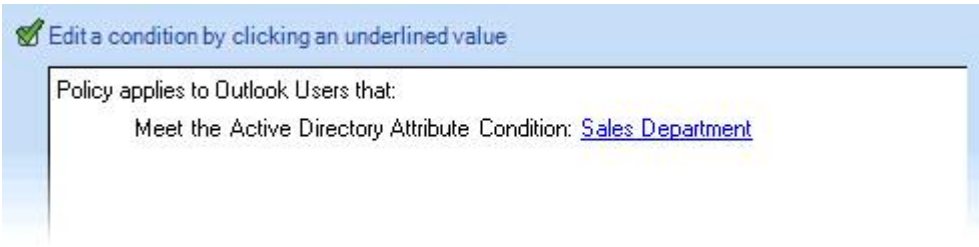

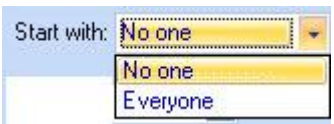



## Creating Queries With the Configure Attributes Window

The [configure attributes](#) window allows you to define [conditions](#) [pg.124] and [exceptions](#) [pg.129] based on queries that are run on Active Directory user attributes - for example, you might want to define a policy to match all users within a given department, or a specific country, or with a certain manager.

With [Exclaimer Signature Manager Outlook Edition](#), you can define queries based upon the full range of Active Directory attributes. The [configure attributes](#) window is opened when defining a [condition](#) [pg.124] or an [exception](#) [pg.129] using the [Outlook user has one or more specific Active Directory attributes](#) option and then selecting the [Active Directory Attribute Values](#) options:



Options in the [configure attributes](#) window are summarized below:

Field	Summary
Condition name	<p>Enter a name for this query. This name is displayed in the main condition/exception window:</p>  <p>It is advisable to specify a name that summarizes the purpose of the query. If you have multiple administrators, you might also choose to add version change dates here.</p>
Active Directory container	<p>Use the browse button -  - to select an Active Directory container, or leave blank to search the entire Active Directory.</p>
Start with	<p>Choose to start the query with <a href="#">no one</a> (so the query will start with nothing and add matched users) or <a href="#">everyone</a> (so the query will start with all Active Directory users and remove matched users):</p> 
	<p>Use this icon to remove a query line.</p>
	<p>Use this icon to add a new query line.</p>
then...	<p>Choose to add or remove matched users:</p>  <p>Defaults to <a href="#">add</a> if you have chosen to <a href="#">start with no one</a> and <a href="#">remove</a> if you have chosen to <a href="#">start with everyone</a>).</p>
users where...	<p>Select the Active Directory field to be queried, then how it should be queried (<a href="#">equal to</a>, <a href="#">does not equal</a>, <a href="#">starts with</a>, <a href="#">ends with</a>, etc.) and finally enter a value to be matched against.</p>
Test	<p>Use the <a href="#">test</a> option to run the query and view matched users in the test pane.</p>

NOTE

See [how do I create a policy based on specific Active Directory attributes?](#) [pg.167] for a working example of a policy based upon an attribute query.

# The Anatomy of an Outlook Policy - Exceptions

Exceptions are used to specify any exceptions to [conditions](#) [pg.124] which have been set. For example, if you have defined a [condition](#) to match everyone within a given department, you might then define an [exception](#) to exclude individual people within that department. Use the [exceptions](#) tab to set required [criteria](#) [pg.130]:

IT Department\*

Save Cancel

New Users Delete Clone

General Template Options Conditions\* Exceptions\* Date Range Next Policy

Select exception(s)

- ☐ Outlook user is a specific person
- ☐ Outlook user is a member of an Active Directory group
- ☐ Outlook user is a member of a Domain or Organizational Unit
- ☒ Outlook user has one or more specific Active Directory attributes

Select an exception

Edit an exception by clicking an underlined value

Policy DOES NOT apply to Outlook Users that:  
have a combination of Active Directory Attribute Values

Use hyperlinks to set criteria for the exception

If multiple exceptions are specified, choose whether ALL must be met in order to trigger this policy or if meeting just one is enough

☐ Do not apply policy when all conditions are met  
☒ Do not apply policy when any condition is met

Once an exception is selected, any [options](#) [pg.130] for that exception are displayed as hyperlinks in the lower pane - select these links to set / refine criteria for the associated exception.

## NOTE

See the [exceptions - options summary](#) [pg.130] page for a summary of available exceptions.

## Available Options for Setting Exceptions

When working with [exceptions](#) [pg.129] for a policy, the following options are available:

- ☐ Outlook user is a specific person
- ☐ Outlook user is a member of an Active Directory group
- ☐ Outlook user is a member of a Domain or Organizational Unit
- ☐ Outlook user has one or more specific Active Directory attributes

When an [exception](#) is selected, further options are available, as summarized below:

- [Outlook user is a specific person](#) [pg.131]
- [Outlook user is a member of an Active Directory group](#) [pg.131]
- [Outlook user is a member of a Domain or Organizational unit](#) [pg.131]
- [Outlook user has one or more specific Active Directory attributes](#) [pg.131]

## Outlook User Is a Specific Person

Use the [mail users](#) link to browse and select a specific user from the user list.

## Outlook User Is a Member of an Active Directory Group

Use the [Active Directory group](#) link to browse and select the required group from a list of Active Directory groups.

## Outlook User Is a Member of a Domain Or Organizational Unit

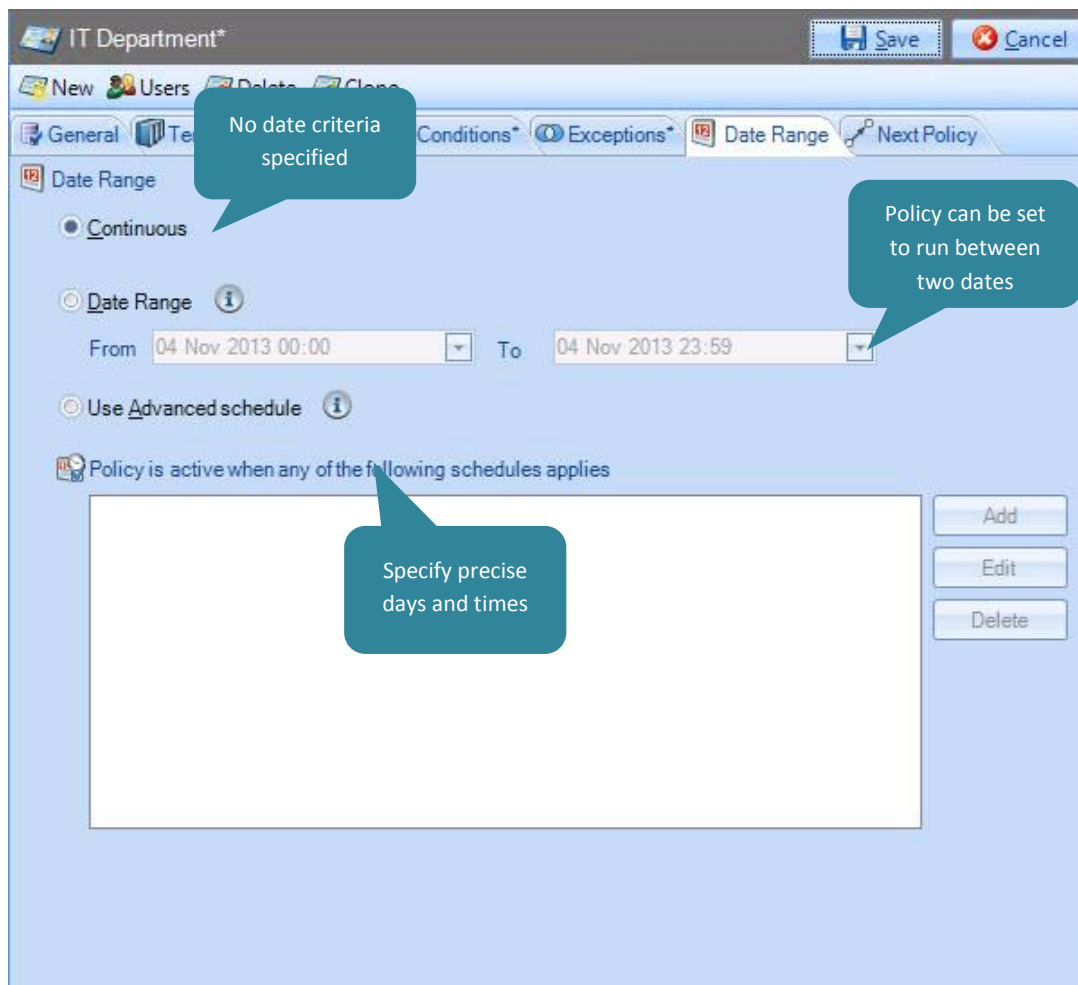
Use the [domain or organizational unit](#) link to browse and select the required domain or unit from a container list.

## Outlook User Has One or More Specific Active Directory Attributes

Use the [Active Directory attribute values](#) link to open the [configure attributes window](#) [pg.127] to define queries to be resolved for matching required users.

# The Anatomy of an Outlook Policy - Date Range

Options on the [date range](#) tab are used to set any date / time limitations for an [Outlook](#) policy:



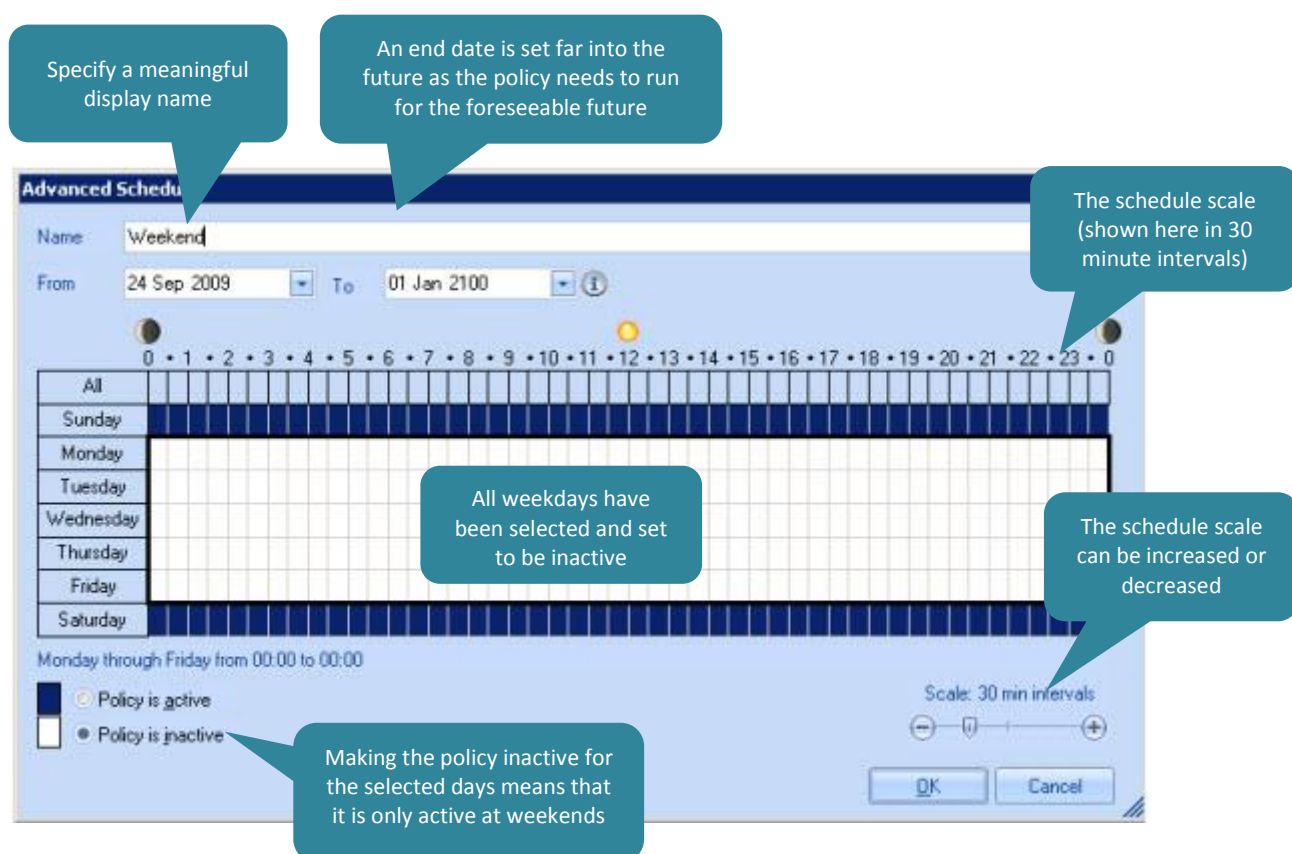
By default, the [date range](#) tab is set to [continuous](#), which means that there are no date or time restrictions associated with the [Outlook](#) policy. Alternatively, specific [to](#) and [from](#) dates can be set so that the policy has a start/end time, or a detailed [schedule](#) can be set.



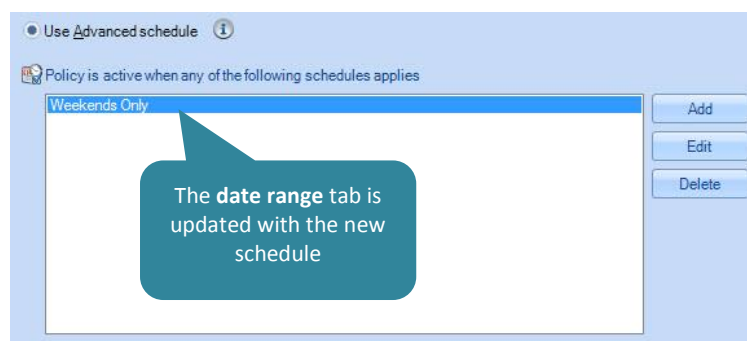
## Using the Advanced Schedule

The [advanced schedule](#) works by selecting days of the week that the [Outlook](#) policy is active or inactive. Each day is split into time intervals, which can be adjusted using a sliding scale at the bottom of the window; this means that [Outlook](#) policies can be set to run on precise days at precise times.

To use the [advanced schedule](#), click the [use advanced schedule](#) radio button and then click [add](#). The example below shows how the schedule is used to create a policy that is only active at weekends:



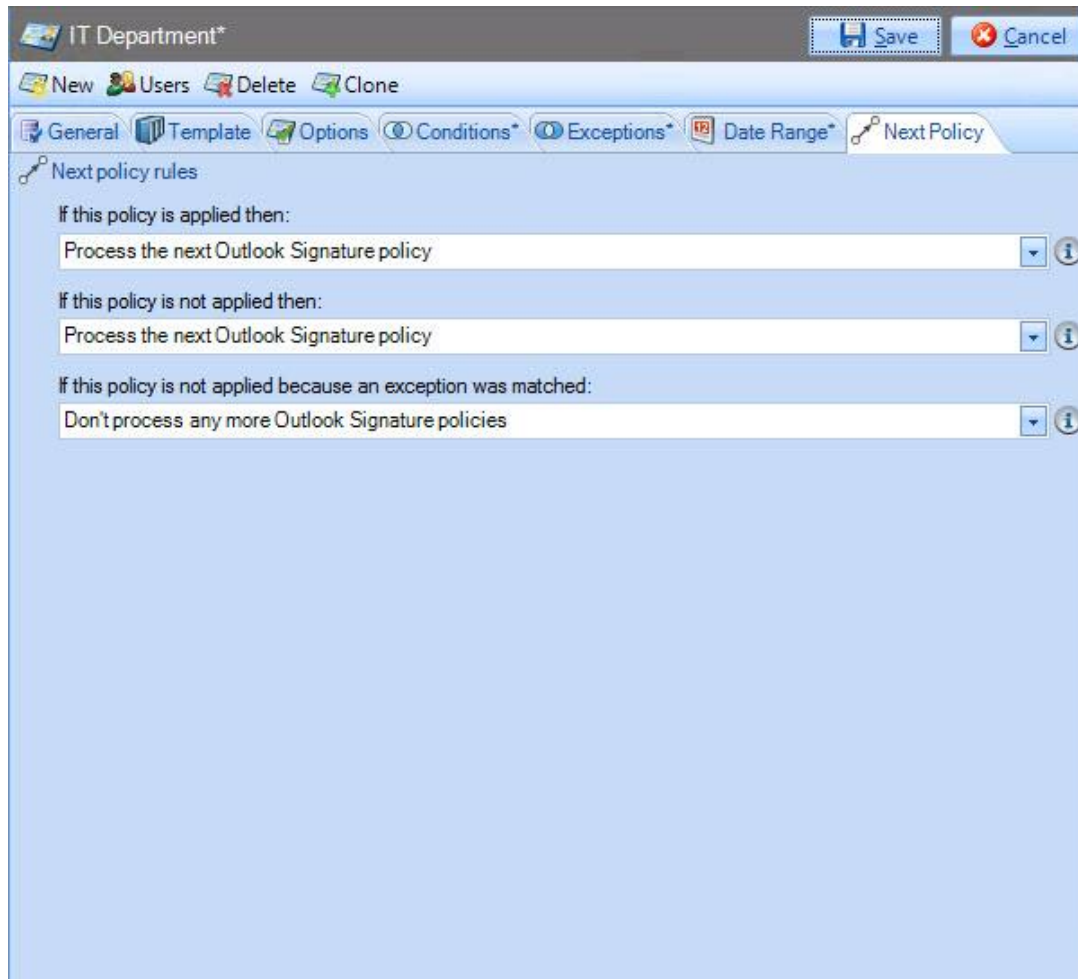
Having made required date and time selections, click [OK](#) to exit back to the updated [date range](#) tab:



To update an existing schedule, select its name and click [edit](#). Similarly, click [delete](#) to remove the selected schedule.

# The Anatomy of an Outlook Policy - Next Policy

If you have a number of [Outlook](#) policies which are dependent upon each other, you can create a 'policy chain' using the [next policy](#) tab:



Whilst you control the sequence in which [Outlook](#) policies are processed using the [policy tab](#) [pg.87], the [next policy](#) tab allows you to define specific policy chains based on whether the previous [Outlook](#) policy in the chain is or is not applied. These options are:

If this policy is applied then:

- Process the next Outlook signature policy
- Don't process any more Outlook signature policies

If this policy is not applied then:

- Process the next Outlook signature policy
- Don't process any more Outlook signature policies

If this policy is not applied because an exception was matched:

- Process the next Outlook signature policy
- Don't process any more Outlook signature policies

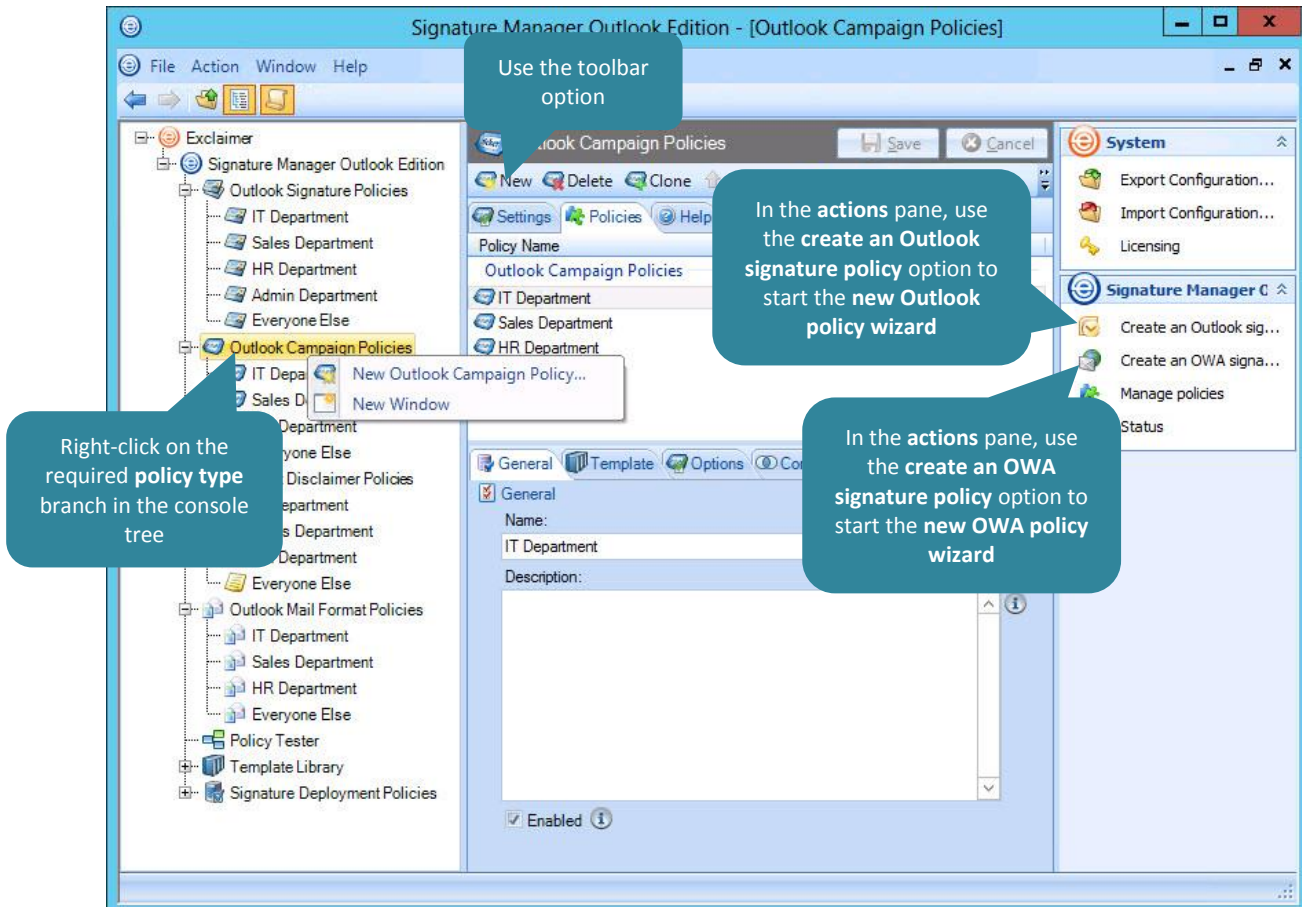
You can use these options for a wide range of scenarios, creating policy chains as simple or as complex as required. For example, you might use the [if this policy is applied then > Don't process any more Signature Manager policies of any type](#) options for a scenario where a Director requires a given signature but does not want a [mail format policy \[pg.112\]](#) to set the default font for messages. Another example might be to define a policy to target a specific group of users and then use [the if this policy is not applied then > process the next Outlook signature policy](#) as a way of excluding groups of users without the need to add multiple exceptions.

NOTE

Unless a next policy option is set to **don't process any more Outlook signature policies**, **Exclaimer Signature Manager Outlook Edition** will continue to process policies in the [policy list \[pg.87\]](#).

# Adding a new Outlook Policy

Outlook policies are added using the [new Outlook policy wizard](#), or the [new OWA policy wizard](#) (depending which option you choose to create the policy). The new policy wizards are a series of screens which guide you through the setup process one step at a time, and are available from various points in [Exclaimer Signature Manager Outlook Edition](#) - from the [console tree](#) [pg.70], from the [console toolbar](#) [pg.69] and from the [actions pane](#) [pg.71]:



Having selected a new policy option, the [new Outlook policy wizard](#) [pg.137] starts.

# The New Outlook Policy Wizard

Outlook policies are added using the [new Outlook policy](#) wizard or the [new OWA policy](#) wizard - a series of screens which guide you through the setup process one step at a time.

The [new Outlook policy](#) option is available from different areas of [Exclaimer Signature Manager Outlook Edition](#) - from the [console tree](#) [pg.70], from the [console toolbar](#) [pg.69] and from the [actions pane](#) [pg.71]. The [new OWA policy](#) option is available from the [actions pane](#) [pg.71]; the process is the same for both (shown below) however [policy options](#) [pg.123] will be set for [Microsoft Outlook](#) or [OWA](#) automatically, dependent upon which option you selected to start the wizard.

## Step 1: Enter General Information

Enter a meaningful name and description for the policy and click [next](#) to continue. For further information about this tab see the [anatomy of a policy - general](#) [pg.120] page of this guide.

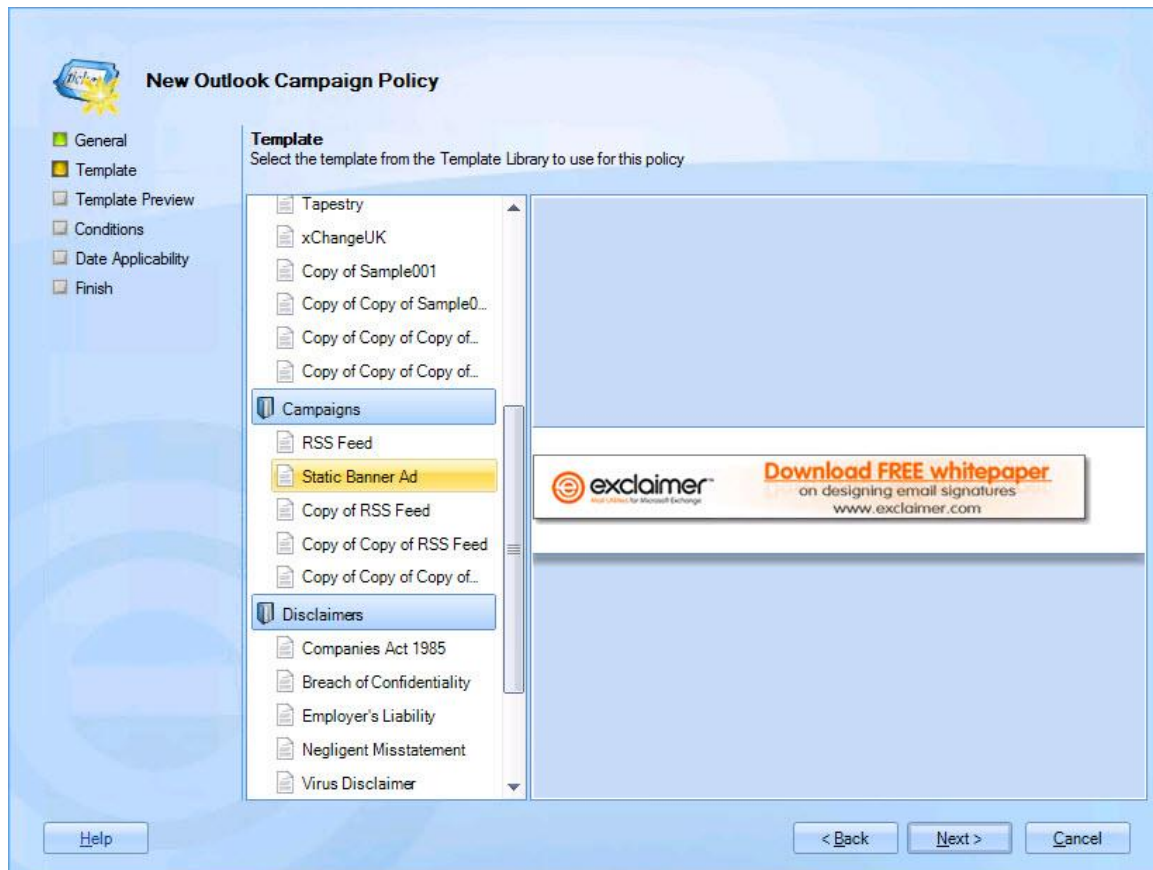
The screenshot shows the 'New Outlook Campaign Policy' wizard window. On the left is a navigation pane with a tree view containing: General (selected), Template, Template Preview, Conditions, Date Applicability, and Finish. The main area is titled 'General' and contains the following elements:

- A heading 'General' followed by the instruction: 'Please enter a descriptive name for your Outlook Campaign Policy. You can also add some comments describing your policy.'
- A checkbox labeled 'General' which is checked.
- A 'Name:' label followed by a text box containing 'New Outlook Campaign Policy'.
- A 'Description:' label followed by a large text area.
- A checkbox labeled 'Enabled' which is checked.

At the bottom of the window are three buttons: 'Help', '< Back', and 'Next >', and a 'Cancel' button.

## Step 2: Associate the Policy with a Template

A list of available [templates](#) [pg.189] is displayed, organized by category down the left-hand side. Navigate this list and select the template to be associated with this policy; then click [next](#) to continue. For further information about this tab see the [anatomy of a policy - template](#) [pg.121] section of this guide:



## Step 3: Preview the Selected Template

The selected template is previewed so you can see how it will be displayed in an email. If the template contains [Active Directory](#) fields, you can enable the [display data from user](#) option (at the bottom of the window) and select a specific user to use for the preview. If required, you can use the [edit](#) button (in the bottom right-hand corner) to edit the selected template using the [template editor](#) [pg.208]:





## Step 4: Set Conditions for the Policy

Set [criteria](#) [pg.125] to determine the circumstances under which the policy is applied to messages; then click [next](#) to continue. Having created the policy, you can update the conditions at any time, and also add [exceptions](#) [pg.129]. For further information about this tab see the [anatomy of a policy - conditions](#) [pg.124] page of this guide:

The screenshot shows the 'New Outlook Campaign Policy' dialog box with the 'Conditions' tab selected. The left sidebar contains a tree view with the following items: General, Template, Template Preview, Conditions (selected), Date Applicability, and Finish. The main area is titled 'Conditions' and contains the following text: 'Please use the list of options below to define the Outlook Users that you would like to include in this Outlook Campaign policy.' Below this text is a section labeled 'Select condition(s)' with a yellow warning icon. It contains a list of five conditions, each with an unchecked checkbox: 'Outlook user is anyone', 'Outlook user is a specific person', 'Outlook user is a member of an Active Directory group', 'Outlook user is a member of a Domain or Organizational Unit', and 'Outlook user has one or more specific Active Directory attributes'. Below the list is a section labeled 'Edit a condition by clicking an underlined value' with a green checkmark icon. It contains a text box with the text 'Policy applies to Outlook Users that:'. At the bottom of the main area are two radio buttons: 'Apply policy when all conditions are met' (selected) and 'Apply policy when any condition is met'. The bottom of the dialog box has three buttons: 'Help', '< Back', and 'Next >', and a 'Cancel' button.

**New Outlook Campaign Policy**

General  
Template  
Template Preview  
Conditions  
Date Applicability  
Finish

**Conditions**  
Please use the list of options below to define the Outlook Users that you would like to include in this Outlook Campaign policy.

✓ Select condition(s) ⚠

- ☐ Outlook user is anyone
- ☐ Outlook user is a specific person
- ☐ Outlook user is a member of an Active Directory group
- ☐ Outlook user is a member of a Domain or Organizational Unit
- ☐ Outlook user has one or more specific Active Directory attributes

✓ Edit a condition by clicking an underlined value

Policy applies to Outlook Users that:

☒ Apply policy when all conditions are met  
☐ Apply policy when any condition is met

Help < Back Next > Cancel



## Step 5: Set Date Range Options

By default, new policies are set to run continuously however, you can set a date range if required. For further information about this tab see the [anatomy of a policy - date range](#) [pg.132] page of this guide.

The screenshot shows the 'New Outlook Campaign Policy' dialog box with the 'Date Applicability' tab selected. The left sidebar contains a list of tabs: General, Template, Template Preview, Conditions, Date Applicability (selected), and Finish. The main area is titled 'Date Applicability' and includes the instruction 'Select a date range and pattern for your Microsoft Outlook Campaign Policy.' Below this, there are three radio button options: 'Continuous' (selected), 'Date Range' (with an information icon), and 'Use Advanced schedule' (with an information icon). The 'Date Range' option is active, showing a 'From' date of '14 Nov 2013 00:00' and a 'To' date of '14 Nov 2013 23:59'. Below these options, there is a section titled 'Policy is active when any of the following schedules applies' with a large empty text box and three buttons: 'Add', 'Edit', and 'Delete'. At the bottom of the dialog, there are buttons for '< Back', 'Next >', and 'Cancel', along with a 'Help' button in the bottom left corner.

## Step 6: Finish Up

Click [finish](#) to exit the wizard and return to the Exclaimer console:



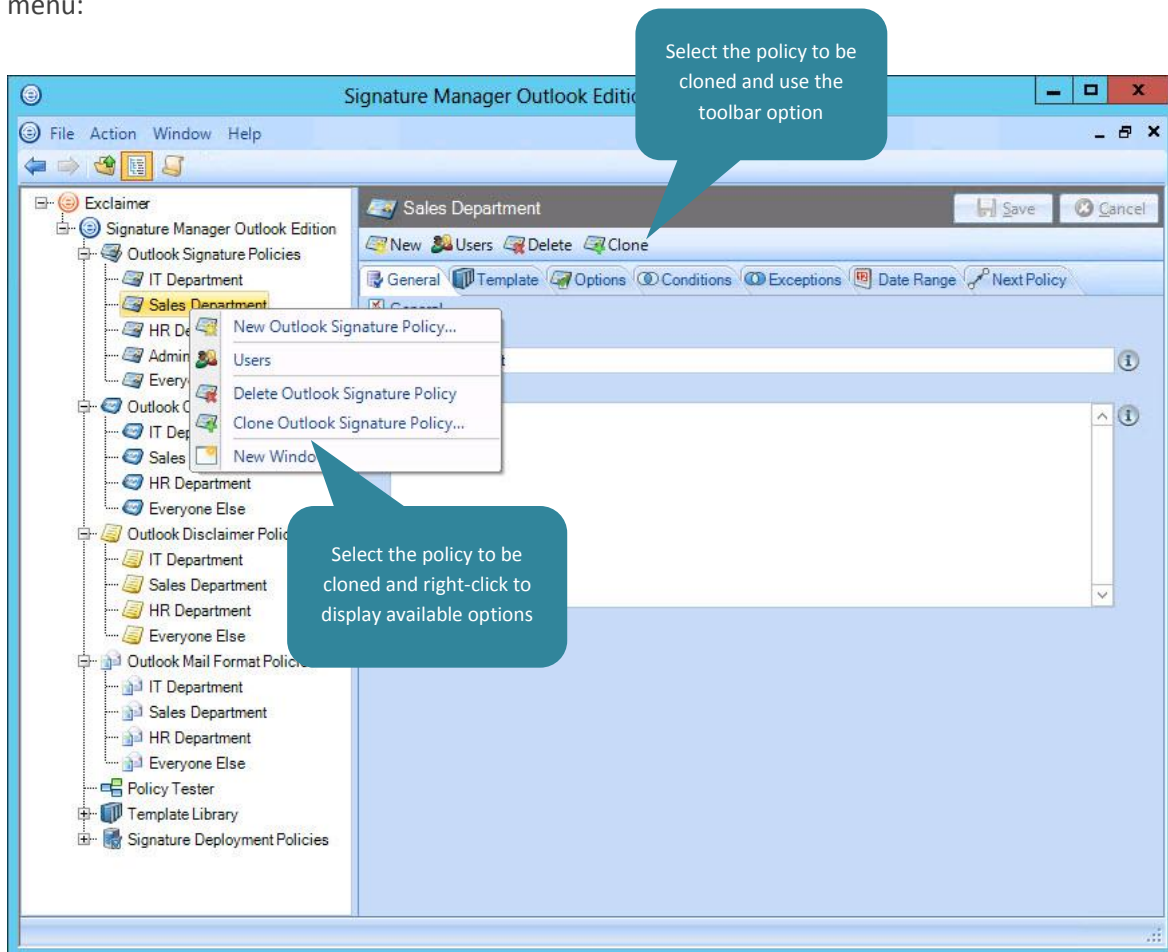
## Step 6: Save Changes

Having exited from the wizard, the new policy is added to the list of policies in the console tree, but it is not yet saved (unsaved entries are displayed with an asterisk (\*) to the left of the name).

Click [save](#) to save changes. From here you can use [selection tabs \[pg.71\]](#) to update settings for the policy, and choose to enable/disable the policy (if a policy is not enabled it will not be processed).

# Cloning an Existing Outlook Policy

If you need to create a new [Outlook](#) policy which has similar settings to an existing policy, it is quicker to take a copy of the existing policy and then update required settings for that copy (as opposed to [creating a new policy from first principles](#) [pg.136]). The [clone](#) option is used to create a copy of an existing policy for this purpose, and is available from the [console toolbar](#) [pg.69], or the right-click menu:



To clone an existing [Outlook](#) policy, select the policy to be copied from the console tree, then either click [clone](#) from the toolbar (or right click and select [clone](#) from the context menu). A copy of the selected policy is added to the console tree, ready to be updated - from here you can change the name, description and any other required [settings](#) [pg.119].

When a policy is cloned, a duplicate copy of the template associated with that policy is also made and added to the [template library](#) [pg.189]. You can edit and save this template, or [associate a different template](#) [pg.172] with the new policy, as required.

Having updated the cloned policy, click [save](#) to save changes.

# Changing an Existing Outlook Policy

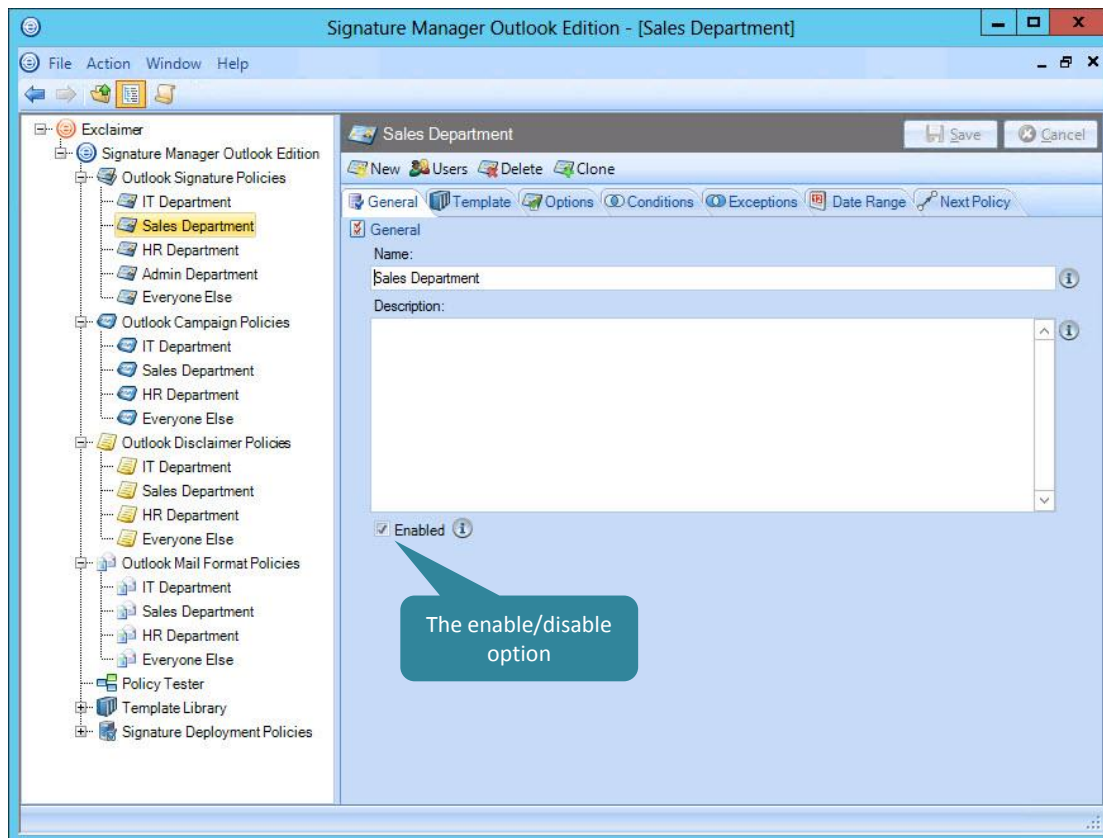
To update an existing [Outlook](#) policy, simply select the policy (either from the [console tree \[pg.70\]](#) or the [policy list \[pg.87\]](#)) and update settings on [selection tabs \[pg.71\]](#) as required.

When an [Outlook](#) policy has been changed but not saved, the branch is displayed with an asterisk (\*) symbol. You can see which tabs contain these unsaved changes, by looking for an asterisk to the right of the tab name.

When you are satisfied that all required changes have been made correctly, click [save](#) to save the new settings. All asterisk symbols are cleared once changes have been saved.

# Enabling and Disabling an Outlook Policy

To quickly enable or disable an Outlook policy, select the required policy (either from the [console tree](#) [pg.70] or the [policy list](#) [pg.87]):



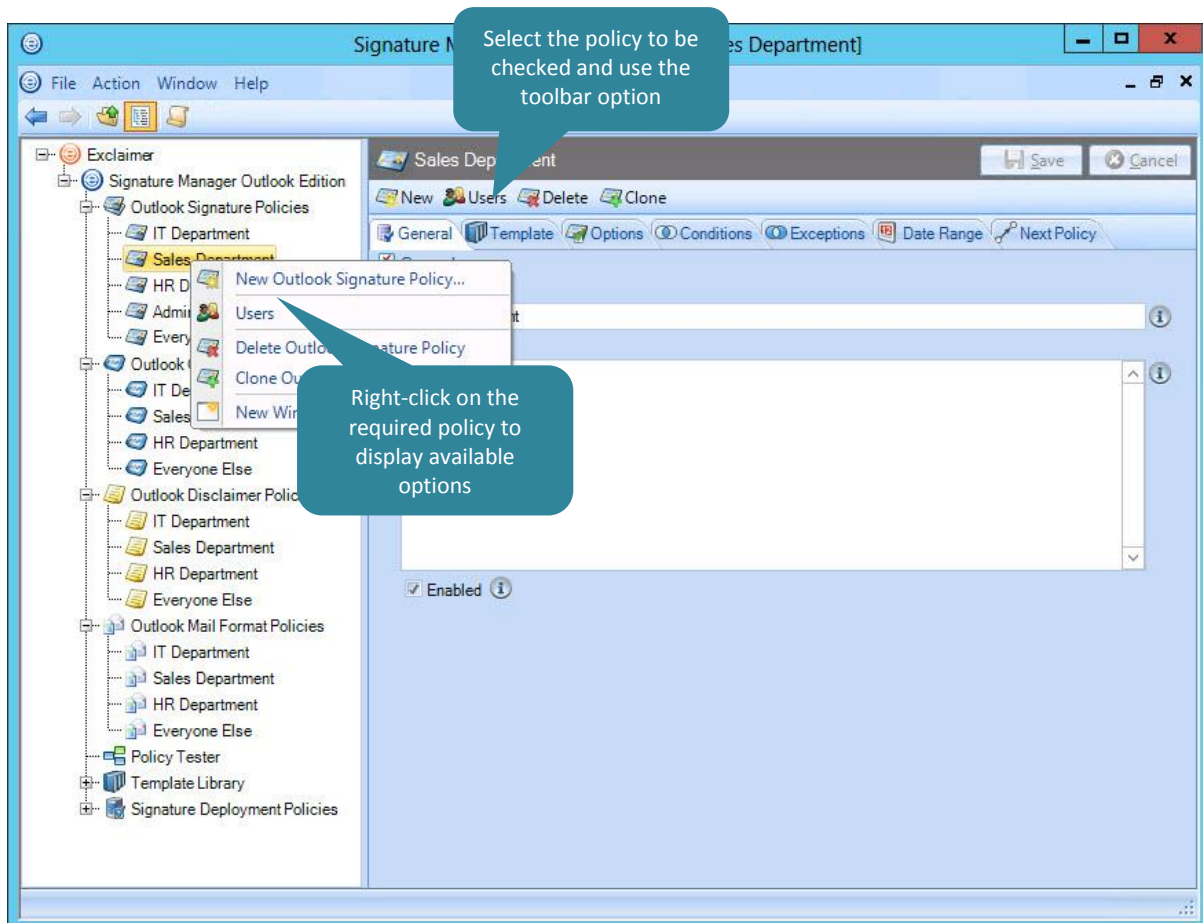
Ensure that the [enabled](#) check box is selected to enable the policy, or de-selected to disable the policy. Click [save](#) to save changes.

## NOTE

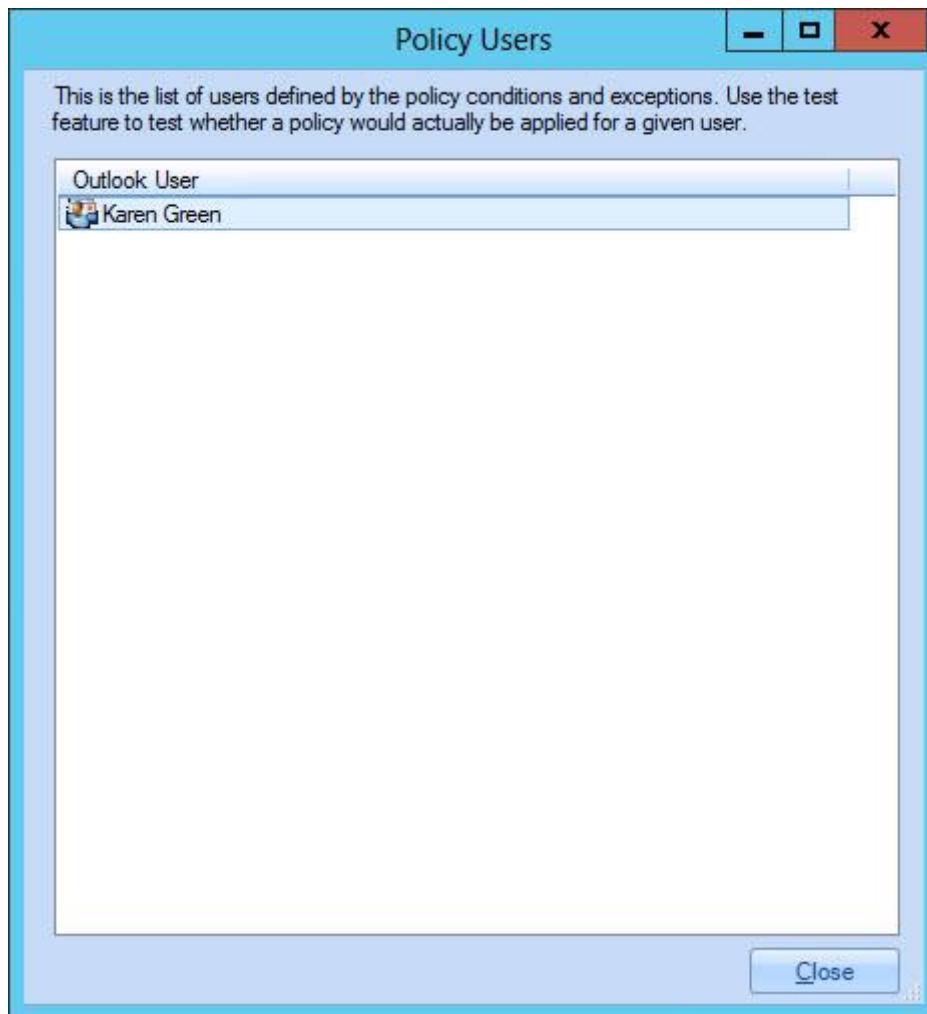
If you do not save changes, any enable/disable changes will not be applied.

# Viewing Which Users Are Associated With an Outlook Policy

To quickly view a list of any users for whom an Outlook policy applies, select the policy to be checked from the console tree, then either click **users** from the toolbar (or right click and select **users** from the context menu):



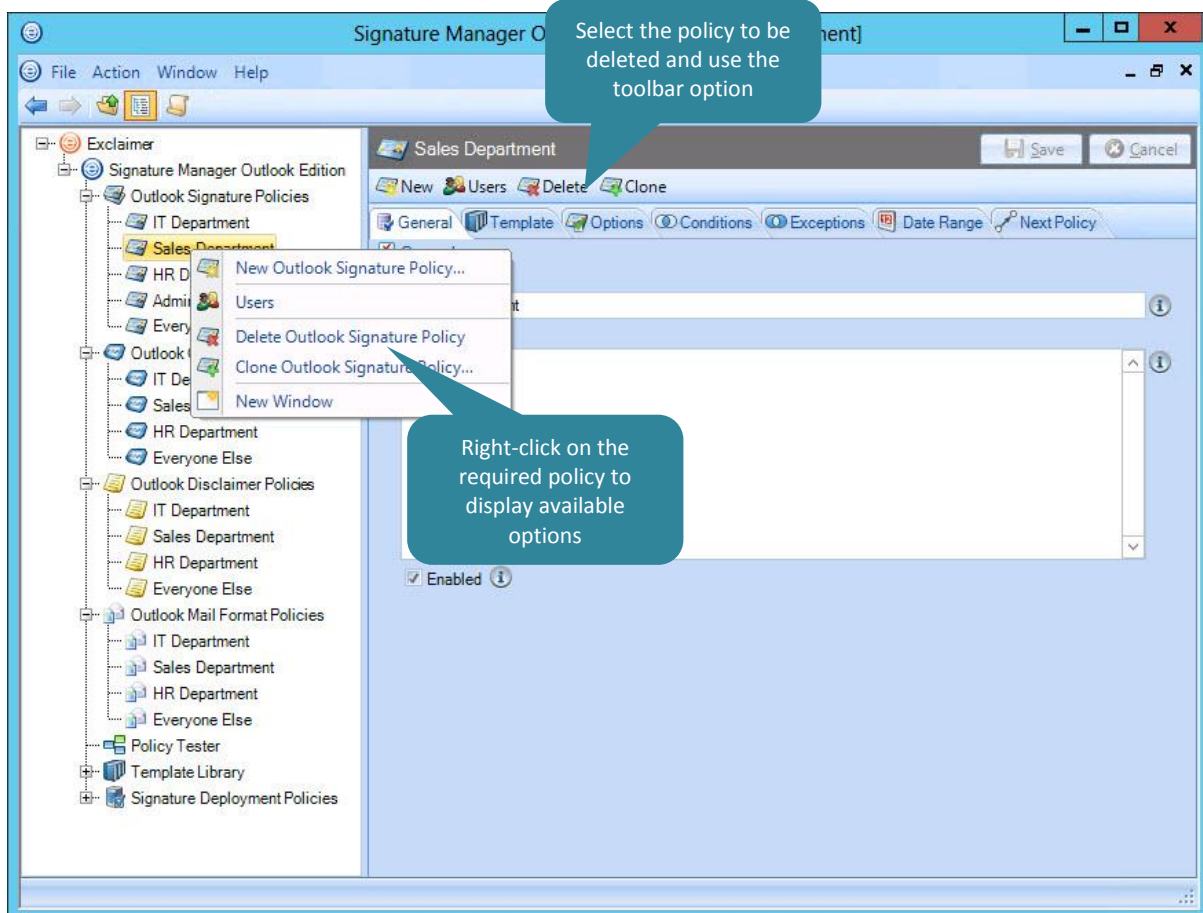
From here, a list of users is displayed in a [policy users](#) window. These are users who match criteria specified for the policy:



To check if the [Outlook](#) policy will be applied to a given user having processed any other policies, you should use the [policy tester](#) [pg.180].

# Removing an Outlook Policy

To remove an existing [Outlook](#) policy, select the policy (either from the [console tree](#) [pg.70] or the [policy list](#) [pg.87]). Then, either right-click and select [delete](#) from the context menu, or click [delete](#) from the toolbar:



Having chosen to delete an [Outlook](#) policy, you are asked [are you sure you want to delete this policy?](#)

Click [yes](#) to confirm the deletion or [no](#) to abandon the task. Finally, click [save](#) to save changes.

## NOTE

A policy is not permanently deleted until settings have been saved. If you exit without saving (or **cancel** changes), the policy will be reinstated in the console tree.



# How To...

This section contains instructions for completing a selection of common tasks with policies using Exclaimer Signature Manager Outlook Edition, including:

- [How do I create my first Outlook signature? \[pg.150\]](#)
- [How do I insert a web style banner ad that alternates daily? \[pg.151\]](#)
- [How do I create a web banner advert with a disclaimer? \[pg.155\]](#)
- [How do I add a campaign image that alternates daily? \[pg.159\]](#)
- [How do I enforce different Outlook settings per department? \[pg.164\]](#)
- [How do I create a policy based upon specific Active Directory attributes? \[pg.167\]](#)
- [How do I apply a campaign template before the signature? \[pg.171\]](#)
- [How do I change the template associated with a policy? \[pg.172\]](#)
- [How do I ensure local signatures are not used? \[pg.174\]](#)
- [How do I change the sequence in which policies run? \[pg.175\]](#)
- [How do I pause signature updates? \[pg.176\]](#)
- [How do I have a design company design and create our organization's email signature? \[pg.178\]](#)

# How Do I Create My First Outlook Signature?

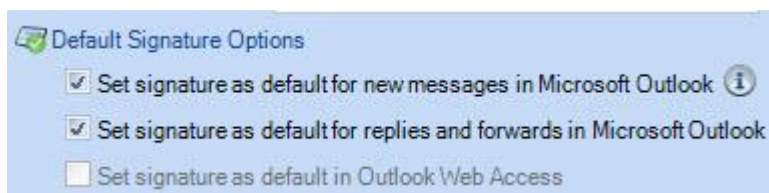
If you are setting up a signature policy for the first time, a good place to start is with a signature that contains fields from your organization's [Active Directory](#) so that information (such as the sender's name and email address) are updated automatically. This ensures that each user's signature accurately reflects information contained within their Active Directory record. The following process shows how this can be achieved:

1. Select the [Outlook signature policies](#) branch in the console tree.
2. Click the [new](#) button from the toolbar to start the [new Outlook policy wizard](#) [pg.137].
3. On the [general](#) window, specify a meaningful [name](#) for the policy - for example 'Standard Signature for All Users'.

## NOTE

Your policy must have a valid name. A valid policy name must be unique and not blank. You should try to make your policy names as descriptive as possible because they are used to uniquely identify the policy in a number of areas. You can also use the policy **description** to record comments and notes about a policy (such as what it does and under what conditions it triggers). We highly recommend that you use this field to keep a record of changes to a policy over time.

4. Click [next](#) to progress with the wizard and choose a signature [template](#) [pg.121]. A range of templates are provided but you can also create your own in the [template library](#) [pg.189].
5. Click [next](#) to see a preview of how the selected template will appear in email messages.
6. Click [next](#) to continue and set [conditions](#) [pg.124] under which this policy will be applied. In this case we want the signature to be applied to all users therefore select the [Outlook user is anyone](#) option.
7. Click [next](#) and then [finish](#) to complete the wizard. The new policy is added to the [Outlook signature policies](#) branch of the console tree and is selected by default.
8. Select the [options](#) [pg.105] tab.
9. Under [default signature options](#), choose to [set signature as default for new messages in Microsoft Outlook](#) and [set signature as default for replies and forwards in Microsoft Outlook](#):



10. Once you have saved changes, the policy is ready for use. It is a good idea to test the policy in the [policy tester](#) [pg.180] to ensure that it works as expected.

## NOTE

For more detailed information about adding policies, see the [adding a new policy](#) [pg.136] section of this guide.

# How Do I Insert A Web Style Banner Ad That Alternates Daily?

There may be times where you wish to include a banner ad in signatures (i.e. a banner image which, when clicked by the recipient, links to a web page) but where the banner image and its associated hyperlink should change on a daily basis. In this instance, you need to control which offers are displayed on particular days of the week, for an indefinite period of time.

To achieve this, you need to create one [campaign policy](#) [pg.108] (and an associated [template](#) [pg.189]) for each day of the week. Each template will contain the required image and hyperlink and each policy will be set to run on a given day. This process is summarized in two stages, below:

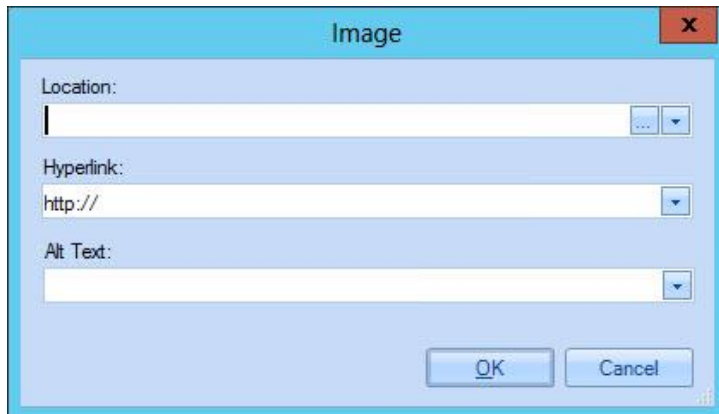
- [Stage 1: Add required banner image to campaign templates](#) [pg.152]
- [Stage 2: Define campaign policies](#) [pg.153]

## NOTE

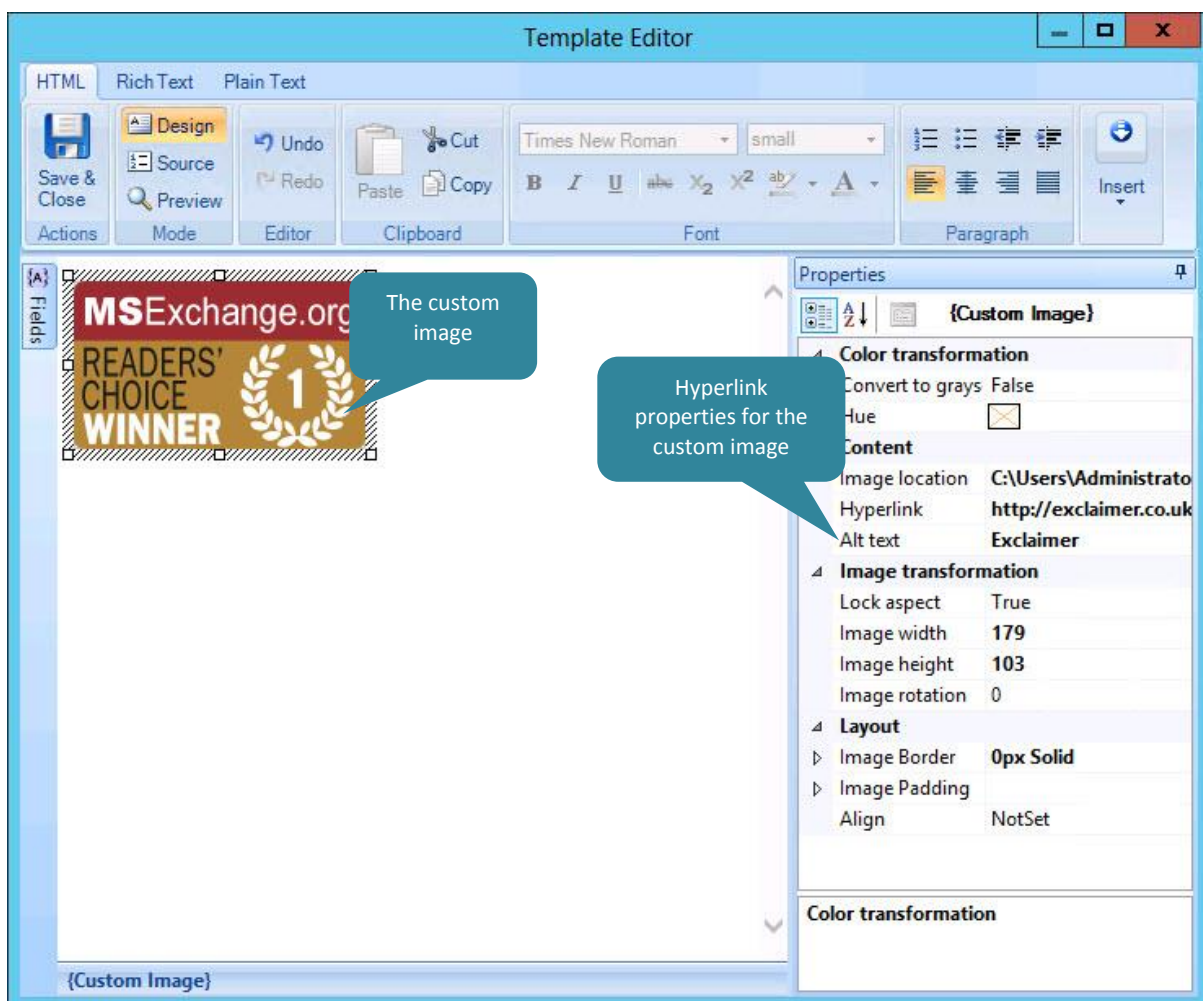
If you are running a campaign where a different image is required on a daily basis **but each image must link to the same web page** then you may wish to consider a different approach - please see [How do I add a campaign image that alternates daily?](#) [pg.159]. You can also create more complex banner adverts in an external HTML editor and choose to rotate HTML files rather than images. For further information please see [Multi-link HTML ads](#) [pg.247].

## Stage 1: Add Required Banner Image to Campaign Templates

Create [pg.198] or edit [pg.202] the required number of campaign templates and insert a [custom image field](#) [pg.231]. When you choose to add a custom image, the [image](#) window is displayed, so you can associate the image with hyperlink details:



Once inserted, you can select the image and view/update these properties as shown below:



Key properties are summarized below:

Property	Summary
Hyperlink	Specify the full URL of the web page to be opened when recipients click the banner image in their message.
Alt Text	Specify text to be displayed if images cannot be displayed in messages (for example, if a recipient has chosen to block images in email messages).
Image Location	Displays the location of the inserted image.

You should create **one template for each day of the week**. As such, you are strongly advised to use meaningful names for the templates - for example 'Monday Product Offer', 'Tuesday Product Offer', etc.

## Stage 2: Define Campaign Policies

1. Select the [Outlook campaign policies](#) branch in the console tree.
2. Click the [new](#) button from the toolbar to start the [new Outlook policy wizard \[pg.137\]](#).
3. On the [general \[pg.120\]](#) window, specify a meaningful [name](#) for the policy - for example 'Monday Product Offer Campaign'.

### NOTE

Your policy must have a valid name. A valid policy name must be unique and not blank. You should try to make your policy names as descriptive as possible because they are used to uniquely identify the policy in a number of areas. You can also use the policy **description** to record comments and notes about a policy (such as what it does and under what conditions it triggers). We highly recommend that you use this field to keep a record of changes to a policy over time.

4. Click [next](#) to progress with the wizard and choose a campaign [template \[pg.121\]](#). Select the required campaign template that was created in [stage 1 \[pg.152\]](#) - for example, if you are creating a policy to be run on Mondays, you would select the template which contains relevant content for Mondays.
5. Click [next](#) to see a preview of how the selected template will appear in email messages.
6. Click [next](#) to continue and set [conditions \[pg.124\]](#) under which this policy will be applied. In this case we want the campaign to be applied to all users therefore select the [Outlook user is anyone](#) option.
7. Click [next](#) to access [date options](#).
8. Select the [use advanced schedule](#) option and then click [add](#) to add a new schedule (for further information about these options please see the [using the advanced schedule \[pg.133\]](#) section of this guide).

9. Define the schedule for the required day of the week - for example, Monday:

Give the schedule a meaningful name

Name: Monday Product Offer

From: 14 Nov 2013 To: 01 Jan 2100

The policy is active on Mondays for an indefinite period of time

The policy is set to be active on Mondays only

Monday from 00:00 to 00:00

Policy is active (selected)

Policy is inactive

Scale: 30 min intervals

OK Cancel

10. Click **OK** to return to the [new Outlook policy wizard](#).
11. Click **next** and then **finish** to complete the wizard. The new policy is added to the [Outlook campaign policies](#) branch of the console tree.
12. Once you have saved changes, the policy is ready for use. It is a good idea to test the policy in the [policy tester](#) [pg.180] to ensure that it works as expected.
13. Repeat this process for each day of the week.

NOTE

For more detailed information about adding policies, see the [adding a new policy](#) [pg.136] section of this guide.

# How Do I Create a Web Banner Advert With a Disclaimer?

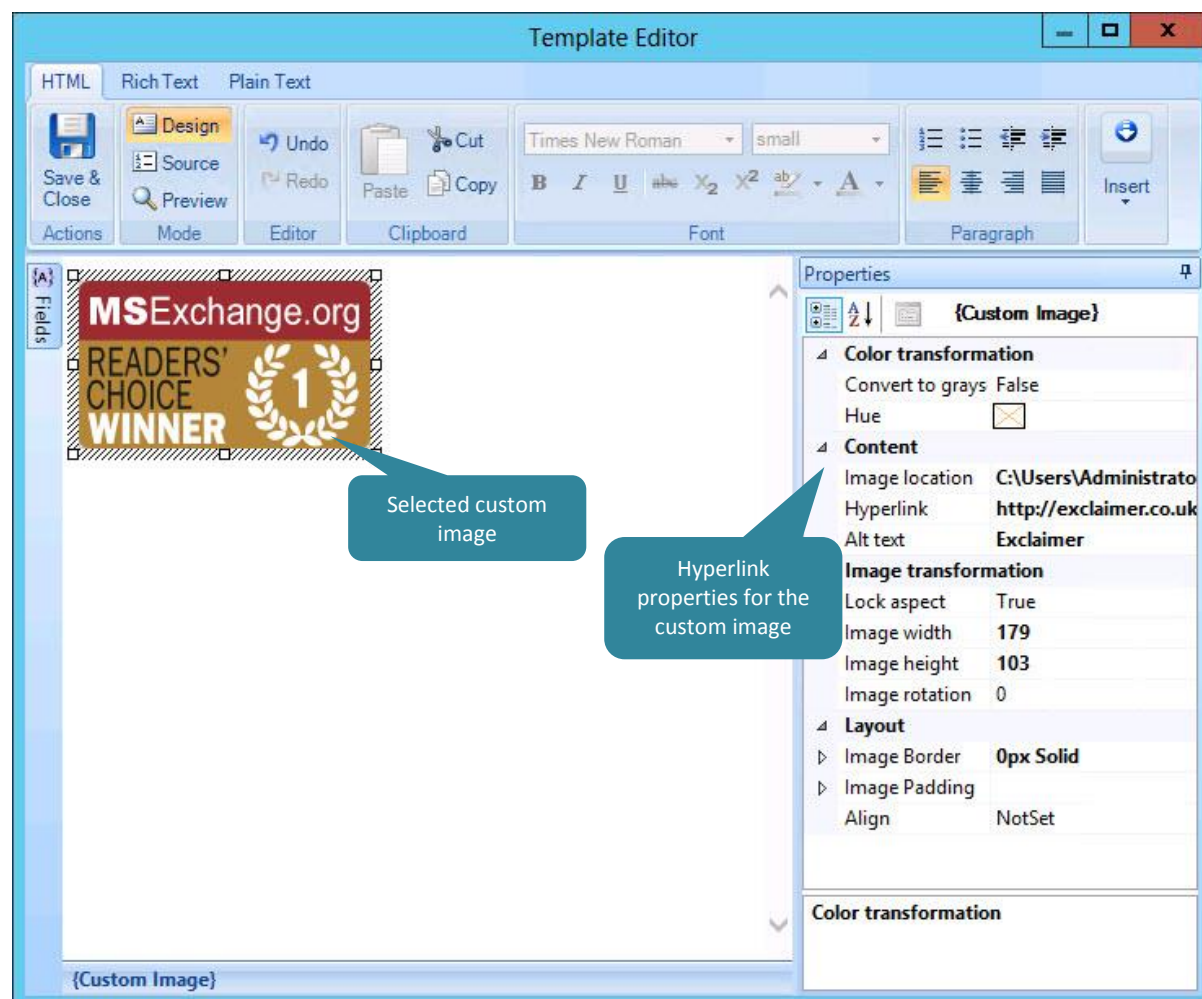
In this scenario, we have a number of web banner adverts that need to be inserted into your organization's email messages on specific dates. In each case, the banner advert should link to a different web page, depending on the offer. The advert must also include a disclaimer.

The process to achieve this is summarized in three stages below:

- [Stage 1: Add required banner image to a campaign template \[pg.156\]](#)
- [Stage 2: Define a campaign policy \[pg.157\]](#)
- [Stage 3: Define a disclaimer policy \[pg.158\]](#)

## Stage 1: Add Required Banner Image to a Campaign Template

Create [pg.198] or edit [pg.202] a campaign template and insert a [custom image field](#) [pg.231]. Once inserted, select the image and set properties as below:



Key properties are summarized below:

Property	Summary
Hyperlink	Specify the full URL of the web page to be opened when recipients click the banner image in their message.
Alt Text	Specify text to be displayed if images cannot be displayed in messages (for example, if a recipient has chosen to block images in email messages).
Image Location	Displays the location of the inserted image.



## Stage 2: Define a Campaign Policy

1. Select the [Outlook campaign policies](#) branch in the console tree.
2. Click the [new](#) button from the toolbar to start the [new Outlook policy wizard \[pg.137\]](#).
3. On the [general \[pg.120\]](#) window, specify a meaningful [name](#) for the policy - for example 'Product Offer - 20.03.2014'.

### NOTE

Your policy must have a valid name. A valid policy name must be unique and not blank. You should try to make your policy names as descriptive as possible because they are used to uniquely identify the policy in a number of areas. You can also use the policy **description** to record comments and notes about a policy (such as what it does and under what conditions it triggers). We highly recommend that you use this field to keep a record of changes to a policy over time.

4. Click [next](#) to progress with the wizard and choose a campaign [template \[pg.121\]](#). Select the campaign template that contains the required banner advert (created in [stage 1 \[pg.156\]](#)).
5. Click [next](#) to see a preview of how the selected template will appear in email messages.
6. Click [next](#) to continue and set [conditions \[pg.124\]](#) under which this policy will be applied. In this case we want the campaign to be applied to all users therefore select the [Outlook user is anyone](#) option.
7. Click [next](#) to [set the date \[pg.132\]](#) on which the campaign should be applied to messages.
8. Click [next](#) and then [finish](#) to complete the wizard. The new policy is added to the [Outlook campaign policies](#) branch of the console tree.
9. Once you have saved changes, the policy is ready for use. It is a good idea to test the policy in the [policy tester \[pg.180\]](#) to ensure that it works as expected.

## Stage 3: Define a Disclaimer Policy

It is considered best practice to provide a disclaimer with any offer that you are running. This can be contained within the email, or appear as a link to a web page. [Exclaimer Signature Manager Outlook Edition](#) allows you to add disclaimers to your organization's Outlook signatures, as follows:

1. Select the [Outlook disclaimer policies](#) branch in the console tree.
2. Click the [new](#) button from the toolbar to start the [new Outlook policy wizard](#) [pg.137].
3. On the [general](#) [pg.120] window, specify a meaningful [name](#) for the policy - for example 'Product Offer Disclaimer - 21.03.2014'.
4. Click [next](#) to progress with the wizard and choose a campaign [template](#) [pg.121]. Select the required disclaimer template (a number of standard templates are provided or you may wish to create your own, more specific versions in the [template library](#) [pg.189]).
5. Click [next](#) to see a preview of how the selected template will appear in email messages.
6. Click [next](#) to continue and set [conditions](#) [pg.124] under which this policy will be applied. In this case we want the disclaimer to be applied to all users therefore select the [Outlook user is anyone](#) option.
7. Click [next](#) and then [finish](#) to complete the wizard. The new policy is added to the [Outlook disclaimer policies](#) branch of the console tree and is selected by default.
8. Select the [date range](#) [pg.132] tab and set a date to match your campaign policy ([stage 2](#) [pg.156]).
9. Once you have saved changes, the policy is ready for use. It is a good idea to test the policy in the [policy tester](#) [pg.180] to ensure that it works as expected.

### NOTE

Repeat stages 1 - 3 for other products / dates required.

# How Do I Add A Campaign Image That Alternates Daily?

There may be times where you wish to include a banner ad in signatures (i.e. a banner image which, when clicked by the recipient, links to a web page) but where the banner image used should change on a daily basis. For example, you might be running a daily offer where a new product is added to your catalog each day and needs promoting - or perhaps you have overstocked some products which need to be pushed. In this instance, you need to control which offers are displayed on particular days so that staff are prepared, and you need to ensure that the banners appear on all your organization's email correspondence.

Given that we wish to link all images to the same web page, the easiest method is to use the [rotating banner ad \[pg.240\]](#) in a campaign template. With this process, you place required images in a given folder and then set properties for the [rotating banner ad \[pg.240\]](#) field so that it checks this folder and rotates any images found at your required frequency. This process is summarized in three stages, below:

- [Stage 1: Image preparation \[pg.160\]](#)
- [Stage 2: Add a rotating banner ad field to the required template \[pg.161\]](#)
- [Stage 3: Define a campaign policy \[pg.162\]](#)

## NOTE

If you are running a campaign where a different image is required on a daily basis **but each image must link to a different web page** (for example, you might show product images and wish to link to specific details for that product on your website) then you need to use a different approach - please see [How do I insert a web style banner ad that alternates daily? \[pg.151\]](#)

## Stage 1: Image Preparation

For this scenario, you would have seven banner images - one for each day of the week. These images should be placed in a directory on your network; you must ensure that the [Exclaimer Outlook Settings Connector Service](#) is set up to log on with an account that has at least read access permissions for the specified directory.

When these images are rotated, [Exclaimer Signature Manager Outlook Edition](#) uses an index from 0 - 6, as shown below:

Index	File
0	Sunday
1	Monday
2	Tuesday
3	Wednesday
4	Thursday
5	Friday
6	Saturday

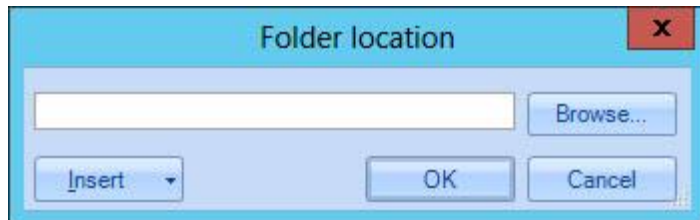
Images are indexed according to filename sequence, for example:

Filename	Index	Day of Week
Banner00.jpg	0	Sunday
Banner01.jpg	1	Monday
Banner02.jpg	2	Tuesday
Banner03.jpg	3	Wednesday
Banner04.jpg	4	Thursday
Banner05.jpg	5	Friday
Banner06.jpg	6	Saturday

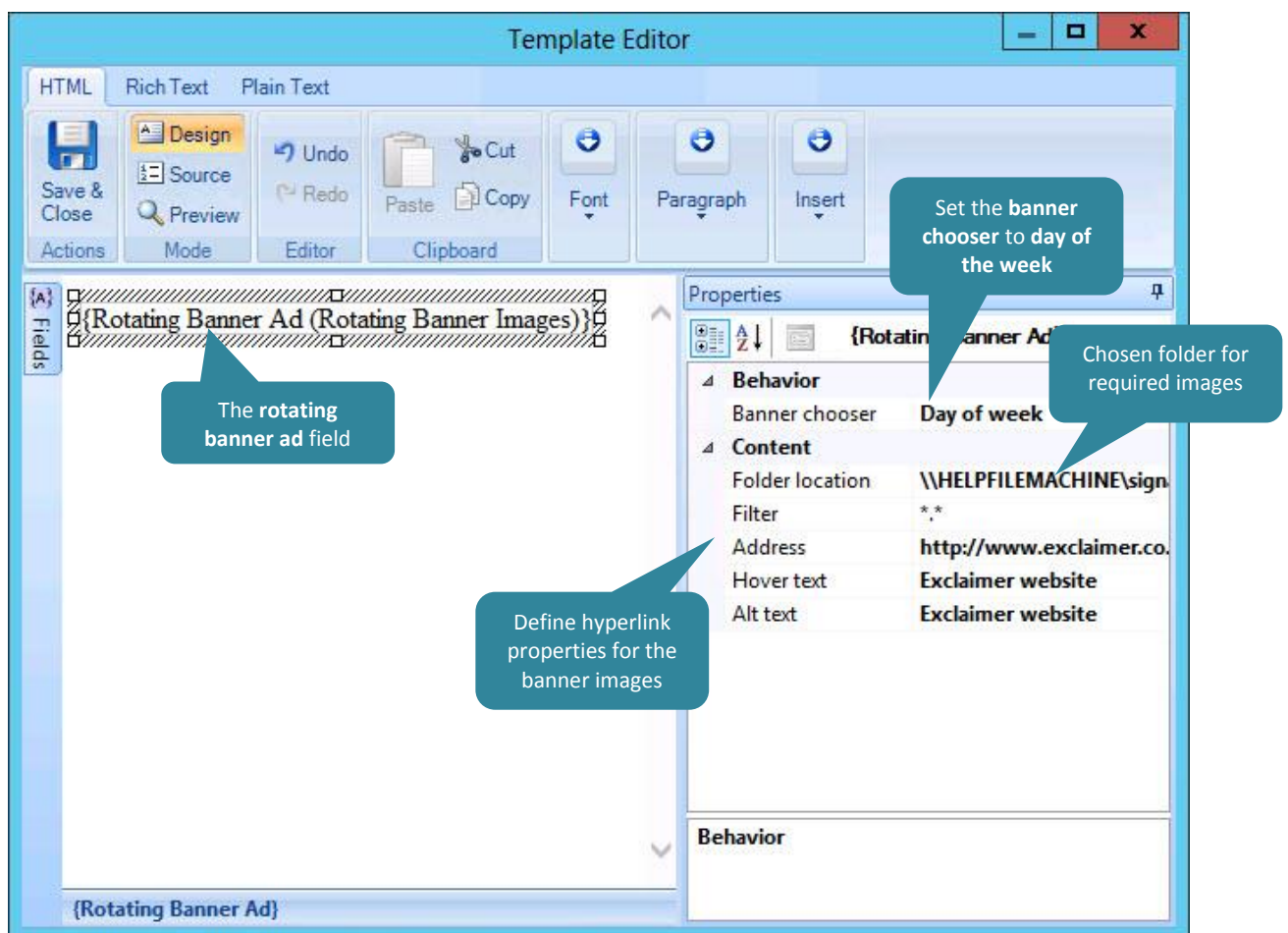
If it is important for particular images to be displayed on a given day, you should ensure that your file naming convention is one which ensures images are sequenced correctly (such as the example shown above).

## Stage 2: Add a Rotating Banner Ad Field to The Required Template

[Create \[pg.198\]](#) or [edit \[pg.202\]](#) a campaign template and insert a [rotating banner ad](#) field. When you choose to add a custom image, the [folder location](#) window is displayed, so you can specify the image location that was decided in [stage 1 \[pg.160\]](#):



Here, you can choose to browse to the required location or, if the location is determined from an [Active Directory](#) field, use the insert drop-down list to select the [Active Directory](#) field which contains the required location. Once inserted, you can select the field and view/update properties as shown below:



Key properties are summarized below:

Property	Summary
Banner chooser	Use the browse button and select <a href="#">day of week</a> .
Folder location	Specify the directory in which required banner images have been placed.
Filter	If required, you can specify a wildcard filter to determine which images are used. By default, <code>*.*</code> is specified, which means that all images in your specified folder will be considered.
Address	Specify the full URL of the web page to be opened when recipients click a banner image in their message. For example: <a href="http://www.exclaimer.com">http://www.exclaimer.com</a> .
Hover Text	Specify text to be displayed when recipients hover their cursor over a banner image in their message. For example: <a href="#">Visit our website</a> .
Alt Text	Specify text to be displayed if images cannot be displayed in messages (for example, if a recipient has chosen to block images in email messages).

## Stage 3: Define a Campaign Policy

1. Select the [Outlook campaign policies](#) branch in the console tree.
2. Click the [new](#) button from the toolbar to start the [new Outlook policy wizard](#) [pg.137].
3. On the [general](#) [pg.120] window, specify a meaningful [name](#) for the policy - for example 'Weekly Rotating Campaign'.

### NOTE

Your policy must have a valid name. A valid policy name must be unique and not blank. You should try to make your policy names as descriptive as possible because they are used to uniquely identify the policy in a number of areas. You can also use the policy **description** to record comments and notes about a policy (such as what it does and under what conditions it triggers). We highly recommend that you use this field to keep a record of changes to a policy over time.

4. Click [next](#) to progress with the wizard and choose a campaign template. Select the campaign template that contains the [rotating banner ad](#) (created in [stage 2](#) [pg.161]).
5. Click [next](#) to see a preview of how the selected template will appear in email messages.
6. Click [next](#) to continue and set [conditions](#) [pg.124] under which this policy will be applied. In this case we want the campaign to be applied to all users therefore select the [Outlook user is anyone](#) option.
7. Click [next](#) to access date options.
8. We do not need to limit the policy to a specific date range, therefore click [next](#) and then [finish](#) to complete the wizard. The new policy is added to the [Outlook campaign policies](#) branch of the console tree.
9. Once you have saved changes, the policy is ready for use. It is a good idea to test the policy in the [policy tester](#) [pg.180] to ensure that it works as expected.

The above process shows how individual, linked images can be used in policy templates. However, you can also create more complex banner adverts in an external HTML editor and choose to rotate HTML files rather than images. For further information please see [Multi-link HTML ads \[pg.247\]](#).

NOTE

For more detailed information about adding policies, see the [adding a new policy](#) [pg.136] section of this guide.

# How Do I Enforce Different Outlook Settings Per Department?

In this scenario, different font settings are required for email messages sent from the **HR** department and from the **Sales** department. The **HR** department should send messages in **Times New Roman** font and the **Sales** department should send messages in **Verdana** font.

The following process shows how this would be achieved, assuming that departments within the organization are defined in **Active Directory** groups. If groups are not used in this way within your organization, you can achieve the same results by defining policies based upon [specific Active Directory attributes](#) [pg.167].

1. Select the **Outlook mail format policies** branch in the console tree.
2. Click the **new** button from the toolbar to start the [new Outlook policy wizard](#) [pg.137].
3. On the [general](#) [pg.120] window, specify a meaningful **name** for the policy - for example 'HR Mail Format'.

NOTE

Your policy must have a valid name. A valid policy name must be unique and not blank. You should try to make your policy names as descriptive as possible because they are used to uniquely identify the policy in a number of areas. You can also use the policy **description** to record comments and notes about a policy (such as what it does and under what conditions it triggers). We highly recommend that you use this field to keep a record of changes to a policy over time.

4. Click **next** to progress with the wizard and access **Outlook options**:

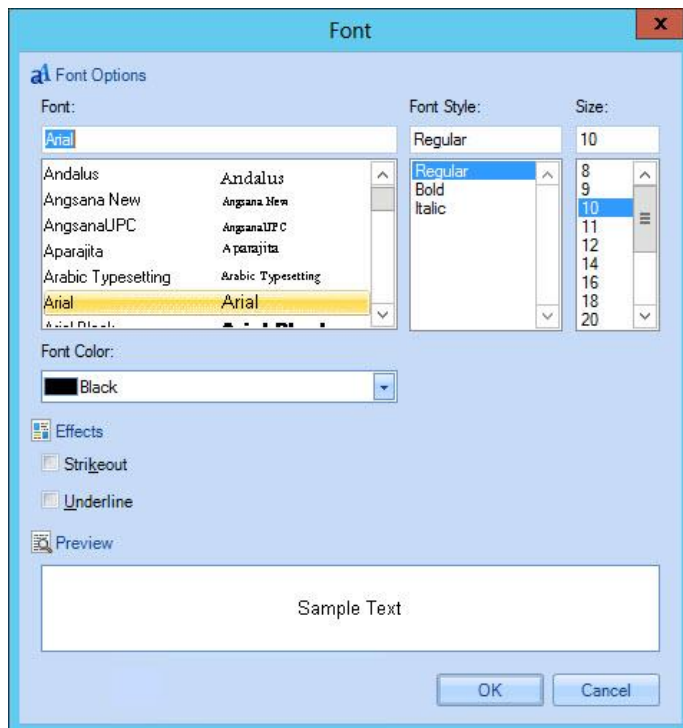
The screenshot shows the 'New Outlook Mail Format Policy' wizard, specifically the 'Outlook Options' tab. The left sidebar contains a tree view with 'General' selected. The main area is titled 'Outlook Options' and contains the following sections:

- Message Format Options:**
  - 'Compose in this message format:' is set to 'HTML'.
  - There are two unchecked checkboxes: 'Use Microsoft Word as default editor for email messages' and 'Use Microsoft Word as default editor for messages in rich text format'.
- Message Font Options:**
  - 'When composing a new message use' is set to 'Arial, 10pt, Black'.
  - 'When composing reply or forward use' is set to 'Arial, 10pt, Black'.
  - 'When composing plain text message use' is set to 'Courier New, 10pt, Black'.
- Outlook Options:**
  - 'Remove all previous existing signatures' is checked.
  - 'Remove all previous existing stationery' is unchecked.

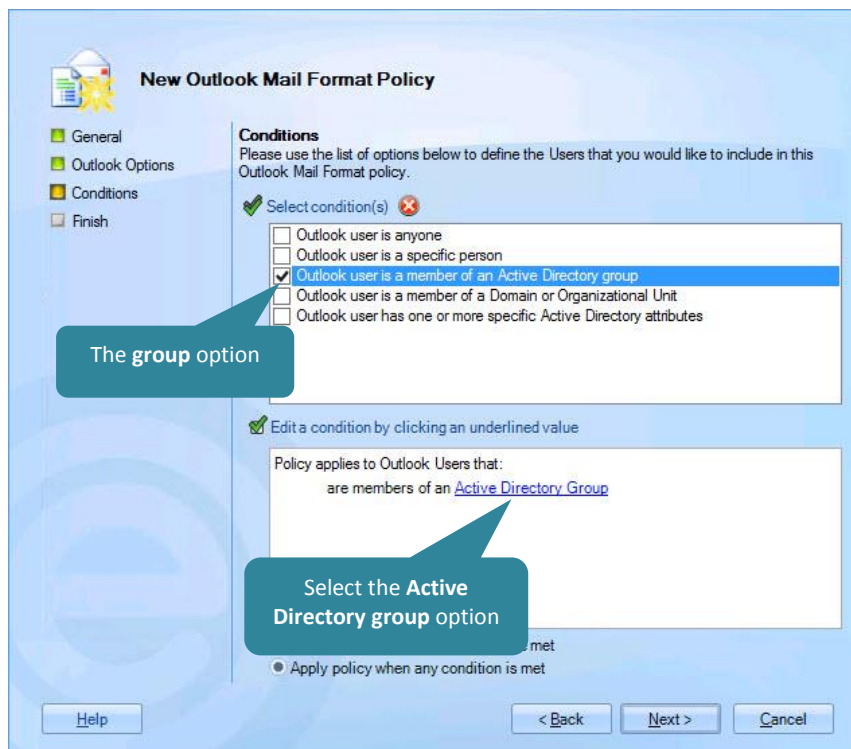
At the bottom, there are buttons for '< Back', 'Next >', and 'Cancel'. A 'Help' button is also present in the bottom left corner.



- Click the browse button for each required option under [message font options](#) and define the required font:



- Click **OK** to return to the [new Outlook policy wizard](#).
- Click **next** to continue and set [conditions](#) [pg.124] under which this policy will be applied.
- Select the [Outlook user is a member of an Active Directory group](#) option and then select the [Active Directory Group](#) hyperlink in the lower pane:



9. Select the [HR](#) group from the list of groups that is displayed and click [OK](#) to return to the [new Outlook policy wizard](#).
10. Click [next](#) and then [finish](#) to complete the wizard. The new policy is added to the [Outlook mail format policies](#) branch of the console tree and is selected by default.
11. Once you have saved changes, the policy is ready for use. It is a good idea to test the policy in the [policy tester](#) [pg.180] to ensure that it works as expected.
12. Repeat this process for the [Sales](#) department.

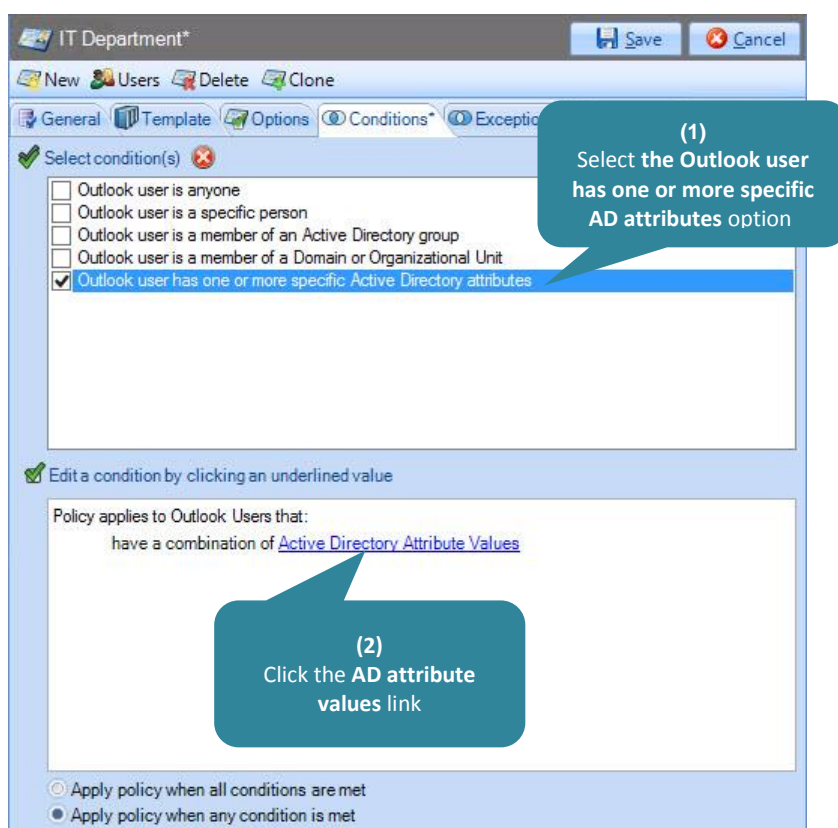
NOTE

For more detailed information about adding policies, see the [adding a new policy](#) [pg.136] section of this guide.

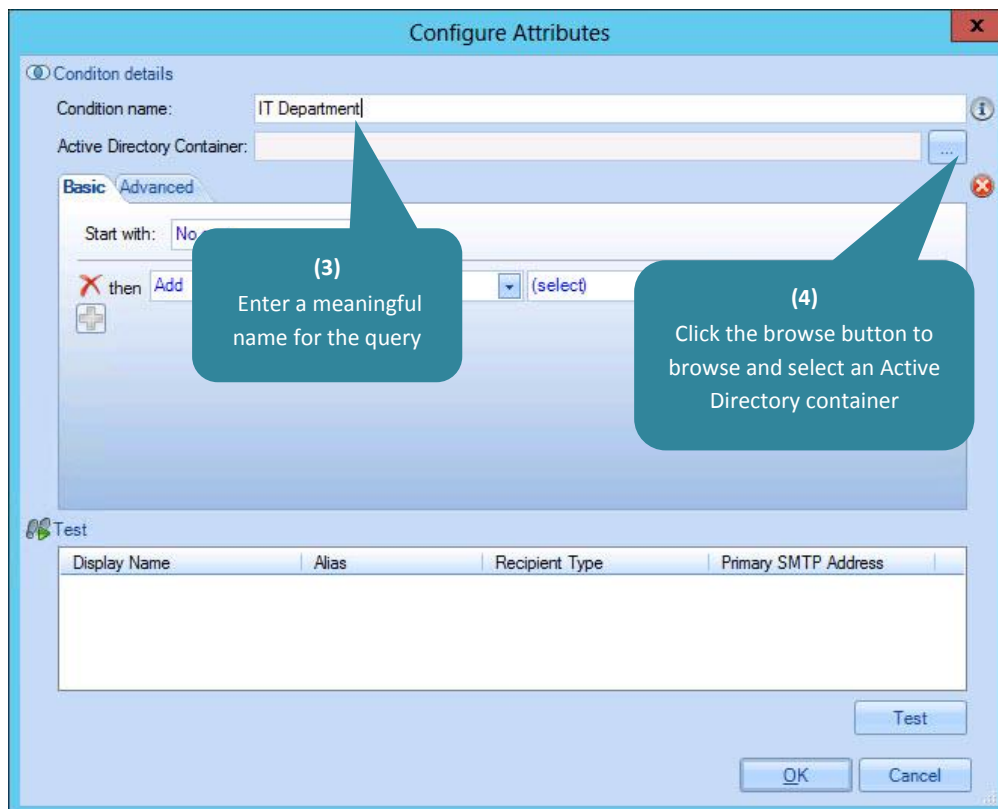
# How Do I Create a Policy Based Upon Specific Active Directory Attributes?

The [configure attributes window](#) [pg.127] allows you to define [conditions](#) [pg.124] and [exceptions](#) [pg.129] based upon queries that are run on [Active Directory](#) user attributes. The following example shows how to set a policy condition which uses an [Active Directory](#) attribute query. In this scenario, a policy is required to apply a policy to any [Outlook](#) users within the 'IT' department of an organization.

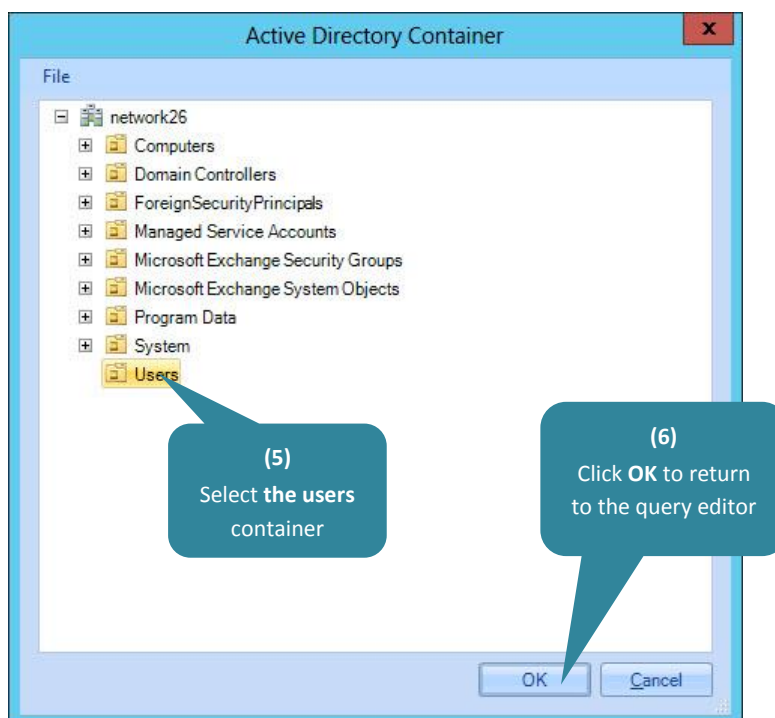
## Steps 1 and 2: Outlook User Has One or More Specific Active Directory Attributes



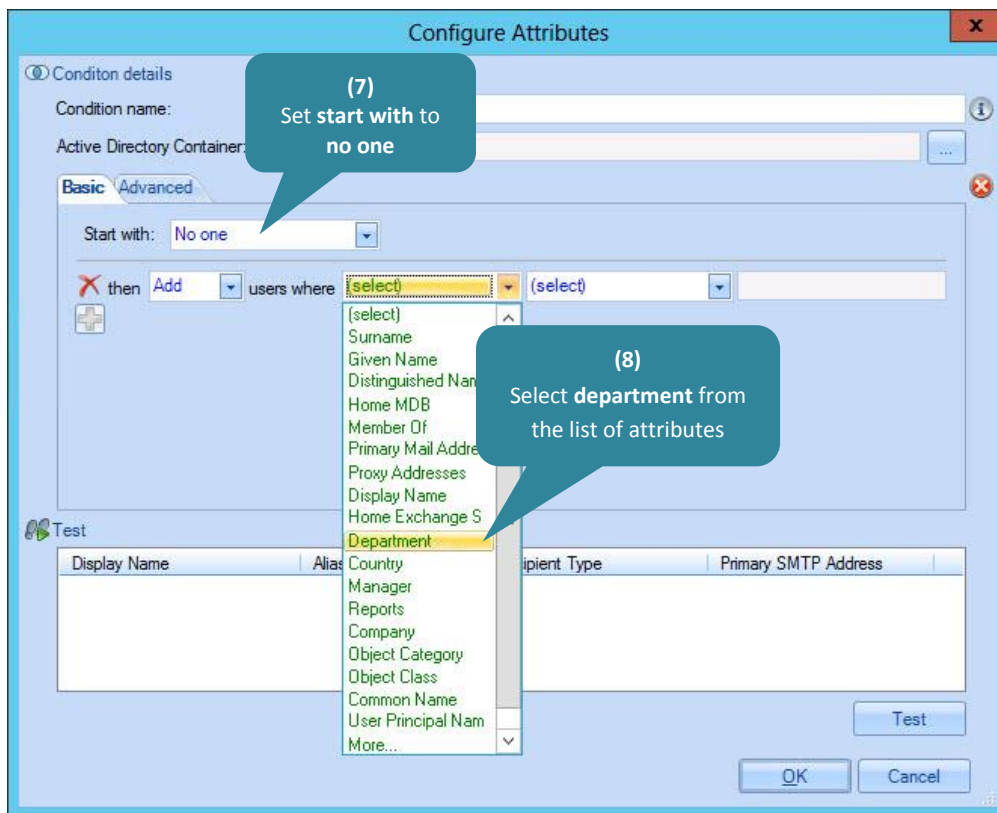
## Steps 3 and 4: Define the Query



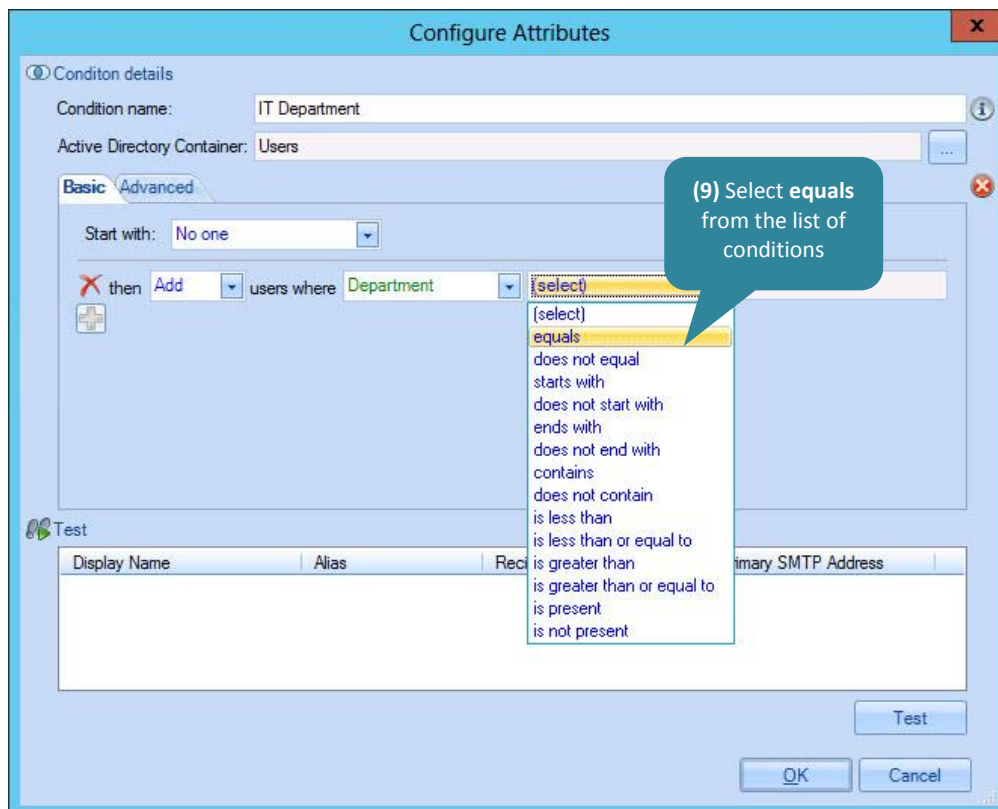
## Steps 5 and 6: Browse and Select an Active Directory Container



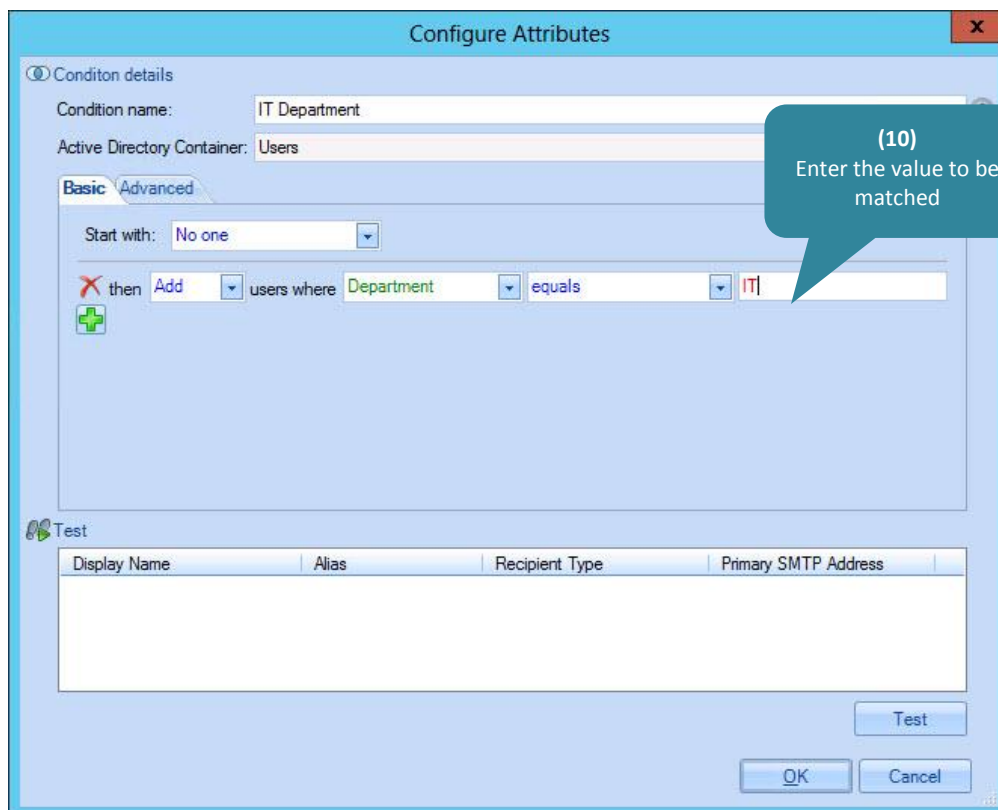
## Steps 7 and 8: Choose a Start Point and Select Required Attribute



## Step 9: Choose How Matching Should Be Made



## Step 10: Enter the Required Attribute Value for Matching



# How do I Apply a Campaign Template Before the Signature Template?

Policy types are always processed in the same sequence, as illustrated below:



This means that signature content is added first, then campaign content, then disclaimer content. Although you cannot change this sequence, you can swap content in policies so that your signature, campaign and disclaimers appear in a different order.

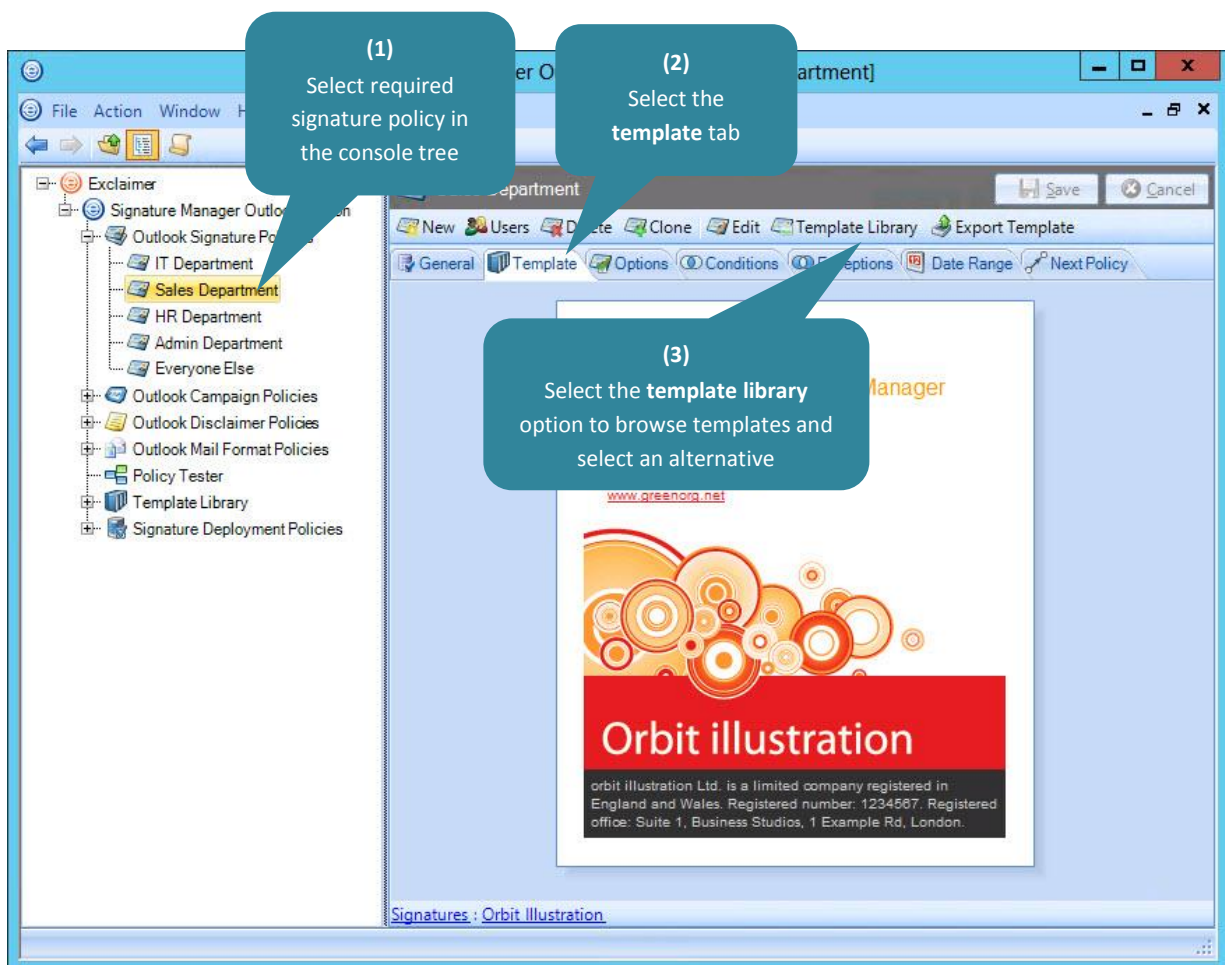
For example, if you wish to include a campaign image before a signature, you could associate a [campaign template](#) with a [signature policy](#) and a [signature template](#) with a [campaign policy](#). This principle applies to any of the Outlook signature policies ([signature](#), [campaign](#) and [disclaimer](#)).

For further information about how policies are processed, see [understanding how policies are processed](#) [pg.98].

# How do I Change the Template Associated with a Policy?

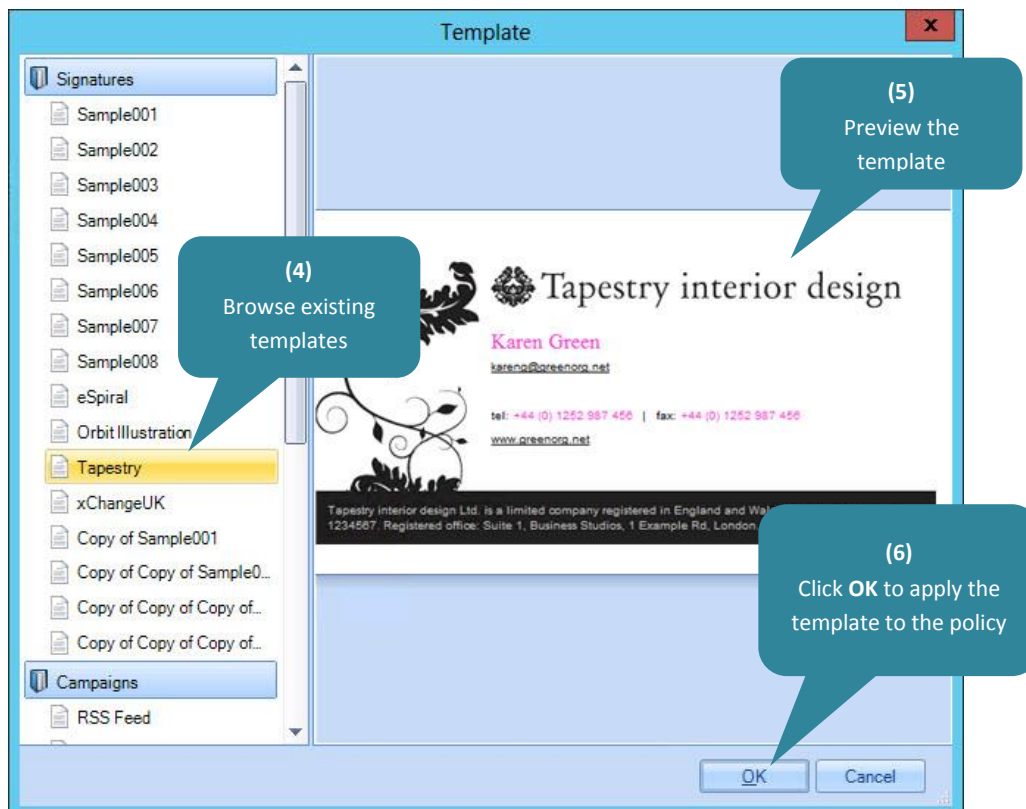
When viewing the template associated with a policy, you can choose to access the [template library](#) [pg.189] and select a new template, as shown below.

## Steps 1 - 3: Access the Template Library from Within a Policy





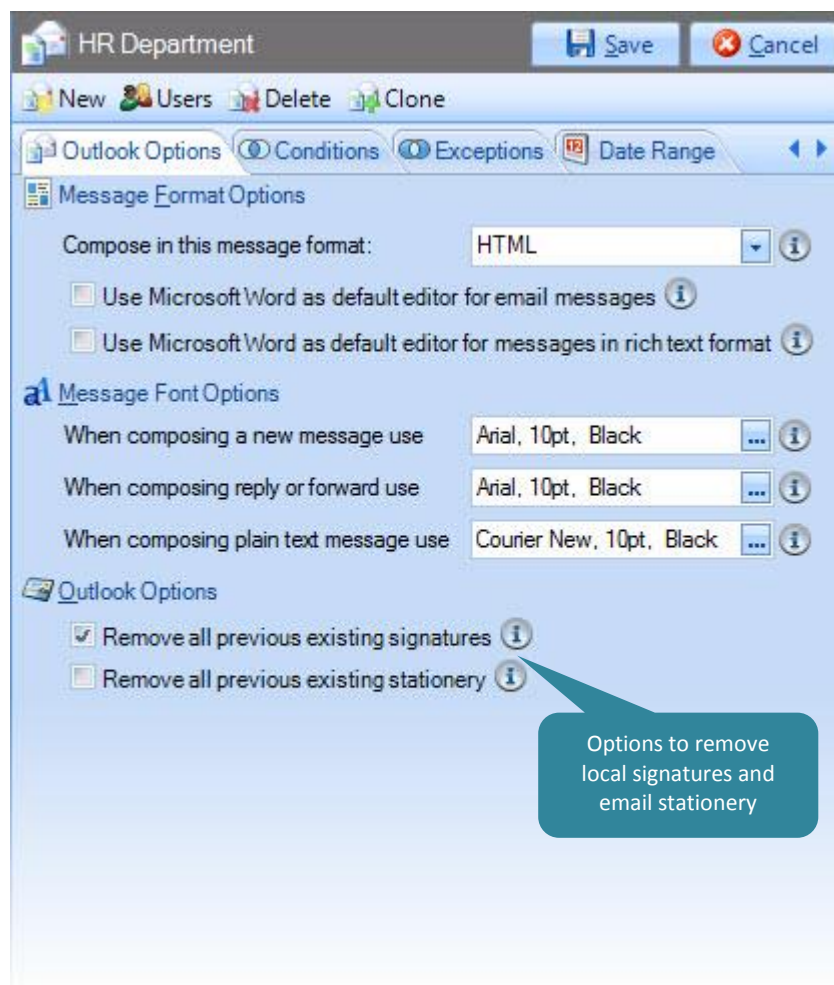
## Steps 4 - 6: Browse and Select New Templates



## How do I Ensure Local Signatures Are Not Used?

Exclaimer Signature Manager Outlook Edition allows you to promote a consistent brand image throughout your organization by sending emails with common signature, branding, promotional and disclaimer content. However, if users create their own, local signatures using Microsoft Outlook's signature options, this consistency can be lost.

You can prevent use of local signatures and stationery by defining a [mail format policy](#) [pg.112] and selecting [remove all previous existing signatures](#) and / or [remove all previous existing stationery](#) options:



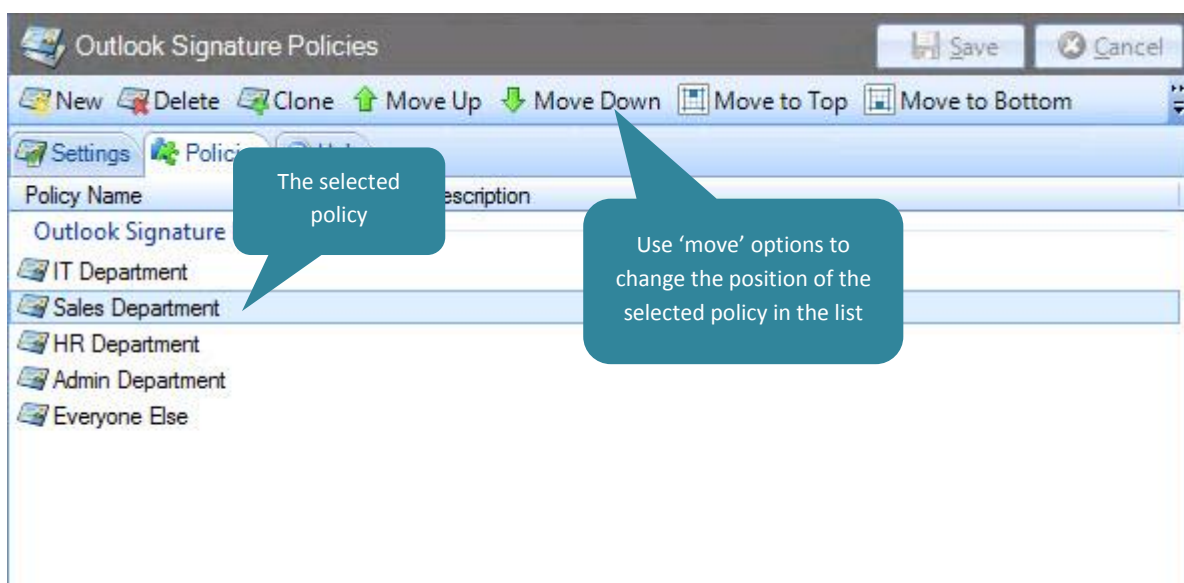
For further information about mail format policy options, please see the [mail format policy options](#) [pg.113].

# How Do I Change The Sequence In Which Policies Run?

Within each policy type, policies are processed in the sequence that they are listed in the [policies list](#) [pg.87]. Policy types are always processed in the same sequence, as illustrated below:



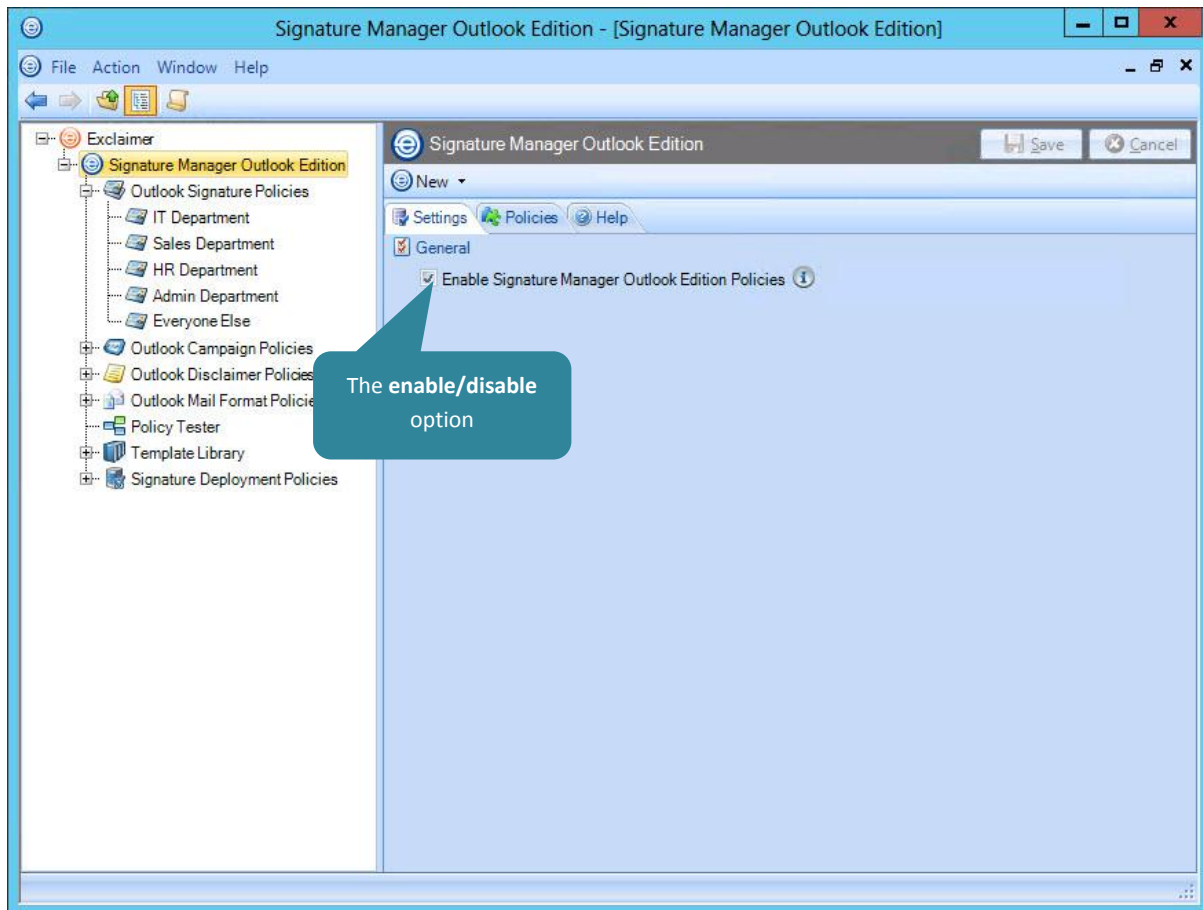
You cannot change this sequence but you can change the sequence of policies **within each policy type**. To do this, access the policies tab and use [move up](#) / [move down](#) buttons as required:



For further information about how policies are processed, see [understanding how policies are processed](#) [pg.98].

# How Do I Pause Signature Updates?

There may be times that you need to stop [Exclaimer Signature Manager Outlook Edition](#) from processing policies. To do this, you can use options on the [Signature Manager Outlook Edition settings tab](#) [pg.86]:

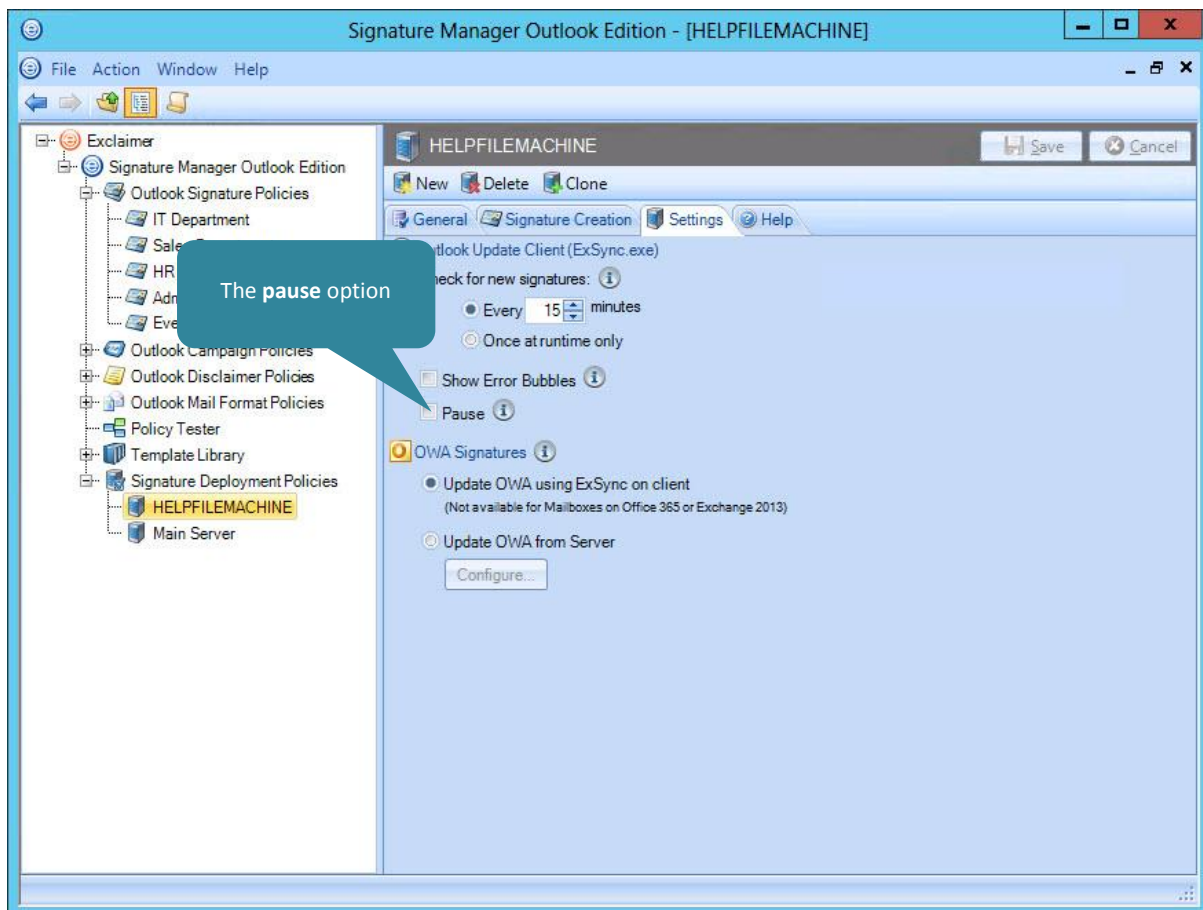


When this option is de-selected, all [signature](#) [pg.104], [campaign](#) [pg.108] and [disclaimer](#) [pg.110] policies will be disabled. In this case, [Exclaimer Signature Manager Outlook Edition](#) still runs but it will not find any policies to process.

## The Pause Option

An alternative approach is to pause updates. In this case, you can choose to pause the [ExSync](#) agent so that policy / settings updates are no longer pulled from the deployment share to users' computers. This is particularly useful (for example) if you are performing maintenance tasks on the server and wish to prevent errors being reported during this time.

The [pause](#) option is available from the [settings](#) tab on each [signature deployment policy](#) - for example:



Many organizations will only have one [signature deployment policy](#) however, if there are multiple [signature deployment policies](#), you can pause as many as required.

# What If I Have a Design Company Designing Our Organization's Email Signatures?

You may have a design agency that deals with the look of your website and your email signatures. If required they can download [Exclaimer Signature Manager Outlook Edition](#) and create [Outlook](#) signature designs that include fields from your [Active Directory](#) and [Exclaimer Signature Manager Outlook Edition](#) components.

[Exclaimer Signature Manager Outlook Edition](#) is available to download from the products page on the [Exclaimer website](#).

## Exporting/Importing an Outlook Signature

[Exclaimer Signature Manager Outlook Edition](#) signatures are exported as specially formatted [.zip](#) files. These [.zip](#) files can then be imported in to your [Exclaimer Signature Manager Outlook Edition](#) installation. For more information on exporting and importing templates, please see [exporting a template \[pg.201\]](#) and [importing a template \[pg.201\]](#).

# Chapter 6

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## The Policy Tester

# Policy Tester Introduction

The [policy tester](#) simulates [policy processing](#) [pg.98] for a specified user and determines which signatures, campaigns or disclaimers will be added to their signature and settings ZIP file.

When using the policy tester, you select the required sender and then run the test to simulate policy processing. Having run the test, you can access a process diagram to:

- [View which Outlook policies have and have not been applied](#) [pg.184]
- [Check the reason why an Outlook policy is or is not applied](#) [pg.186]
- [Preview the message at any stage in the process](#) [pg.186]

Finally, you can [view original messages and their final output](#) [pg.187].

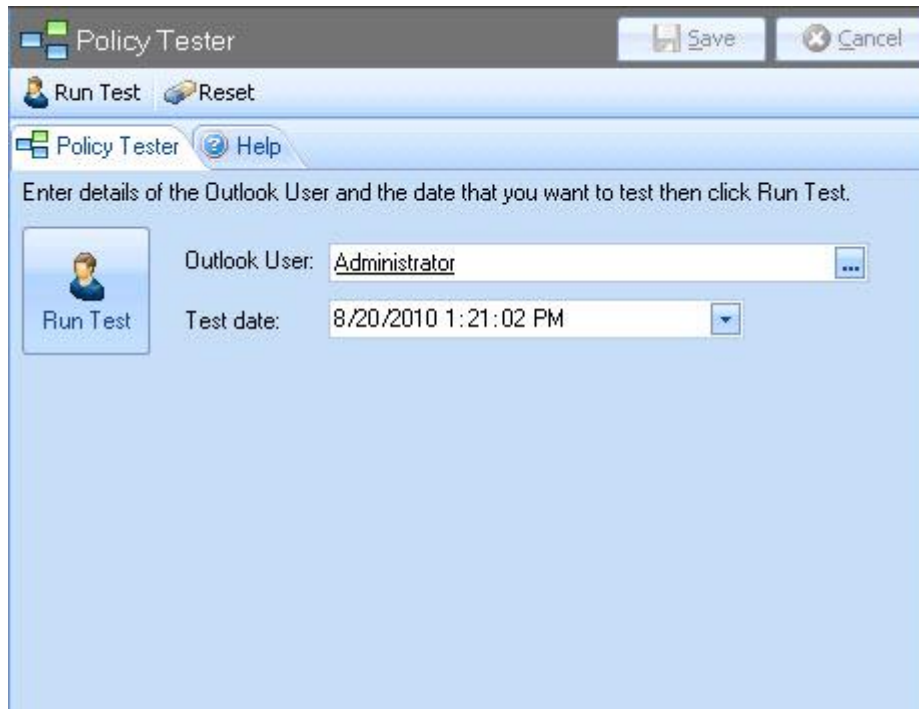
## NOTE

If a policy test applies signatures in a way that was not expected, ensure that your policies are sequenced correctly. For further information please see [understanding how policies are processed](#) [pg.98].



# Understanding the Policy Tester Window

The [policy tester](#) allows you to select an [Outlook](#) user for whom a test signature will be applied, together with a date and time (so you can check any [date range](#) [\[pg.132\]](#) conditions that might be set):





Simply use the browse [\[...\]](#) button associated with the [Outlook user](#) field to select the required user and click the arrow associated with the [test date](#) field to select the required date from a popup calendar. Having selected a date, you can adjust the time manually, if required.

## NOTE

Remember that any signatures generated in the **policy tester** are never actually deployed, so you can select whichever sender is most appropriate for testing a policy, without concern.

## The Policy Tester Toolbar

The following options are available from the policy tester toolbar:

Toolbar option	Summary
 Run Test	Having set required test criteria, use this option to run the current policy test.
 Reset	Use this option to clear all settings in the policy tester and start from a 'clean' point.

# Running a policy test

To run a policy test, follow the steps below:

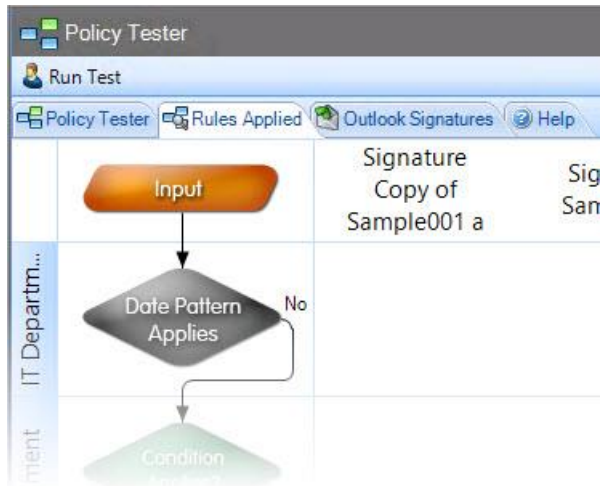
1. Ensure that policies are in the correct sequence on the [policy list \[pg.87\]](#).
2. Select the [policy tester](#) branch of the console tree.
3. Use the browse button associated with the [Outlook user](#) field to select the required user.
4. Click the arrow associated with the [test date](#) field to select the required date from a popup calendar. Having selected a date, you can adjust the time manually, if required.
5. Click the [run test](#) button from the toolbar.

## NOTE

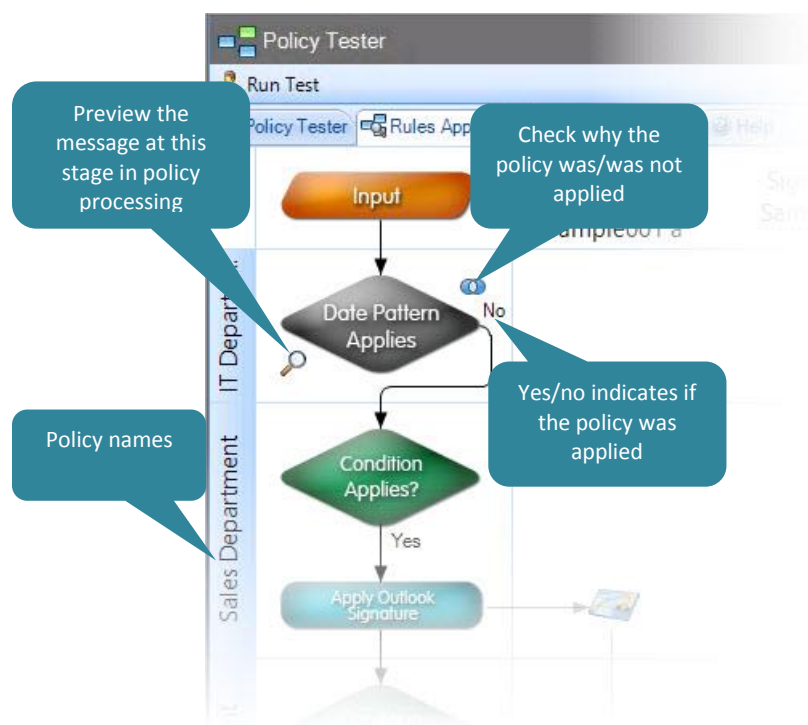
If a policy test applies signatures in a way that was not expected, ensure that your policies are sequenced correctly. For further information please see [understanding how policies are processed \[pg.98\]](#).

# Working with Rules Applied Information

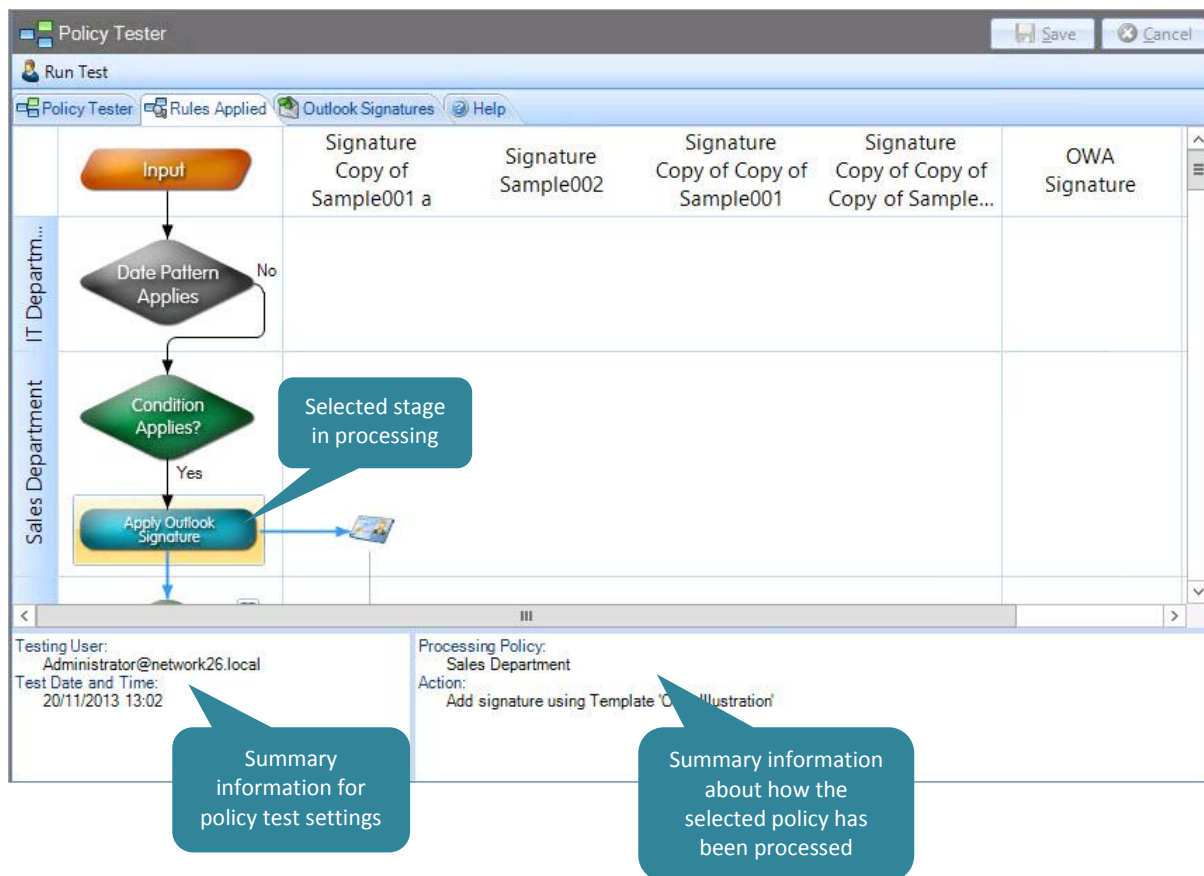
Having run a policy test, an additional tab named **rules applied** is displayed:



From here, you can view the outcome of the policy test as a **process diagram**. Here, each policy processed is displayed with a **yes** or **no** indicator, so you can see if the policy was applied. When you hover the cursor over a segment of the diagram, additional options are displayed:




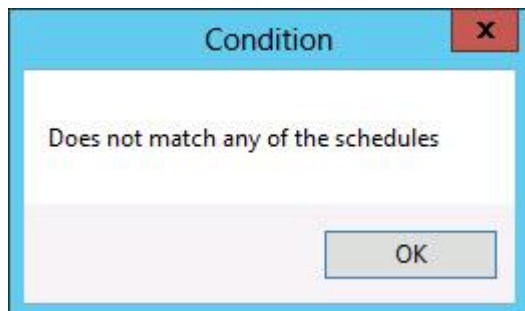
At the bottom of the [rules applied](#) window, summary information is available. From here, you can view basic settings for the policy test, and an explanation of how the selected policy has been processed (at the selected stage):



## Checking the Reason Why A Policy Is or Is Not Applied

To view a brief summary of why a policy was or was not applied to the user, hover the cursor over the relevant section of the process diagram until additional icons are displayed (as shown in the example above).



Click  to view summary information - for example:



More detailed information is available at the bottom of the [rules applied](#) tab, as described in the previous section.

## Previewing the Signature at Any Stage in the Process

To see a preview of the test signature at a particular stage of processing, hover the cursor over the relevant section of the process diagram until additional icons are displayed.

Click  and then  to open a [signature preview](#) window, where you can view the signature (as processed so far) in [HTML](#), [RTF](#) and [Plain Text](#) formats.

### NOTE

If a policy test applies signatures in a way that is not expected, ensure that your policies are sequenced correctly. For further information please see [understanding how policies are processed](#) [pg.98].

# Working with Test Signatures

Having run a policy test, an additional tab named **Outlook signatures** is displayed. From here, you can view the final signature as it would be applied, and confirm applicable **mail format** settings:



# Chapter 7

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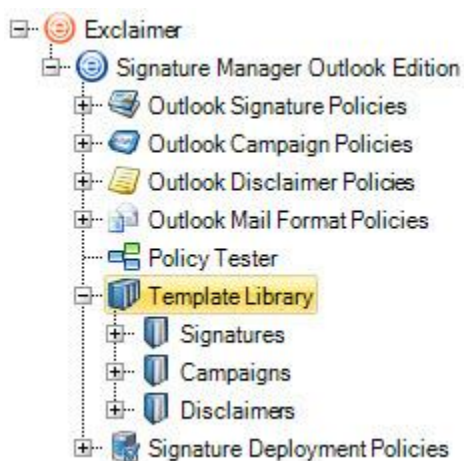
## The Template Library



# Template Library Introduction

Templates are used to create rich, sophisticated [HTML](#) layouts (including tables, images and dynamic [Active Directory](#) fields) for signatures, campaigns and disclaimers. Alternative versions are also created in [RTF](#) and [Plain Text](#) formats, so all message types can be handled, and you can be confident that signature content is always applied consistently, for all message types.

Within [Exclaimer Signature Manager Outlook Edition](#), all work with templates is completed using the [template library](#) (within the [Exclaimer console \[pg.66\]](#) tree):



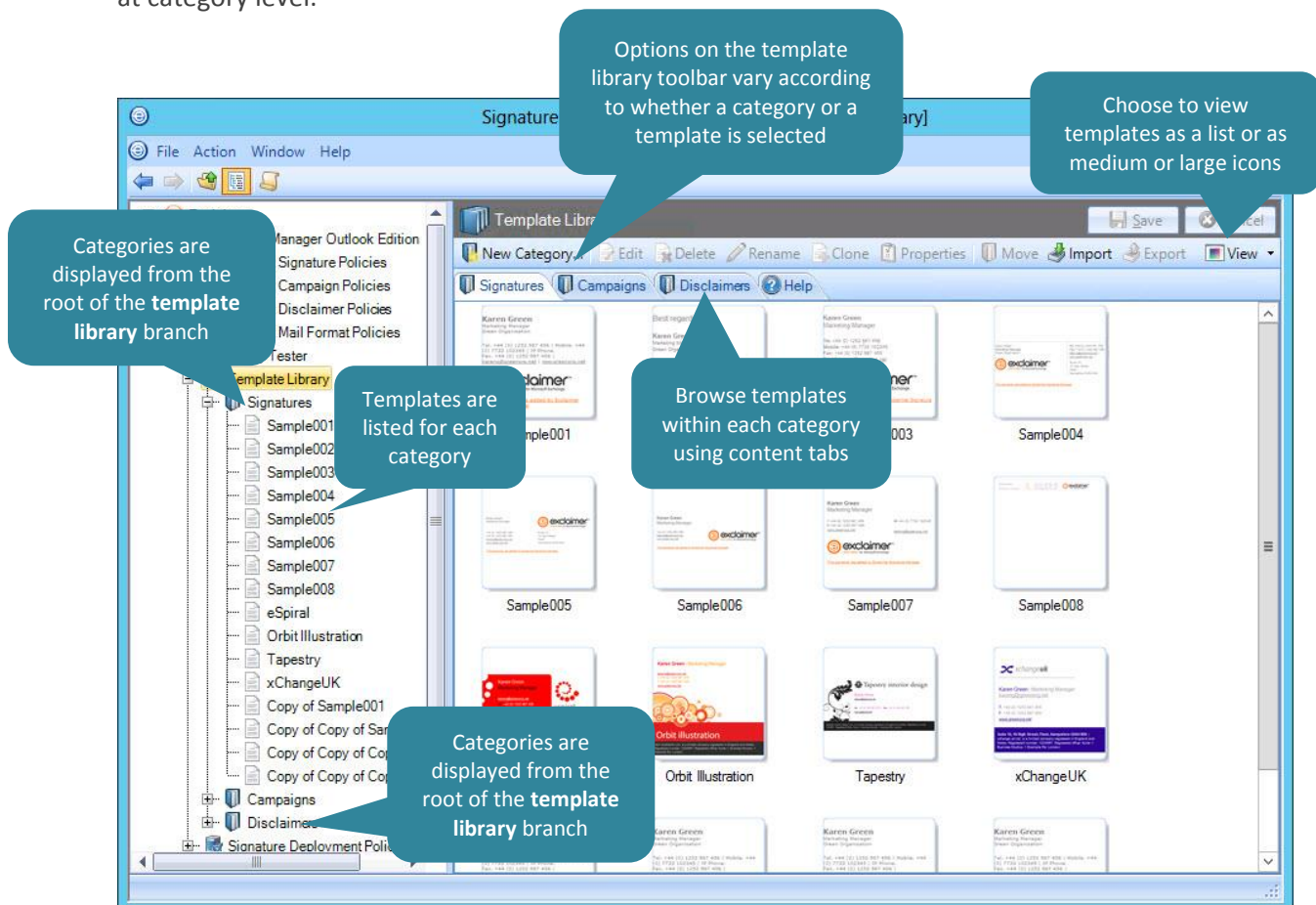
The [template library](#) is organized using [categories](#), so that templates of the same type are grouped. When the topmost branch ([template library](#)) is selected, you can browse templates and work at category level. Below this, you can select specific categories to browse, edit and add templates. This section explains how the [template](#) library is used, including:

- [Understanding the template library window \[pg.190\]](#)
- [Working with categories \[pg.193\]](#)
- [Adding a new template \[pg.198\]](#)
- [The template editor \[pg.208\]](#)
- [Cloning a template \[pg.200\]](#)
- [Exporting a template \[pg.201\]](#)
- [Importing a template \[pg.201\]](#)
- [Editing a template \[pg.202\]](#)
- [Renaming a template \[pg.203\]](#)
- [Moving a template \[pg.205\]](#)
- [Removing a template \[pg.206\]](#)

You can also learn more about specific tasks, using the [how to \[pg.330\]](#) section for templates.

# Understanding the Template Library Window

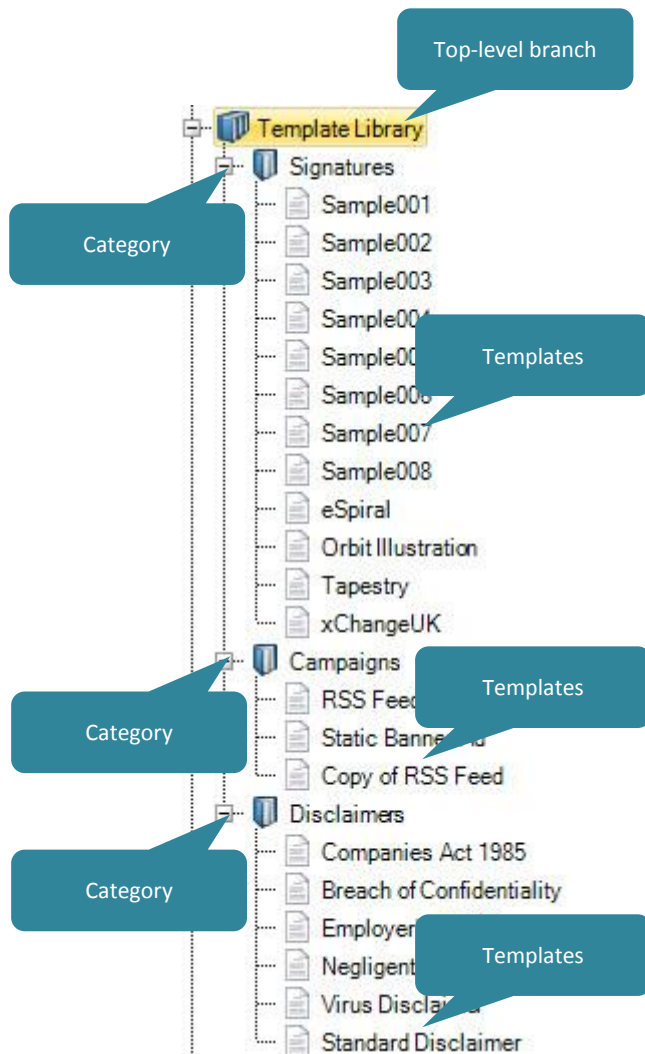
When the **template library** branch is selected in the console tree, you can browse templates and work at category level:



Options shown here are summarized in the following sections.



# The Console Tree

When the top level ([template library](#)) branch is selected in the console tree, any template categories are shown as child branches, followed by templates within those categories:



## The Template Library Toolbar

The [template library](#) toolbar provides quick access to key tasks. Options on this toolbar vary, depending on which branch of the library is currently selected. Those listed below are available when the top level ([template library](#)) branch is selected:

Option	Function	Notes
 New Category...	<a href="#">Create new category</a> [pg.194]	Adds a new category to the bottom of the console tree.
 Import	<a href="#">Import a template</a> [pg.201]	Previously exported template files can be imported into the template library.

## The Template Library Content Pane

When the top level ([template library](#)) branch is selected, the content pane displays available categories as a series of tabs. If a category is selected, templates within that category are shown in the content pane, and if a template is selected the content pane shows a preview of that template.

## View Options

When a category is selected, use [view](#) options to show templates as medium or large icons.

# Working with Categories

Within the [template library](#), categories are used to organise templates into logical groups. Default categories are provided for [signatures](#), [campaigns](#) and [disclaimers](#) but you can create as many of your own categories as required. There is no right or wrong way to define categories - use whatever structure suits your organizational needs.

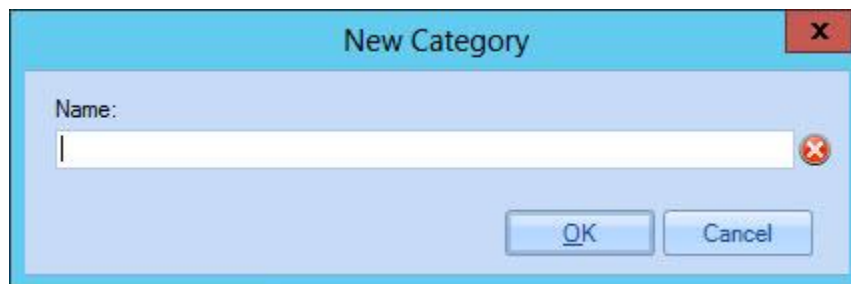
To view and browse existing categories, select the [template library](#) branch from the console tree. Existing categories can be viewed in the tree structure, or from the [content pane \[pg.192\]](#). From here you can:

- [Add a new category \[pg.194\]](#)
- [Rename a category \[pg.194\]](#)
- [Remove a category \[pg.195\]](#)

## Adding a New Category

To add a new template [category](#), follow the steps below:

1. Select the [template library](#) branch in the console tree.
2. Select the [new category](#) button from the toolbar, or right click and select [new category](#) from the context menu. You are prompted to enter a category name:

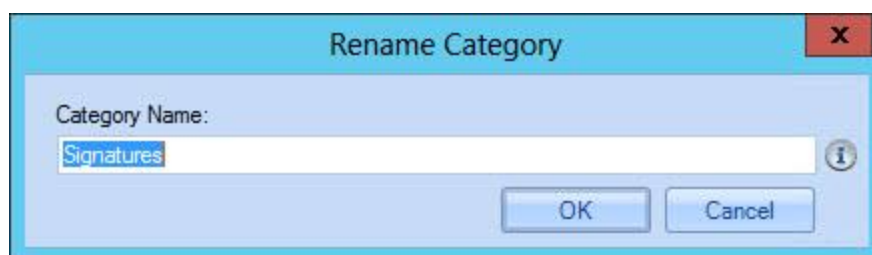
A screenshot of a 'New Category' dialog box. It has a light blue header with the title 'New Category' and a red close button (X) on the right. The main area is white and contains a label 'Name:' followed by a text input field. To the right of the input field is a red button with a white 'X'. At the bottom right are two buttons: 'OK' and 'Cancel'.

3. Enter the required name and click [OK](#). The new category is added to the end of the categories list in the console tree.

## Renaming a Category

To rename a template [category](#), follow the steps below:

1. Select the [template library](#) branch in the console tree.
2. Select the category to be updated.
3. Right click and select [rename category](#) from the context menu. The existing name is presented in editable form:

A screenshot of a 'Rename Category' dialog box. It has a light blue header with the title 'Rename Category' and a red close button (X) on the right. The main area is white and contains a label 'Category Name:' followed by a text input field. The input field contains the text 'Signatures'. To the right of the input field is a blue information icon (i). At the bottom right are two buttons: 'OK' and 'Cancel'.

4. Update the category name and click [OK](#).

### NOTE

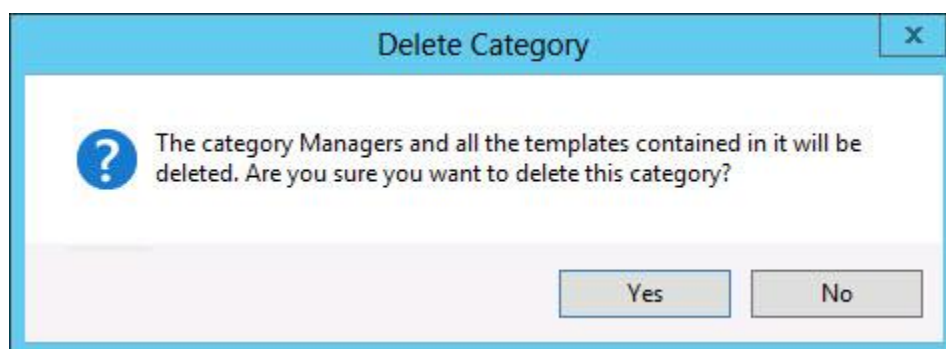
When you are satisfied that all changes have been made correctly, click the main **save** button to [save changes](#) [pg.79] made in this session. Alternatively, use the **cancel** button to abandon all changes.

## Removing a Category

It is important to note that removing a category will also remove any templates within that category. If required, you can [move existing templates](#) [pg.205] to alternative locations within the [template library](#), or you may wish to [rename](#) [pg.194] the category rather than remove it.

To remove a template category, follow the steps below:

1. Select the [template library](#) branch in the console tree.
2. Select the category to be removed.
3. Right click and select [delete category](#) from the context menu. You are prompted to confirm that you wish to proceed:



4. Click [yes](#) to remove the category.

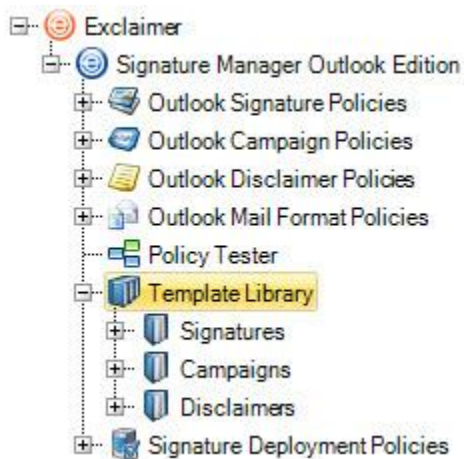
### NOTE

A category is not permanently deleted until settings have been saved. If you exit without saving (or **cancel** changes), the category will be reinstated in the console tree.

# Working with Templates

Templates are used to create rich, sophisticated [HTML](#) layouts (including tables, images and dynamic [Active Directory](#) fields) for signatures, campaigns and disclaimers. Alternative versions are also created in [RTF](#) and [Plain Text](#) formats, so all message types can be handled.

Within [Exclaimer Signature Manager Outlook Edition](#), all work with templates is completed using the [template library](#) (within the [Exclaimer console \[pg.66\]](#) tree):



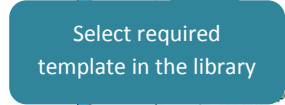
Having selected a template, you can preview and edit content in different formats using an intuitive [template editor \[pg.208\]](#), and of course you can add new templates to the library. This section explains how to work with templates, including:

- [Previewing a template \[pg.197\]](#)
- [Adding a new template \[pg.198\]](#)
- [The template editor \[pg.208\]](#)
- [Cloning a template \[pg.200\]](#)
- [Exporting a template \[pg.201\]](#)
- [Importing a template \[pg.201\]](#)
- [Editing a template \[pg.202\]](#)
- [Renaming a template \[pg.203\]](#)
- [Viewing template properties \[pg.204\]](#)
- [Moving a template \[pg.205\]](#)
- [Removing a template \[pg.206\]](#)

You can also learn more about specific tasks, using the [how to \[pg.330\]](#) section for templates.



To quickly see how a particular template will look when it is applied in a signature, simply select the required template from the console tree. The template is displayed in the **preview** tab (within the content pane):



Use the template breadcrumb trail to access parent categories

From here you can:

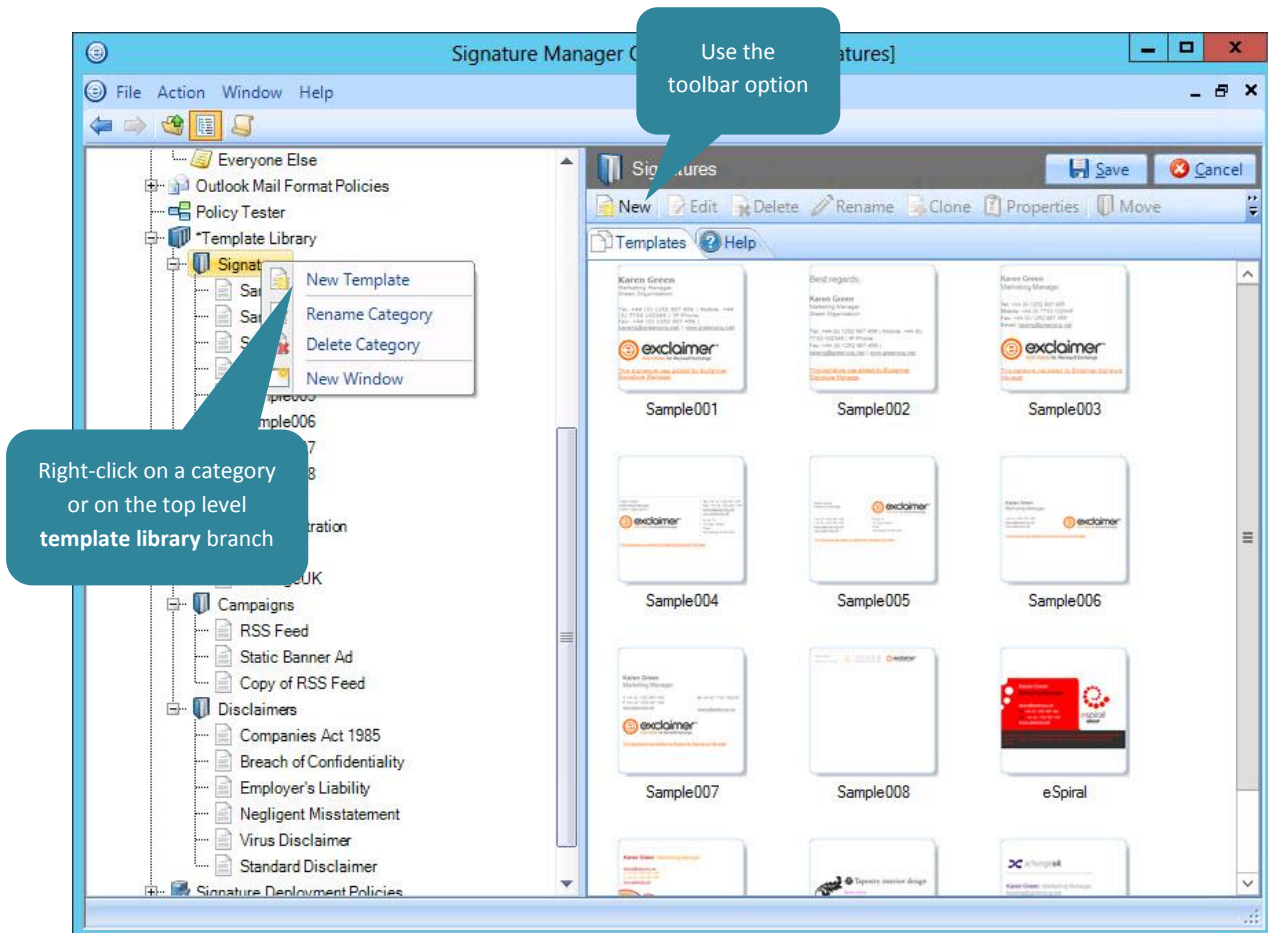
- Double click anywhere in the [preview](#) tab to [edit the template](#) [pg.202] in the [template editor](#) [pg.208]
- Select a template [category](#) [pg.193] from the template breadcrumb trail to view other templates in that category
- Use toolbar options to [edit](#) [pg.202], [delete](#) [pg.206], [clone](#) [pg.200], [rename](#) [pg.203] or [move](#) [pg.205] the template

## NOTE

This **preview** option always shows the **HTML** version of the template. If you wish to preview **RTF** or **Plain Text** versions, you should choose to edit the template [pg.202] and select the **preview** mode for the required format.

# Adding a New Template

The **new template** option can be accessed from the **console tree** and also from the template library toolbar:



## Preparation

It is best to collect all the information you might need before you start creating your templates. For example:

- Legal (disclaimer) text; obtain a brief of any legal text that must be sent with outgoing email messages (it is important to check what local legislation applies to your organization to ensure compliance).
- Logo images; any images should be in the correct size and file format for the web (It is considered best practice to use small image files in any emails).
- General branding images.
- Color references (in web-safe RGB hexadecimal if you have them).
- Brand / style guidelines (for example, you might have an in-house style guide which details preferred fonts to be used).

## To Add a New Template

To add a new template, follow the steps below:

1. Select the [new template](#) option to open a blank template in the [template editor \[pg.208\]](#). At this stage, the new template is added to the [template](#) library with a temporary name (this name reflects the category name).
2. Create your template with required text and formatting.

NOTE

Remember that you can use tables, images, dynamic fields and properties when creating templates. Please refer to [the template editor \[pg.208\]](#) section of this guide for detailed information about editor options.

3. Switch between [HTML](#), [RTF](#) and [Plain Text](#) tabs to create the template in each format.

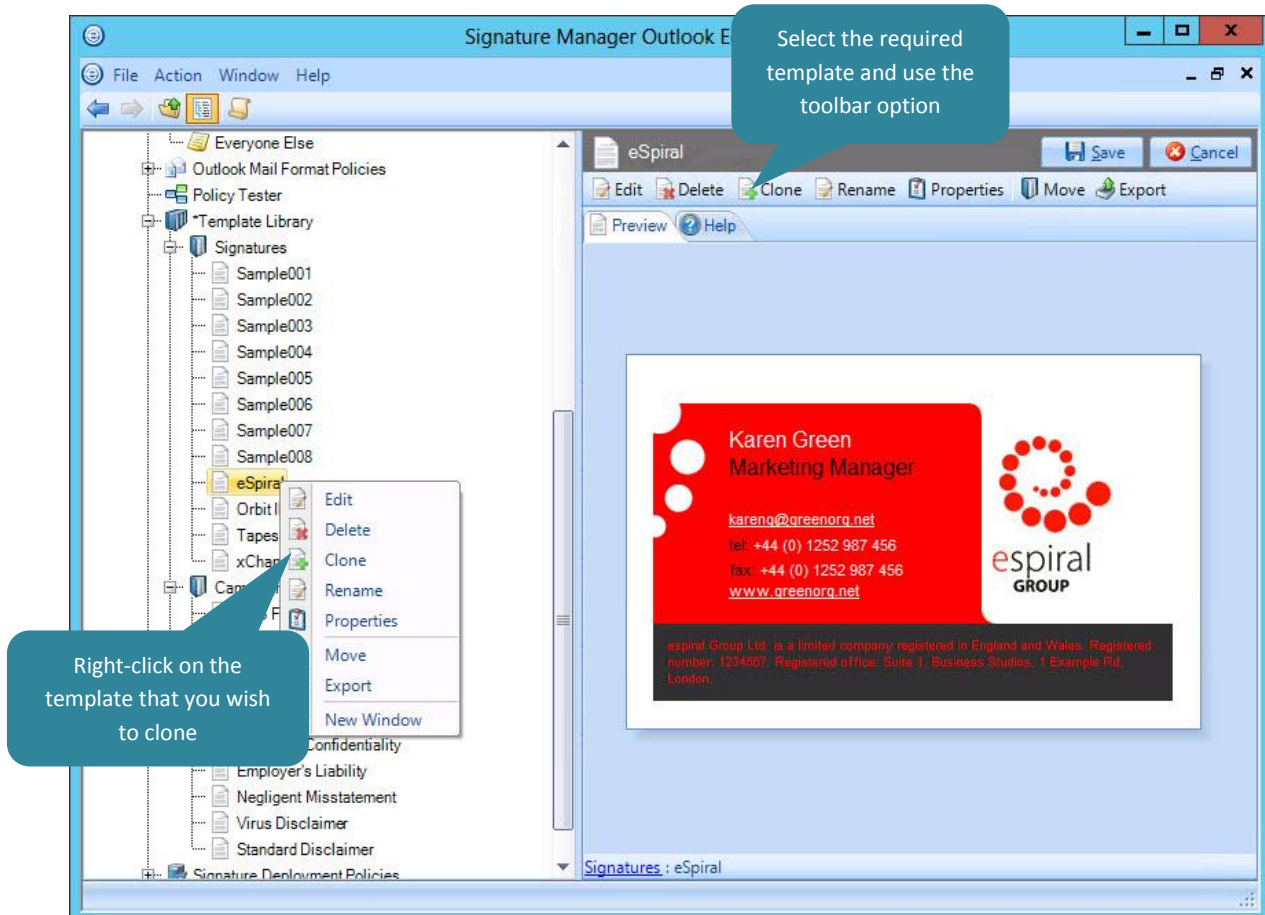
NOTE

You must create versions in each format for each template, as email could be sent in any of these three formats.

4. Click [save and close](#) (from the editor toolbar) to return to the [template library](#). If you have not updated all format tabs ([HTML](#), [RTF](#) and [Plain Text](#)), warnings are displayed before you can save the template.
5. If required, [rename \[pg.203\]](#) the new template.
6. If required, [move \[pg.205\]](#) the template to a different [category \[pg.193\]](#).
7. Click the main [save](#) button to [save changes \[pg.79\]](#) made in this session. Alternatively, use the [cancel](#) button to abandon all changes.

## Cloning a Template

If you need to create a new template which has similar settings to an existing template, it is quicker to take a copy of the existing template and then update that copy (as opposed to [creating a new template from first principles](#) [pg.198]). The **clone** option is used to create a copy of an existing template for this purpose, and is available from the **template library** toolbar and the right-click menu:



To clone an existing template, select the template to be copied from the console tree, then either click **clone** from the toolbar or right click and select **clone** from the context menu. A copy of the selected template is added to the console tree, ready to be updated:

From here you can [change the name](#) [pg.203] and [edit template content](#) [pg.202] as required. Having updated the cloned template, click the main **save** button to [save changes](#) [pg.79] made in this session. Alternatively, use the **cancel** button to abandon all changes.

## Exporting a Template

If required, you can export a template to a file. This is useful (for example) if you wish to delete a template but need to take a copy first, just in case the template is needed in future.

To export a template, follow the steps below:

1. In the console tree, select the parent category for the template so that available templates for that category are displayed in the content pane.
2. In the content pane, select the template to be exported. Notice that [import](#) and [export](#) options are now activated on the toolbar.
3. Select [export](#) to open the [save as](#) window.

### NOTE

The **file name** defaults to the name of the selected template and the **file type** is **zip**. A **zip** file is used because there are multiple parts to a template file - it is not a single document.

4. Navigate drives and folders to select the required location for the template file.
5. Click [save](#) to complete the export.

## Importing a Template

Previously [exported](#) [pg.201] template files can be imported into the [template library](#). To do this, follow the steps below:

1. In the console tree, select a parent category for the template. Notice that [import](#) and [export](#) options are now activated on the toolbar.
2. Select [import](#) to display the [open](#) window.

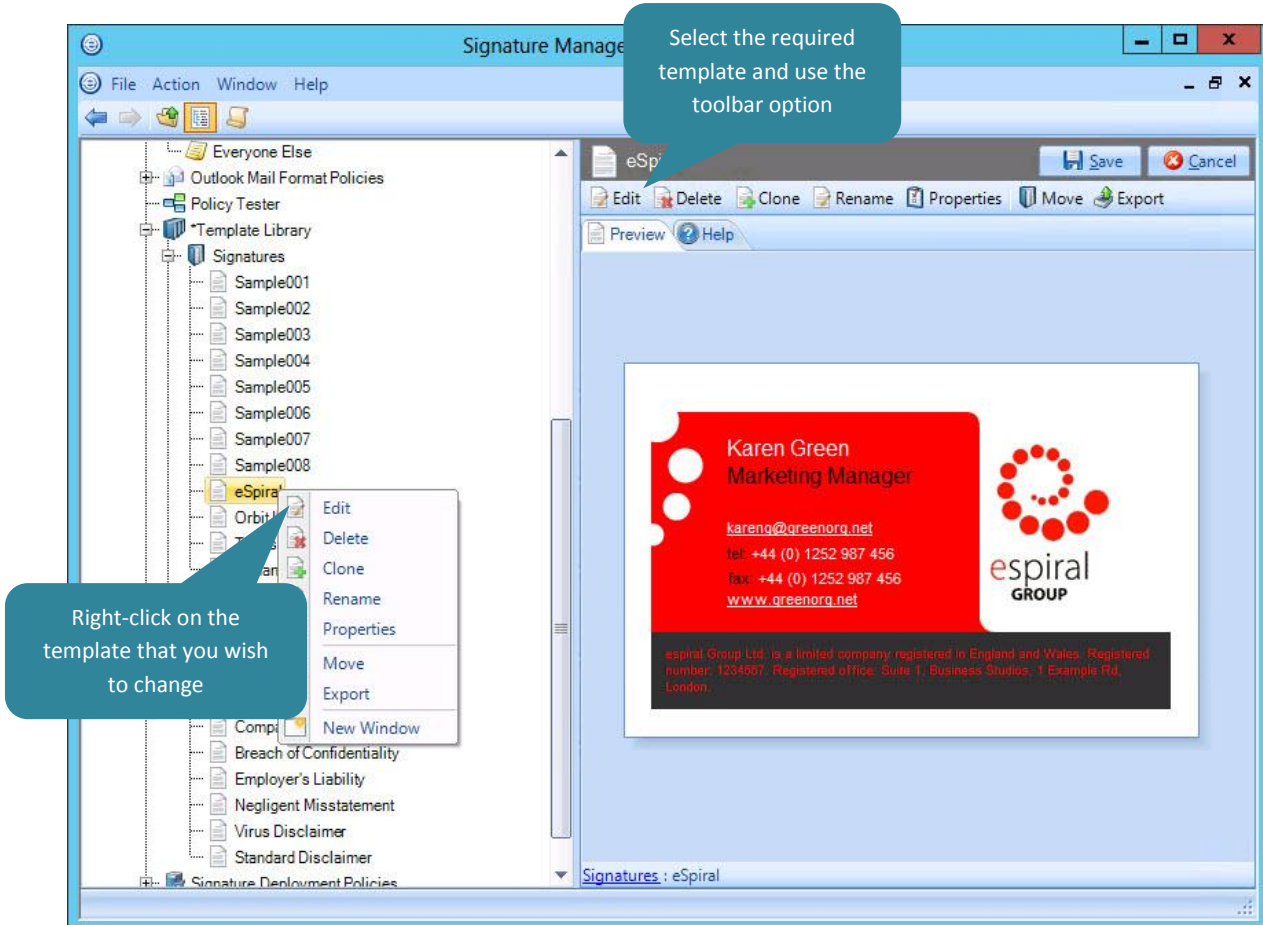
### NOTE

When a template is exported, the exported file format is **.zip**. Notice that the default file type here is set to **.zip**.

3. Navigate drives and folders to select the required import file.
4. Click [open](#) to complete the import and add the template to the [template library](#).

## Editing a Template

The [edit](#) option is available from the [console tree](#), from the library [toolbar](#) and by double clicking anywhere in the template preview pane:



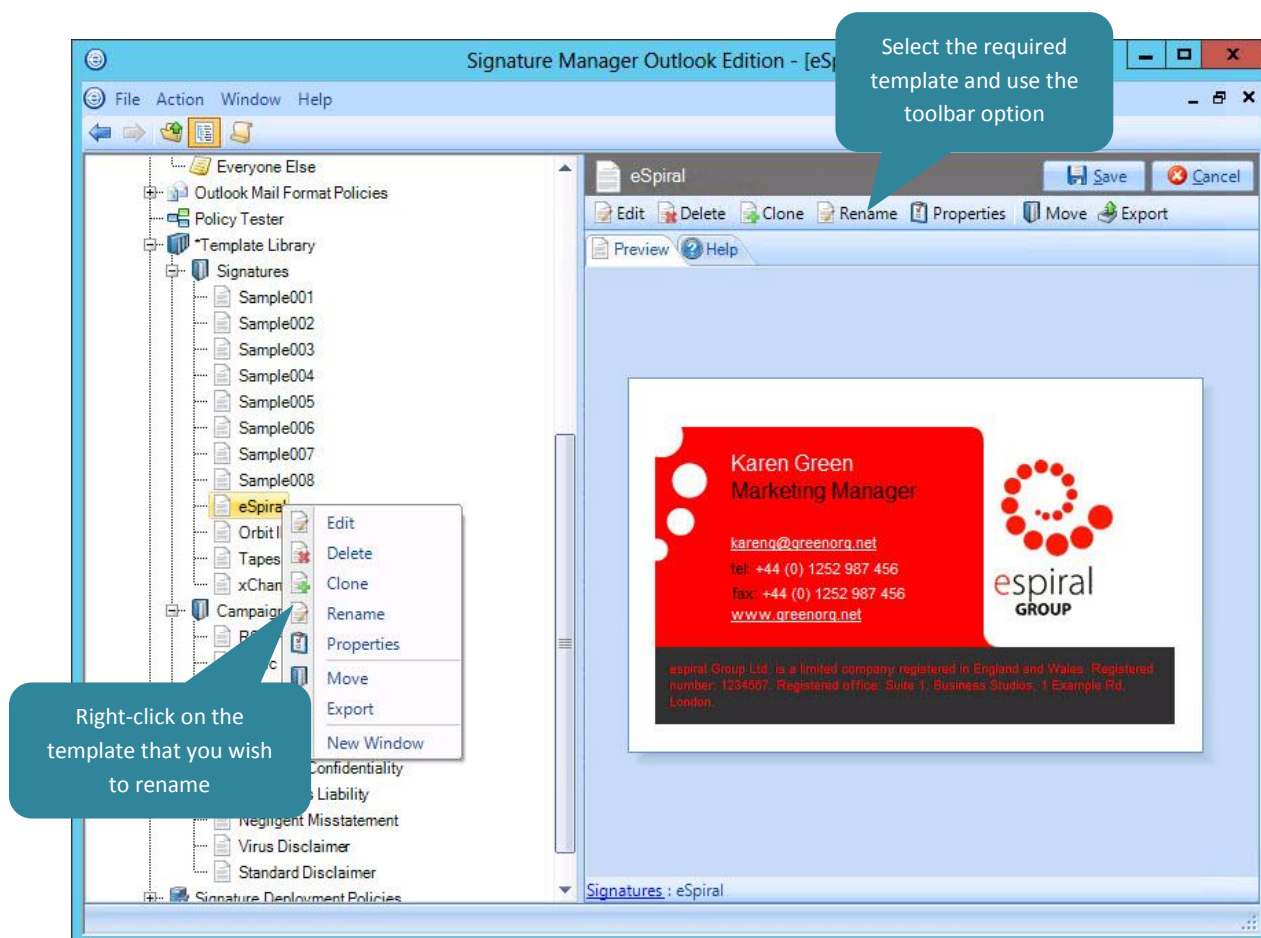
Having selected the [edit](#) option, the template is opened in the [template editor](#) [pg.208]. Simply make required changes, then click [save and close](#) (from the editor toolbar) to return to the [template library](#).

When you are satisfied with changes to the template, click the main [save](#) button to [save changes](#) [pg.79] made in this session. Alternatively, use the [cancel](#) button to abandon all changes.

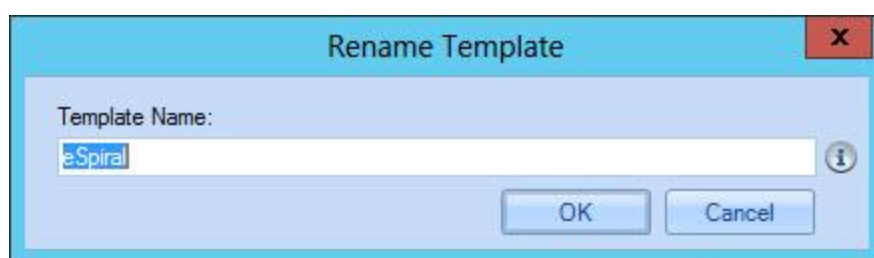


# Renaming a Template

The **rename** option is available from the **console tree** and from the template library **toolbar**:



Having selected the **rename** option, you are prompted to enter a template name:



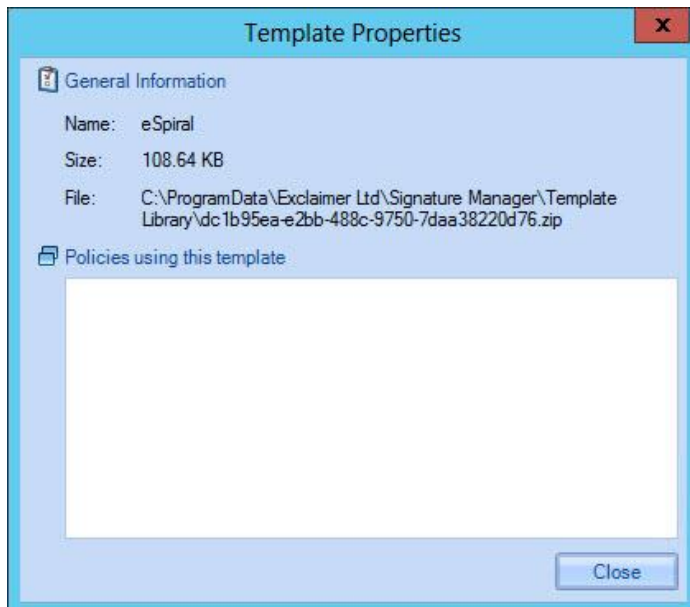
Simply enter the required name and click **OK**.

## NOTE

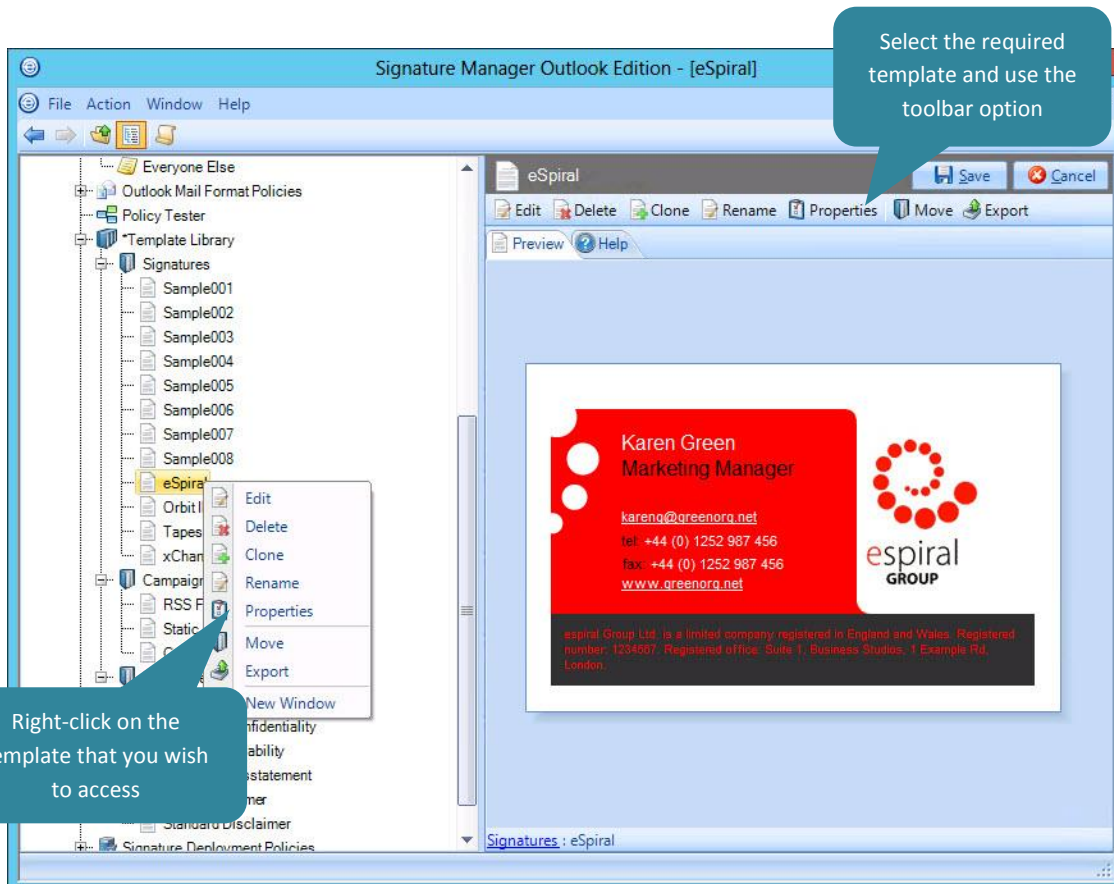
When you are satisfied that all tabs have been updated correctly, click the **save** button to **save changes** [pg. 79] made in this session. Alternatively, use the **cancel** button to abandon all changes.

# Viewing Template Properties

The **template properties** window shows general information about the template. From here you can see the template name, size and file location together with a list of policies using the template:



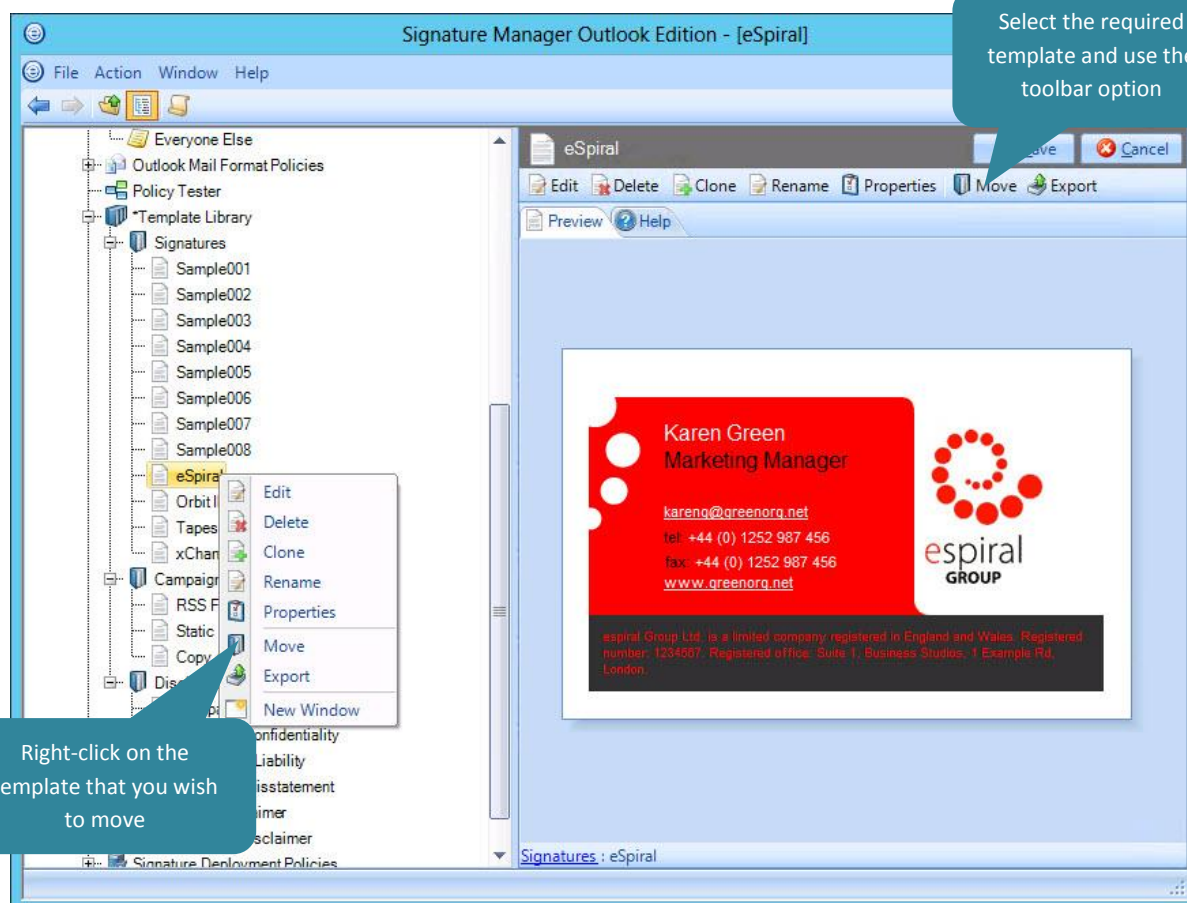
The **properties** option is available from the **template library** toolbar and from the right-click menu:



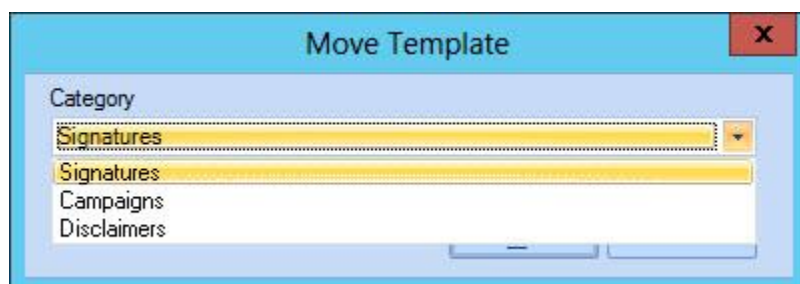


# Moving a Template

Templates can be moved from one category to another using the **move** option, available from the **template library** toolbar and the right-click menu:



Having selected the **move** option, a list of available categories is displayed:



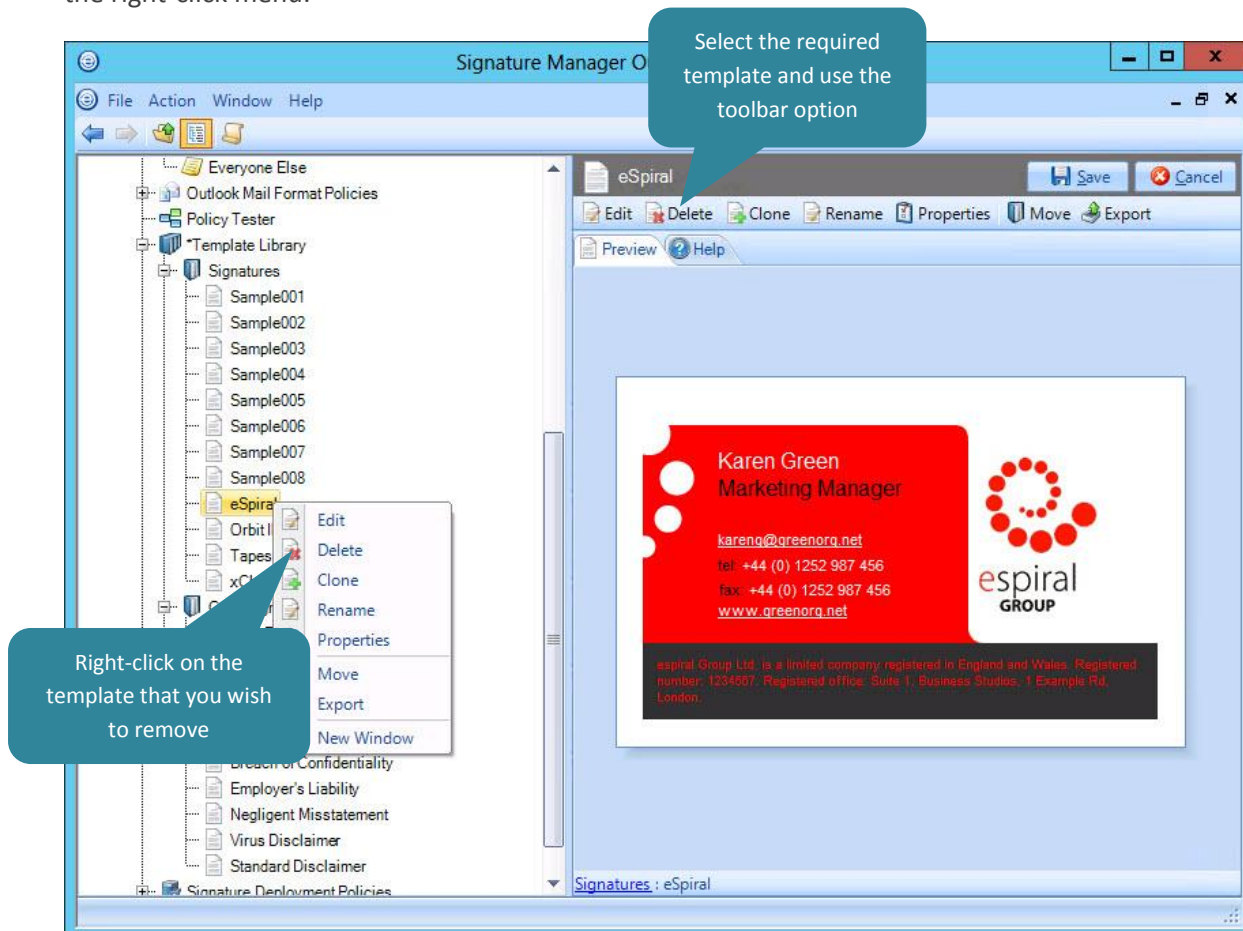
Select the required category and click **OK** to complete the operation.

## NOTE

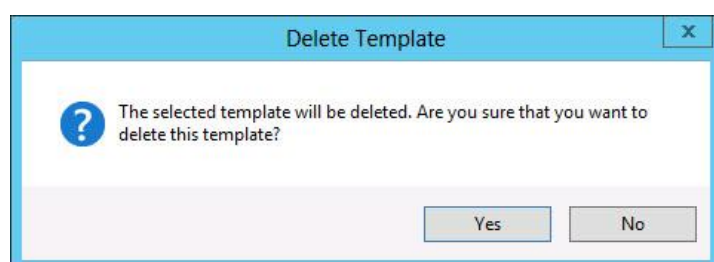
Click the main **save** button to save changes [pg.79] made in this session. Alternatively, use the **cancel** button to abandon all changes.

# Removing a Template

Templates can be removed using the **delete** option, available from the template library toolbar and the right-click menu:



Having selected the **delete** option, you are prompted to confirm that you wish to proceed:



Click **yes** to remove the selected template.

## NOTE

A template is not permanently deleted until settings have been saved. If you exit without saving (or **cancel** changes), the template will be reinstated in the console tree.

# Chapter 8

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## The Template Editor

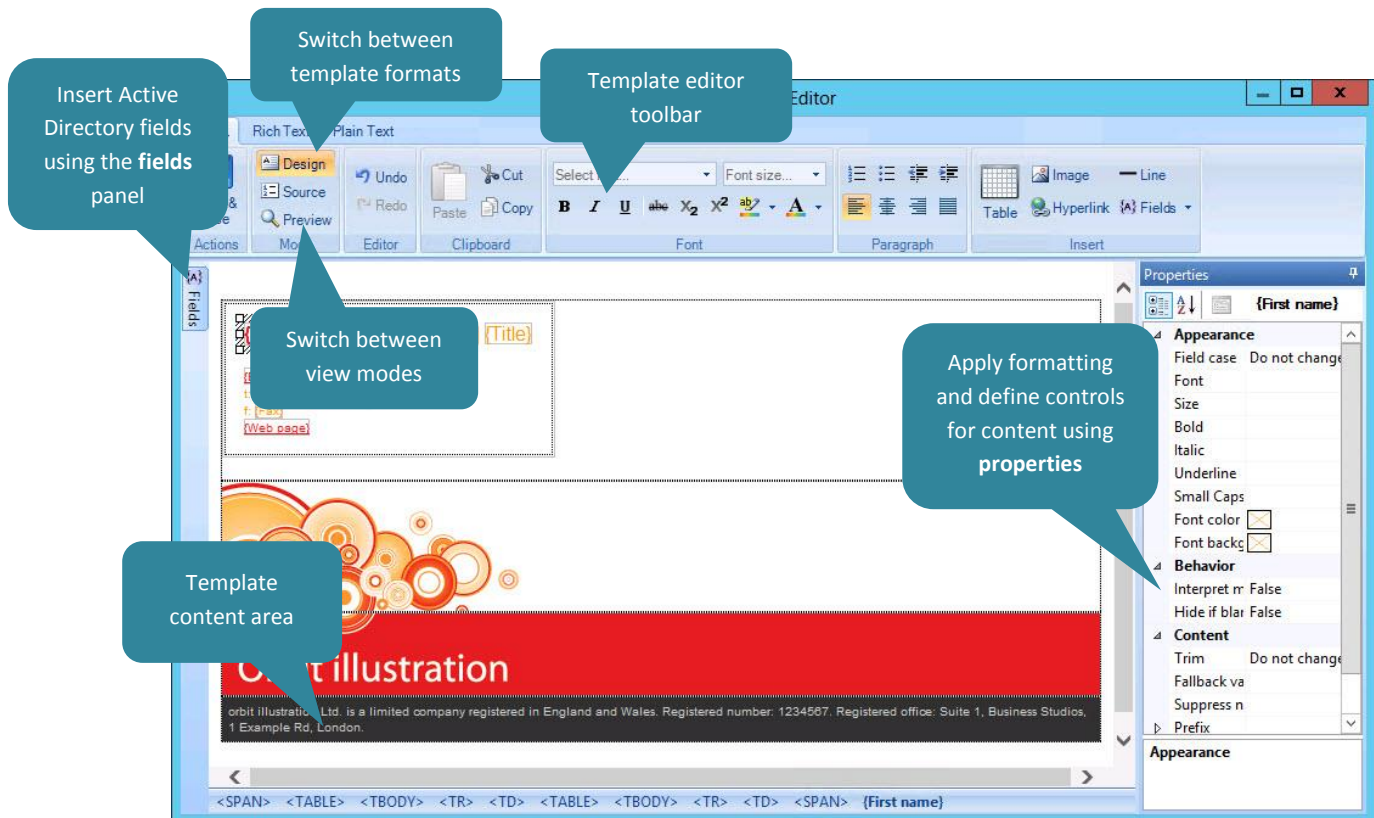
# Template Editor Introduction

The [template editor](#) is used to add, edit and preview templates in [HTML](#), [RTF](#) and [Plain Text](#) formats. With a look and feel that will be familiar to [Microsoft Outlook](#) users, you can create templates which are as basic or as sophisticated as required. This section provides an introduction to the template editor, including:

- [Understanding the template editor window](#) [pg.209]
- [Template editor - toolbar variations](#) [pg.212]
- [Fields](#) [pg.219]
- [Properties](#) [pg.313]

# Understanding the Template Editor Window

The **template editor** is used to add, edit and preview templates in **HTML**, **RTF** and **Plain Text** formats:



The editor has a familiar, intuitive design, as summarized in the following sections.

## The Content Area

All content is added to the main content area of the [template editor](#). When you choose to add a new template, the editor is opened and you can add text, images and [Active Directory fields](#) [pg.219] as required.

## Switching Between Different Views

Toolbar options are available for switching between [design](#), [source](#) and [preview](#) modes, where:

- The [design](#) option shows the template design in WYSIWYG (What You See Is What You Get) mode, so you can edit content in situ.
- The [source](#) option displays [HTML](#) source code for the template.
- The [preview](#) option shows how the template will be displayed using a sample email message. If required, you can choose a specific user to see how the template would be displayed using details for that sender.

## Switching Between Different Format Types

Tabs at the top of the editor are used to switch between different formats for a template ([HTML](#), [RTF](#) and [Plain Text](#)). When a new template is added, all three formats must be updated.

## The Template Editor Toolbar

If you are used to working with [Microsoft Outlook](#), the template editor toolbar will be very familiar. When switching between format tabs, toolbar options will change, since some options are only applicable to a given format (for example, you can insert tables into [HTML](#) templates, but not in [RTF](#) or [Plain Text](#) versions). For a summary of the different toolbar options, see [template editor - toolbar variations](#) [pg.212].

## The Fields Panel

The [fields](#) option is used to insert dynamic content from the [Active Directory](#). Click on the [fields](#) option to activate the fields panel - a list of available fields that can be inserted into the template. Once a [field](#) has been inserted, this panel is automatically hidden so that the template editor is not cluttered.

Fields can be used in all template formats ([HTML](#), [RTF](#) and [Plain Text](#)). For further information, see the [fields](#) [pg.219] section of this guide.

# The Properties Pane

Properties are used to format and control template content. Almost every piece of content added to a template will have properties associated with it - for example, text, tables, images, fields, hyperlinks, etc. The [properties](#) pane changes to reflect the current selection in the [template editor](#) - see the [properties \[pg.313\]](#) section of this guide for further information.

# Toolbar Variations

When working with the [template editor](#), each template is created in three formats - [HTML](#), [RTF](#) and [Plain Text](#). You must define all three formats for each template; this ensures that all scenarios are catered for.

With [Exclaimer Signature Manager Outlook Edition](#), creating different versions of a template is made simple, using the [HTML](#), [RTF](#) and [Plain Text](#) tabs at the top of the template editor. When a tab is selected, toolbar options are updated to show options that are relevant for that format.

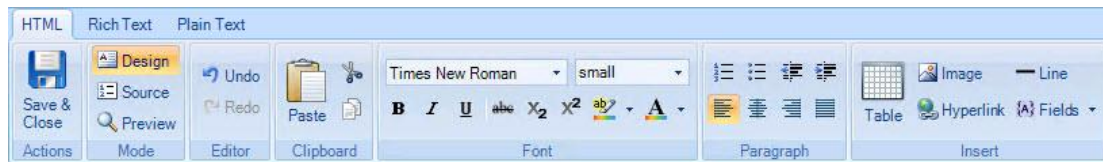
This section summarizes toolbar options for each format:

- [The HTML editor toolbar \[pg.213\]](#)
- [The RTF editor toolbar \[pg.214\]](#)
- [The Plain Text editor toolbar \[pg.215\]](#)



# The HTML Editor Toolbar

HTML templates can be sophisticated and feature-rich, utilizing many of the options and techniques that you would expect from web pages (including tables, images, hyperlinks and dynamic content fields):

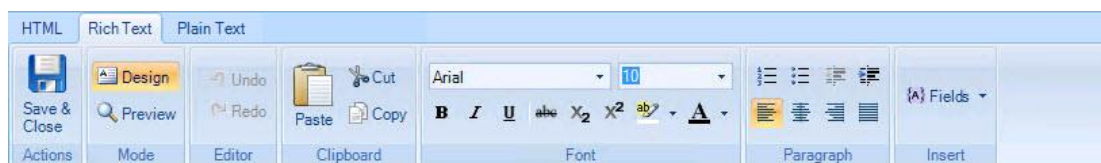


These options are summarized below:

Toolbar Option	Summary
Actions	Save and close the current template and return to the template library.
Mode	<p>Mode options are used to switch between different view modes. Choose from:</p> <ul style="list-style-type: none"> <li>design - view and work with the WYSIWYG editor</li> <li>source - view and work with the HTML source</li> <li>preview - preview the template applied to a test message</li> </ul>
Editor	<p>Editor options are used to perform key editorial tasks. Choose from:</p> <ul style="list-style-type: none"> <li>undo - undo the last action in the editor</li> <li>redo - redo the last action in the editor</li> </ul>
Clipboard	<p>Clipboard options are used to manipulate text. Choose from:</p> <ul style="list-style-type: none"> <li>copy - copy currently selected text to the Windows clipboard</li> <li>cut - remove currently selected text and copy it to the Windows clipboard</li> <li>paste - paste previously copied text at the current cursor position</li> </ul>
Font	<p>Font options are used to apply formatting to text.</p> <ul style="list-style-type: none"> <li>font name - select the required font from the drop-down list</li> <li>font size - select the required font size from the drop-down list</li> </ul> <p>Remaining options are summarized below, listed from left to right: bold, italic, underline, strike through, sub script, super script, highlight color, font color.</p>
Paragraph	<p>Paragraph options are used to apply paragraph formatting. Options are summarized below, listed from left to right:</p> <p>numbered list, bulleted list, outdent, indent, align left, center, align right, justify.</p>
Insert	<p>Insert options are used to apply more detailed formatting and interactive content. Options are summarized below, listed from left to right:</p> <p>insert table, insert image, insert horizontal line, insert hyperlink, insert fields.</p>

# The RTF Editor Toolbar

RTF templates can include standard formatting options and dynamic content fields:

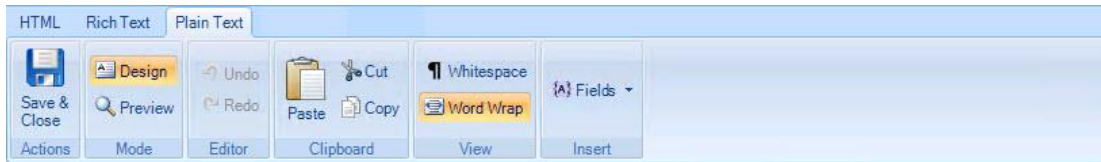


These options are summarized below:

Toolbar Option	Summary
Actions	Save and close the current template and return to the template library.
Mode	<p>Mode options are used to switch between different view modes. Choose from:</p> <ul style="list-style-type: none"> <li>• <b>design</b> - view and work with the WYSIWYG editor</li> <li>• <b>preview</b> - preview the template applied to a test message</li> </ul>
Editor	<p>Editor options are used to perform key editorial tasks. Choose from:</p> <ul style="list-style-type: none"> <li>• <b>undo</b> - undo the last action in the editor</li> <li>• <b>redo</b> - redo the last action in the editor</li> </ul>
Clipboard	<p>Clipboard options are used to manipulate text. Choose from:</p> <ul style="list-style-type: none"> <li>• <b>copy</b> - copy currently selected text to the Windows clipboard</li> <li>• <b>cut</b> - remove currently selected text and copy it to the Windows clipboard</li> <li>• <b>paste</b> - paste previously copied text at the current cursor position</li> </ul>
Font	<p>Font options are used to apply formatting to text.</p> <ul style="list-style-type: none"> <li>• <b>font name</b> - select the required font from the drop-down list</li> <li>• <b>font size</b> - select the required font size from the drop-down list</li> </ul> <p>Remaining options are summarized below, listed from left to right:  <b>bold</b>, <b>italic</b>, <b>underline</b>, <b>strike through</b>, <b>sub script</b>, <b>super script</b>, <b>highlight color</b>, <b>font color</b>.</p>
Paragraph	<p>Paragraph options are used to apply paragraph formatting. Options are summarized below, listed from left to right:  <b>numbered list</b>, <b>bulleted list</b>, <b>outdent</b>, <b>indent</b>, <b>align left</b>, <b>center</b>, <b>align right</b>, <b>justify</b>.</p>
Insert	Insert options are used to insert <b>Active Directory fields</b> into the template.

# The Plain Text Editor Toolbar

Plain text templates are composed without any formatting information; however you can still include [Active Directory fields](#). When the template editor is set to [Plain Text](#) mode, the toolbar is shown as below:

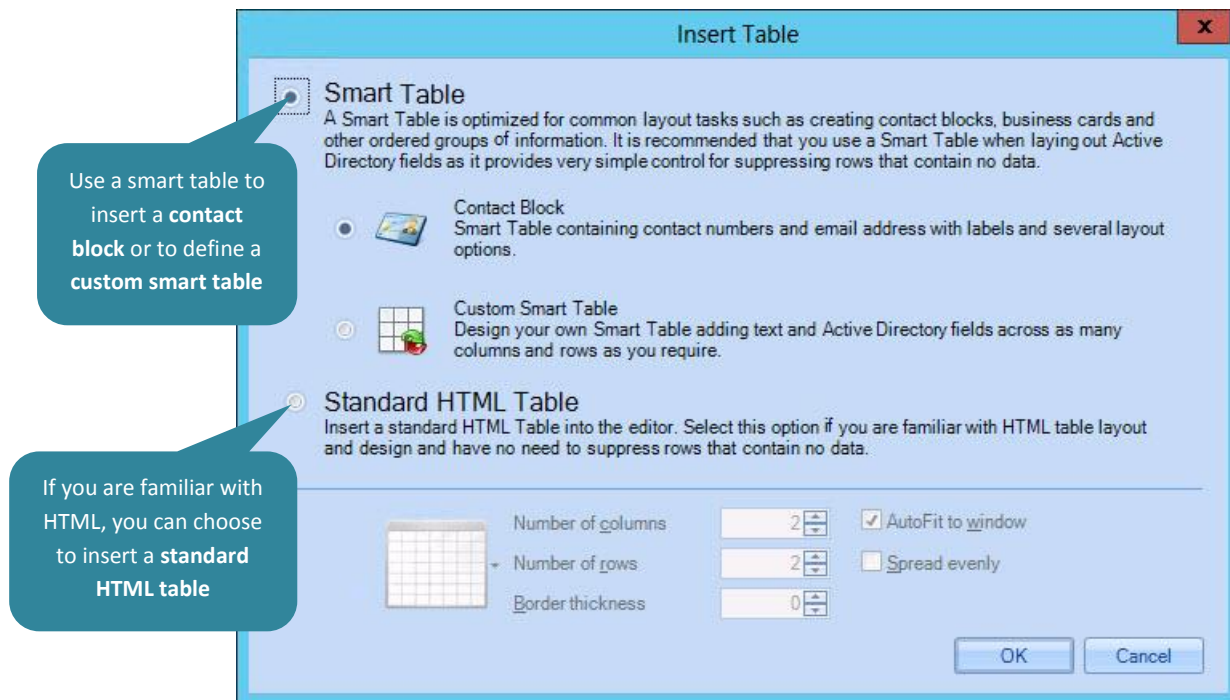


These options are summarized below:

Toolbar Option	Summary
Actions	Save and close the current template and return to the template library.
Mode	<a href="#">Mode</a> options are used to switch between different view modes. Choose from: <ul style="list-style-type: none"><li>• <a href="#">design</a> - view and work with the WYSIWYG editor</li><li>• <a href="#">preview</a> - preview the template applied to a test message</li></ul>
Editor	<a href="#">Editor</a> options are used to perform key editorial tasks. Choose from: <ul style="list-style-type: none"><li>• <a href="#">undo</a> - undo the last action in the editor</li><li>• <a href="#">redo</a> - redo the last action in the editor</li></ul>
Clipboard	<a href="#">Clipboard</a> options are used to manipulate text. Choose from: <ul style="list-style-type: none"><li>• <a href="#">copy</a> - copy currently selected text to the Windows clipboard</li><li>• <a href="#">cut</a> - remove currently selected text and copy it to the Windows clipboard</li><li>• <a href="#">paste</a> - paste previously copied text at the current cursor position</li></ul>
View	<a href="#">View</a> options are used to help when working with <a href="#">Plain Text</a> . Select the <a href="#">whitespace</a> option to view paragraph markers within the editor and click <a href="#">word wrap</a> to wrap text to accommodate the window size. These options do not change the way in which the template will be viewed by recipients.
Insert	<a href="#">Insert</a> options are used to insert <a href="#">Active Directory fields</a> into the template.

# Tables

When working with [HTML](#) templates, using the [table](#) option from the editor toolbar displays an [insert table](#) options window:



From here, you can choose the type of table to be inserted - choose from:

- A smart table - contact block
- A smart table - custom
- A standard HTML table

These options are summarized in the following sections.

## Smart table - Contact Block

When working with templates, one of the most common requirements is to insert standard contact information for the message sender. You can do this by adding individual [fields](#) [pg.219] to the template, but it can be neater and quicker to use a predefined [contact block](#).

A [contact block](#) is essentially a table of commonly used message sender fields - for example:

<b>DDI:</b>	{Pager}
<b>Tel:</b>	{Telephone number}
<b>Fax:</b>	{Fax}
<b>Email:</b>	{E-mail (as hyperlink)}
<b>Web:</b>	{Web page (as hyperlink)}

A key benefit of using a [contact block](#) rather than individual fields is that you can choose to suppress a row if there is no information in the message sender's [Active Directory](#) information to include. For example, if a [contact block](#) includes a {fax} field but there are no fax details for a message sender, the 'fax' row of the block is not displayed when the message is sent.

Once inserted, a [contact block](#) can be edited - for example, you might wish to swap one field for another, or adjust the formatting (using [properties](#) [pg.313]). For further information, please see [how do I create a contact block?](#) [pg.334]

### NOTE

When the **contact block** is selected from the **insert table options** window, table rows and attributes are not available. This is because the **contact block** is a predefined table; however you can adjust the table once it has been inserted into the template.

## Smart Table - Custom

The [custom smart table](#) option can be used to insert a table and specify content / attributes using straightforward data entry fields. This is a quick and easy way to insert a table and include [Active Directory](#) fields (or other content) at the same time; the alternative would be to insert a standard [HTML](#) table and add fields or other content manually.

For further information, please see the [smart tables](#) [pg.268] page.

## Standard HTML Table

If you wish to insert a standard [HTML](#) table and do not wish to specify any content until after it has been added to the template, use the [standard HTML table](#) option. This is useful (for example) if you wish to insert a basic table to form the basic layout of a template, or if you wish to include tabular data which is not comprised of fields.

Having selected the [standard HTML table](#) option from the [insert table](#) window, you can set the number of columns and rows, together with border, autofit and spread attributes. Then, click [OK](#) to insert the table and start to add content.

## The HTML Element Trail

When working with any kind of table in the HTML template editor, it may be useful to note the 'HTML element trail' at the bottom of the editor window:



<TABLE> <TBODY> <TR> <TD> <FONT> <P> {Contact Block}

Depending on the size of your table, it can sometimes be tricky to select a particular row, column or cell, but you can do this very easily from the element trail - just click the required element. When you click on an element, further options are displayed:



Selecting properties will show properties for this table element in the [properties pane](#) [\[pg.313\]](#).

# Fields

Templates can include a wide range of dynamic information using [Active Directory fields \[pg.222\]](#). These fields are inserted into templates (using the [template editor \[pg.208\]](#)) and then dynamically updated when signatures are generated.

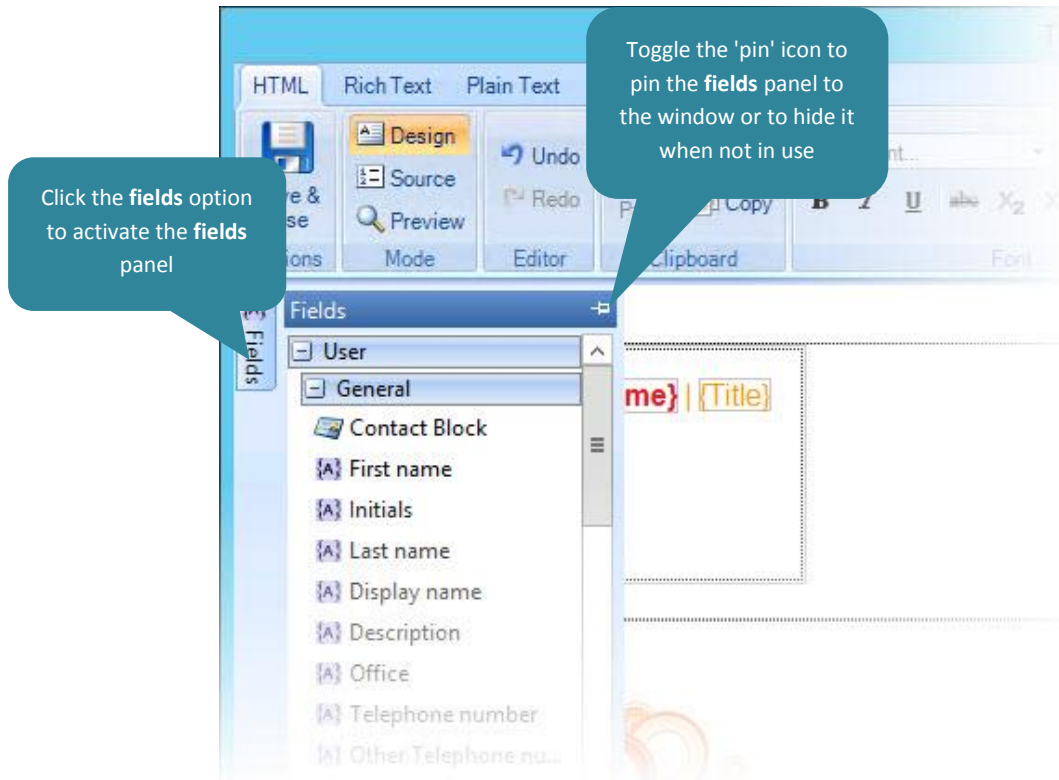
For example, you might define a template for a standard signature, which uses fields for the message sender's name, department and telephone number. Each time this template is applied to a signature, fields are replaced with the associated [Active Directory](#) content for the user. This allows you to personalize signatures without the need to create a different signature for each individual user.

This section contains useful information for working with fields, including:

- [Working with the fields panel \[pg.220\]](#)
- [Working with fields \[pg.221\]](#)
- [Available fields \[pg.222\]](#)

# Working With the Fields Panel

When not in use, the fields panel is hidden, to avoid cluttering editing space in the [template editor](#) [pg.208]. To activate this panel, click the [fields](#) option on the top, left-hand side of the [template editor](#):



Scroll down the list to view fields, which are organized into related groups, namely:

- [User > General](#) [pg.223]
- [User > Address](#) [pg.224]
- [User > Telephone](#) [pg.225]
- [User > Organization](#) [pg.226]
- [User > Exchange Advanced](#) [pg.226]
- [User > AD Photos](#) [pg.226]
- [User > Other AD Fields](#) [pg.227]
- [Dynamic content](#) [pg.228]
- [Advanced](#) [pg.270]
- [General](#) [pg.312]

To insert a field, simply double click the required entry in the panel. The field is inserted and the fields panel closes automatically. If you do not wish to insert a field, click the [fields](#) button to close the panel.



# Working with Fields

## Using Spaces between Fields

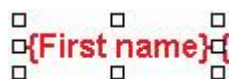
The placement of content will be made exactly as displayed in the editor. For example, if you enter three blank spaces between a first name and a last name field, there will be three blank spaces between these items when they are displayed in emails.

## Copying and Pasting Fields

You can copy and paste fields to new positions within the template - care should be taken to ensure you copy/paste the entire field rather than just the text element. When you click on a field, it behaves like a table cell. For a correct selection, you should see the borders of the cell clearly marked. For example:



...or



# Available Fields

This section summarizes all fields that can be used when defining templates in [Exclaimer Signature Manager Outlook Edition](#):

- [User > General](#) [pg.223]
- [User > Address](#) [pg.224]
- [User > Telephone](#) [pg.225]
- [User > Organization](#) [pg.226]
- [User > Exchange Advanced](#) [pg.226]
- [User > AD Photos](#) [pg.226]
- [User > Other AD Fields](#) [pg.227]
- [Dynamic content](#) [pg.228]
- [Advanced fields](#) [pg.270]
- [General fields](#) [pg.312]

## User > General Fields

Fields in the [general fields](#) section are summarized below:

Field	Inserts...
Contact Block	A block of contact information for the user in tabular form. Once selected, you can choose fields to be grouped in a table as a standard contact block. This is a good way to add signature-type details, since you can suppress fields if they are blank and so avoid blank lines in a signature (or any other block of fields). For further information please see <a href="#">how do I create a contact block?</a> [pg.334].
First Name	The first name of the user.
Initials	Initials for the user.
Last name	The last name of the user.
Display name	Display name for the user.
Description	Description information for the user.
Office	Office information for the user.
Telephone Number	Telephone number for the user.
Other Telephone Number	Other telephone number for the user.
E-mail	E-mail address for the user.
E-mail (as hyperlink)	Displays a <a href="#">hyperlink</a> window with predefined settings to insert your email address as a hyperlink. You can just accept these properties or change if required.
Web Page	Web page address for the user.
Web Page (as hyperlink)	Web page address for the user, presented as a hyperlink.
Other Web Page	Alternative web page for the user.
Personal Block	Inserts <a href="#">display name</a> , <a href="#">title</a> and <a href="#">company</a> fields as a block.

## User > Address Fields

Fields in the [address](#) section are summarized below:

Field	Inserts...
Address Block	A block of address information for the user in tabular form. Includes <a href="#">street</a> , <a href="#">city</a> , <a href="#">state/province</a> and <a href="#">zip/postal code</a> .
Street	Street information for the user.
P.O. Box	P.O. Box information for the user.
City	City information for the user.
State/Province	State/province information for the user.
Zip/Postal Code	Zip/postal code information for the user.
Country/Region	Country/region information for the user.
Country/Region (2 letters)	Two letter country abbreviation for the user (e.g. UK).

### NOTE

This information is taken from the Active Directory; therefore content may vary from one organization to another. For example, one organization may use **the P.O. Box** field to indicate a genuine box number, whilst another may use this field for something completely different.

## User > Telephone Fields

Fields in the [telephone](#) section are summarized below:

Field	Inserts...
Home	Home telephone number for the user.
Other Home	Other home telephone number for the user.
Pager	Pager number for the user.
Other Pager	Other pager number for the user.
Mobile	Mobile telephone number for the user.
Other Mobile	Other mobile number for the user.
Fax	Fax number for the user.
Other Fax	Other fax number for the user.
IP Phone	IP phone number for the user.
Other IP Phone	Other IP phone number for the user.
Notes	Notes for the user.

### NOTE

This information is taken from the Active Directory; therefore content may vary from one organization to another. For example, one organization may use the **notes** field to enter telephone related notes, whilst another may use this field for something completely different.

## User > Organization Fields

Fields in the [organization](#) section are summarized below:

Field	Inserts...
Title	The user's job title.
Department	The department in which the user works.
Company	The company for whom the user works.
Manager Display Name	The name of the user's manager.
Manager E-mail	The email address of the user's manager.
Manager E-mail (as hyperlink)	Displays a <a href="#">hyperlink</a> window with predefined settings to insert your manager's email address as a hyperlink. You can just accept these properties or change if required.

### NOTE

This information is taken from the Active Directory; therefore content may vary from one organization to another. For example, one organization may use the **department** field to enter true departmental information, whilst another may use this field for something completely different.

## User > Exchange Advanced Fields

These are custom [Exchange](#) fields, typically used for organization-specific information. Use of these fields will vary from one installation to another.

## User > AD Photos Fields

Fields in the [Outlook photos](#) section are summarized below:

Field	Inserts...
JPEG Photo	Insert JPEG photo of the user.
Photo	Insert other photo of the user.
Thumbnail Logo	Insert thumbnail logo associated with the user.
Thumbnail Photo	Insert thumbnail photo associated with the user.

### NOTE

Although the Active Directory includes fields for photos, there is no in-built, straightforward way to add photos to it. The [Exclaimer Outlook Photos](#) application allows you to create and manage images for all objects in your Active Directory - please contact us if you would like further information.

## User > Other AD Fields

Fields in the [other AD fields](#) section are summarized below:

Field	Inserts...
Home Address	Insert the user's home address.
Personal Title	Insert the user's personal title.
Postal Address	Insert the user's postal address.
AD Field	Insert details from the <a href="#">Custom AD</a> field (this can be used to access data in the <a href="#">Active Directory</a> for which no specific field exists in <a href="#">Signature Manager Outlook Edition</a> ).

### NOTE

This information is taken from the Active Directory, therefore content may vary from one organization to another. For example, one organization may use the **postal address** field to indicate a genuine alternative address, whilst another may use this field for something completely different.

## Dynamic Content Fields

This section summarizes dynamic content fields which can be used when defining templates in Exclaimer Signature Manager Outlook Edition:

- [Content from file](#) [pg.229]
- [Custom hyperlink](#) [pg.230]
- [Custom image](#) [pg.231]
- [QR code](#) [pg.232]
- [Rotating banner ad](#) [pg.240]
- [RSS feed](#) [pg.248]
- [Social media strip](#) [pg.251]
- [Composite field](#) [pg.259]
- [List of fields](#) [pg.261]
- [Custom smart table](#) [pg.268]

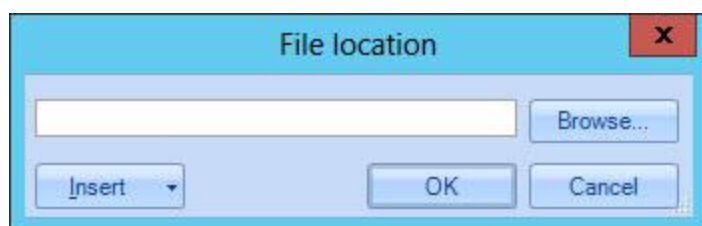


## Content from File

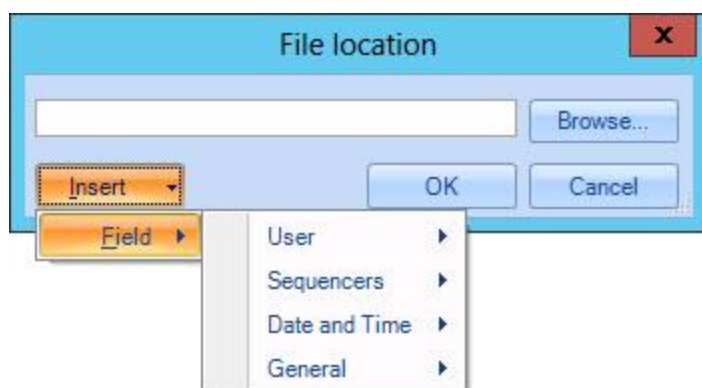
The [content from file](#) field is used to insert content from an external document, by specifying a location for the required document. This is useful (for example) if you need to use content that is constantly being updated; rather than adding text directly into the template editor each time there is a change, simply specify a location to the original file and the latest content will always be included. The file location specified must be accessible to the user [NETWORK SERVICE](#).

To use content from an existing file in a template, follow the steps below:

1. Use the [fields panel](#) to insert a [content from file](#) field and open the [file location](#) window:



2. Click the [browse](#) button to display the [open](#) window and navigate drives and folders to select the required file. Alternatively, use the insert button to select an [Active Directory](#) field to insert as the file source:



### NOTE

Remember that you can switch to **preview** mode (from the [template editor toolbar](#) [pg.209]) to see the effect of any dynamic fields you have inserted.

## Custom Hyperlink

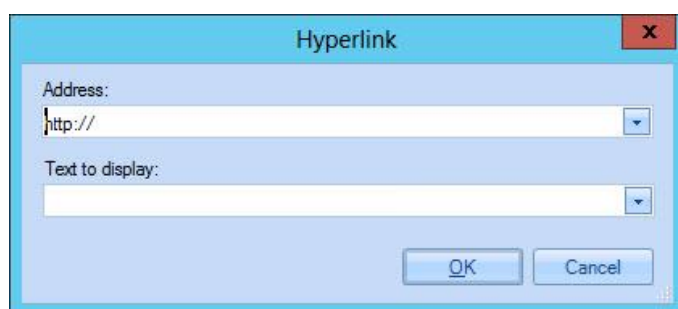
A **custom hyperlink** can be used to insert a standard hyperlink (i.e. a URL for a web page), and any other kind of link (for example, a **mailto** email link) - for example:



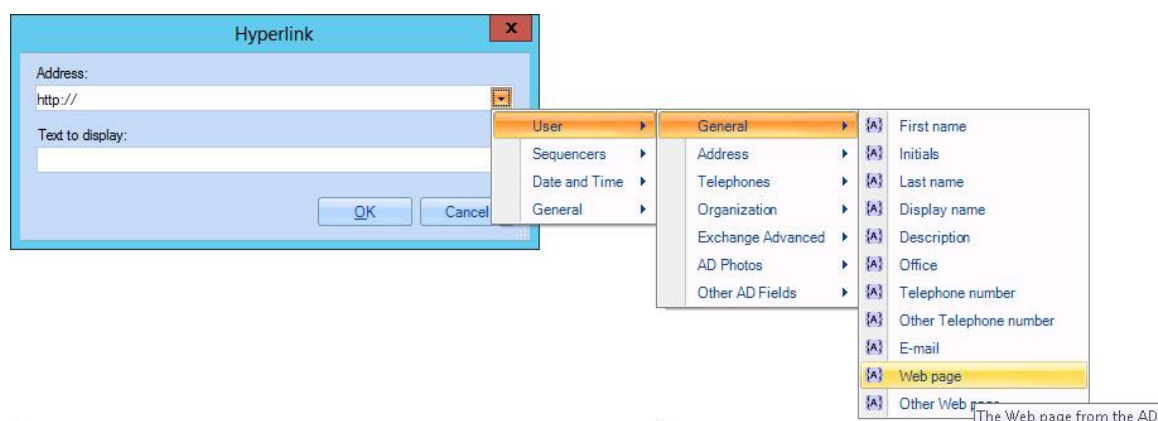
[Visit my blog!](#)

Additionally, it has the option to include other **Active Directory** fields. This means that you can create a **custom hyperlink** and insert (for example) the **user > web page** field to insert a link to the user's own web page in the signature. To insert a **custom hyperlink** and specify a field within it, follow the steps below:

1. Use the **fields panel** to insert a **custom hyperlink** field. When this field is added to a template, the **hyperlink** window is displayed:



2. Click the down arrow associated with this field to select the required **Active Directory** field to insert as the link target (here, the user's web page):



3. Enter text that users click to activate the link. Note that this text is only displayed when the template is in **preview mode** [pg.209], or when the template is applied to email messages.
4. Click **OK** to confirm details.

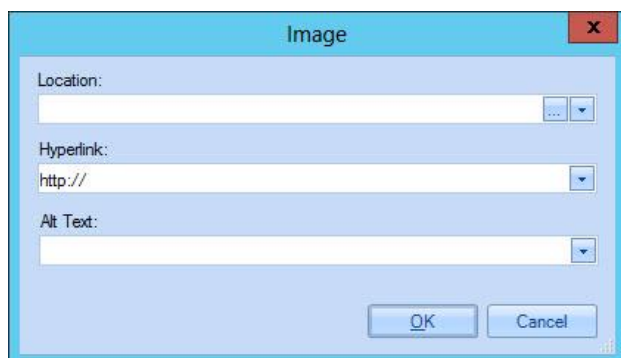
## Custom Image

The **custom image** field allows you to insert an image and use it as a trigger for a hyperlink - for example:




When the recipient clicks on the image, the specified web page will open in their default browser. You can specify an image from a specific file location, or from an **Active Directory** field. To do this, follow the steps below:

1. Use the **fields panel** to insert a **custom image** field. When this field is added to a template, the **image** window is displayed:



2. Enter link information for the image, as summarized below:

Item	Summary
Location	Click the browse -  - button to the right of the <b>location</b> field to navigate drives and folders to specify an image location. Alternatively, click the down arrow associated with this field to select an <b>Active Directory</b> field to insert as the image source (for example, you might wish to use the user's thumbnail photo).
Hyperlink	Use this option to add a hyperlink for the image. Type the required URL into the <b>hyperlink</b> field (i.e. the web address that should be displayed when a user clicks the image in the message. Alternatively, click the down arrow associated with this field to select an <b>Active Directory</b> field to insert as the link (for example, you might wish to include the user's web page).
Alt Text	Enter text to be displayed when the recipient hovers their mouse over the image, or if the image cannot be displayed.

### NOTE

Remember that you can switch to **preview** mode (from the **template editor toolbar** [pg.209]) to see the effect of any dynamic fields you have inserted.

## QR Code

The **QR code** (**Quick Response code**) field is used to insert special barcode type images which can be scanned by QR scanners and smartphones - for example:



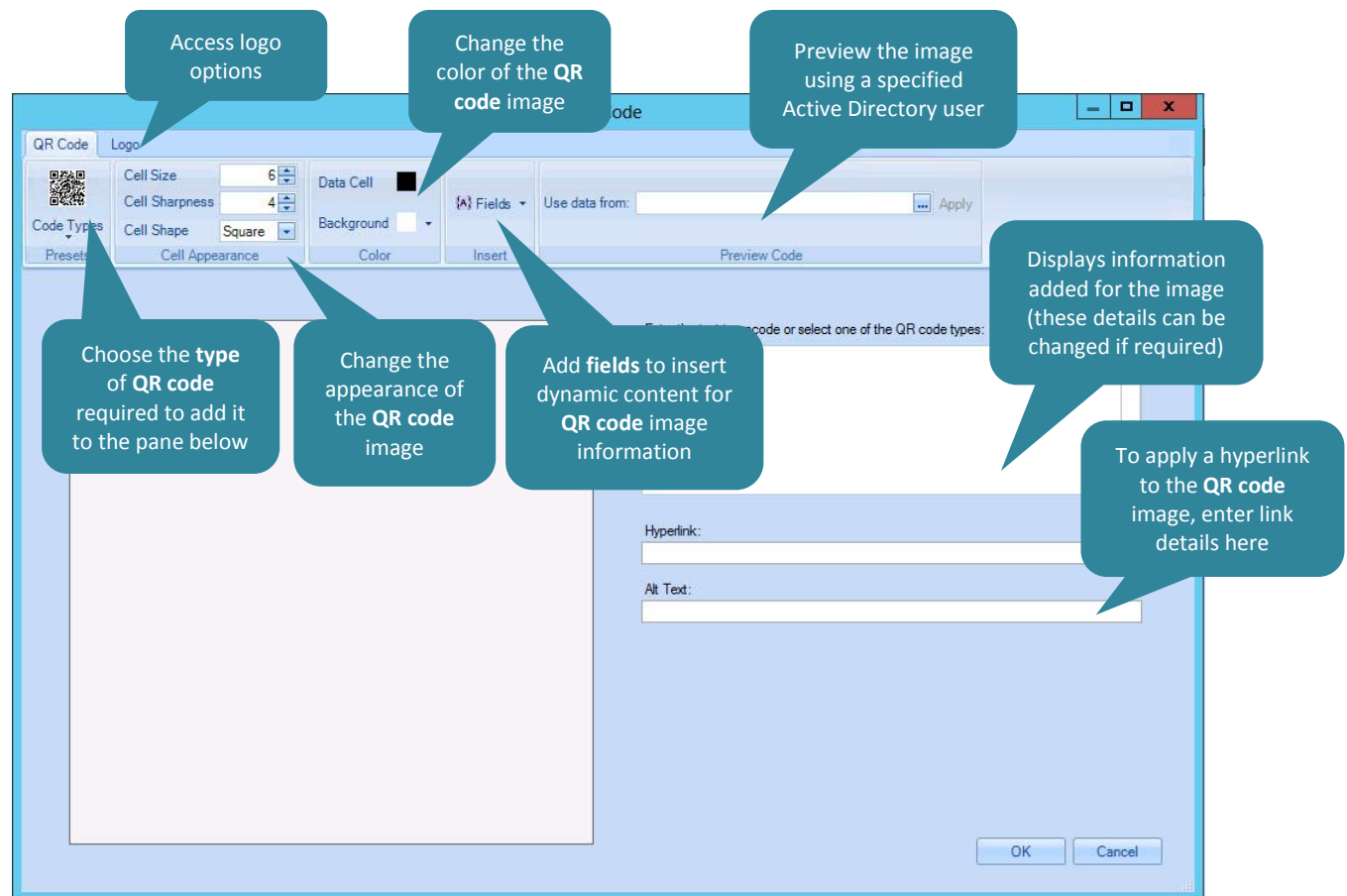
These images contain information comprised of text and/or other fields - for example, you might include contact information, website details, etc. Using **Exclaimer Signature Manager Outlook Edition**, you can [add a QR code \[pg.233\]](#) and in doing so, specify:

- The type of **QR code** that is required (i.e. the type of information to be encapsulated - URL, contact, calendar event, etc.)
- How the **QR code** should be displayed (size, sharpness, shape, color and background)
- Any text, **Active Directory** fields and hyperlink details to be associated with the **QR code**

If required, you can also use [logo options \[pg.236\]](#) to display a given logo with the **QR code**. You can choose to display the logo as a background, in the center of the **QR code** or in a [user defined position \[pg.237\]](#).

## Adding a QR code to a template

To add a **QR code** image, use the **fields** panel to insert a **QR code** field. When this field is added to a template, the **QR code** window is displayed:



From here:

1. Use the code **type** drop-down list to choose the type of **QR code** image that you wish to create. You can choose one of the following options:

Action	Summary
URL	Displays a <b>URL</b> window - enter the full URL for the website that you wish to include within the image.
Contact Details	Displays a <b>contact details</b> window which is pre-populated with name, telephone, email and address fields from the <b>Active Directory</b> . If required, use arrows associated with each field to make changes.
Calendar Event	Displays a <b>calendar event</b> window so you can add event name, location, time zone and the event start/end times.
Map Location	Displays a <b>map location</b> window so you can enter latitude and longitude coordinates.

.../continued

Action	Summary
Telephone Number	Displays a <a href="#">telephone number</a> window which is pre-populated with the <a href="#">telephone</a> field from the <a href="#">Active Directory</a> . If required, use the arrow associated with this field to make changes.
SMS Text	<p>Displays the <a href="#">SMS text</a> window. Here, enter the required telephone number (if required, use the arrow associated with this field to populate it via an <a href="#">Active Directory</a> field). Then, enter required text for the SMS text message in the field below (you can use the insert button to include <a href="#">Active Directory</a> fields here).</p> <div> <div>NOTE</div> <p>Text messages are limited to 160 characters in length - any content after 160 characters will be truncated.</p> </div>

- Having selected the [code type](#) and entered associated details, the image and any details that you entered are added to the [QR code](#) window. From here you can use toolbar options to:
  - Change the size, sharpness and shape of the QR code image
  - Change the color of the image (i.e. the actual composite parts) and/or the image background
  - Click in the information pane (populated with details you have entered so far) and insert [Active Directory](#) fields
  - Preview the image using details for a selected user
- If you would like recipients to be able to click on the [QR code](#) image to access a website (or perhaps a [mailto](#) link), enter link details using [hyperlink](#) and [alt text](#) fields.
- If required, click the [logo](#) tab (at the top of the window) to apply a logo to the image. Here, you can browse for the required logo, or use the arrow associated with the logo field to add a logo via an [Active Directory](#) field.
- Click [OK](#) to confirm details and add the [QR code](#) image to the template.

NOTE

Certain combinations of images and colors may produce a **QR code** that is not always readable. We advise customers test the **QR code** with a smartphone to ensure it works as expected, before releasing it in a signature.

To edit the properties of an existing **QR code** image in a template, simply double-click the image to access the **QR code** window.

## Changing the Size of the QR Code

Having defined a QR code in the QR code window, the image can be resized as required. To resize the image, hover your cursor over the marker in the bottom left-hand corner of the image to enable sizing grab handles:



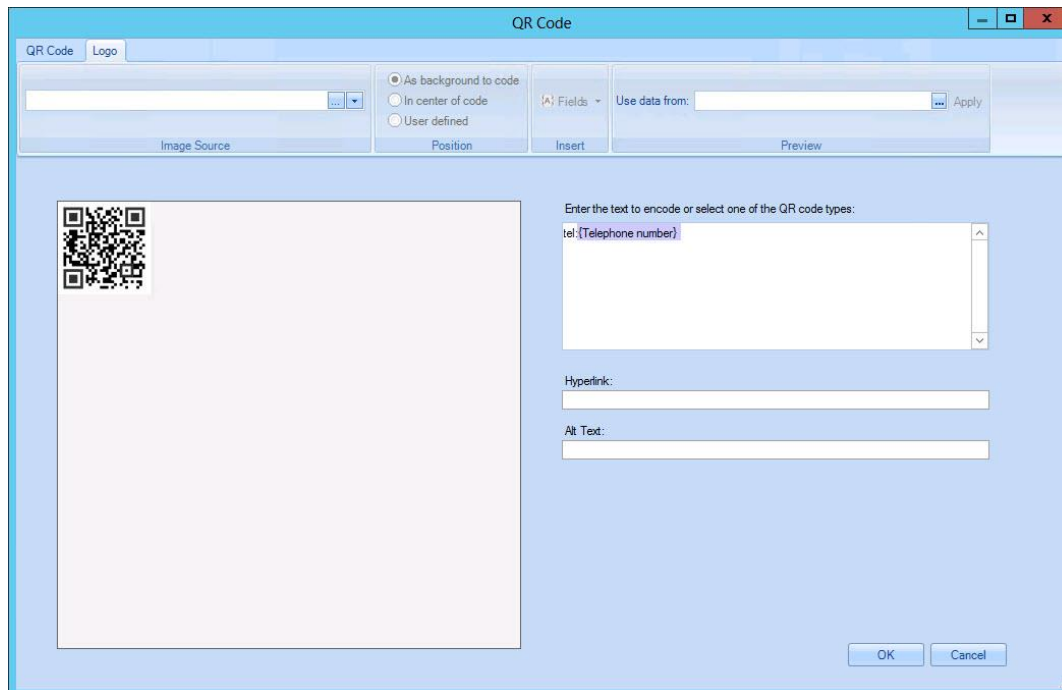
Having done this, you can simply drag the image to the required size:



## Adding a Logo Image

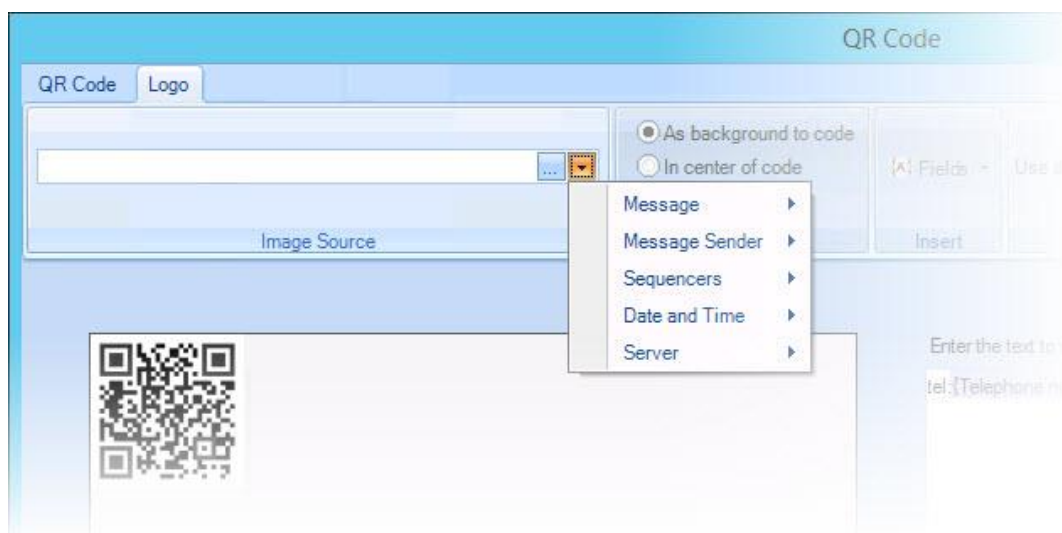
If required, you can choose to associate a [logo](#) (or any other image) with a [QR code](#). A [logo](#) image can be displayed as a background for the [QR code](#), in the center of the [QR code](#) or in a [user defined position](#) [pg.237].

To add a [logo](#) image, select the [logo](#) tab from the [QR code](#) window. Here, the [QR code](#) image is displayed (but cannot be [adjusted](#) [pg.237]) so you can see how it will look with your selected image:



If you are adding a [logo](#) image from a file on your computer or network, select the browse [...] button associated with the [image source](#) field to locate and select the required image file.

Alternatively, you can add a [logo](#) image via an [Active Directory](#) field. To do this, select the arrow associated with the [image source](#) field and choose the required field:





The selected image is displayed with the **QR code**. By default, it is set **as background to the code** - if required, use **position** options to change this.

If the **position** is set to **in center of code**, the logo image is positioned in the center of the **QR code** - for example:



When the **position** is set to **as background to the code** or **in center of code**, the image is automatically scaled for a best fit with the **QR code** (if you subsequently change the size of the **QR code**, the **logo** image is scaled accordingly).

When the **position** is set to **user defined**, you can adjust the size and the position of the **logo** image manually - please see [repositioning a QR code and logo manually](#) [pg.237] for further information about this option.

## Repositioning a QR Code and Logo Manually

If you have added a **logo** image and you wish to manually control the position and/or size of that image in relation to the **QR code**, access the **logo** tab and set the **position** to **user defined**:



Having done this, the **logo** is separated from the **QR code**. To move the **logo**, hover your cursor over the **logo** image to enable positioning grab handles and simply drag it to the required position - for example:



NOTE

Notice that the **logo** image is displayed with resizing 'handles' (one in each corner). If required, use these to scale the image up or down.

When you are repositioning the **logo**, the **QR code** image is also displayed so you can easily position the **logo** in relation to the **QR code**. However, the **QR code** cannot be moved or adjusted here.

To adjust the position (and other settings) for the **QR code**, select the **QR code** tab. Here you will see the **QR code** and the **logo**, but only the **QR code** can be adjusted. Hover your cursor over the **QR code** image to enable positioning grab handles - then, simply drag it to the required position.

In summary, although the **QR code** and the **logo** image are associated with each other, each of these items can only be adjusted within its respective **QR code** or **logo** tab.

NOTE

Keep in mind that you are positioning the **logo** in relation to the **QR code** (or vice versa) - you are not specifying where these items are positioned within the template.

Once the **QR code** and any associated **logo** are confirmed (and the **QR code** window is closed), their ultimate position and alignment within the template is controlled by any settings and properties associated with the **QR code** element in the template editor, as with any other field.

## Optimizing the display of QR codes and logos

Each **QR code** is comprised of cells, as shown below:



Using **cell appearance** and **color** settings for the **QR code**, you can control the size, sharpness, shape, color and background of these cells:



When a **QR code** is first added, these settings are automatically defined to display the code with optimal clarity. However, if you are also using a **logo** image, you may need to adjust these settings to ensure that the **logo** is displayed clearly.

This is particularly relevant where the position of the **logo** image is set **to as background to the code** or **user defined**. With default **cell appearance** settings, the **logo** image is typically obscured by the **QR code** however; reducing the **cell size** and **cell sharpness** will increase transparency, making the **logo** image clearer. You may also find that adjusting the **cell shape** and **color** settings for the **QR code** also helps with the clarity of a **logo** image.

## Rotating Banner Ad

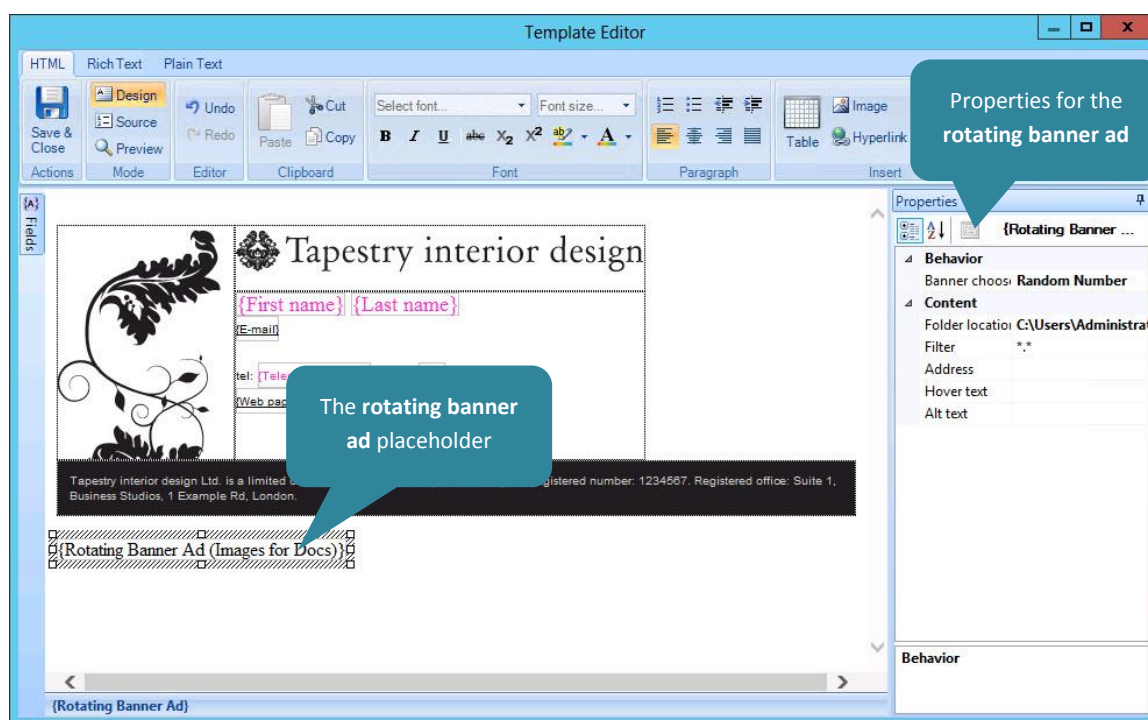
The **rotating banner ad** field can be used where you have a selection of images that you would like to use on a rotational basis, within a template. To achieve this, you place required images in a given folder and then set properties for the **rotating banner ad** field so that it checks this folder and rotates any images found at your required frequency. You can choose to rotate items randomly, sequentially and (using more advanced options) specify a more precise frequency of rotation (for example, daily, weekly, monthly, etc.).

### NOTE

As well as standard image files, you can also rotate HTML web banners - see [Multi-link HTML ads \[pg.247\]](#) for further information.

The following process explains how to use this field for rotating images with an associated hyperlink (i.e. when a user clicks the image displayed in their email message, they are directed to a given URL):

1. Ensure that required image files are in a single folder on the computer where **Exclaimer Signature Manager Outlook Edition** is installed.
2. Use the **fields panel** to insert a **rotating banner ad** field.
3. Select the newly inserted field and check the **properties pane** - properties for the image are shown:



4. Select the drop-down list to the right of the [banner chooser](#) field. Here, you specify the frequency and order in which banner ads in the selected folder are displayed. Available options are summarized below:

Action	Summary
Sequencers	
Message Sender Sequential Number	<p>Each time an <a href="#">Outlook</a> signature is requested (via <a href="#">ExSync [pg.27]</a>), <a href="#">Exclaimer Signature Manager Outlook Edition</a> displays a different banner starting with the first and ending with the last (ordered in an alpha/numeric sequence 0-9-a-z).</p> <p>When the last banner in the sequence is reached the entire process starts again so that the user will always have a banner inserted in to their signature. <a href="#">Exclaimer Signature Manager Outlook Edition</a> remembers the last banner it used for each user. Therefore, when an <a href="#">Outlook</a> signature is next requested it will update with the next banner in the sequence for that user.</p>
Random Number	<p>Each time an <a href="#">Outlook</a> signature is requested (via <a href="#">ExSync [pg.27]</a>), <a href="#">Exclaimer Signature Manager Outlook Edition</a> displays a different banner. The banners are changed on a random basis.</p>
Server Sequential Number	<p>Each time an <a href="#">Outlook</a> signature is requested (via <a href="#">ExSync [pg.27]</a>), <a href="#">Exclaimer Signature Manager Outlook Edition</a> displays a different banner, starting with the first and ending with the last (ordered in an alpha/numeric sequence 0-9, -a-z).</p> <p>When the last banner in the sequence is reached the entire process starts again so that the user will always have a banner inserted in to their signature. Rather than remembering the last banner used for each user, <a href="#">Exclaimer Signature Manager Outlook Edition</a> changes the banner for each request processed (irrespective of user) and updates with the next banner in the sequence.</p>
Template Sequential	<p>If you have a folder of images (banners) and they are named (for example) 1-10; each time this particular template is applied to a message it will increment the number and thus the corresponding numbered image (banner) is inserted.</p>
Exchange Advanced	
<p>These options allow you to define images to be used based upon specific AD attributes. These are for advanced use only - please contact support for further information.</p> <p style="text-align: right;">.../continued</p>	

Action	Summary																
Date and Time																	
Day of the Week	<p>Each day of a week is given a number:</p> <table> <tr> <th>Index</th><th>File</th></tr> <tr> <td>0</td><td>Sunday</td></tr> <tr> <td>1</td><td>Monday</td></tr> <tr> <td>2</td><td>Tuesday</td></tr> <tr> <td>3</td><td>Wednesday</td></tr> <tr> <td>4</td><td>Thursday</td></tr> <tr> <td>5</td><td>Friday</td></tr> <tr> <td>6</td><td>Saturday</td></tr> </table> <p>This corresponds to the index of files in the folder that you have specified for a <a href="#">rotating banner ad</a>. If your folder contains just five files, <a href="#">Exclaimer Signature Manager Outlook Edition</a> will cycle through them as follows:</p> <p>Banner01.jpg - (0)  Banner02.jpg - (1)  Banner03.jpg - (2)  Banner04.jpg - (3)  Banner05.jpg - (4)  Banner01.jpg - (5)  Banner02.jpg - (6)  Banner03.jpg - (0)  Banner04.jpg - (1)  Banner05.jpg - (2)  Banner01.jpg - (3)  Banner02.jpg - (4)  Banner03.jpg - (5)  Banner04.jpg - (6)</p> <p>As can be seen from the example above, <a href="#">Exclaimer Signature Manager Outlook Edition</a> repeats the sequence so that users will always have a banner inserted in to their signatures.</p>	Index	File	0	Sunday	1	Monday	2	Tuesday	3	Wednesday	4	Thursday	5	Friday	6	Saturday
Index	File																
0	Sunday																
1	Monday																
2	Tuesday																
3	Wednesday																
4	Thursday																
5	Friday																
6	Saturday																
Week of the Year	<p>This allows you to cycle through banner ads, changing to a different banner ad every week. Each week of the year is given a number 00-51. This corresponds to the index of files in the folder that you have specified for a <a href="#">rotating banner ad</a>. If your folder contains just five files <a href="#">Exclaimer Signature Manager Outlook Edition</a> will cycle through them as follows:</p> <p>Banner01.jpg - (00)  Banner02.jpg - (01)  Banner03.jpg - (02)  Banner04.jpg - (03)  Banner05.jpg - (04)  Banner01.jpg - (05)  Banner02.jpg - (06)  Banner04.jpg - (07)  Banner05.jpg - (08)  ...  Banner##.jpg - (51)  Banner##.jpg - (00)  Banner##.jpg - (01)</p>																

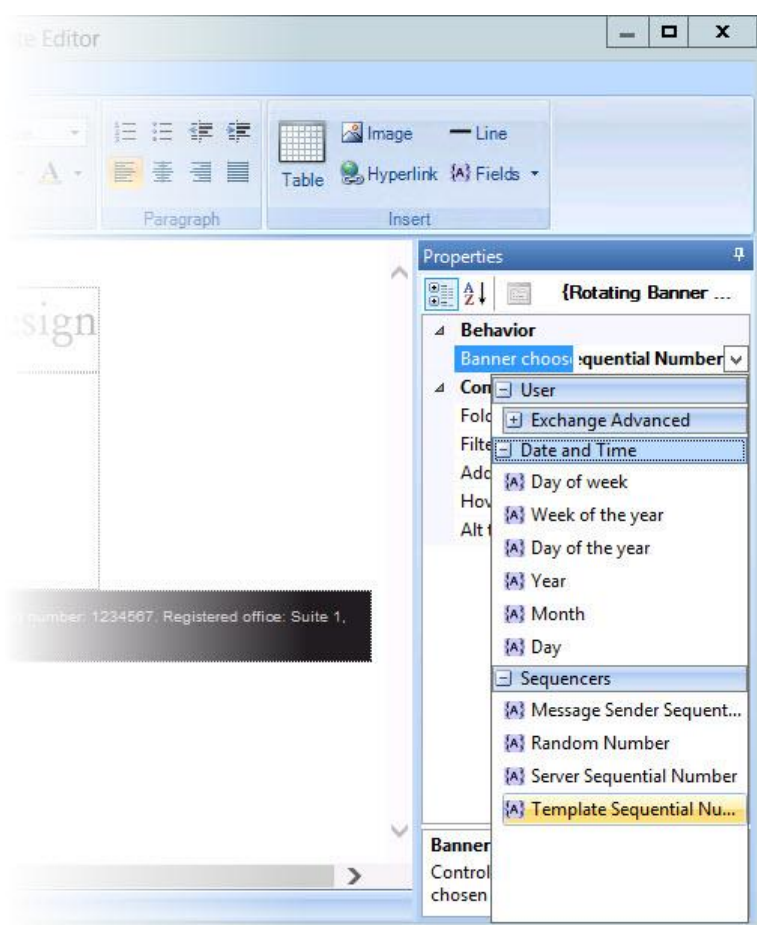
Action	Summary										
Day of the Year	<p>This allows you to cycle through banner ads, changing to a different banner ad every day of the year.</p> <p>Each day of the year is given a number 000-364/365. This corresponds to the index of files in the folder that you have specified for a banner ad. If your folder contains just five files, <a href="#">Exclaimer Signature Manager Outlook Edition</a> will cycle through them like this:</p> <p>Banner01.jpg - (000)  Banner02.jpg - (001)  Banner03.jpg - (002)  Banner04.jpg - (003)  Banner05.jpg - (004)  Banner01.jpg - (005)  Banner02.jpg - (006)  Banner04.jpg - (007)  Banner05.jpg - (008)  ...  Banner##.jpg - (365)  Banner##.jpg - (000)  Banner##.jpg - (001)</p>										
Year	<p>This allows you to cycle through banner ads, changing to a different banner ad every year. For example, suppose you have the following four files:</p> <table border="1"> <thead> <tr> <th>Index</th><th>File</th></tr> </thead> <tbody> <tr> <td>0</td><td>a.gif</td></tr> <tr> <td>1</td><td>b.gif</td></tr> <tr> <td>2</td><td>c.gif</td></tr> <tr> <td>3</td><td>d.gif</td></tr> </tbody> </table> <p>If the year was 2009 you can calculate which file will be displayed using the following equation:</p> <div> <p>2009 % 4 (where 2009 is the year and 4 is the number of files you have in the folder)</p> <p>2009/4=502 (as integer)  502*4=2008  2009-2008=1</p> <p>The result of 1 would display <b>b.gif</b> from the list of files.</p> </div> <p>If you had the same four files and the year was 2010 you can calculate which file will be displayed using the following equation:</p> <div> <p>2010 % 4 (where 2010 is the year and 4 is the number of files you have in the folder)</p> <p>2010/4=502 (as integer)  502*4=2008  2010-2008=2</p> <p>The result of 2 would display <b>c.gif</b> from the list of files.</p> </div>	Index	File	0	a.gif	1	b.gif	2	c.gif	3	d.gif
Index	File										
0	a.gif										
1	b.gif										
2	c.gif										
3	d.gif										

Action	Summary										
	<p>If you had the same four files and the year was 2011 you can calculate which file will be displayed using the following equation:</p> <div> <p>2011 % 4 (where 2011 is the year and 4 is the number of files you have in the folder)</p> <p>2011/4=502 (as integer)</p> <p>502*4=2008</p> <p>2011-2008=3</p> <p>The result of 3 would display d.gif from the list of files.</p> </div>										
Month	<p>This allows you to cycle through banner ads, changing to a different banner ad every month. For example, suppose you have the following four files:</p> <table> <tr> <th>Index</th><th>File</th></tr> <tr> <td>0</td><td>a.gif</td></tr> <tr> <td>1</td><td>b.gif</td></tr> <tr> <td>2</td><td>c.gif</td></tr> <tr> <td>3</td><td>d.gif</td></tr> </table> <p>If the month was July (the 7th month) you can calculate which file will be displayed using the following equation:</p> <div> <p>7 % 4 (where July (7) is the month and 4 is the number of files you have in the folder)</p> <p>7/4=1 (as integer)</p> <p>1*4=4</p> <p>7-4=3</p> <p>The result of 3 would display d.gif from the list of files.</p> </div> <p>If you had the same four files and the month was September (the 9th month) you can calculate which file will be displayed using the following equation:</p> <div> <p>9 % 4 (where September (9) is the month and 4 is the number of files you have in the folder)</p> <p>9/4=2 (as integer)</p> <p>2*4=8</p> <p>9-8=1</p> <p>The result of 1 would display b.gif from the list of files.</p> </div> <p>.../continued</p>	Index	File	0	a.gif	1	b.gif	2	c.gif	3	d.gif
Index	File										
0	a.gif										
1	b.gif										
2	c.gif										
3	d.gif										





Action	Summary										
Day	<p>This allows you to cycle through banner ads, changing to a different banner ad every day. For example, suppose you have the following four files:</p> <table> <tr> <th>Index</th><th>File</th></tr> <tr> <td>0</td><td>a.gif</td></tr> <tr> <td>1</td><td>b.gif</td></tr> <tr> <td>2</td><td>c.gif</td></tr> <tr> <td>3</td><td>d.gif</td></tr> </table> <p>If the day was the 23rd day of the year you can work out which file will be displayed using the following equation:</p> <div> <math display="block">23 \% 4 \text{ (where 23 is the day number and 4 is the number of files you have in the folder)}</math> <math display="block">23/4=5 \text{ (as integer)}</math> <math display="block">5*4=20</math> <math display="block">23-20=3</math> <p>The result of 3 would display d.gif from the list of files.</p> </div> <p>If the day was the 50th day of the year you can work out which file will be displayed using the following equation:</p> <div> <math display="block">50 \% 4 \text{ (where 50 is the day number and 4 is the number of files you have in the folder)}</math> <math display="block">50/4=12 \text{ (as integer)}</math> <math display="block">12*4=48</math> <math display="block">50-48=2</math> <p>The result of 2 would display c.gif from the list of files.</p> </div>	Index	File	0	a.gif	1	b.gif	2	c.gif	3	d.gif
Index	File										
0	a.gif										
1	b.gif										
2	c.gif										
3	d.gif										

5. Choose the required sequence:



6. Set remaining properties as follows:

Action	Summary
Folder Location	Click the browse -  - button to open the <a href="#">folder location</a> window, then click <a href="#">browse</a> to navigate drives and folders to specify a folder location. Alternatively, click <a href="#">insert</a> to navigate available fields and select an <a href="#">Active Directory</a> field to insert as the location.
Filter	If required, you can use wildcards so that only certain images are used (for example, you might wish to use a series of images which start with '14' and would therefore specify '14*.*' or you might only wish to use JPEG images and therefore specify '*.JPG').
Address	Use this option to apply a hyperlink to banner images. Click the browse -  - button to open the <a href="#">address</a> window, then type the required URL into the <a href="#">address</a> field (i.e. the web address that should be displayed when a user clicks the image in the message). Alternatively, click <a href="#">insert</a> to navigate available fields and select an <a href="#">Active Directory</a> field as the link target (for example, you might wish to use the user's web page).
Hover Text	Enter text to be displayed when a user hovers the cursor over a rotating banner ad.

Alt Text	Enter text to be displayed if images cannot be displayed.
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## Multi-link HTML Ads

If required, you can use a third party HTML editor to create sophisticated HTML web banners to be rotated. These might incorporate multiple images and hyperlinks - for example:



Simply save your web banners as [.htm](#) files and add them to the required folder location for your rotating banner ad.

### NOTE

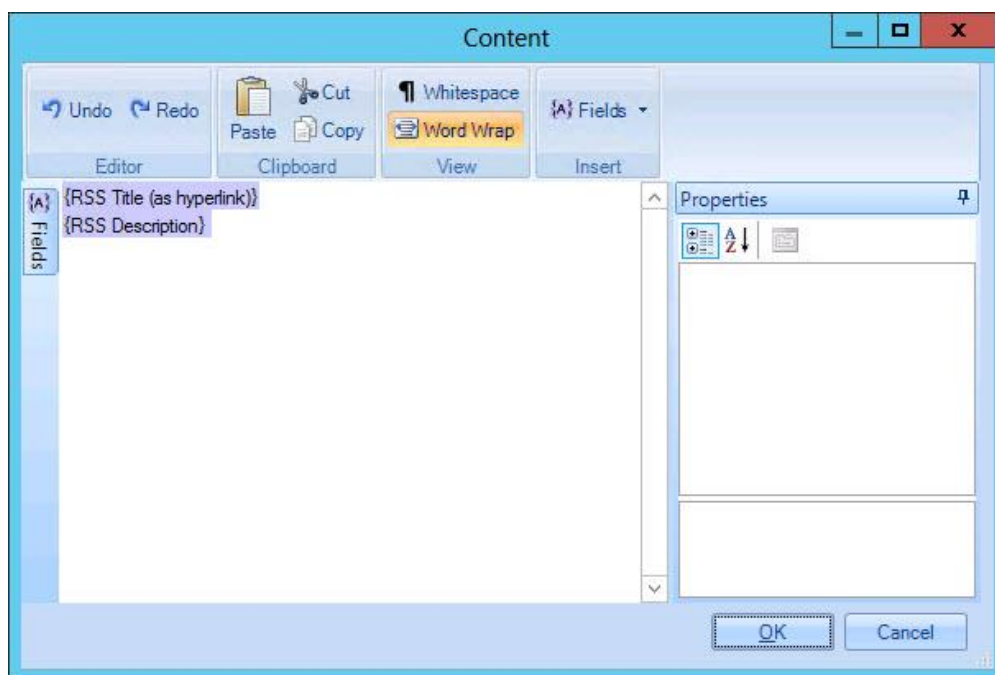
It is recommended that **Universal Naming Convention (UNC)** referenced images are used where possible. However, if necessary you can use **URL** referenced images (on a computer that can be viewed publicly), or images which have been copied locally to the machine upon which Exclaimer Signature Manager Outlook Edition is installed.

## RSS Feed

The **RSS feed** field is used to insert an **RSS feed** into email messages - for example:

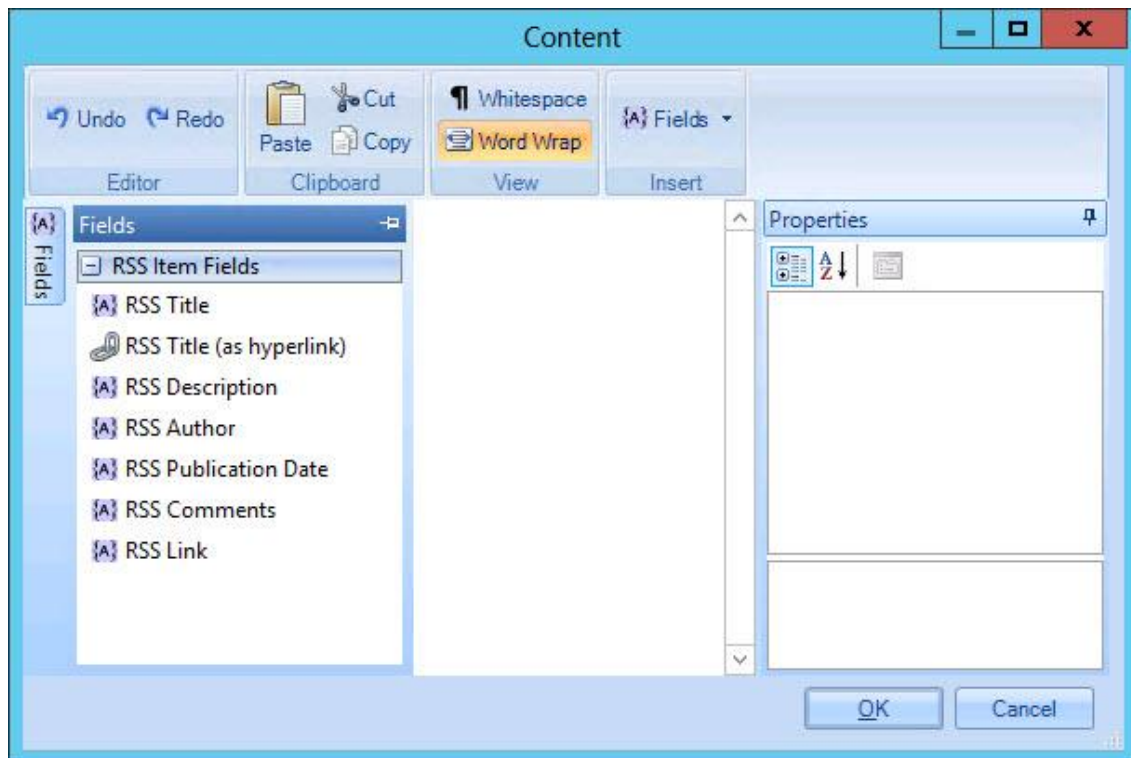


To insert an **RSS feed**, use the **fields panel** to insert an **RSS feed** field. When this field is added to a template, the **content** window is displayed:



This window is used to determine which [RSS feed](#) elements should be included in the template - i.e. what RSS details should be displayed when the email message is received. An [RSS feed](#) is comprised of a number of different elements. By default, the [RSS title \(as hyperlink\)](#) and [RSS description](#) elements are included, which means that recipients of the email message would see each RSS item with a title and summary text (as shown in the example at the start of this section).

If required, you can change the composition of the [RSS feed](#) field via the [fields](#) panel in this window:

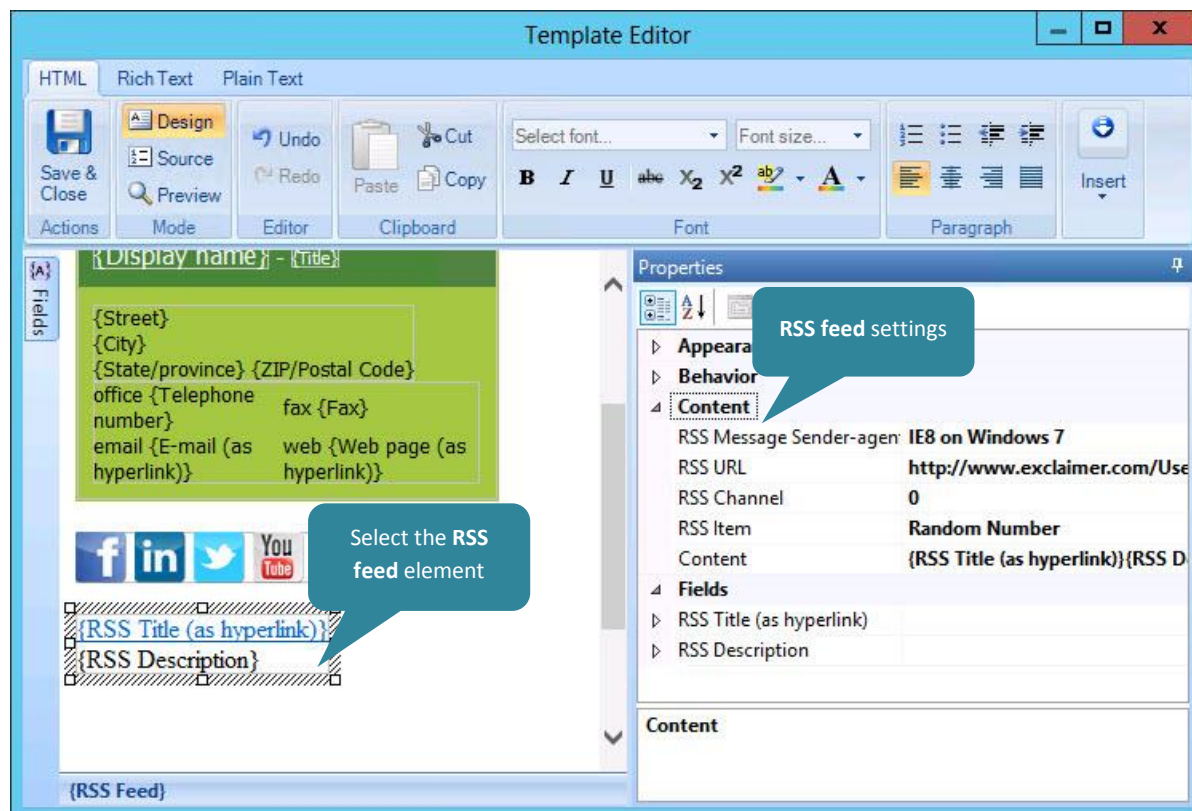


All RSS fields are available for selection and, as with any other field, properties are displayed in the right-hand pane when a field is inserted and then selected.


However, these properties relate to each element of the RSS feed. Please refer to [RSS feed properties \[pg.250\]](#) for further information about defining properties for the RSS feed as a whole (i.e. to specify a [URL](#) and a [channel](#)).

## RSS Feed Properties

Having added an **RSS feed** field and confirmed the required composite parts (as above), the **RSS feed** element is added to your template. When this element is selected, general settings for the **RSS feed** can be defined in the **properties** pane, within the **content** section:



Key properties are summarized below:

Action	Summary
RSS URL	Enter required URL for the feed.
RSS Channel	Some organizations have feeds with multiple channels - for example, one channel for news and another for announcements. Use this option if a specific channel selection is required.
RSS Item	Choose whether to display a random feed entry, or a sequential number. Use the drop-down list and scroll down to the <a href="#">sequencers</a> section to change this setting.
Content	Any fields that have been included in the <b>RSS feed</b> element (as defined when the <b>RSS feed</b> field was <a href="#">added to the template</a> [pg.248]) are shown here. If you wish to change these fields, click to activate this property and then select the browse -  - button to open the <b>content</b> window.

### NOTE

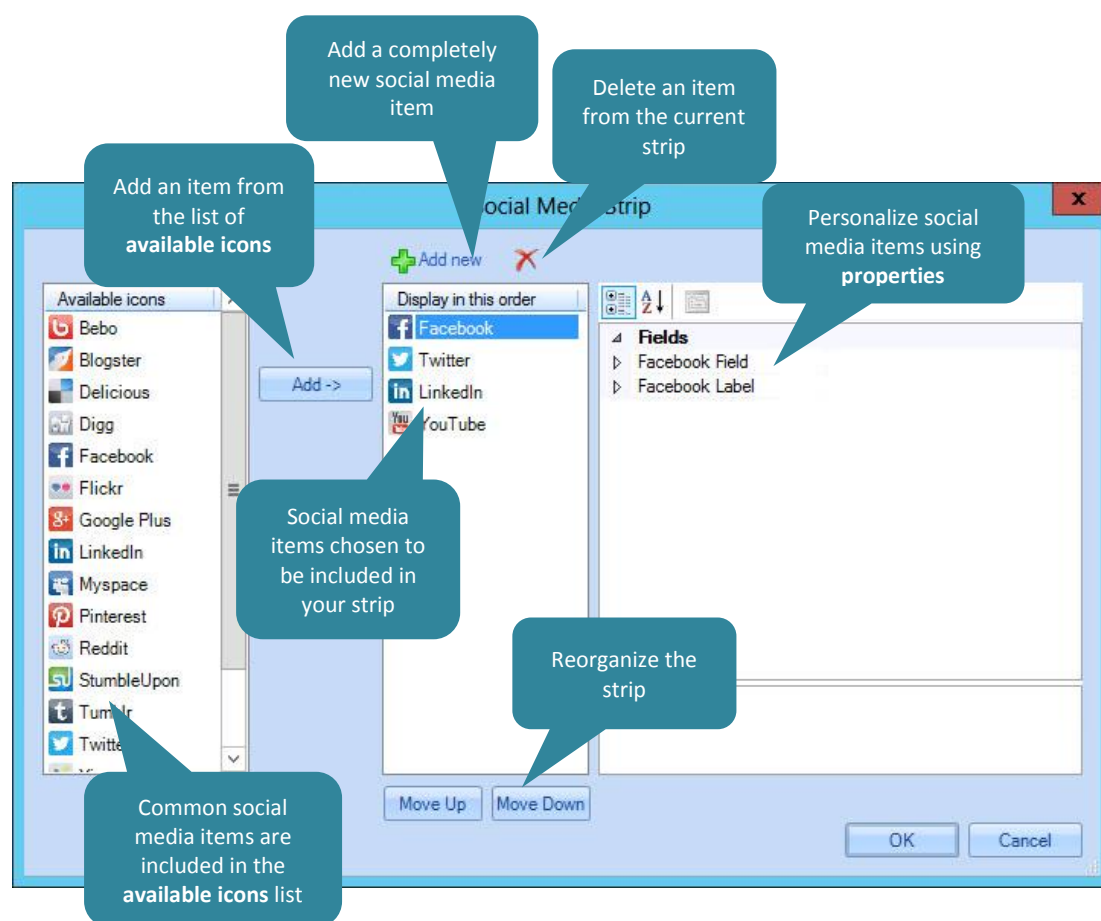
Remember that you can switch to **preview** mode (from the [template editor toolbar](#) [pg.209]) to see the effect of any dynamic fields you have inserted.

## Social Media Strip

The **social media strip** field inserts a strip of predefined social media icons which can then be tailored to meet your requirements. By default, the **social media strip** includes icons (and associated properties) for **Facebook**, **LinkedIn**, **Twitter**, **YouTube** and **Google Plus**:



To add a social media strip to your template, select the **social media strip** field from the fields panel to access the **social media strip** window:



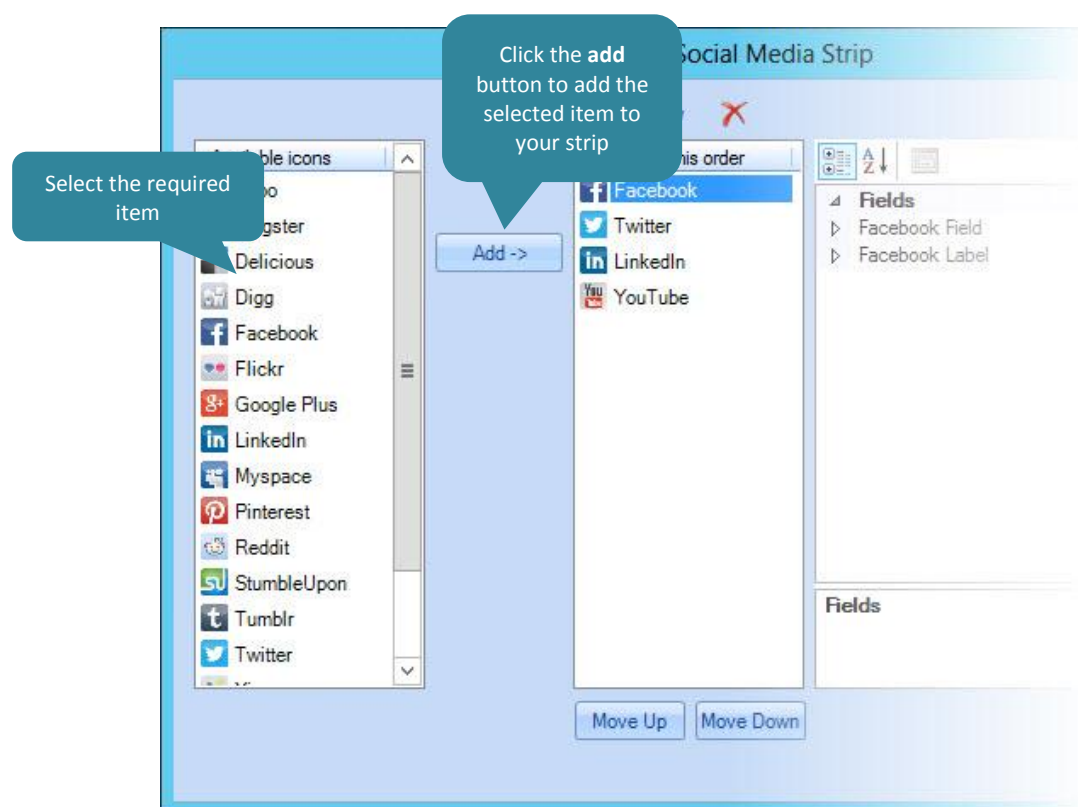


From here you can:

- [Add an existing item to the social media strip \[pg.252\]](#)
- [Personalize items in the social media strip \[pg.253\]](#)
- [Add a new item to the social media strip \[pg.256\]](#)
- [Remove an item from the social media strip \[pg.257\]](#)
- [Reorganize the social media strip \[pg.258\]](#)
- [Customize the social media strip \[pg.258\]](#)

## Adding an Existing Item to The Social Media Strip

A list of common social media items is displayed in the **available icons** pane, on the left-hand side of the **social media strip** window. To add one of these items to your social media strip, simply select it from this list and click the **add** button:



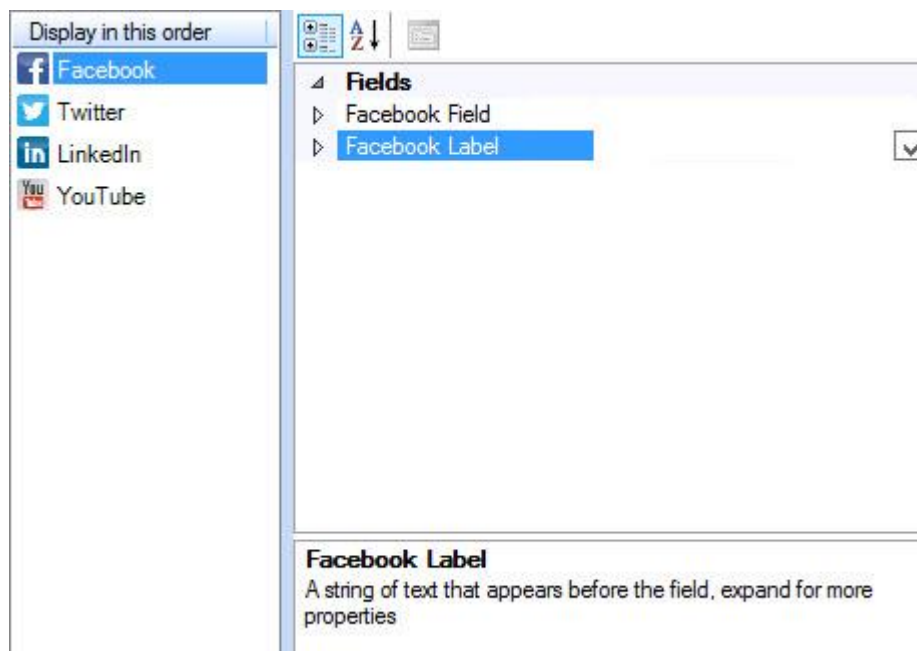
The selected item is added to the end of the social media strip, shown in the center pane. The item is added with an icon and generic properties which you then need to [personalize \[pg.253\]](#) with your own details. If required, you can also choose to [reorganize items \[pg.258\]](#) in this pane to change the sequence of the completed social media strip.



## Personalizing a Social Media Item

When a social media item is added from the [available icons](#) list, it is added with an icon and generic properties. For example, when the [Facebook](#) item is added, the default hyperlink associated with the icon is <http://www.facebook.com>, therefore you will need to update this with the link to your own Facebook page.

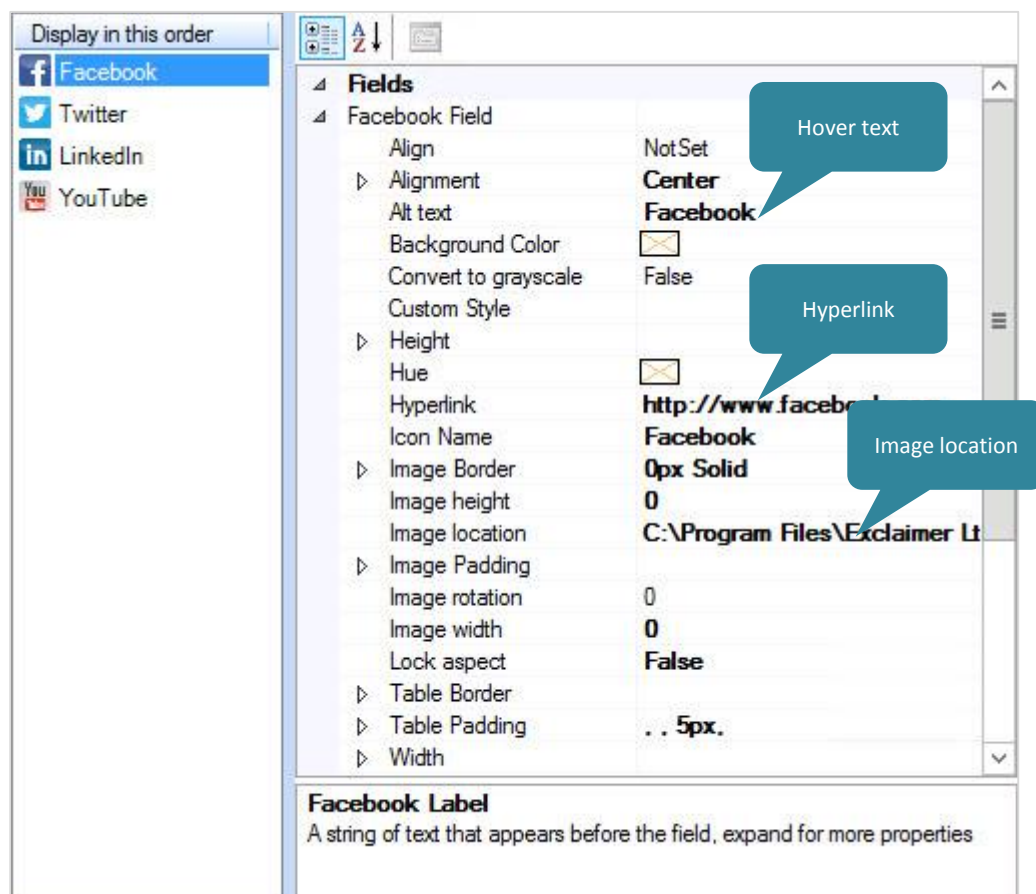
Properties for each item are listed within two main categories - [field](#) and [label](#):



[Field properties](#) [pg.254] are concerned with the behavior and appearance of the item - for example, what image is used for the icon, what hyperlink is used when the recipient clicks on the icon, etc. [Label properties](#) [pg.255] can be used if you wish to add some text to be displayed with an icon in the strip.

## Field Properties

When an item is added to the social media strip, a range of [field](#) properties is available however, there are a number of key properties that should be checked and updated as required. These items are shown below:



Here:

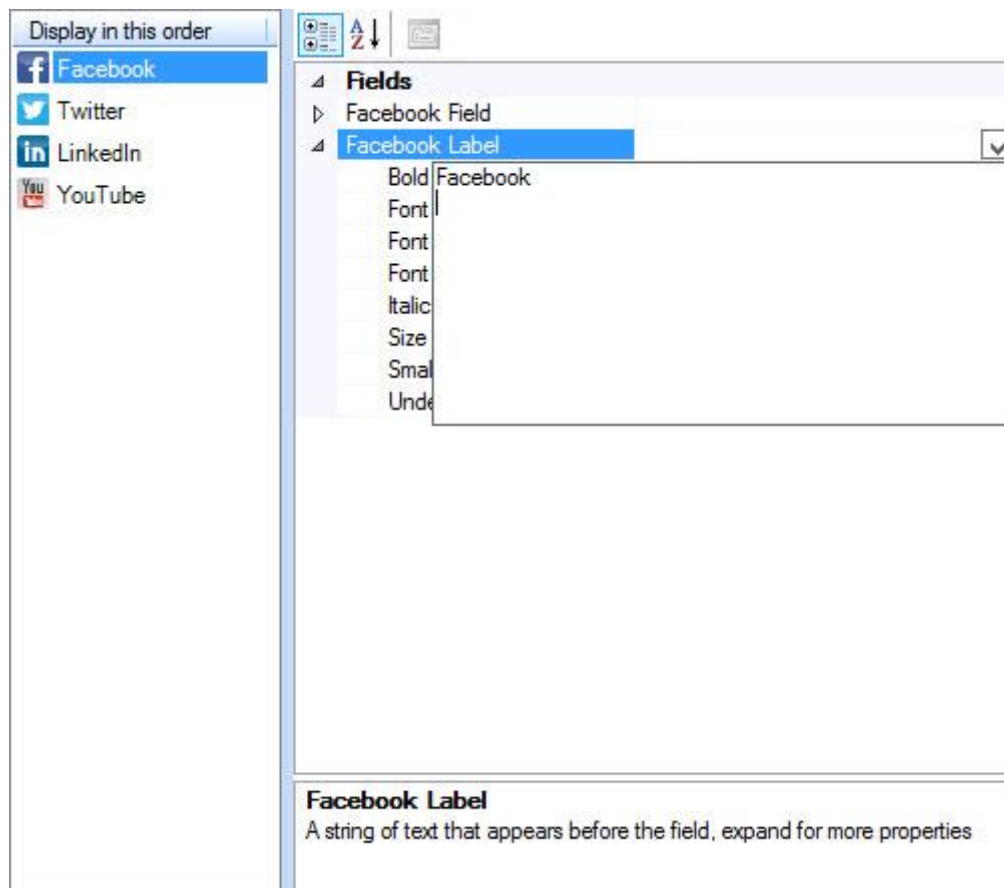
- The [alt text](#) property contains text that will be displayed when a message recipient hovers their cursor over the icon for that item. Default text is provided but you may wish to change this to something more personal (for example, 'Visit us on Facebook!').
- The [hyperlink](#) property contains a link to the main site for the social media item - for example, <http://www.facebook.com>. You should update this link to reflect your own feed/page - for example, <http://www.facebook.com/pages/Exclaimer/148766371817678>.
- The [image location](#) property shows where the icon for the social media item is stored. If you are happy to use the default icon then there is no need to change this however, if you wish to use an alternative icon, you should change this property accordingly.

## Label Properties

Label properties can be used if you wish to add text to a social media item - for example:

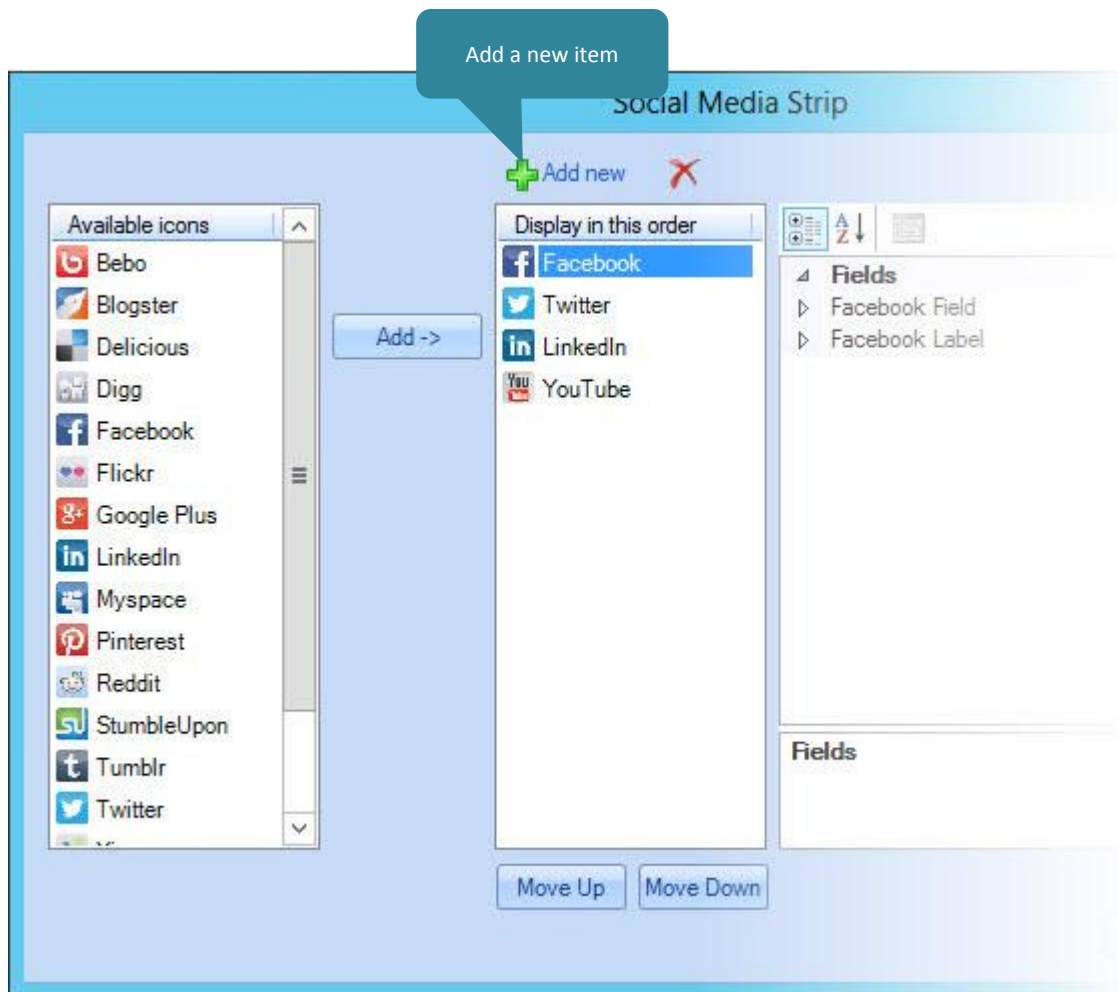


To do this, click anywhere within the topmost **label** field to activate it and then click the associated down-arrow to open the text box and add required text:



## Adding a New Item to the Social Media Strip

If you need to add a social media item which is not shown in the [available icons](#) list, click the [add new](#) option at the top of the [social media strip](#) window:



From here, the [add icon](#) window is displayed:

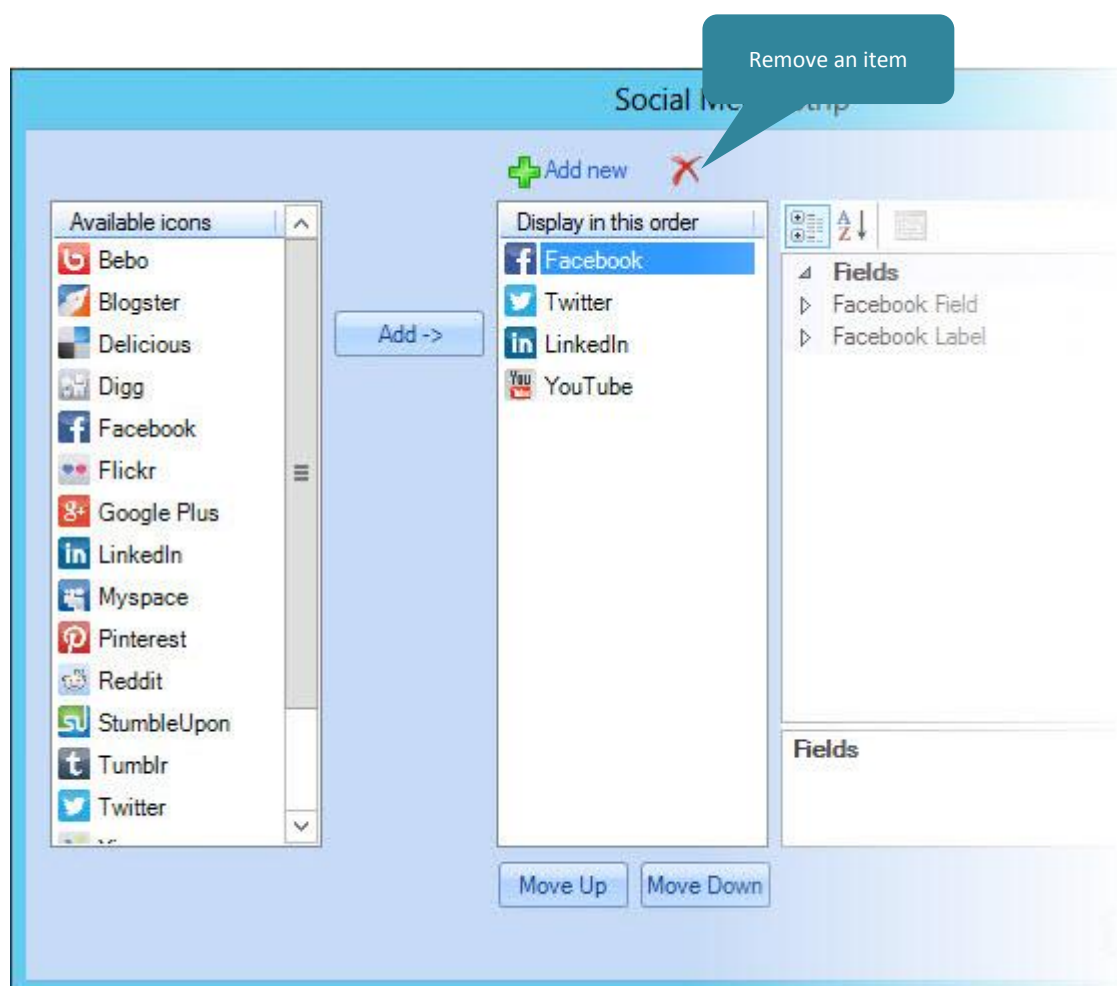


Complete details for this item using the table below as a guide:

Toolbar option	Summary
Icon Name	Enter a name for this item. This name is used to identify this item in the <a href="#">available icons</a> list.
Location	Click the browse button associated with this field to navigate drives and folders to locate the required image.
Hyperlink	Enter the full URL associated with this item - for example, <a href="http://www.facebook.com/pages/Exclaimer/148766371817678">http://www.facebook.com/pages/Exclaimer/148766371817678</a> .
Alt Text	Enter text to be displayed when a message recipient hovers their cursor over the icon for this item - for example, 'Visit us on Facebook!'.

## Removing an Item from the Social Media Strip

To remove an item from the social media strip, simply select the required item (in the center pane) and click the cross icon at the top of the [social media strip](#) window:

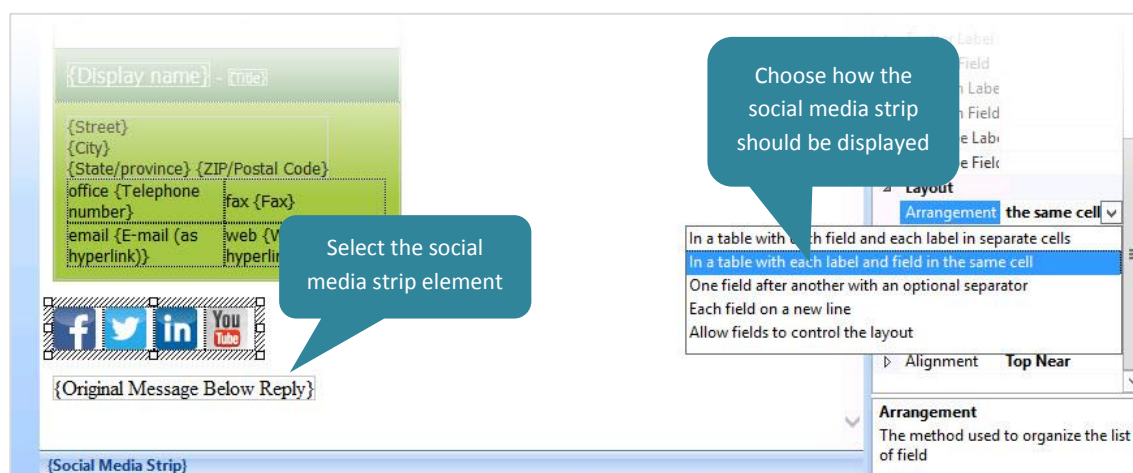


## Reorganizing the Social Media Strip

Social media items are displayed in the sequence that they appear within the center pane of the **social media strip** window. To change this sequence, select an item and use move up/ move down buttons to shift its position in the list.

## Customizing the Social Media Strip

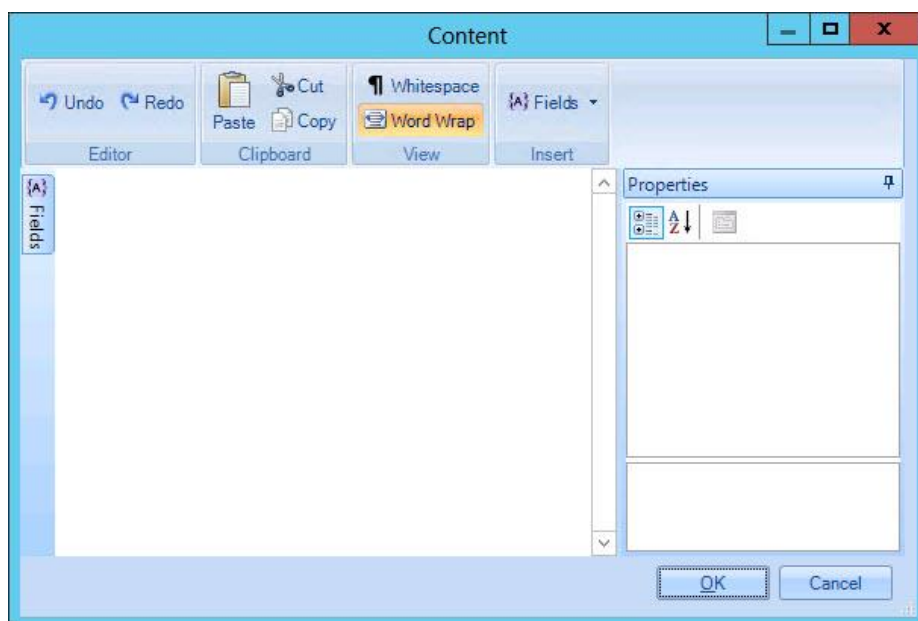
Once a social media strip has been added to a template, you can define properties for the strip as a whole. For example, you can define a border, background color and layout. To do this, select the social media strip and access the **properties** panel:



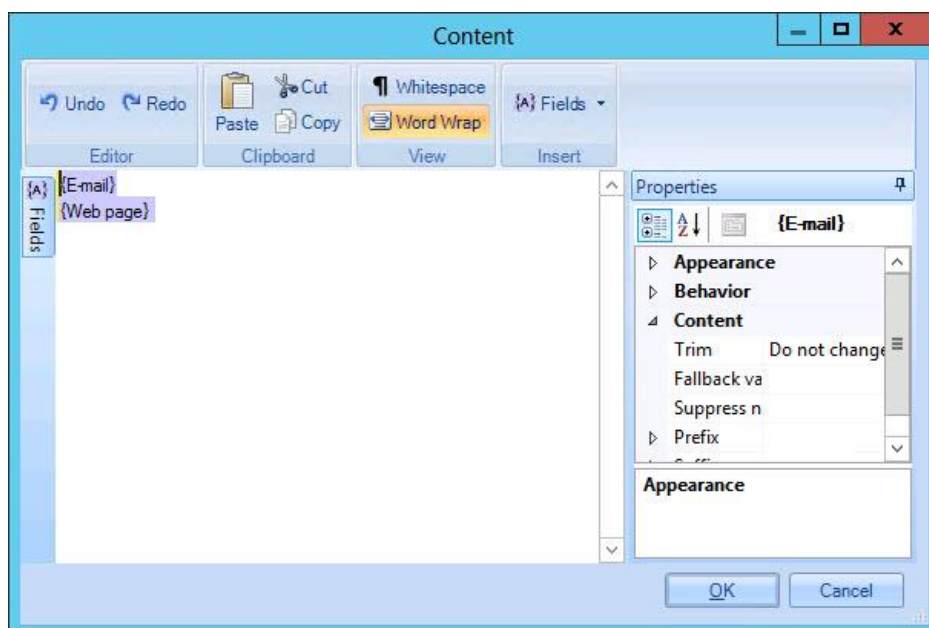
## Composite Field

A [composite](#) field is used as a container for multiple fields that need to be used together. For example, you might define a [composite](#) field which contains [department](#), [company](#) and the [user's web page](#). A [composite](#) field might contain just fields, but it can also contain text. To define a [composite](#) field, follow the steps below:

1. Use the [fields](#) panel to insert a [composite](#) field. When this field is added to a template, the [content](#) window is displayed:



2. Use the [fields](#) panel to insert required fields - i.e. fields that will make up the [composite](#) field. Adding fields here works in exactly the same way as adding any sort of field - you can select any field that has been added and update properties in the right-hand pane:



3. Having entered all required fields, click **OK** to exit from the **content** window and return to the template editor.

NOTE

Remember that you can switch to **preview** mode (from the template editor toolbar [pg.209]) to see the effect of any dynamic fields you have inserted.



## List of Fields

The [list of fields](#) is used to choose a number of fields to be [added](#) [pg.261], together with associated labels.

Having added a [list of fields](#), you can specify [font properties for all labels](#) [pg.264], so there is no need to format each label individually unless you have a particular need for doing so. You can also choose [how the fields and labels should be displayed](#) [pg.265] - for example, you might choose to use a tabular layout or as a single line with a given separator.

The example below shows an extract from a template in both design and preview modes. Here, a [list of fields](#) element has been added to insert three fields with associated labels, displayed as a single line with a separator:

Design Mode



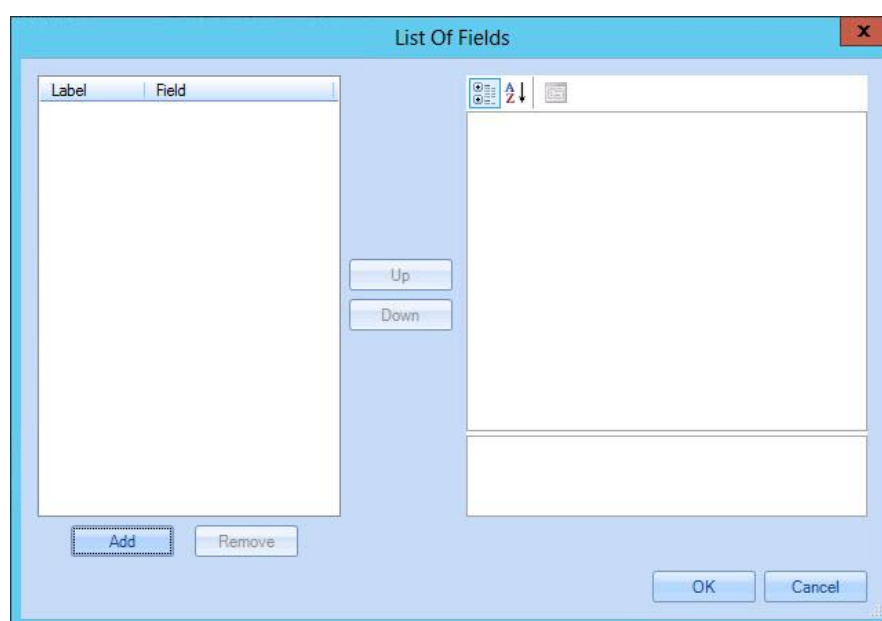
Preview Mode



## Adding a List of Fields

To add a list of fields:

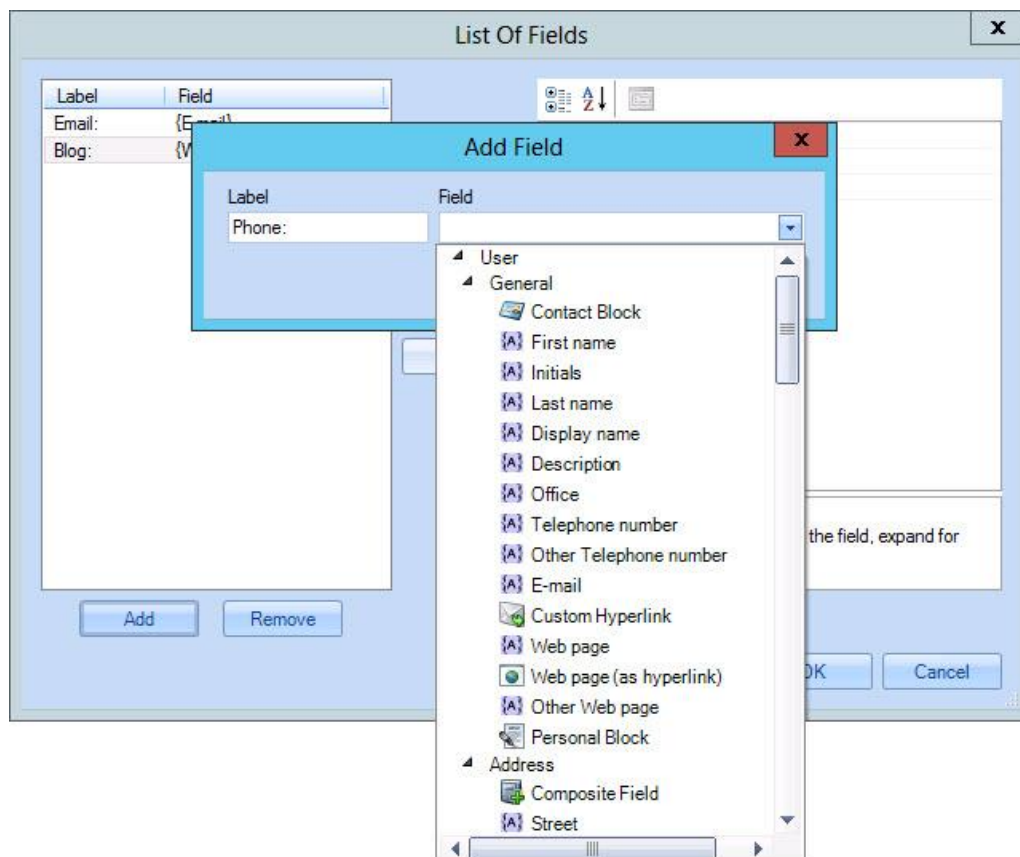
1. Use the [fields panel](#) to insert a [list of fields](#) field. When this field is added to a template, the [list of fields](#) window is displayed:



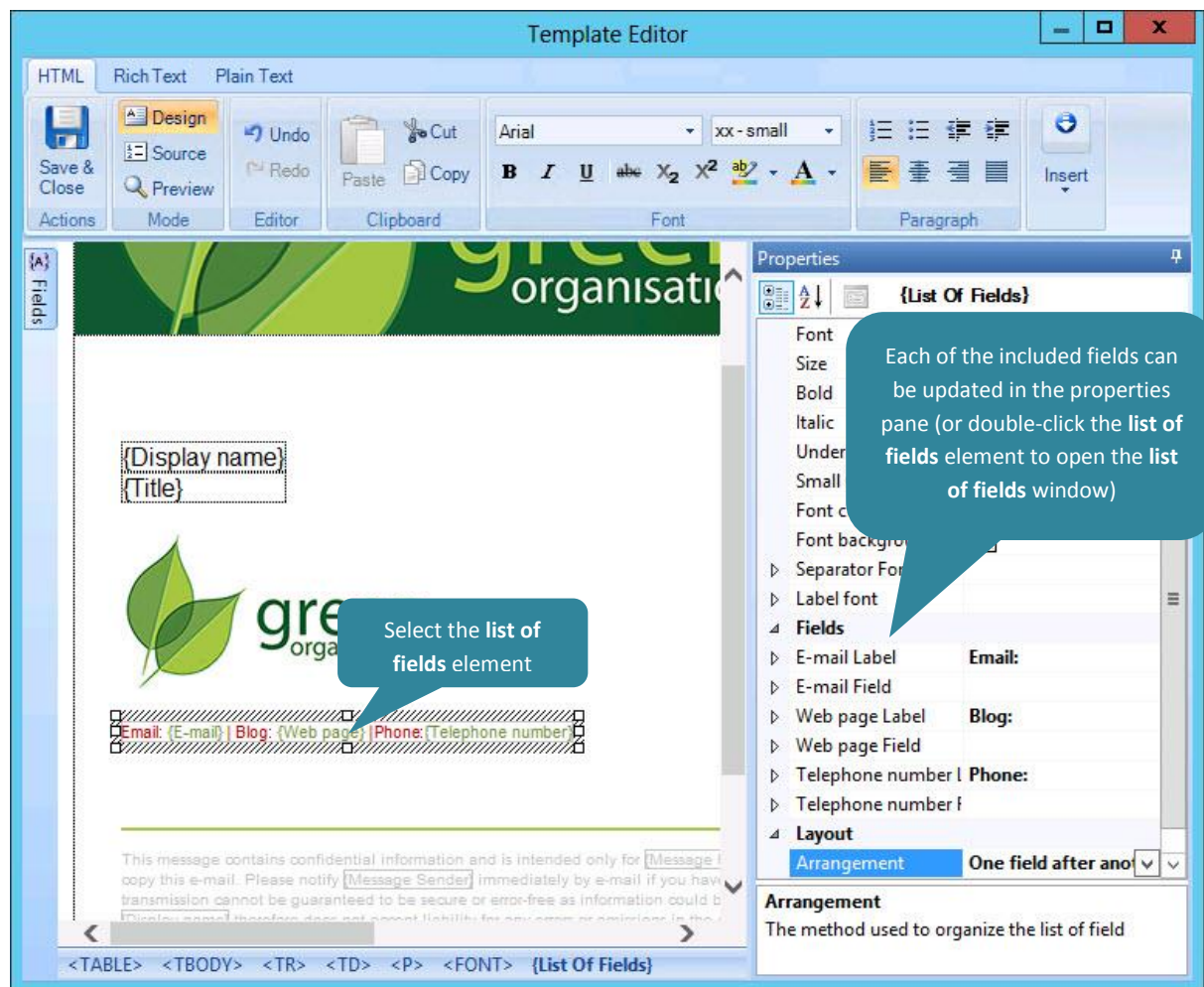
2. Click the **add** button to add the first required field. The **add field** window is displayed:



3. Enter a **label** for the field and use the arrow associated with **field** to choose the required field:

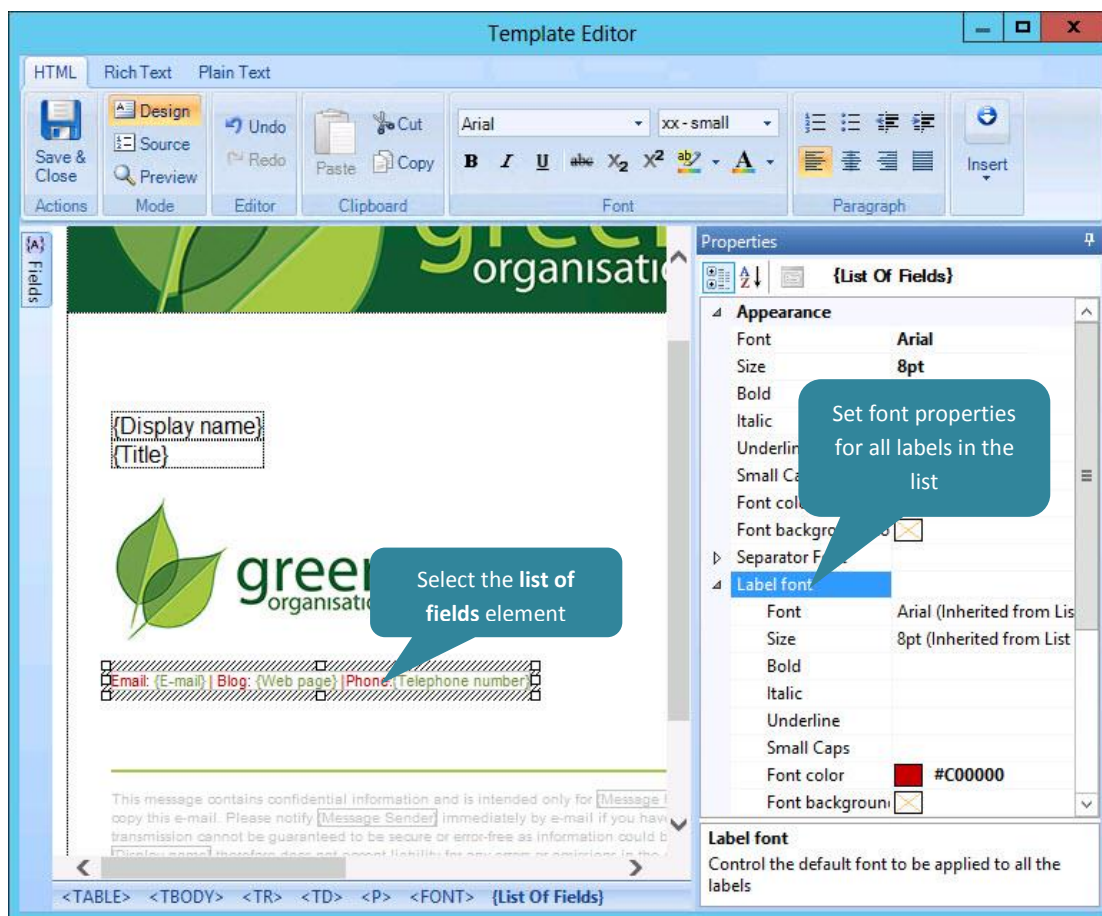


4. Add as many fields as required in this way and then click **OK** to return to the template editor, where the **list of fields** element is added to the template:



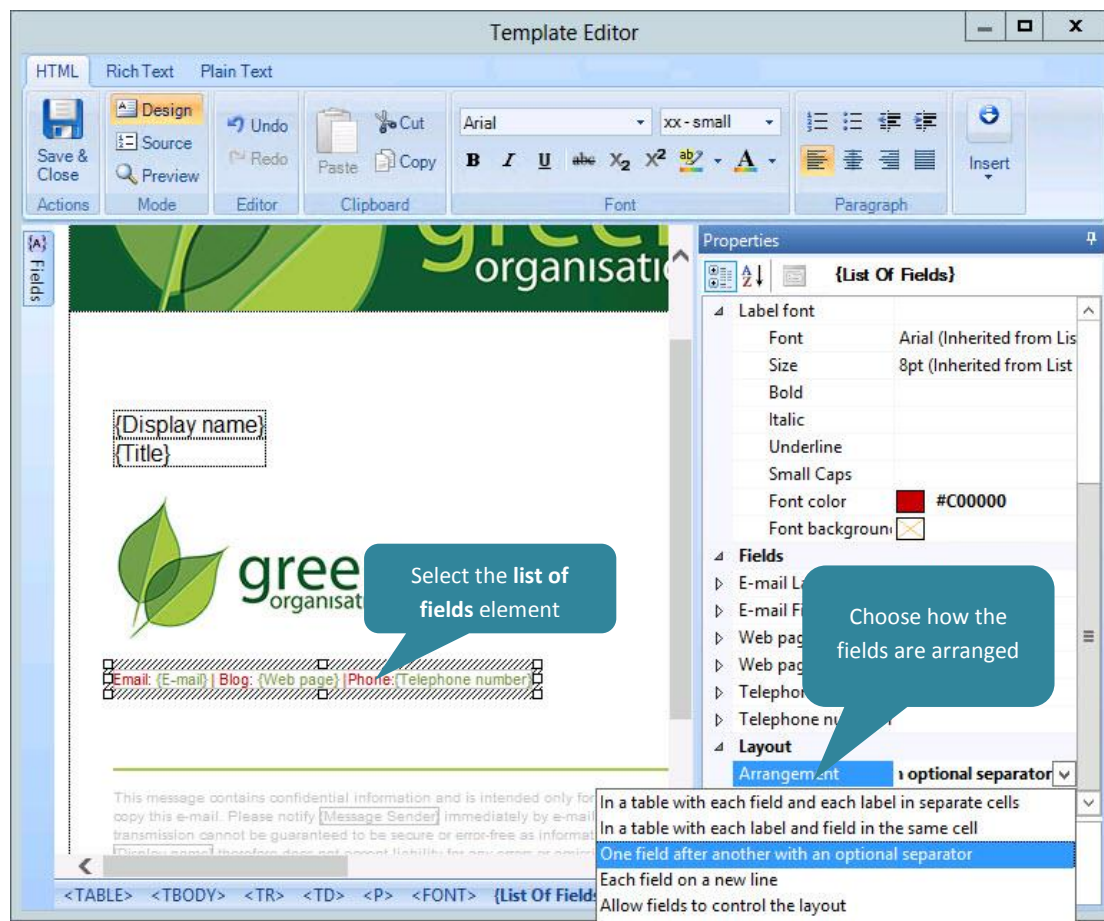
## Changing the Appearance of All Field Labels

To quickly change the appearance of all labels in a list of fields, simply select the **list of fields** element and update font settings within the **label font** section of the **properties** pane:



## Choosing How a List of Fields is Arranged

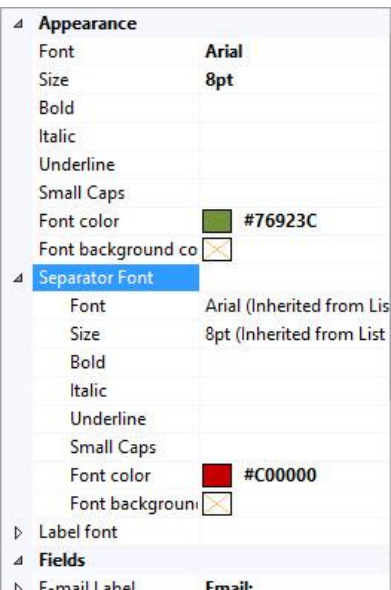
By default, a [list of fields](#) is presented in tabular form, with labels in the left-hand column and fields on the right. If required, you can change the arrangement using [layout > arrangement](#) settings in the [properties](#) pane:



Available options are summarized below:

Action	Summary
In a table with each field and each label in separate cells	<p>This is the default setting with field labels in the left-hand column and fields on the right:</p> <p>Email: kareng@greenorg.net  Blog: www.greenorg.net  Phone: +44 (0) 1252 987 456</p> <p>With this option, additional properties are available so you can also specify how the table should be displayed:</p> <div> <div>Layout</div> <div> Arrangement In a table with each Number of Columns: 2 Cell spacing 0 Cell padding 0 Width Height Alignment Top Near </div> </div>
In a table with each label and field in the same cell	<p>Arranges the label and field in the same cell:</p> <p>Email: kareng@greenorg.net  Blog: www.greenorg.net  Phone: +44 (0) 1252 987 456</p> <p>With this option, additional properties are available so you can also specify how the table should be displayed:</p> <div> <div>Layout</div> <div> Arrangement In a table with each Number of Columns: 1 Cell spacing 0 Cell padding 0 Width Height Alignment Top Near </div> </div> <p>.../continued</p>

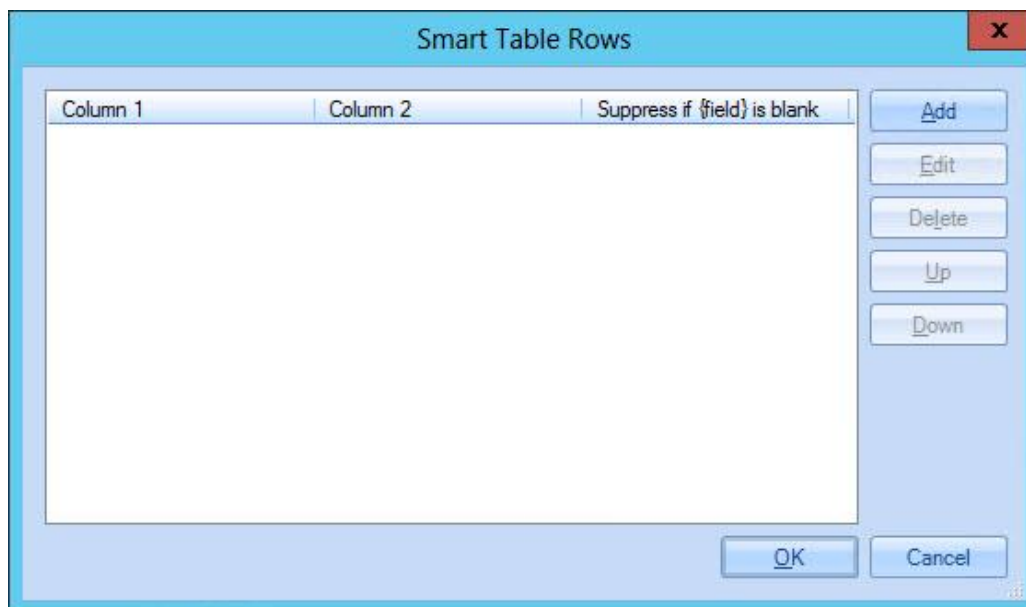


Action	Summary
One field after another with an optional separator	<p>With this option, each label and field is arranged in a continuous line, optionally delimited by a separator:</p> <p>Email: kareng@greenorg.net   Blog: www.greenorg.net   Phone: +44 (0) 1252 987 456</p> <p>The separator is defined using the <a href="#">field separator</a> property, which is available when this option is selected:</p>  <p>Having added a separator, you can apply formatting for your chosen character using <a href="#">separator font</a> properties:</p> 
Each field on a new line	<p>Use this option to display each label and field together on a new line:</p> <p>Email: kareng@greenorg.net Blog: www.greenorg.net Phone: +44 (0) 1252 987 456</p>
Allow fields to control the layout	<p>Select this option to accept the most appropriate layout as determined by fields you have selected for inclusion:</p> <p>Email: kareng@greenorg.net • Blog: www.greenorg.net • Phone: +44 (0) 1252 987 456</p>

## Smart Tables

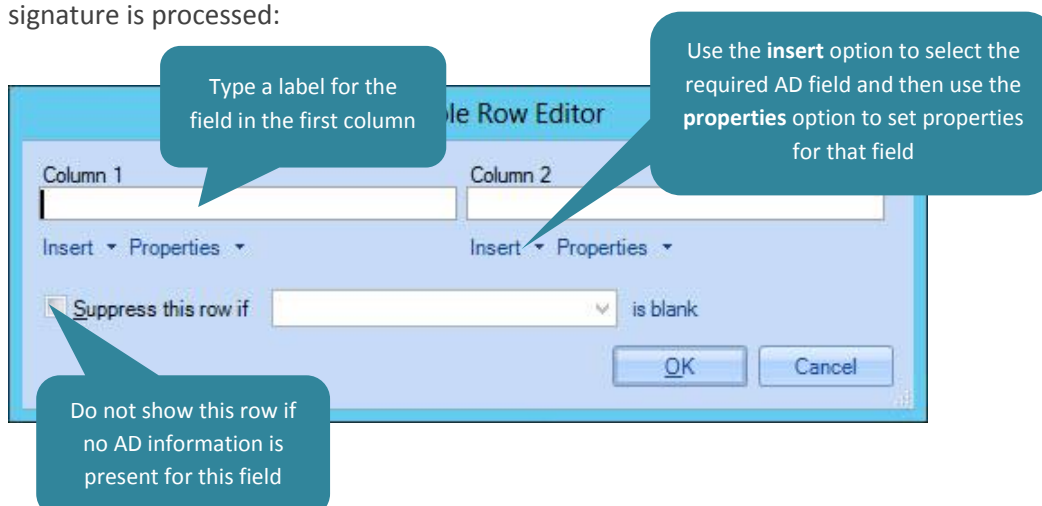
The [custom smart tables](#) field can be used to insert a table and specify content / attributes using straightforward data entry fields. This is a quick and easy way to insert a table and include [Active Directory](#) fields (or other content) at the same time; the alternative would be to [insert a standard HTML table](#) [pg.216] and add fields or other content manually.

Having selected the [custom smart tables](#) field, the [smart table rows](#) window is displayed:



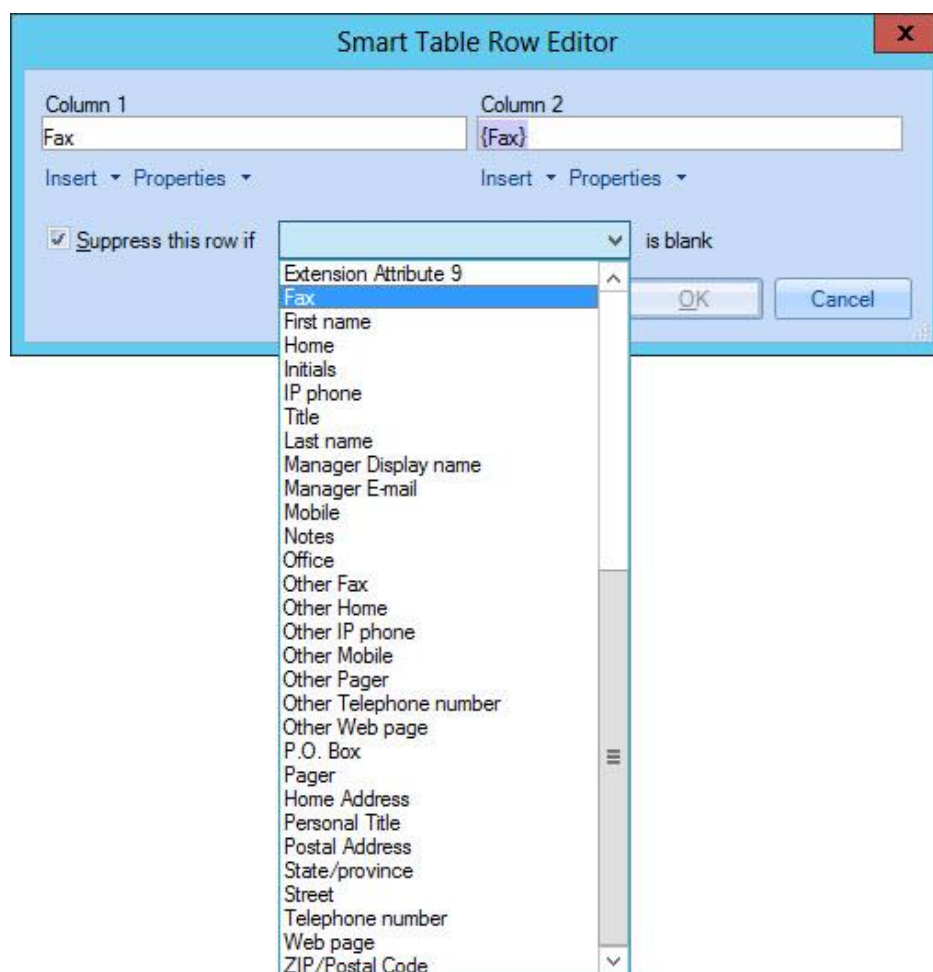
By default, a two column table is added. If you need a smart table with more (or fewer) columns you can continue with the setup for two columns and adjust the number of columns after the table is inserted, or you may prefer to cancel this operation and use the [table](#) [pg.216] option from the [HTML](#) toolbar (since this option allows you to specify the required number of rows and columns at the outset).

From here, click [add](#) to start adding rows to the table. The [smart table row editor](#) allows you to define content for each column in the row - you can add text or fields, as required. If you are adding a field, you can choose to suppress this row if no [Active Directory](#) information is found for the field when the signature is processed:






If required, you can choose to not show a table row if no [Active Directory](#) information is found for a specified field - for example:



Continue to add as many rows as needed. If required, you can select a row and use [up](#) / [down](#) options to adjust the sequence. You can also [edit](#) and [delete](#) existing rows. Once all rows have been added, click [OK](#) to insert the table into the template.

Item 1 Label	Item 1 Content
Item 2 Label	Item 2 Content
Item 3 Label	Item 3 Content
Item 4 Label	Item 5 Content

## Updating an Existing Smart Table

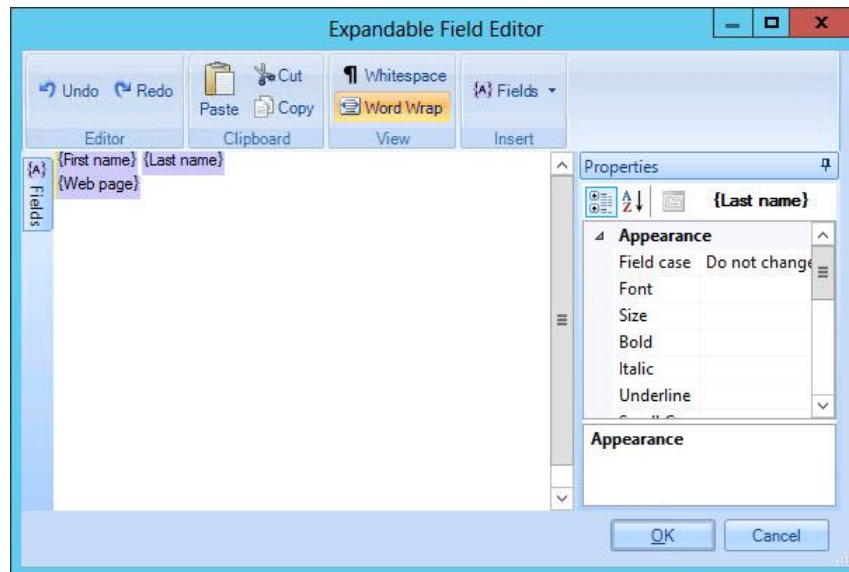
To update an existing smart table in a template, simply select and double-click the table. Alternatively, select the entire table and expand the [misc](#) section in the [properties](#) pane. From here, select the browse -  - button to the right of the [rows](#) entry. The [smart table rows](#) window is displayed so you can add, edit or remove rows as required.

# Advanced Fields

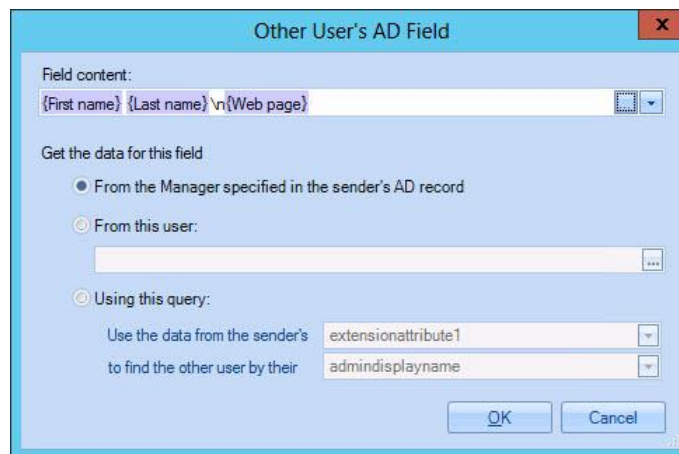
Fields in the [advanced fields](#) section are summarized below:

Field	Inserts...
Conditional field	Set conditions under which <a href="#">Active Directory</a> information will or will not be included. For further information please refer to the <a href="#">conditional field example sections [pg.272]</a> of this guide.
Other User's AD field	<div><p>Add <a href="#">Active Directory</a> information for another (specified) user. Once this field is added, the <a href="#">other user's AD field</a> window is displayed so you can choose what <a href="#">Active Directory</a> information to include and for whom:</p><div><div>Other User's AD Field</div><div><div>Field content:</div><div><div></div><div>...</div><div>▼</div></div></div><div><div>Get the data for this field</div><div><div><input checked="" type="radio"/> From the Manager specified in the sender's AD record</div><div><input type="radio"/> From this user:</div><div><div></div><div>...</div></div><div><input type="radio"/> Using this query:</div><div><div>Use the data from the sender's</div><div>extensionattribute1</div><div>▼</div></div><div><div>to find the other user by their</div><div>admindisplayname</div><div>▼</div></div></div><div><div>OK</div><div>Cancel</div></div></div></div><p>Here, you can select <a href="#">Active Directory</a> details to be included for another user (i.e. a user who is not actually sending the message). You can include details for:</p><ul style="list-style-type: none"><li>• The message sender's <a href="#">manager</a> (as identified from the content of the sender's <a href="#">manager display name</a> field in the <a href="#">Active Directory</a>)</li><li>• A specified <a href="#">user</a> from the <a href="#">Active Directory</a> (click the browse button to select the required user)</li><li>• The user matched for a <a href="#">query</a> defined using <a href="#">exchange advanced [pg.226]</a> fields</li></ul><p>Using <a href="#">field content</a> options (at the top of this window) you can choose to include information from a single <a href="#">Active Directory</a> field, or multiple fields. For a single field, select the down arrow and make your selection:</p><div><div>Other User's AD Field</div><div><div>Field content:</div><div><div></div><div>...</div><div>▼</div></div></div><div><div>Get the data for this field</div><div><div><input checked="" type="radio"/> From the Manager specified in the sender's AD record</div><div><input type="radio"/> From this user:</div><div><div></div><div>...</div></div><div><input type="radio"/> Using this query:</div><div><div>Use the data from the sender's</div><div>extensionattribute1</div><div>▼</div></div><div><div>to find the other user by their</div><div>admindisplayname</div><div>▼</div></div></div><div><div>OK</div><div>Cancel</div></div></div></div><div>.../continued</div></div>

For multiple fields, click the [...] button to open the [expandable field editor](#) and then select all required fields:

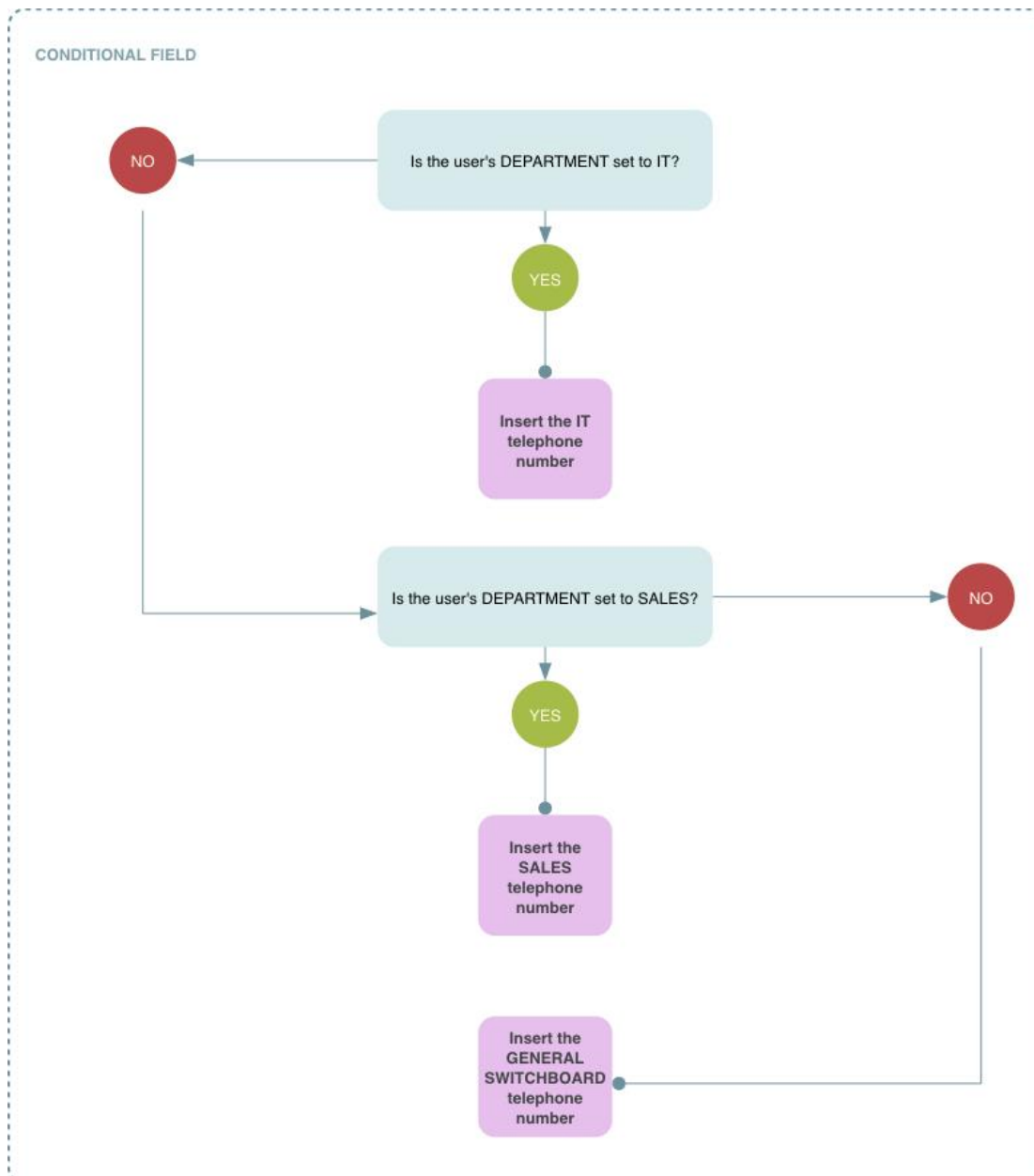


Click **OK** to confirm your selections and exit back to the updated [other user's AD field](#) window - for example:



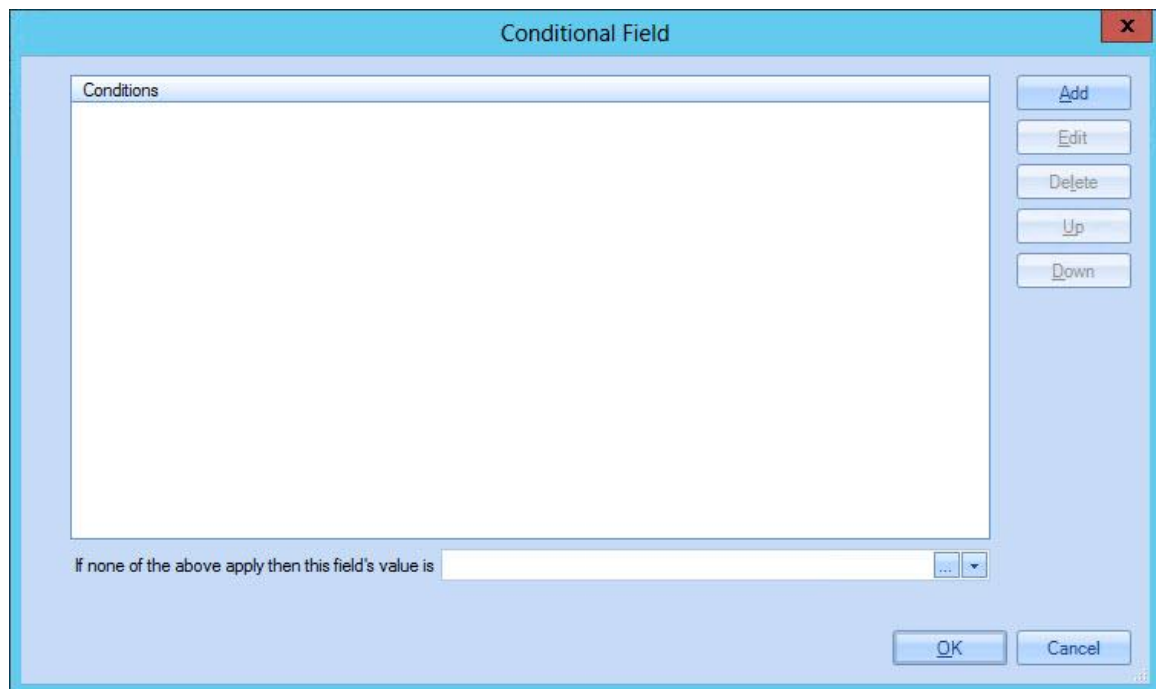
## Conditional Field Example 1

This example shows a [conditional field](#) being used to apply different signature content for users within two given departments, and a generic signature for everyone else. The scenario for this example is illustrated below:



To achieve this scenario using [Exclaimer Signature Manager Outlook Edition](#), follow the steps below:

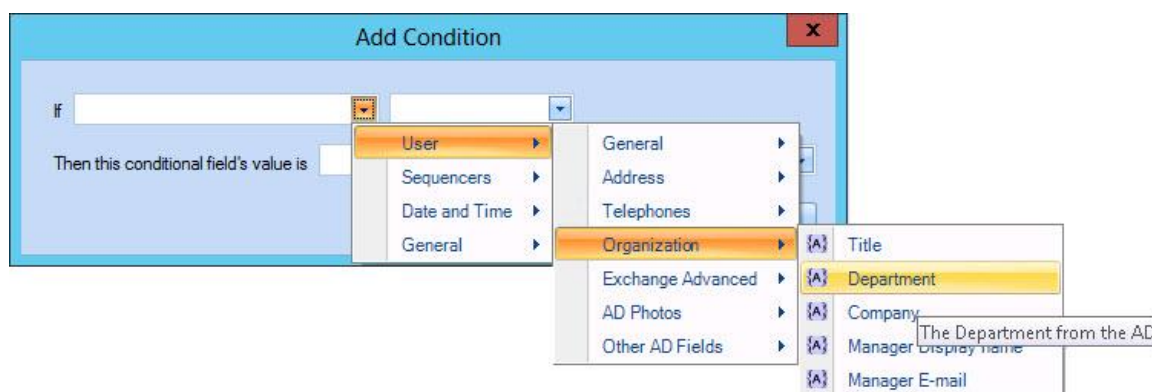
1. [Edit \[pg.202\]](#) or [create \[pg.198\]](#) the required template so that the template editor is open.
2. Position your cursor at the position where conditional content is required.
3. Using the [fields panel](#), insert a [conditional field](#) (listed in the [advanced](#) section). The [conditional field](#) window is displayed:



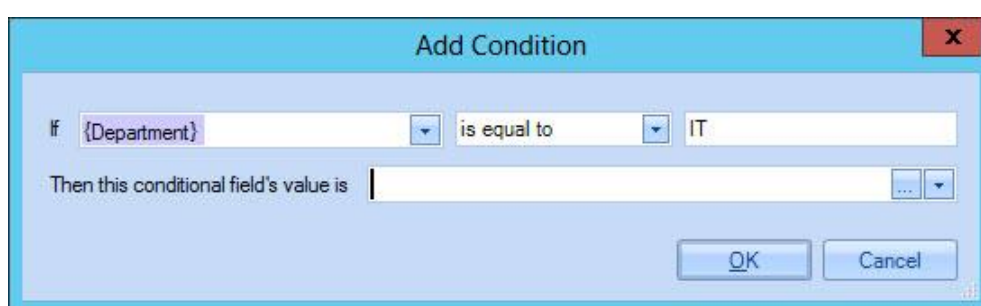
4. Click the [add](#) button to enter the first condition (i.e. to add signature content and associated rules for the [IT department](#)). The [add condition](#) window is displayed:



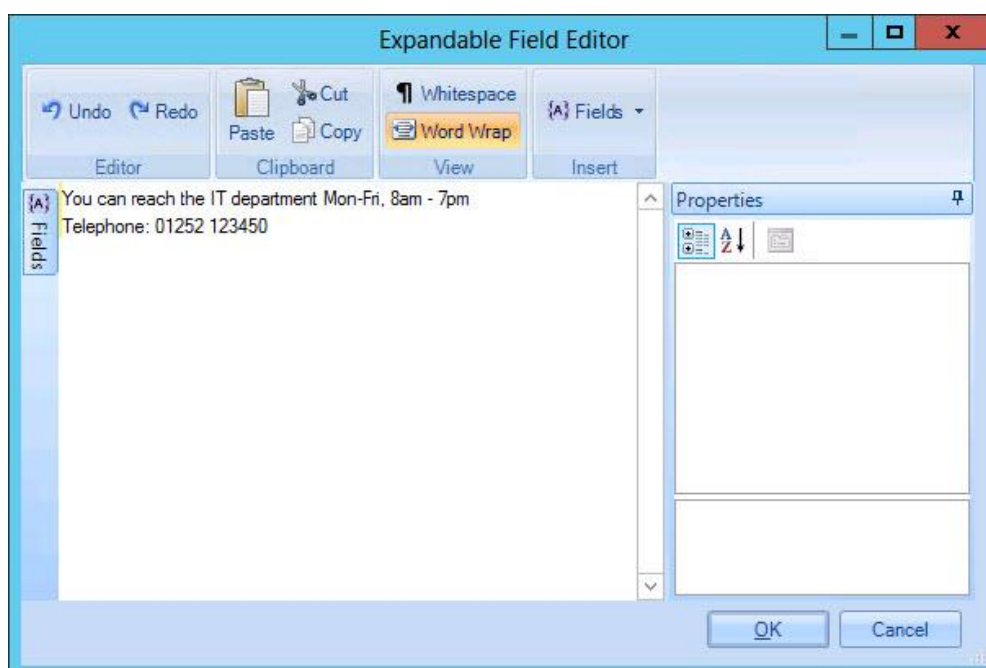
- Using the drop-down lists associated with the **if** field, navigate to select **user > organization > department** field:



- Leave the qualifier as the default **is equal to** and type **IT** into the associated value field:



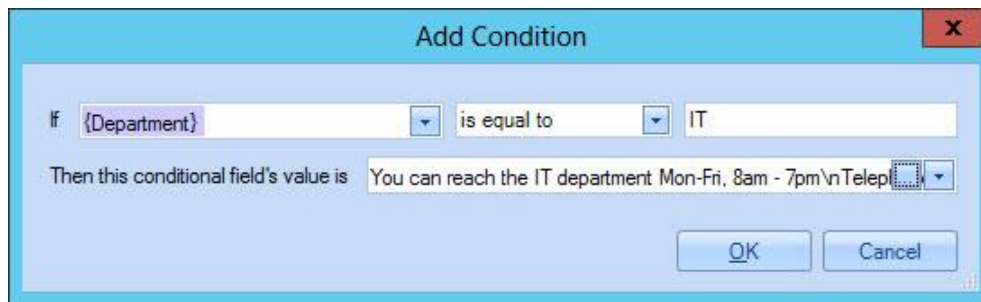
- Click the [...] button associated with the **then this conditional field's value is** field to open the **expandable field editor** window. Here, enter content to be inserted if the associated condition is met (i.e. for messages sent by the **IT department**). You can enter text and/or fields as required:



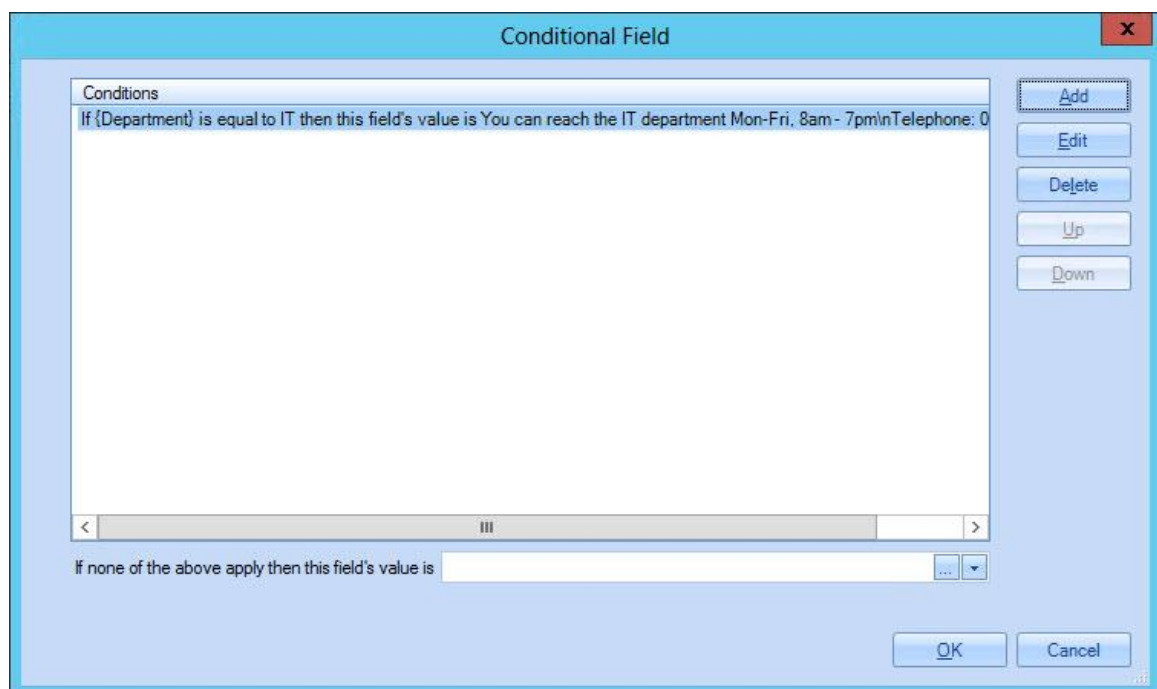
#### NOTE

Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See [step 21](#) [pg.279] for details about changing these properties.

8. Click **OK** to save changes and exit back to the **add condition** window, where your first condition is now displayed:



9. Click **OK** to exit back to the **conditional field** window:

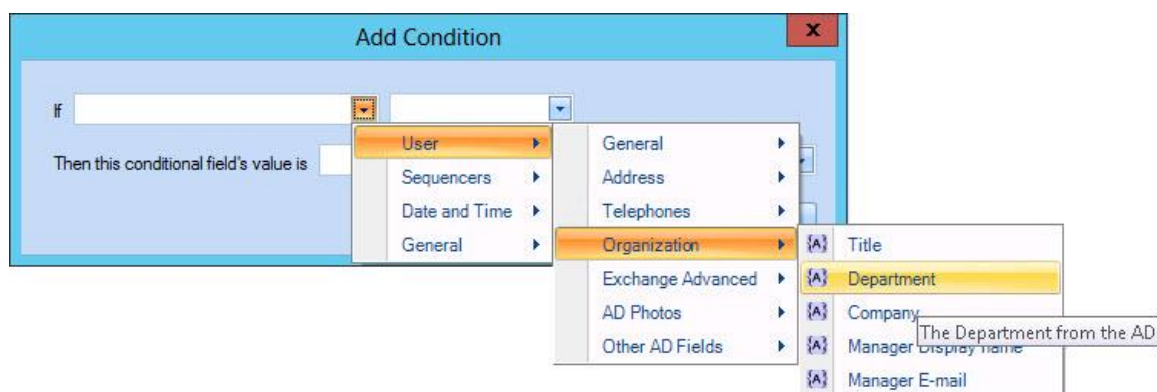


10. Click the **add** button to enter the second condition (i.e. to add signature content and associated rules for the **Sales department**). The **add condition** window is displayed:

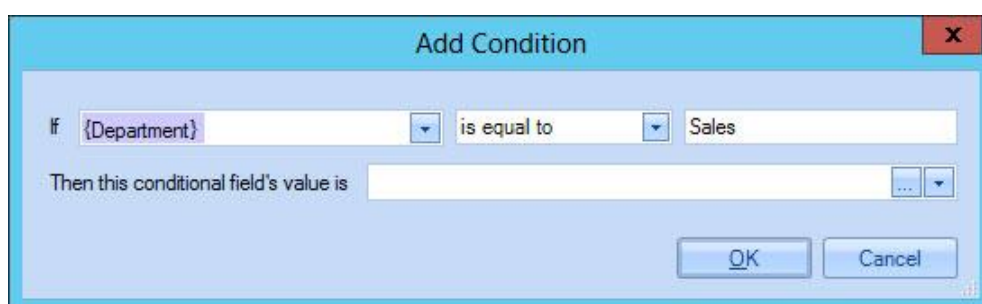




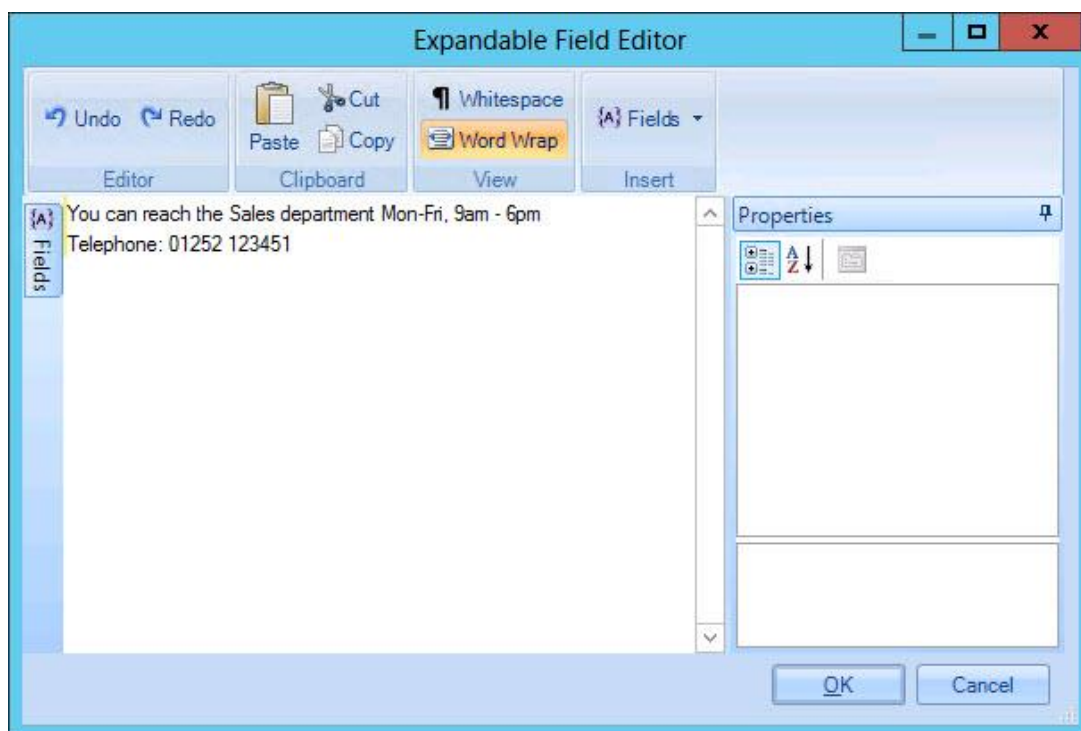
11. Using the drop-down lists associated with the **if** field, navigate to select **user > organization > department** field:



12. Leave the qualifier as the default **is equal to** and type **Sales** into the associated value field:



13. Click the [...] button associated with the **then this conditional field's value is** field to open the **expandable field editor** window. Here, enter content to be inserted if the associated condition is met (i.e. for messages sent by the **Sales department**). You can enter text and/or fields as required:





## NOTE

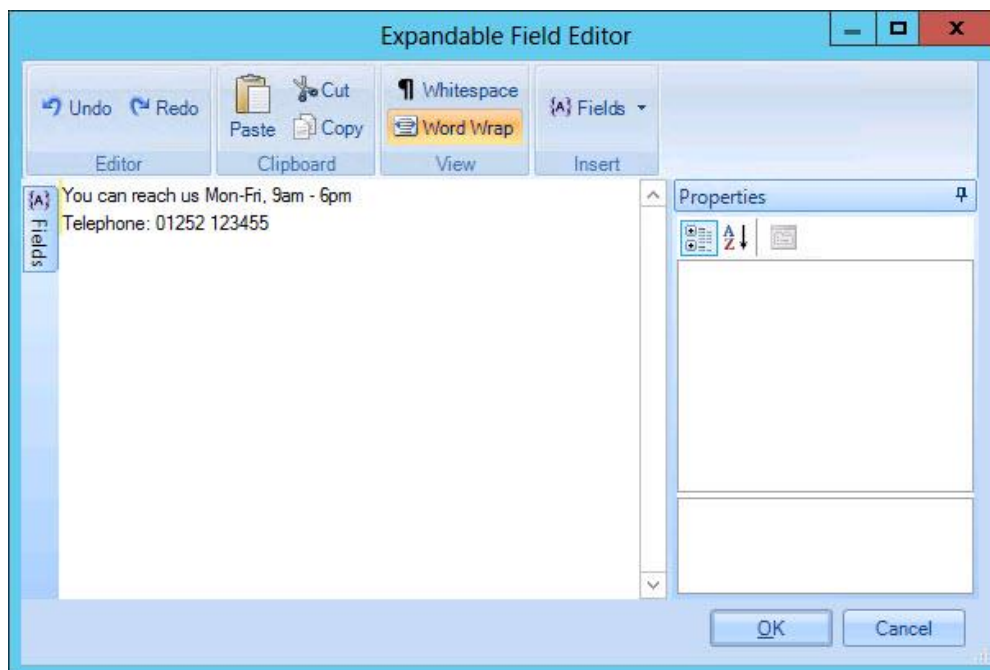
Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See [step 21](#) [pg.279] for details about changing these properties.

14. Click **OK** to save changes and exit back to the **add condition** window, where your second condition is now displayed:

15. Click **OK** to exit back to the **conditional field** window where both conditions are now displayed:

16. To define signature content that should be applied for everyone else (i.e. people who are not in either the **IT** or **Sales** departments), move to the bottom of this window and click the [...] button associated with the **if none of the above apply then this field's value is** field. The **expandable field editor** window is displayed.

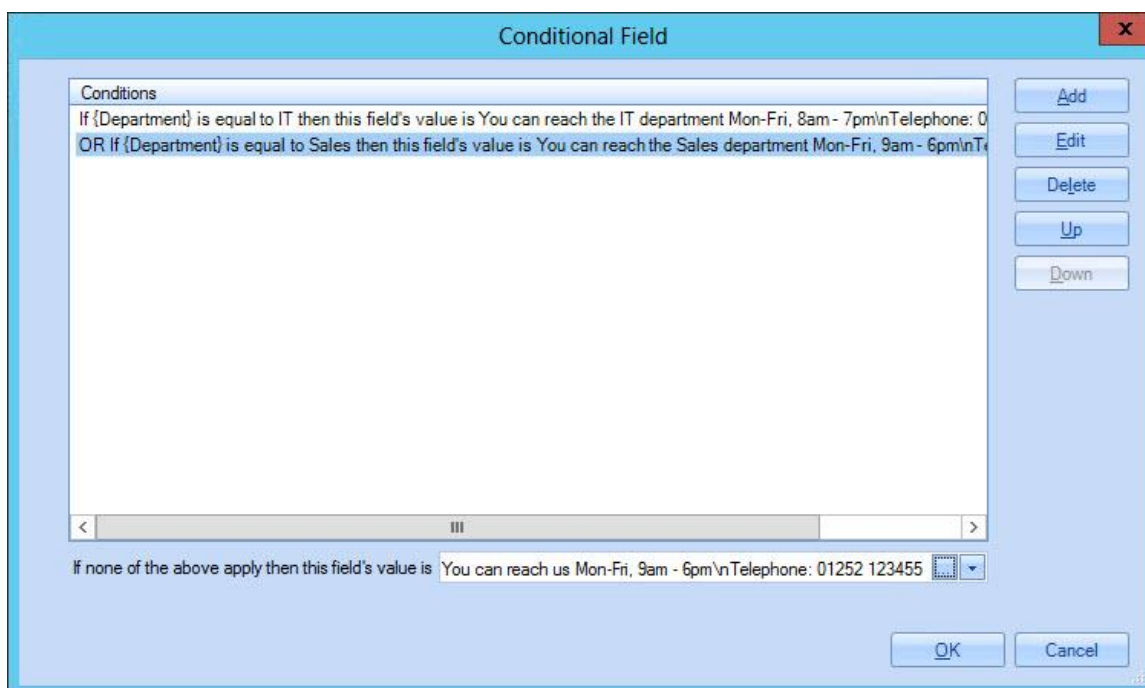
17. Use this window to enter content to be used if neither of the specified conditions are met (i.e. for messages sent by non **IT/Sales** users). You can enter text and/or fields as required:



**NOTE**

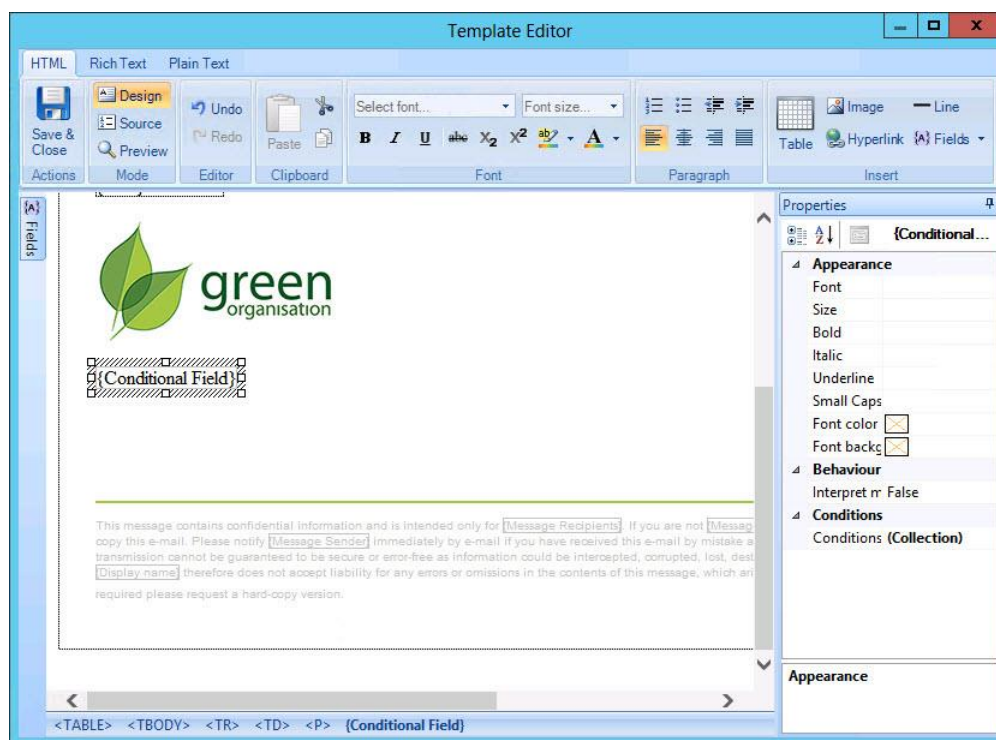
Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See [step 21](#) [pg.279] for details about changing these properties.

18. Click **OK** to save changes and exit back to the **conditional field** window:

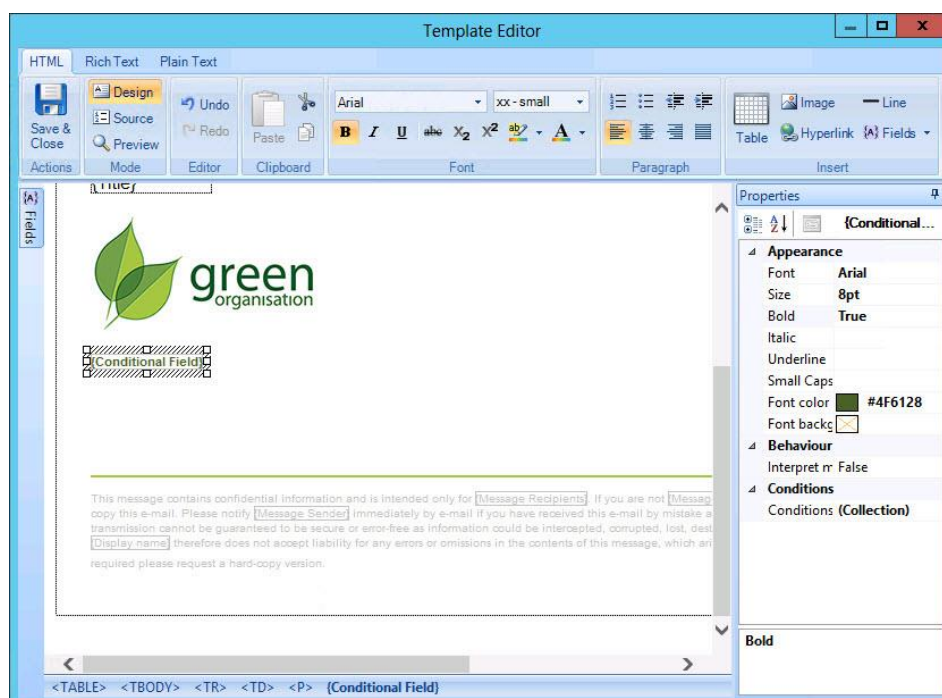


19. Settings for the conditional field are now complete, with two conditions (one for **IT** users and one for **Sales** users) and then required content for everyone else.

20. Click **OK** to exit back to the template editor, where the **conditional field** is now shown:



21. Select this field and use **appearance** settings in the **properties** pane (on the right-hand side of the template editor) to apply required formatting. Any properties specified here will be applied to the associated conditional content when it is used:



In preview mode for an [IT](#) user, this example is displayed as follows (notice that the text has the same font settings as those defined for the [conditional field](#) element):



22. Save the template in the normal way. The template can now be associated with an [Outlook policy](#) [pg.94] where the only [condition](#) [pg.124] required is [all messages](#) (although you can apply further conditions at policy level, if necessary).

NOTE

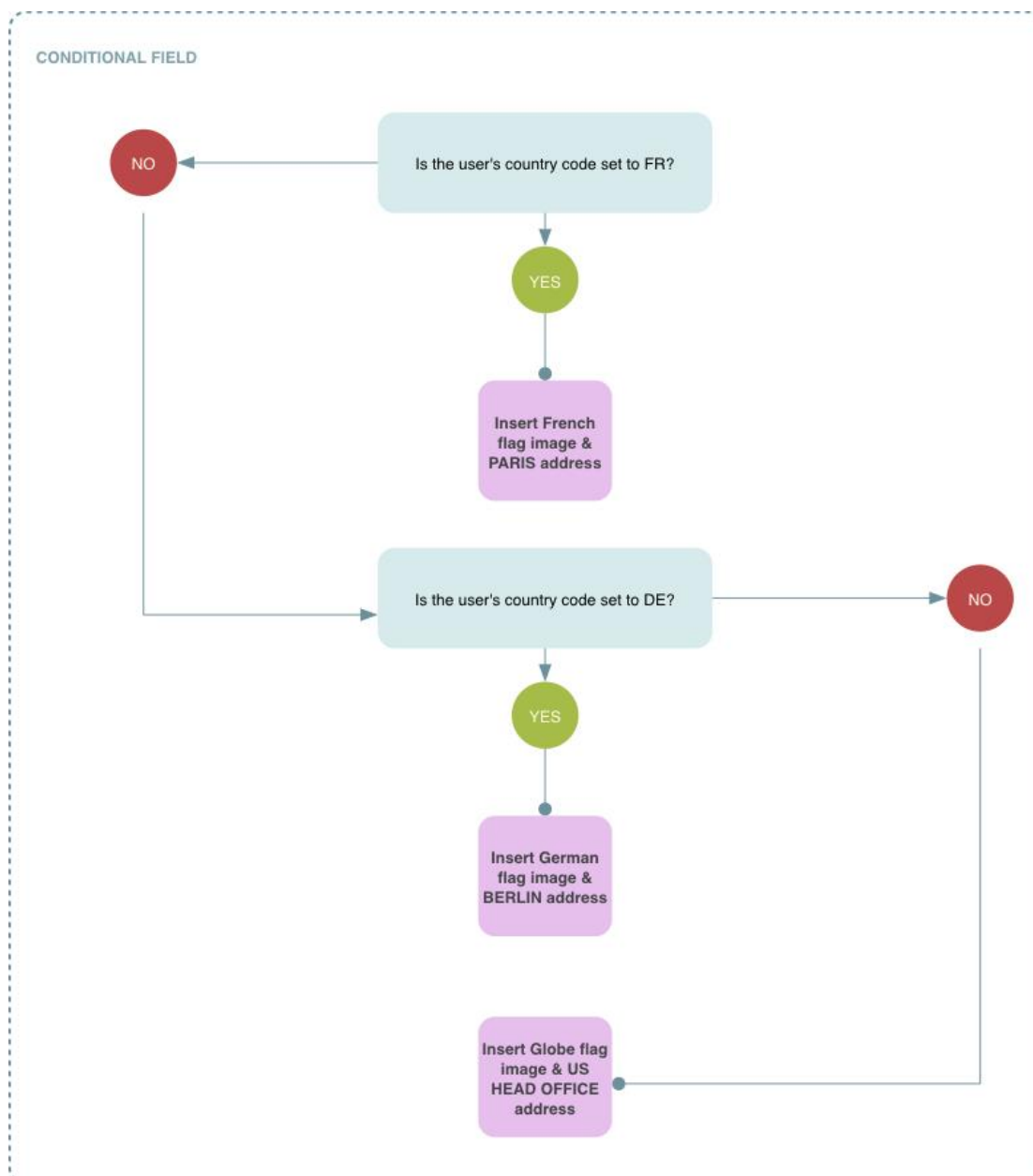
Using nested conditional fields (i.e. adding one **conditional field** within another **conditional field**) can be a particularly powerful approach for advanced users who need to create complex signatures to cater for a wide range of scenarios within an organization. For further information, please refer to the [conditional field example 3 \(advanced\)](#) [pg.292] section.

## Conditional Field Example 2

This example shows a **conditional field** being used to apply different signature content for users in:

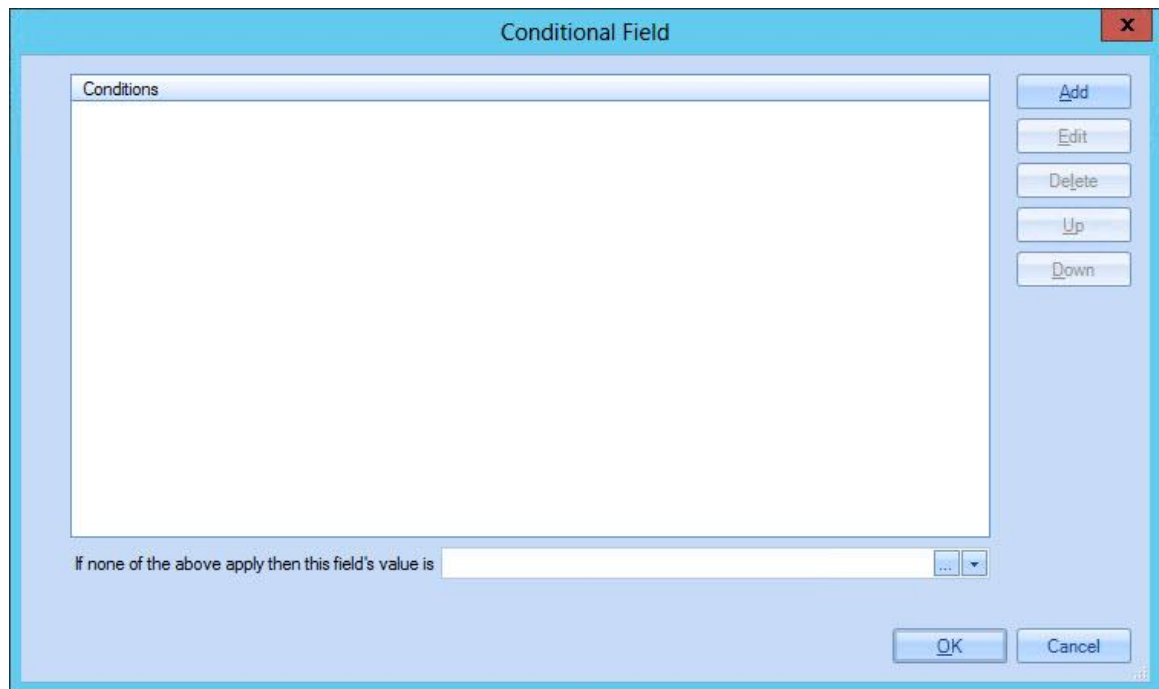
- France (add a French flag image and a Paris address)
- Germany (add a German flag image and a Berlin address)
- Everyone else (add a globe image and a US address)

In this example, conditional content is added in the form of text and a custom image. The scenario for this example is illustrated below:



To achieve this scenario using [Exclaimer Signature Manager Outlook Edition](#), follow the steps below:

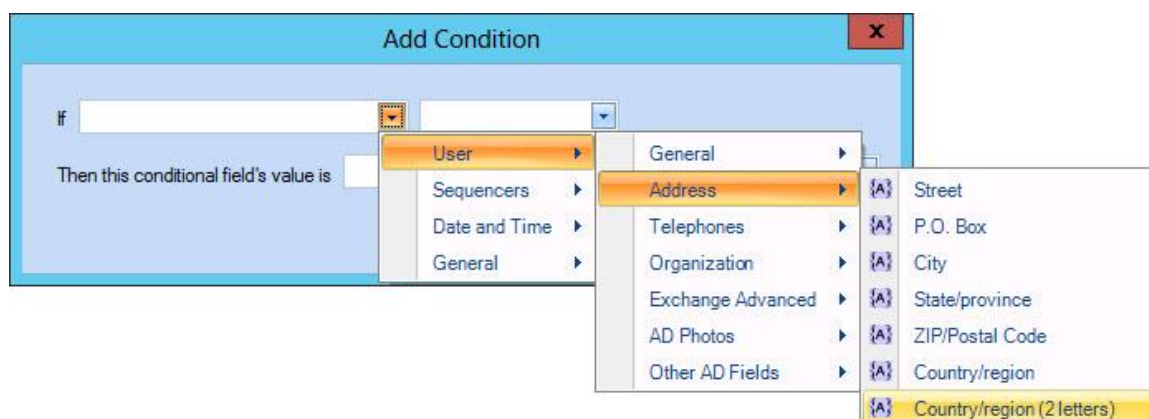
1. [Edit \[pg.202\]](#) or [create \[pg.198\]](#) the required template so that the template editor is open.
2. Position your cursor at the position where conditional content is required.
3. Using the [fields panel](#), insert a [conditional field](#) (listed in the advanced section). The [conditional field](#) window is displayed:



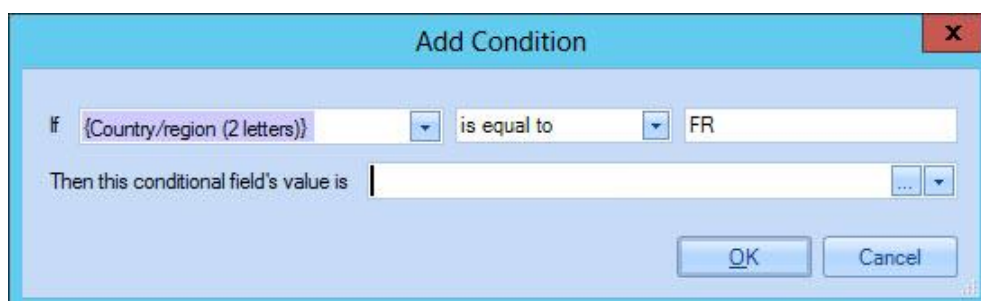
4. Click the [add](#) button to enter the first condition (i.e. to add signature content and associated rules for [French](#) users). The [add condition](#) window is displayed:



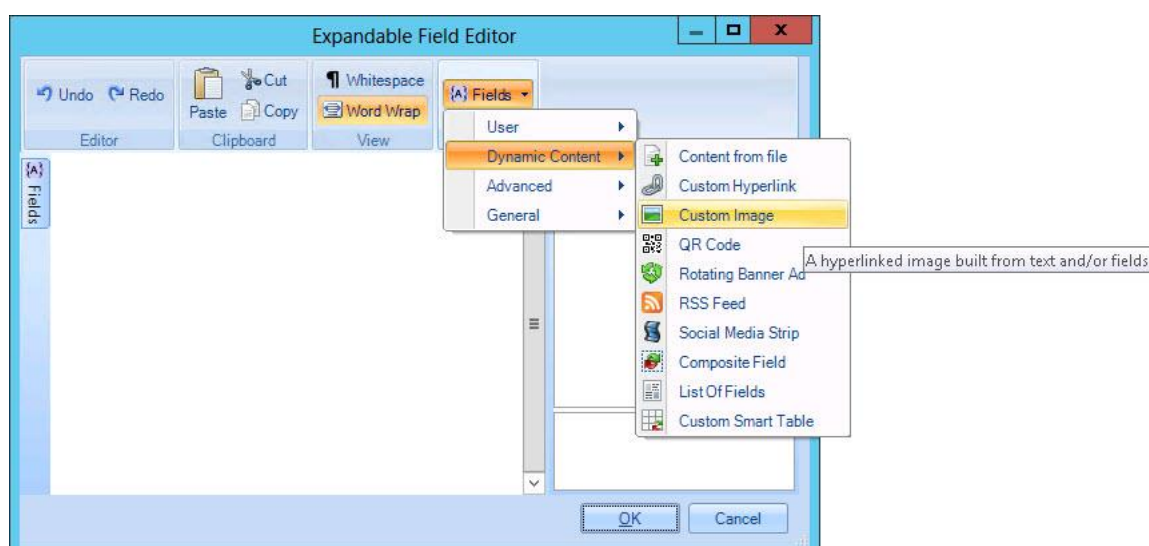
- Using the drop-down lists associated with the **if** field, navigate to select **user > address > country/region (2 letters)** field:



- Leave the qualifier as the default **is equal to** and type **FR** into the associated value field:

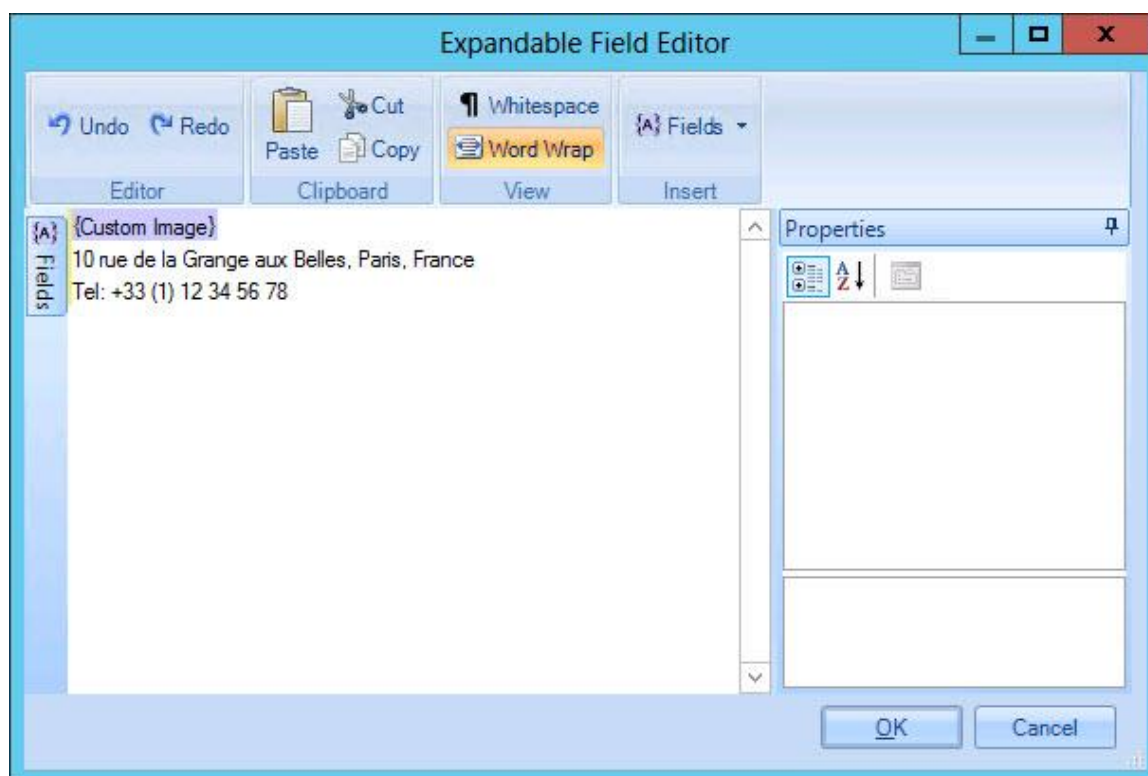


- Click the [...] button associated with the **then this conditional field's value is** field to open the **expandable field editor** window. Use this window to enter content to be inserted if the associated condition is met (i.e. for messages sent by **French** users). You can enter text and/or fields as required - to enter an image of a French flag, the **custom image** field can be used:





8. Select the required [custom image](#) [pg.231] in the normal way and add Paris address details as text (alternatively, you could use [Active Directory address](#) fields if applicable):



**NOTE**

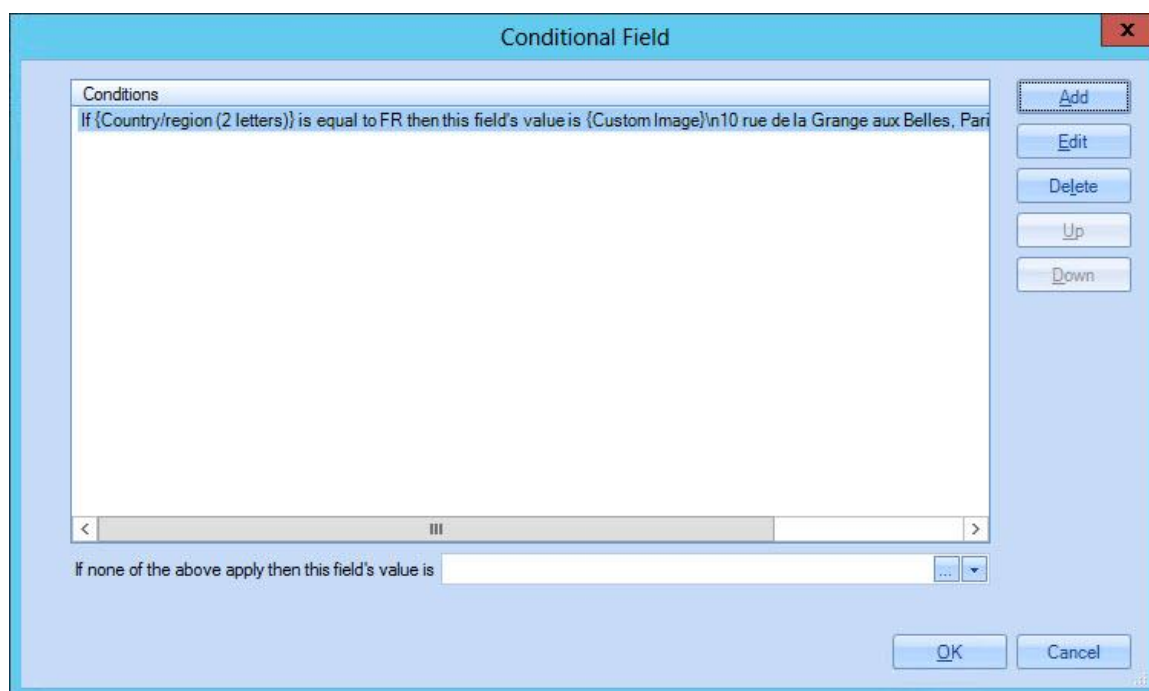
Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See [step 23](#) [pg.290] for details about changing these properties.

9. Click **OK** to save changes and exit back to the [add condition](#) window, where your first condition is now displayed:





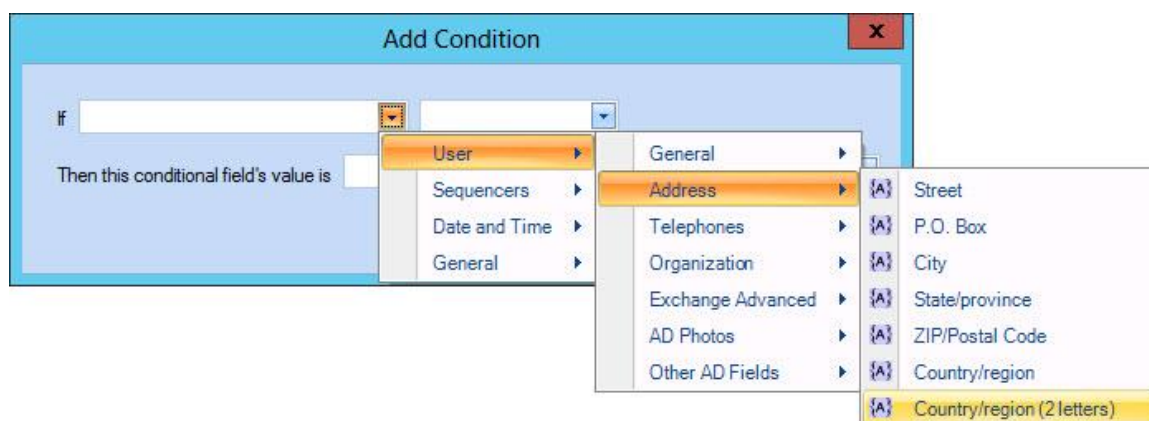
10. Click **OK** to exit back to the **conditional field** window:



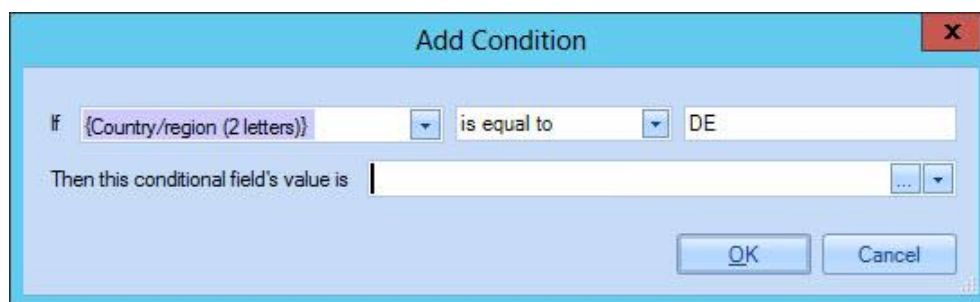
11. Click the **add** button to enter the second condition (i.e. to add signature content and associated rules for **German** users). The **add condition** window is displayed:



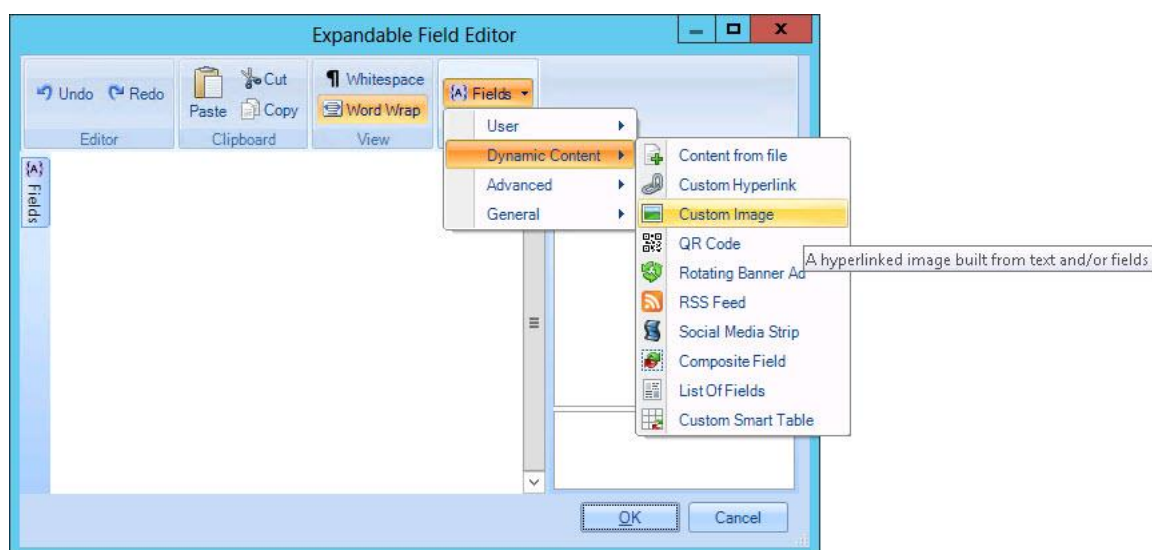
12. Using the drop-down lists associated with the **if** field, navigate to select **user > address > country/region (2 letters)** field:



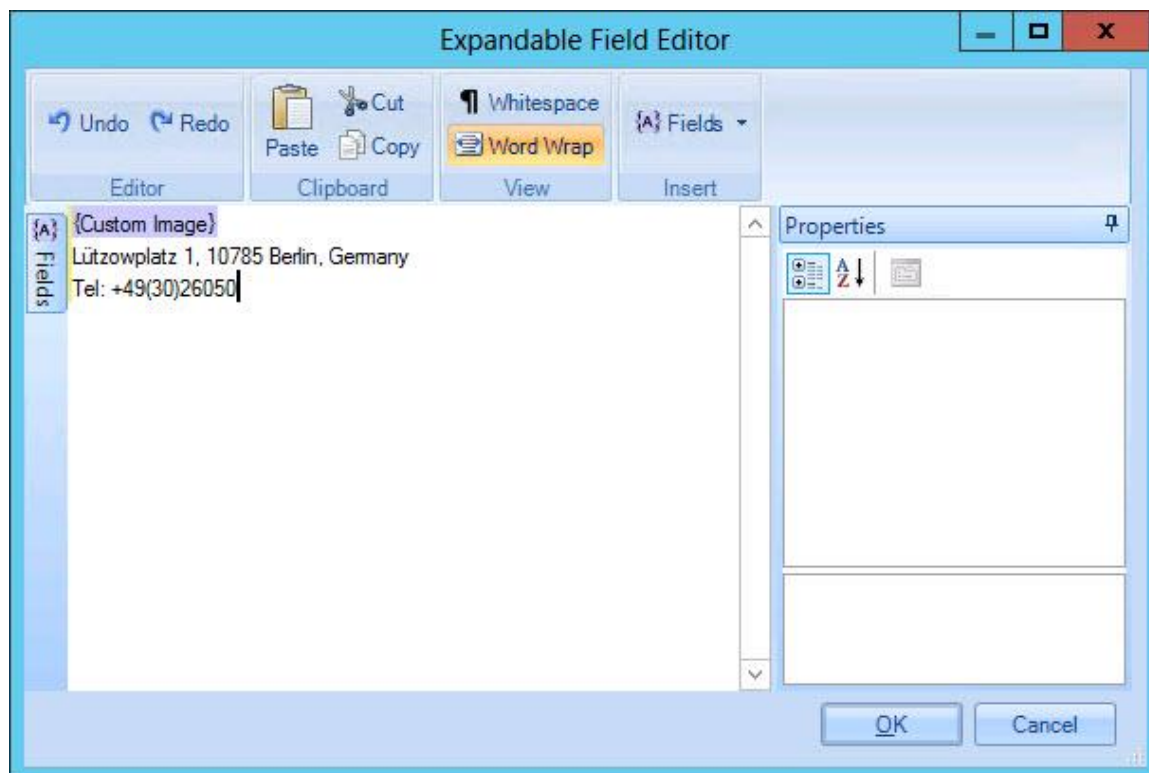
13. Leave the qualifier as the default **is equal to** and type **DE** into the associated value field:



14. Click the [...] button associated with the **then this conditional field's value is** field to open the **expandable field editor** window. Use this window to enter content to be inserted if the associated condition is met (i.e. for messages sent by **German** users). You can enter text and/or fields as required - to enter an image of a German flag, the **custom image** field can be used:



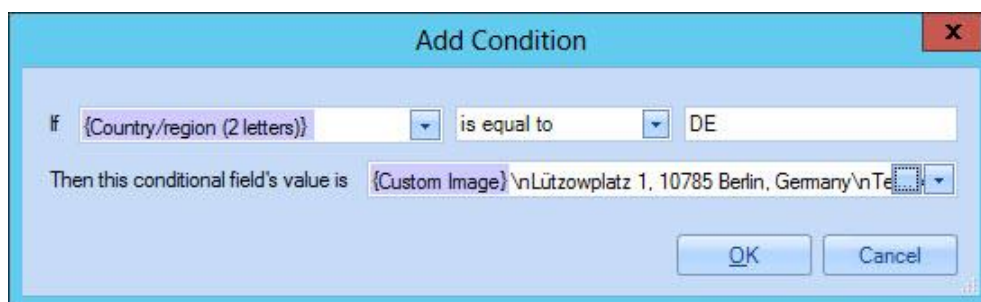
15. Select the required [custom image](#) [pg.231] in the normal way and add Berlin address details as text (alternatively, you could use [Active Directory](#) address fields if applicable):



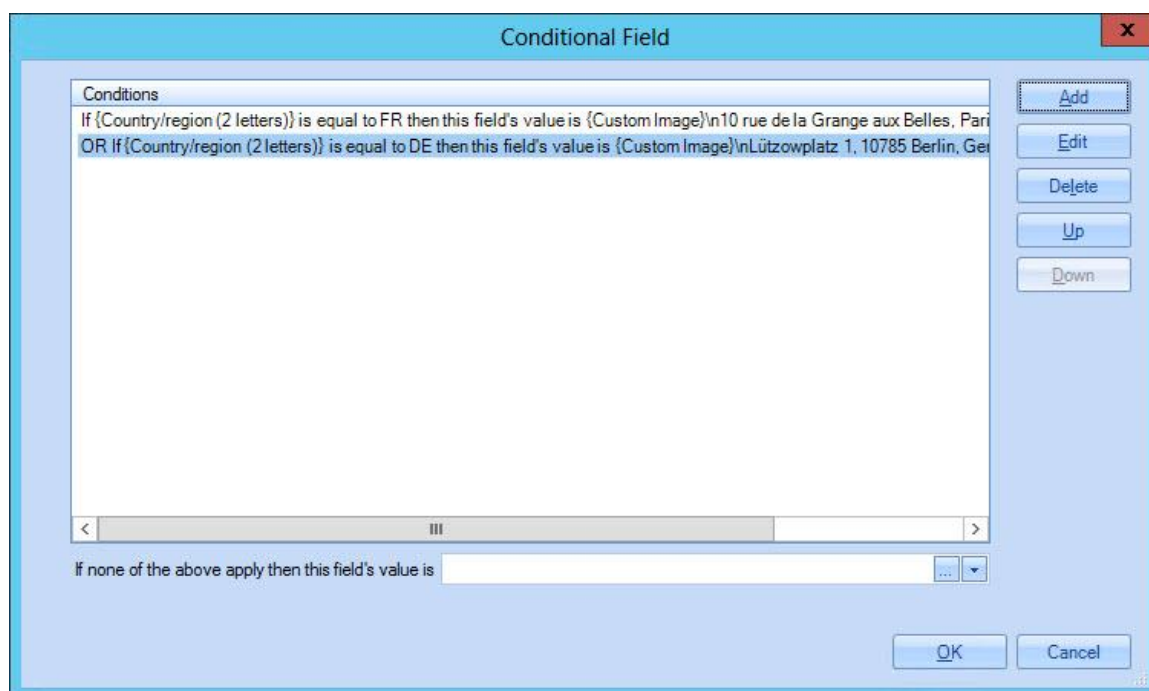
NOTE

Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See [step 23](#) [pg.290] for details about changing these properties.

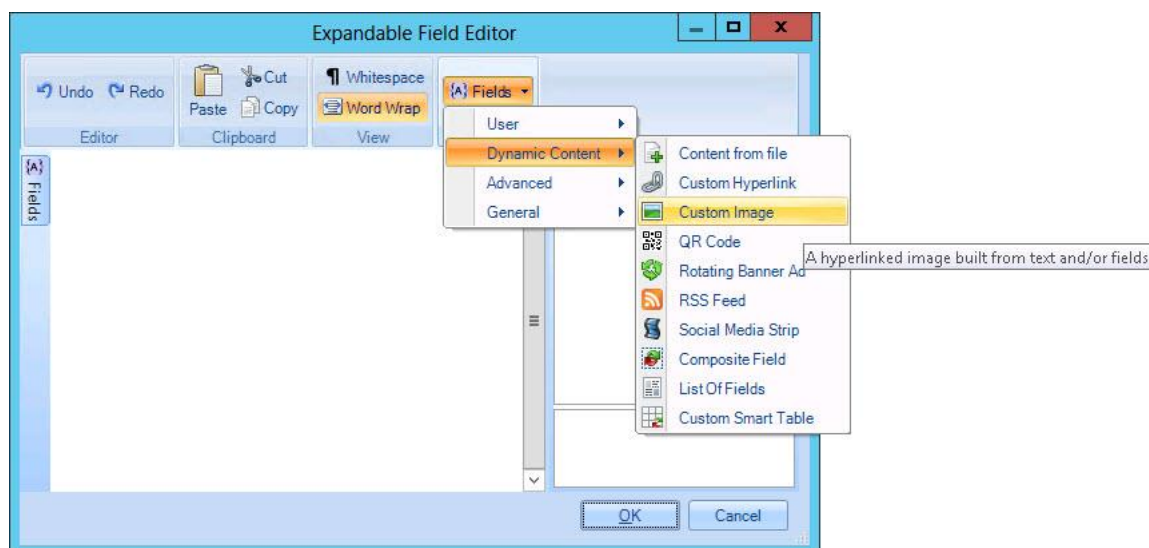
16. Click **OK** to save changes and exit back to the [add condition](#) window, where your second condition is now displayed:



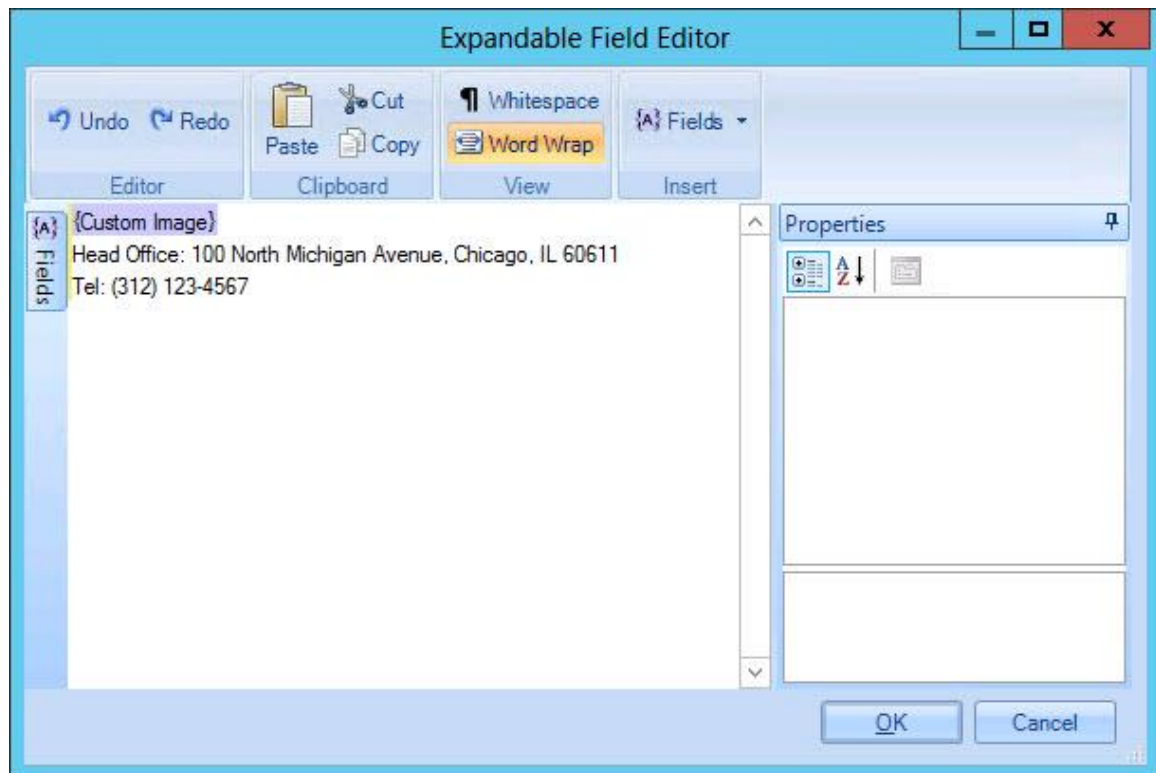
17. Click **OK** to exit back to the **conditional field** window where both conditions are now displayed:



18. To define signature content that should be applied for everyone else (i.e. people who are not in France or Germany), move to the bottom of this window and click the [...] button associated with the **if none of the above apply then this field's value is** field. The **expandable field editor** window is displayed.
19. Use this window to enter content to be used if neither of the specified conditions are met (i.e. for messages sent by non-French/German users). You can enter text and/or fields as required - to enter an image of a globe, the **custom image** field can be used:



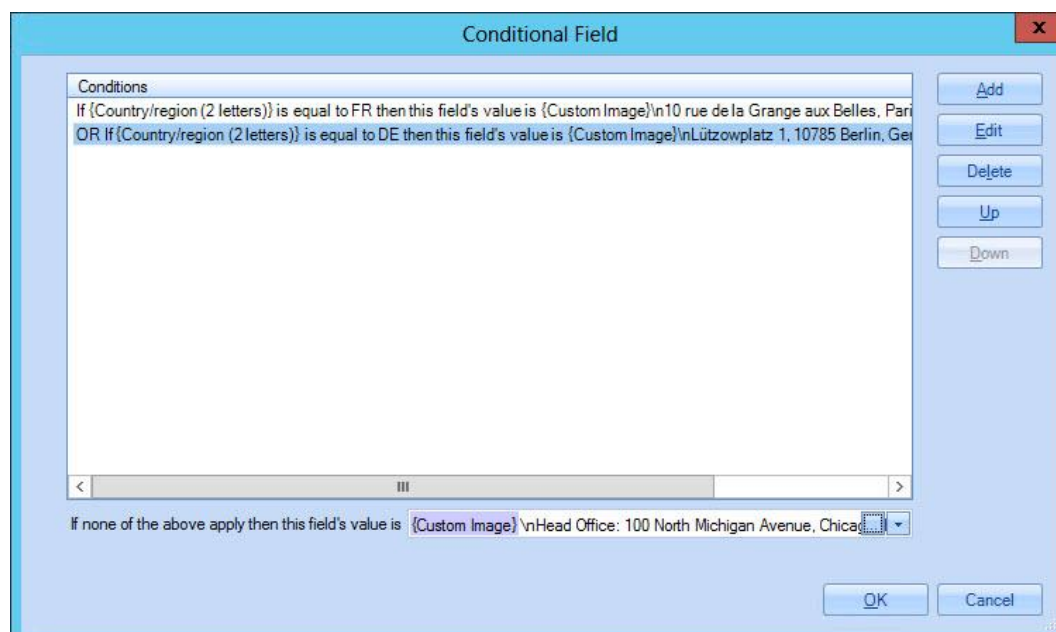
20. Select the required [custom image](#) [pg.231] in the normal way and add the [Head Office](#) address details as text (alternatively, you could use [Active Directory](#) address fields if applicable):



NOTE

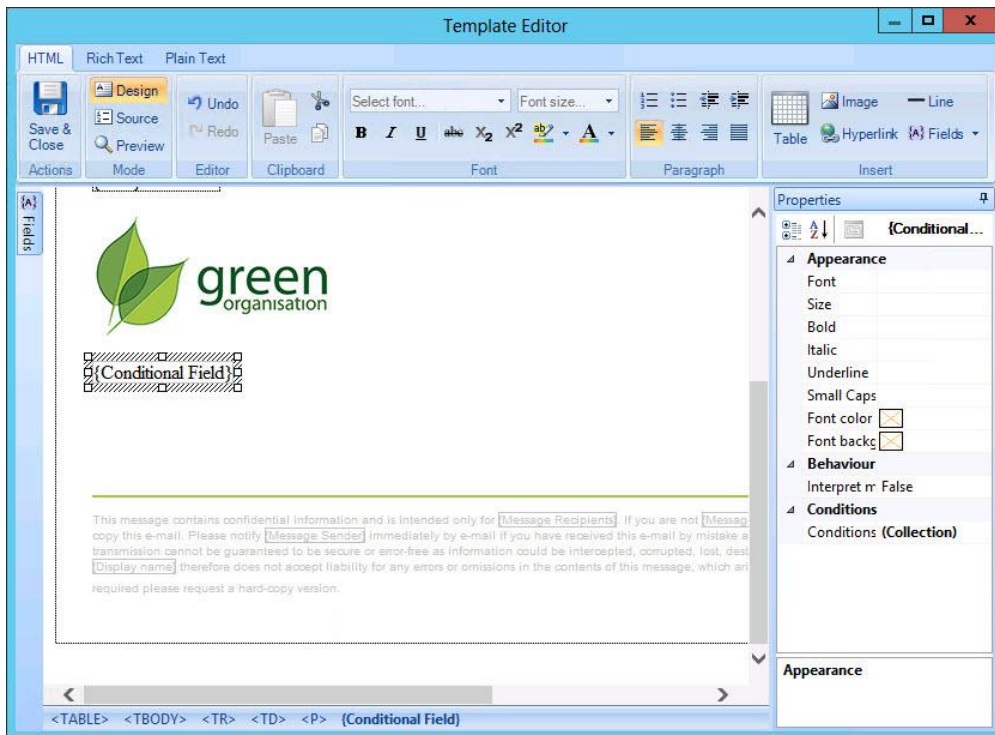
Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See [step 23](#) [pg.290] for details about changing these properties.

21. Click **OK** to save changes and exit back to the [conditional field](#) window:

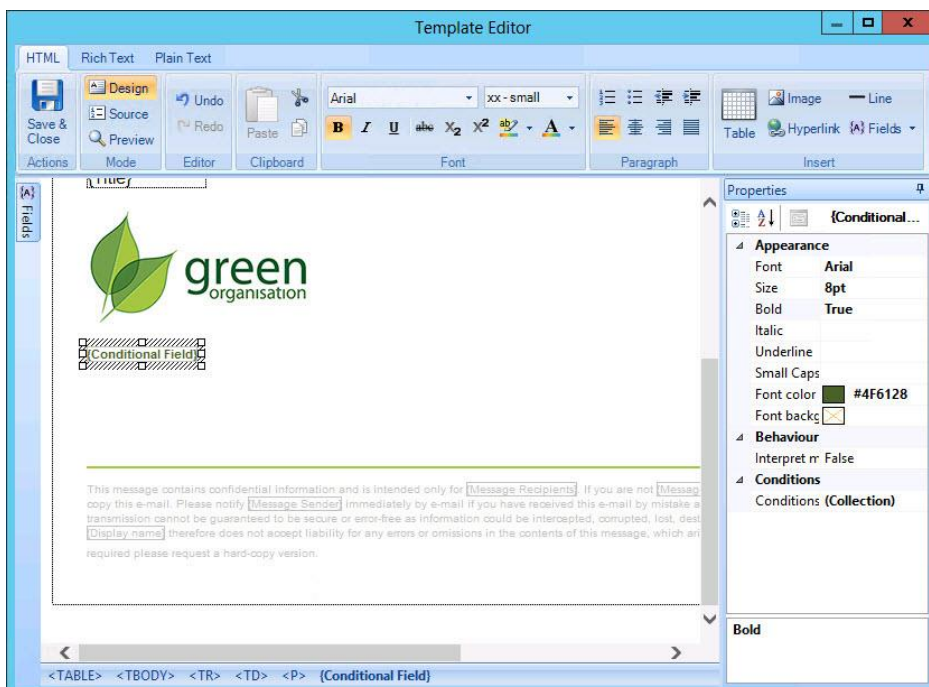


Settings for the conditional field are now complete, with two conditions (one for French users and one for German users) and then required content for everyone else.

22. Click **OK** to exit back to the template editor, where the **conditional field** is now shown:



23. Select this field and use **appearance** settings in the **properties** pane (on the right-hand side of the template editor) to apply required formatting. Any properties specified here will be applied to the associated conditional content when it is used:





In preview mode for a [French](#) user, this example is displayed as follows (notice that the text has the same font settings as those defined for the [conditional field](#) element above):



24. Save the template in the normal way. The template can now be associated with an [Outlook policy](#) [pg.104] where the only [condition](#) [pg.124] required is [all messages](#) (although you can apply further conditions at policy level, if necessary).

NOTE

Using nested conditional fields (i.e. adding one **conditional field** within another **conditional field**) can be a particularly powerful approach for advanced users who need to create complex signatures to cater for a wide range of scenarios within an organization. For further information, please refer to the [conditional field example 3 \(advanced\)](#) [pg.292] section.

### Conditional Field Example 3 (Advanced)

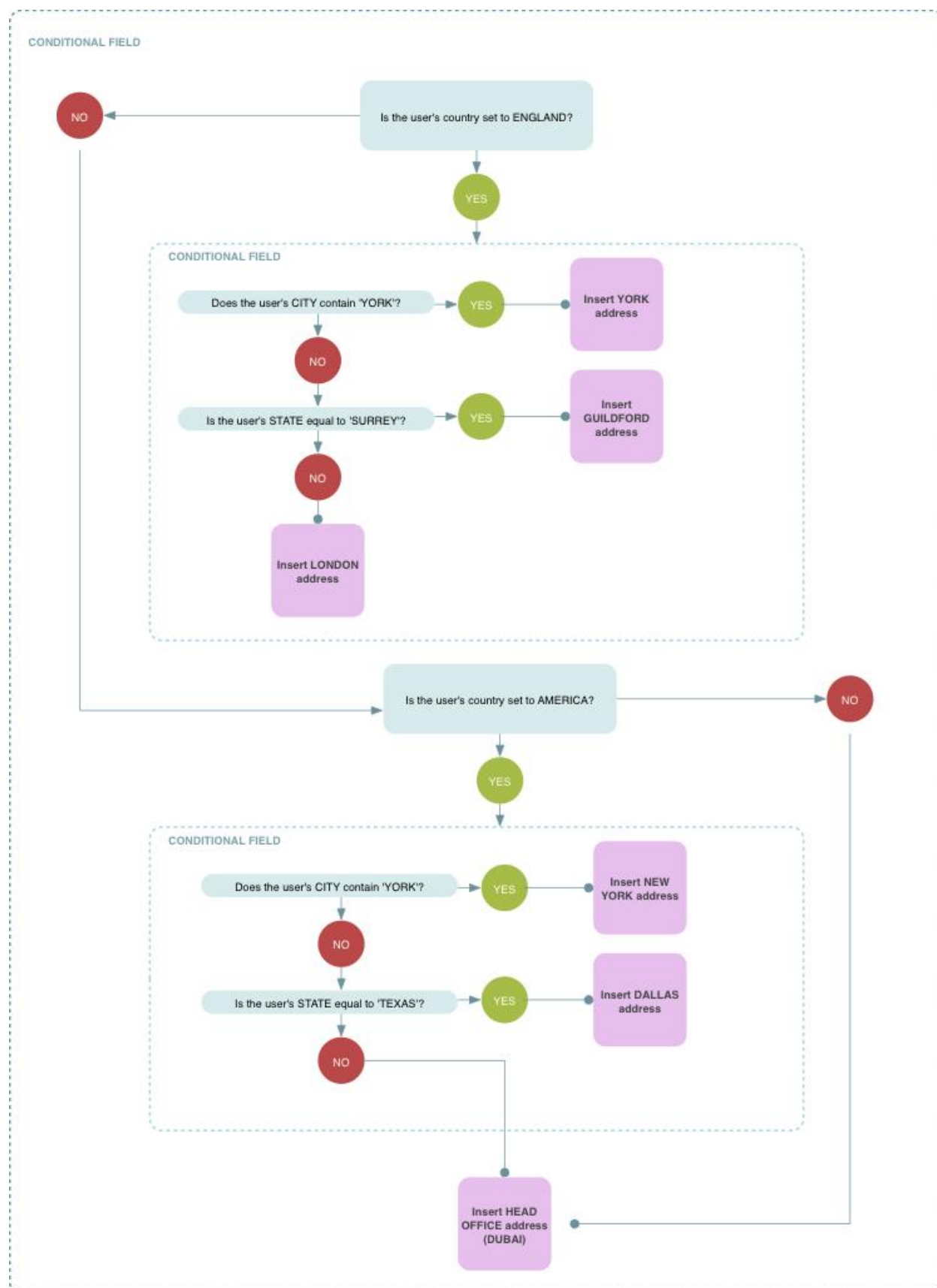
This example shows advanced use of the [conditional field](#) being used to apply different signature content for users. In the case, nested [conditional fields](#) (i.e. one [conditional field](#) within another [conditional field](#)) are used to achieve the example scenario below:

- If a user's country is equal to England then insert a [conditional field](#) where:
  - If the user's town contains York then insert the York address
  - If the user's state is equal to Surrey then insert the Guildford address
  - Otherwise insert the London address
- If a user's country is equal to America then insert a [conditional field](#) where:
  - If the user's town contains York then insert the New York address
  - If the user's state contains Texas then insert the Dallas address
- Otherwise insert the Dubai head office address

For clarity, this example is illustrated on the following page.



### Conditional field example 3 scenario:



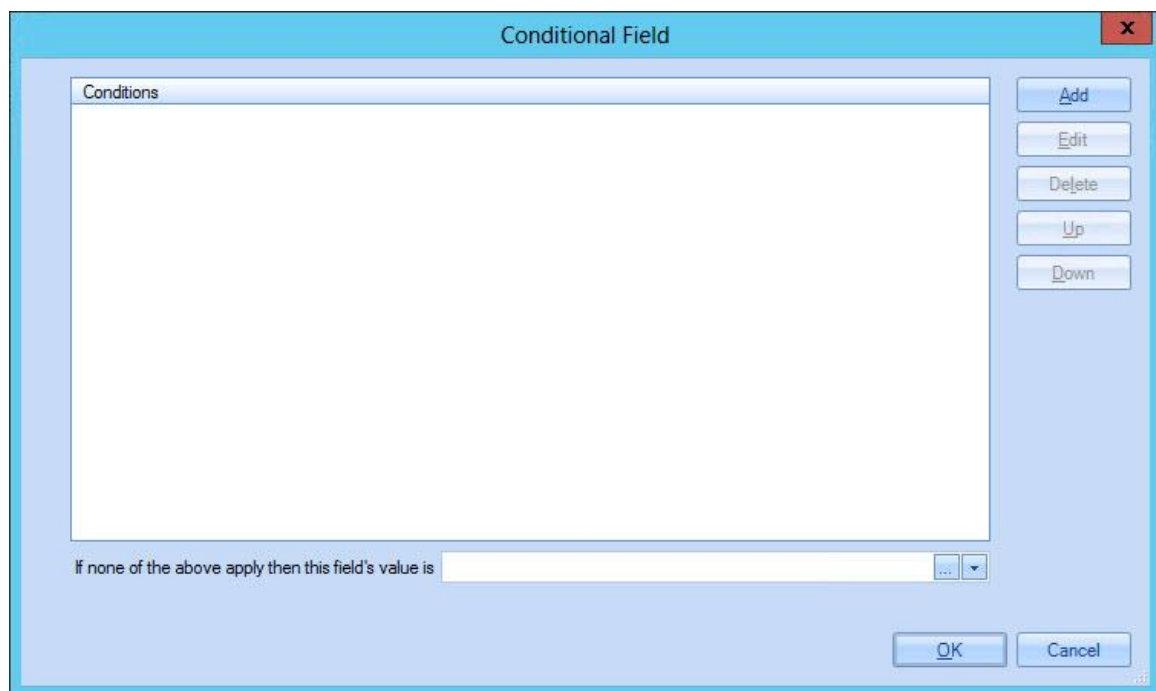
To achieve this scenario using [Exclaimer Signature Manager Outlook Edition](#), follow the steps below:

- [Stage 1: Add a conditional field and specify the first condition for users based in England \(via a nested conditional field to refine by city/state\)](#) [pg.295]
- [Stage 2: Specify the second condition for users based in America \(via a nested conditional field to refine by city/state\)](#) [pg.303]
- [Stage 3: Specify signature content for all other users \(i.e. users who are not in England or America\)](#) [pg.309]

Additionally, further information about how appearance properties for nested fields are inherited from the 'master' field can be found in the [understanding inheritance of appearance properties](#) [pg.311] section, at the end of this section.

## Stage 1: Add a Conditional Field and Specify the First Condition for Users Based In England

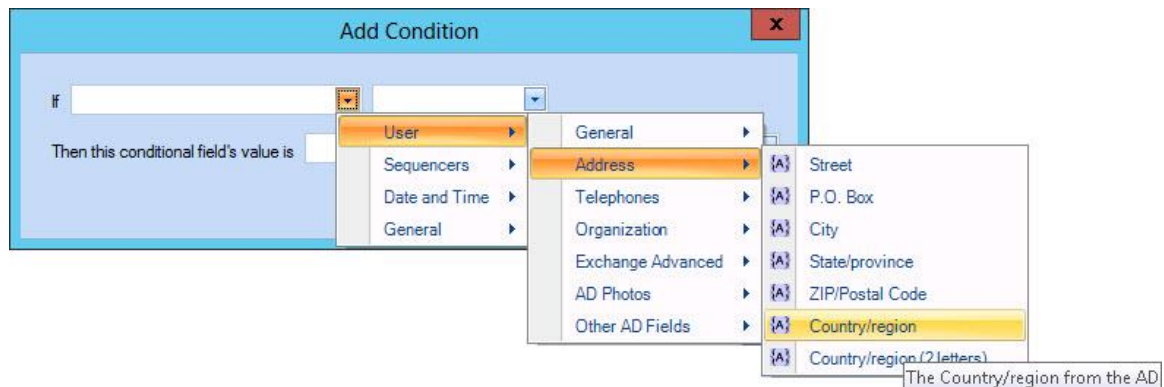
1. [Edit \[pg.202\]](#) or [create \[pg.198\]](#) the required template so that the template editor is open.
2. Position your cursor at the position where conditional content is required.
3. Using the [fields panel](#), navigate to select the [advanced > conditional field](#). The [conditional field](#) window is displayed:



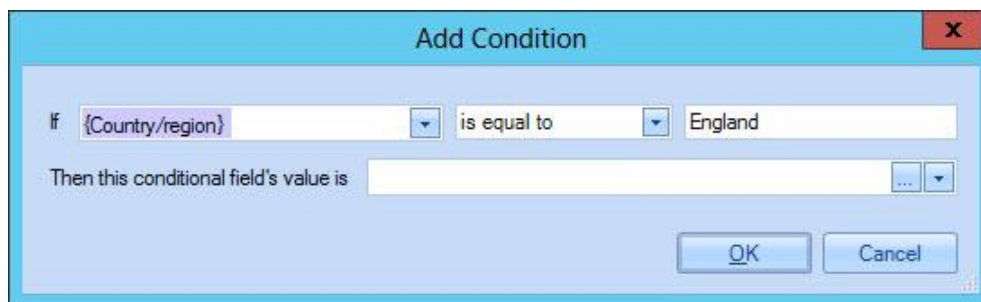
4. Click the [add](#) button to enter the first condition (i.e. to add signature content and associated rules for users based in [England](#)). The [add condition](#) window is displayed:



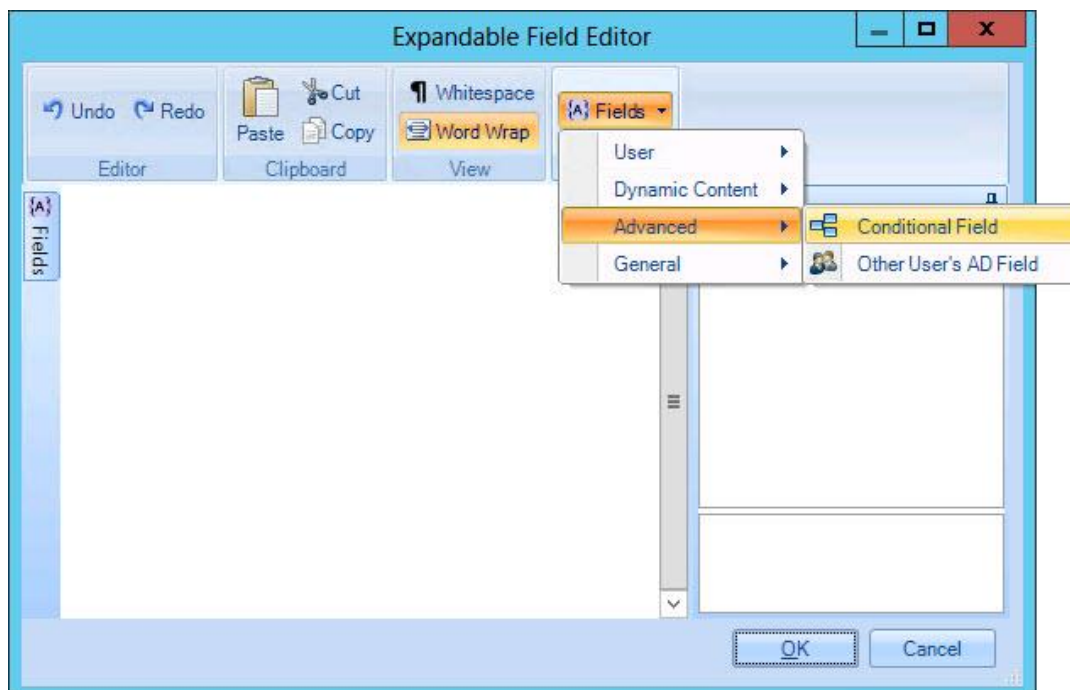
5. Using the drop-down lists associated with the **if** field, navigate to select **user > address > country/region** field:



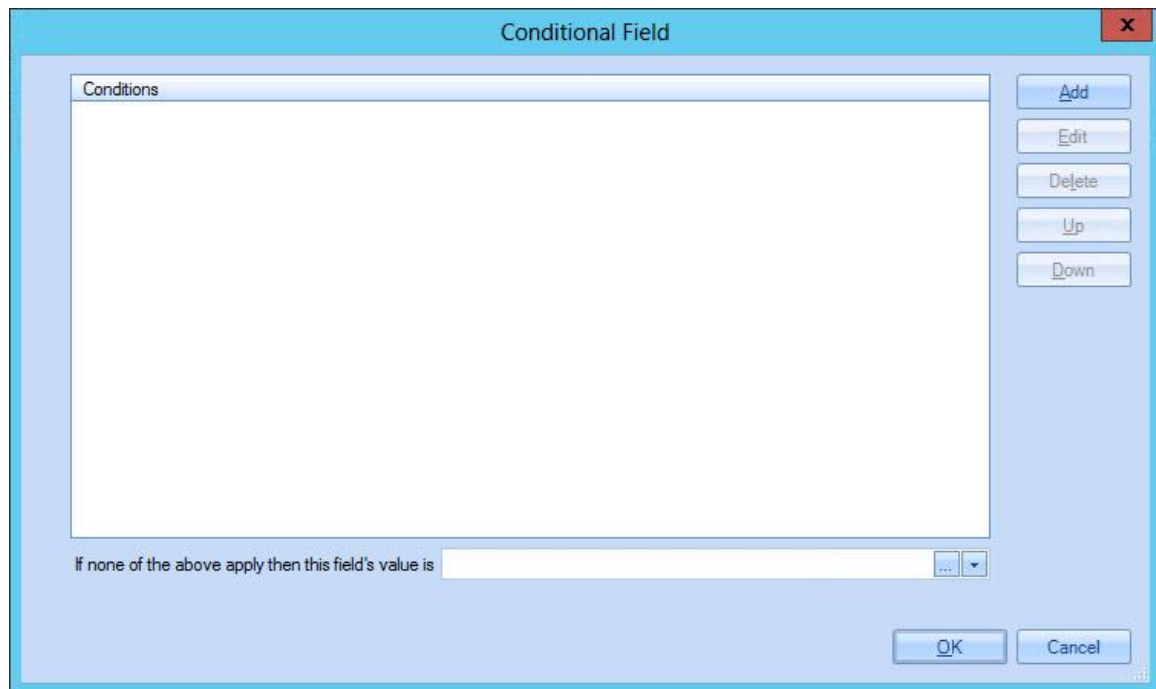
6. Leave the qualifier as the default **is equal to** and type **England** into the associated value field:



7. Click the [...] button associated with the **then this conditional field's value is** field to open the **expandable field editor** window. Use this window to enter another **conditional field** to determine the city/state and thus signature content for users in **England**. First, navigate to select **advanced > conditional field**:



The **conditional field** window is displayed:



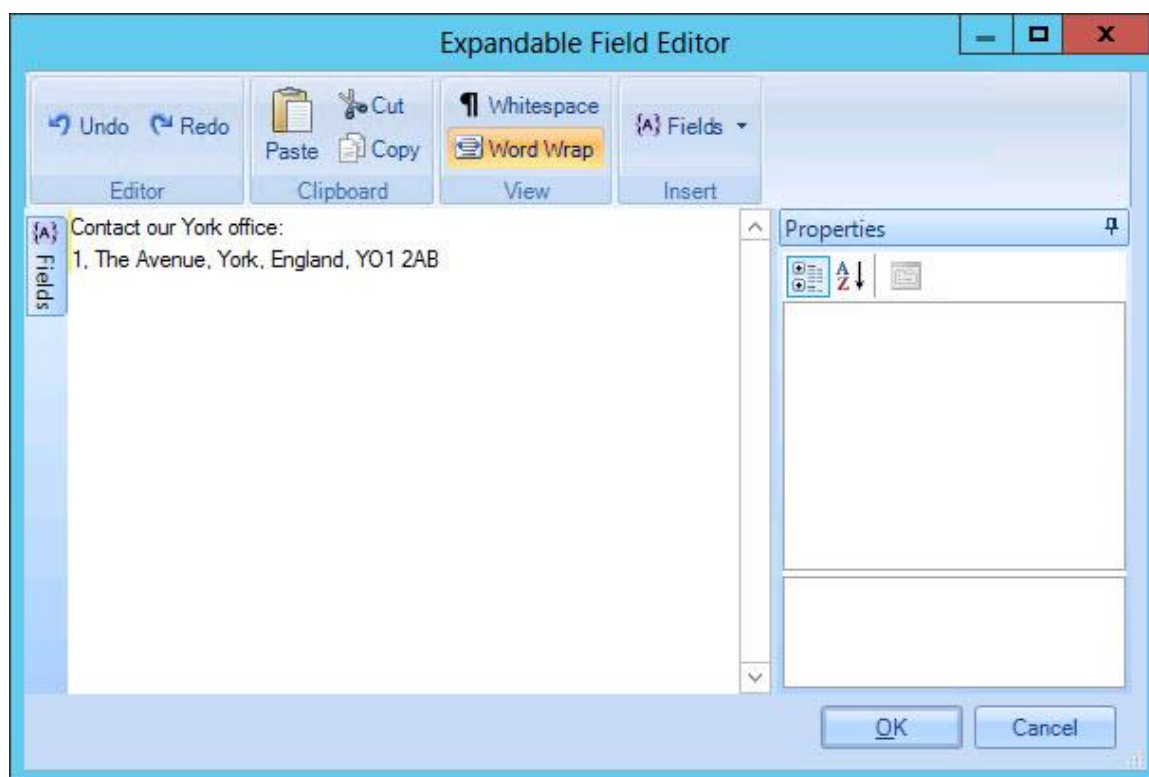
- Click the **add** button to enter the first condition (i.e. to add signature content and associated rules for users based in **York**). The **add condition** window is displayed. Using the drop-down lists associated with the **if** field, navigate to select **message sender** > **address** > **city** field:



- Click **OK** to save changes and exit back to the **add condition** window, where your condition is now displayed. Change the qualifier to **contains** and type **York** into the associated value field (alternatively, you could use the **equal to** qualifier and enter the value as **New York**):



10. Click the [...] button associated with the **then this conditional field's value is** field to open the **expandable field editor** window. Use this window to enter content to be inserted if the associated condition is met (i.e. for messages sent by users based in York, England). You can enter text and/or fields as required:

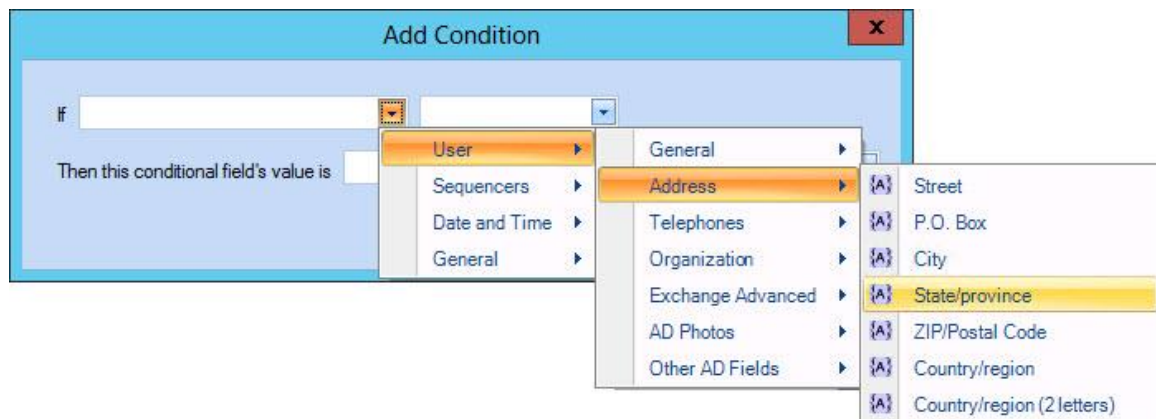


NOTE

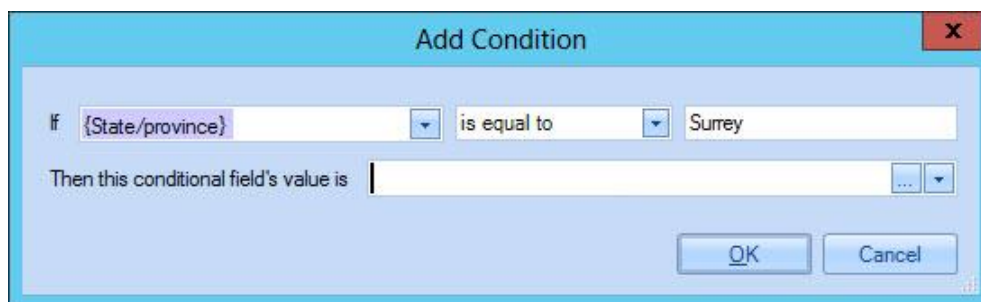
By default, any text entered here will inherit font and other formatting properties which are applied to the 'master' **conditional field** element as a whole (as defined at the very end of this process). However, if you wish to apply specific appearance properties for England signatures, you can define them in [step 21](#) [pg.301]. For further information about how appearance properties for nested fields are inherited from the 'master' field, see [understanding inheritance of appearance properties](#) [pg.311].

11. Click **OK** to save changes and exit back to the **add condition** window.
12. Click **OK** to exit back to the **conditional field** window.

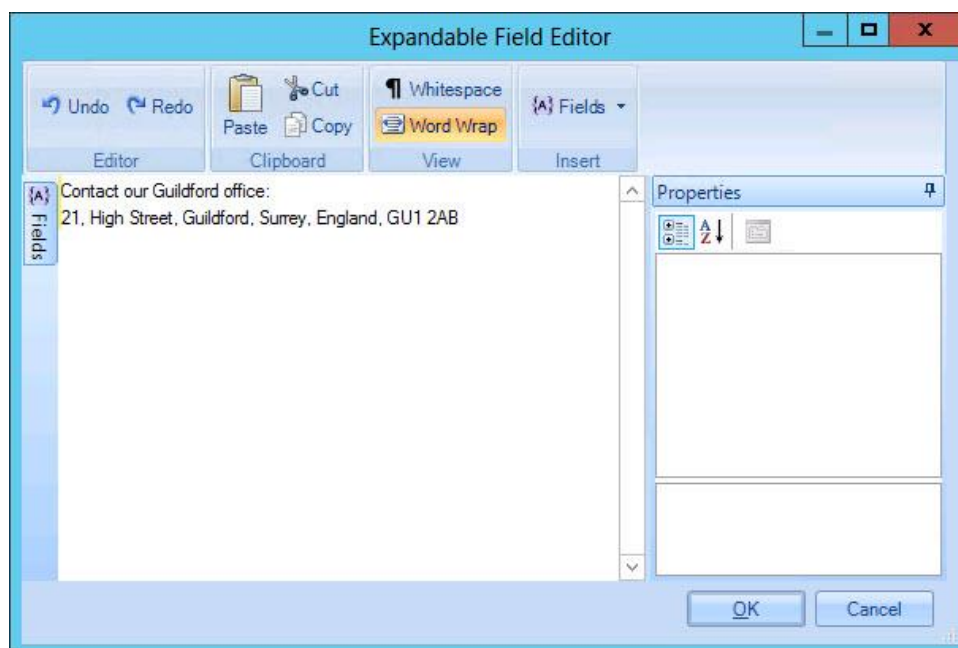
13. Click the **add** button to enter the condition (i.e. to add signature content and associated rules for users based in **Surrey**). The **add condition** window is displayed. Using the drop-down lists associated with the **if** field, navigate to select **message sender > address > state/province** field:



14. Click **OK** to save changes and exit back to the **add condition** window, where your condition is now displayed. Leave the qualifier as the default **is equal to** and type **Surrey** into the associated value field:



15. Click the **[...]** button associated with the **then this conditional field's value is** field to open the **expandable field editor** window. Use this window to enter content to be inserted if the associated condition is met (i.e. for messages sent by users based in Surrey, England). You can enter text and/or fields as required:



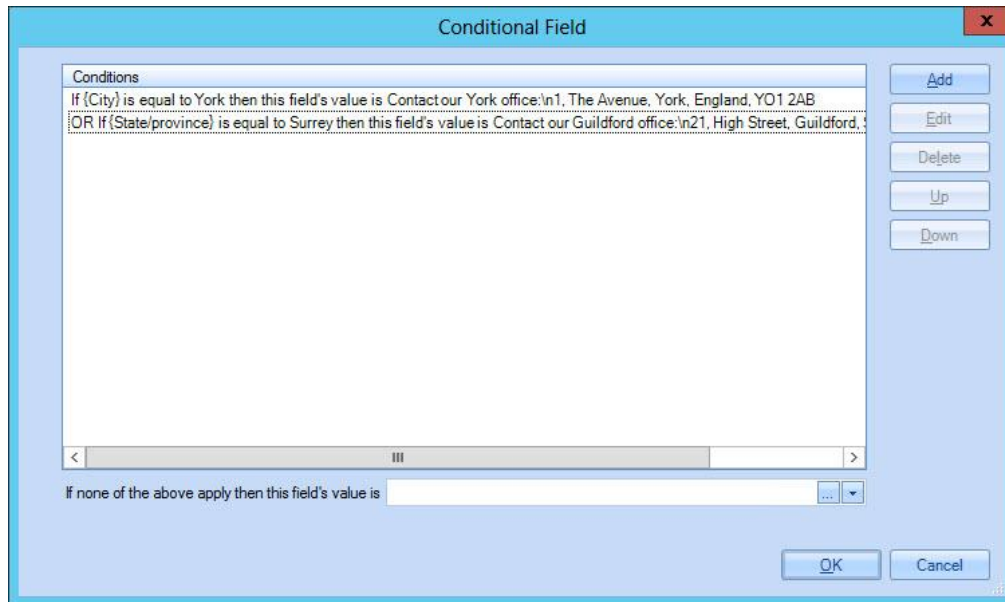


## NOTE

Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See [step 21](#) [pg.301] for details about changing these properties.

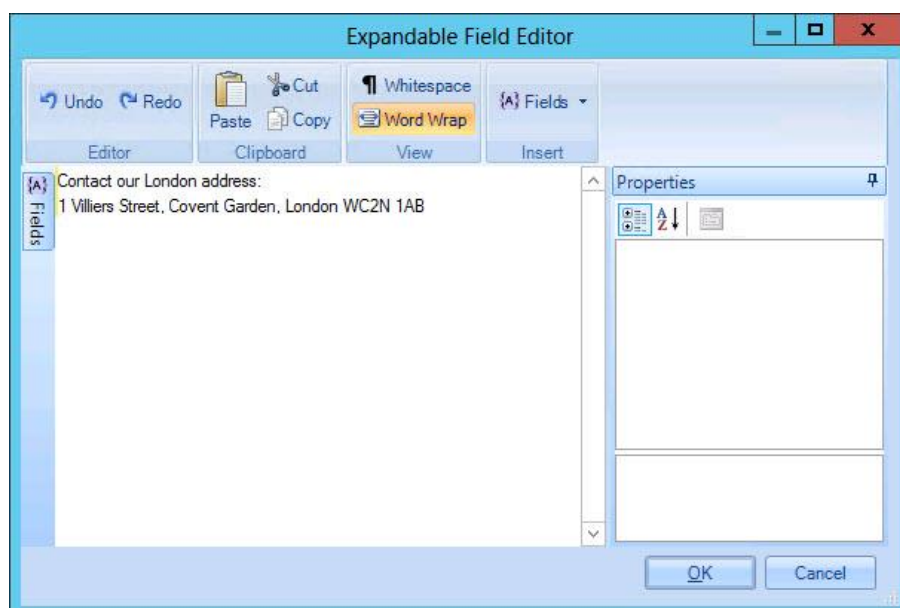
16. Click **OK** to save changes and exit back to the **add condition** window.

17. Click **OK** to exit back to the **conditional field** window:



18. To define signature content that should be applied for all other users based in England (i.e. people who are not in York or Surrey), move to the bottom of this window and click the [...] button associated with the **if none of the above apply then this field's value is** field. The **expandable field editor** window is displayed.

19. Use this window to enter content to be used - i.e. the London address. You can enter text and/or fields as required:

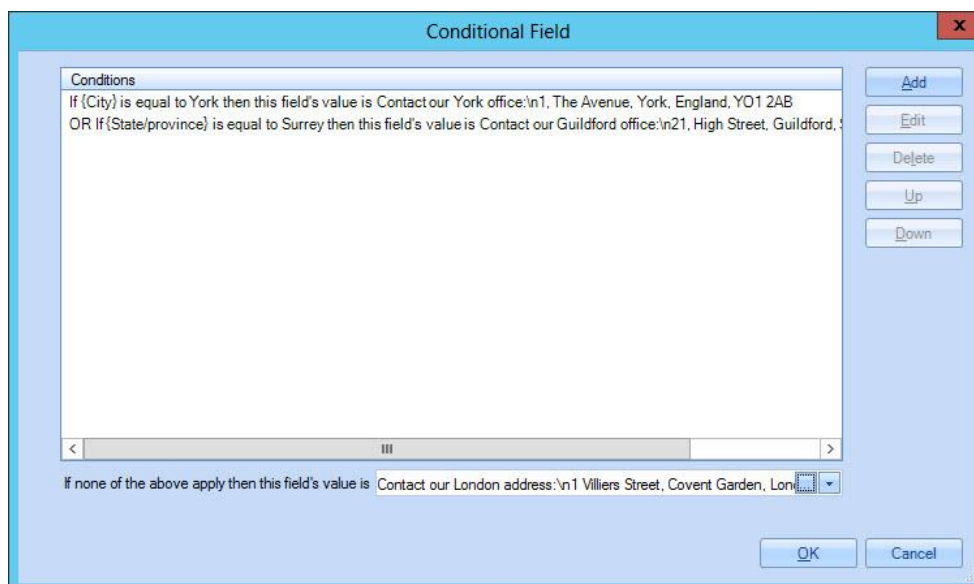




## NOTE

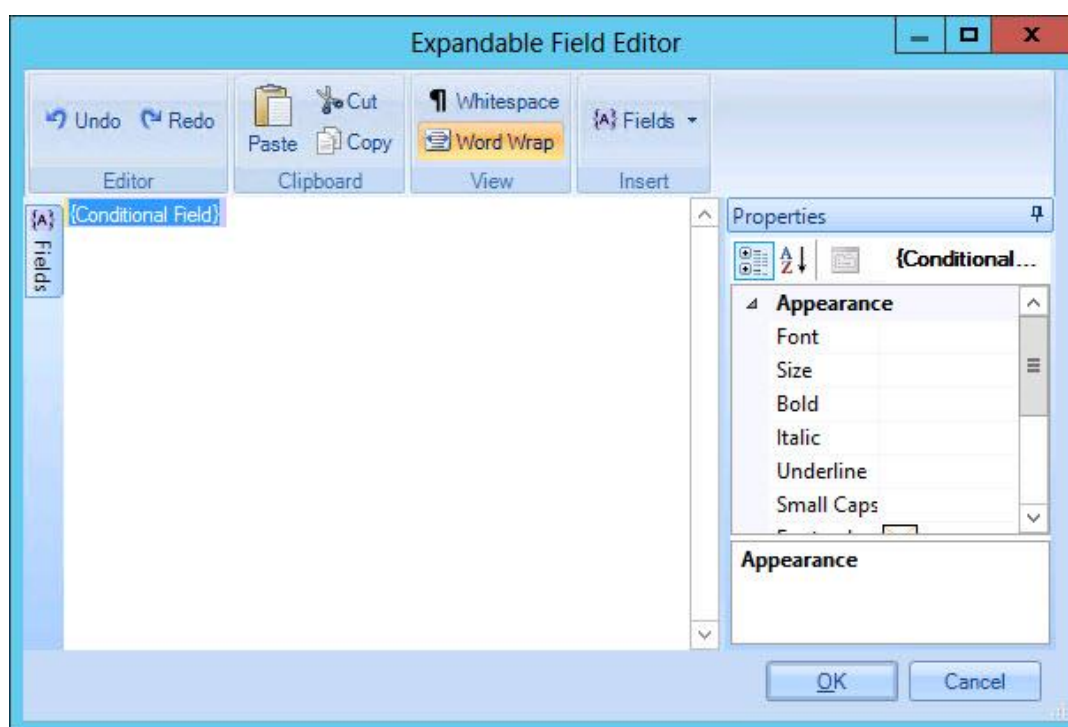
Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See [step 21](#) [pg.301] for details about changing these properties.

20. Click **OK** to save changes and exit back to the **conditional field** window:



Settings for the conditional field are now complete, with two conditions (one for **York** users and one for **Surrey** users) and then required content for all other users based in England.

21. Click **OK** to exit back to the **expandable field editor** for the **England** condition, which now contains a **conditional field** element:



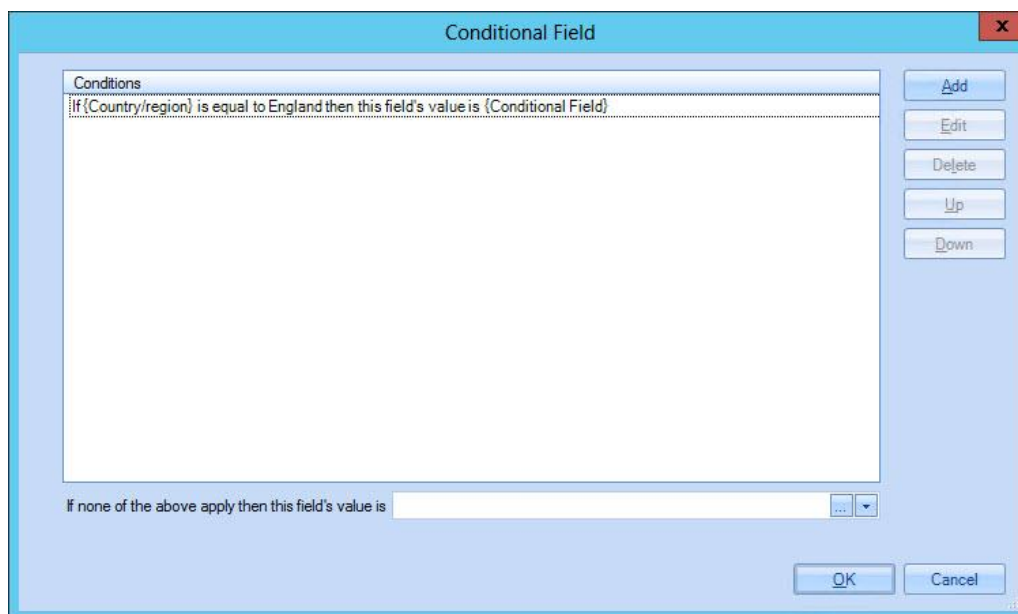
If required, select this field and use **appearance** settings in the **properties** pane (on the right-hand side of the window) to apply required formatting. Any properties specified here will be applied to the associated conditional content when it is used - i.e. to all 'English' signature content.

However, **appearance** property settings for nested fields are inherited from the 'master' **conditional field**, so if you intend to use the same formatting for all signature content (i.e. for users based in England, America or anywhere else) then you can leave these settings as they are and update properties for the final conditional field at the end of this process (see [stage 3, step 5](#) [pg.310]).

For further information about how appearance properties for nested fields are inherited from the 'master' field, see [understanding inheritance of appearance properties](#) [pg.311].

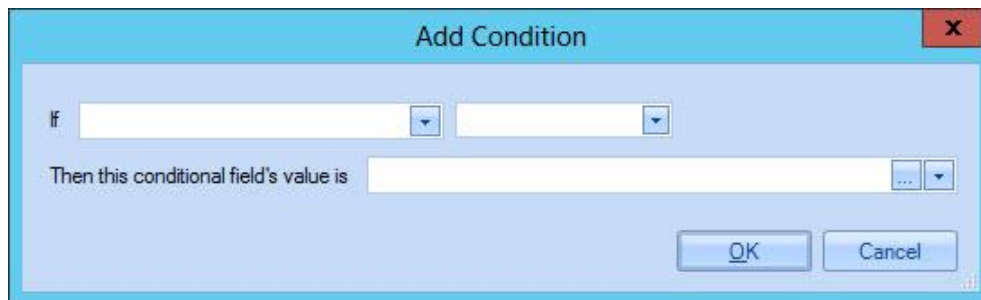
22. Click **OK** to save changes and exit back to the **add condition** window.

23. Click **OK** to exit back to the **conditional field** window, where the condition for England is now shown:



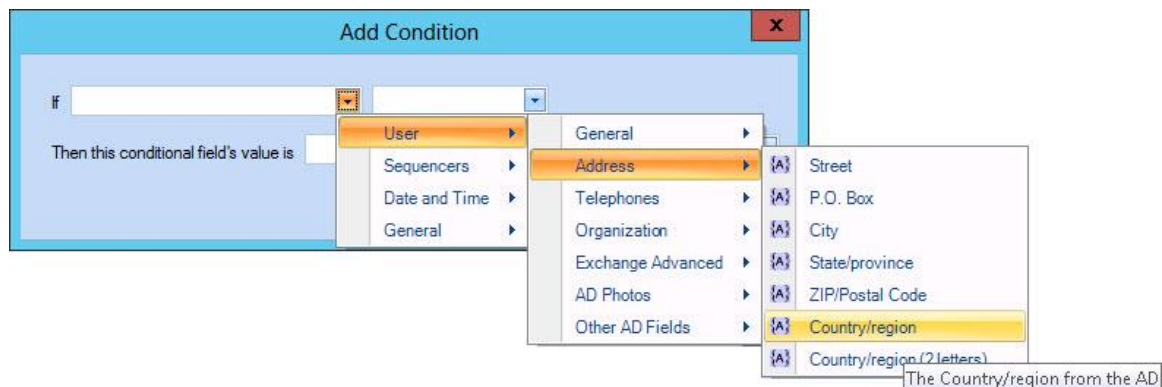
## Stage 2: Specify the Second Condition for Users Based in America

1. Click the **add** button to enter the first condition (i.e. to add signature content and associated rules for users based in **America**). The **add condition** window is displayed:



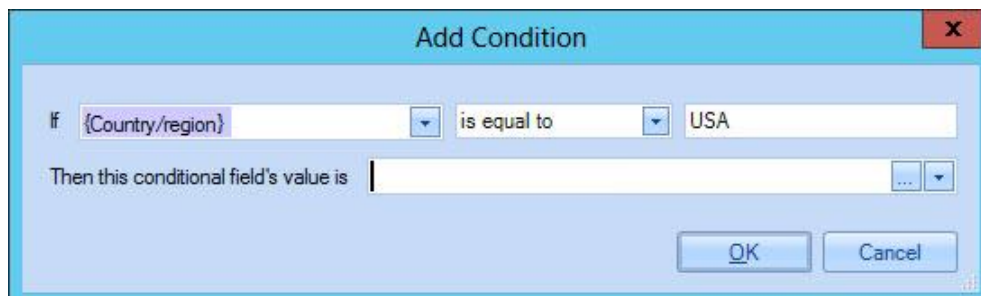
The **Add Condition** dialog box is shown. It has a title bar with a close button (X). The main area contains two sections: "If" and "Then this conditional field's value is". The "If" section has two empty dropdown menus. The "Then" section has a text input field and a dropdown menu. At the bottom right are **OK** and **Cancel** buttons.

2. Using the drop-down lists associated with the **if** field, navigate to select **message sender > address > country/region** field:



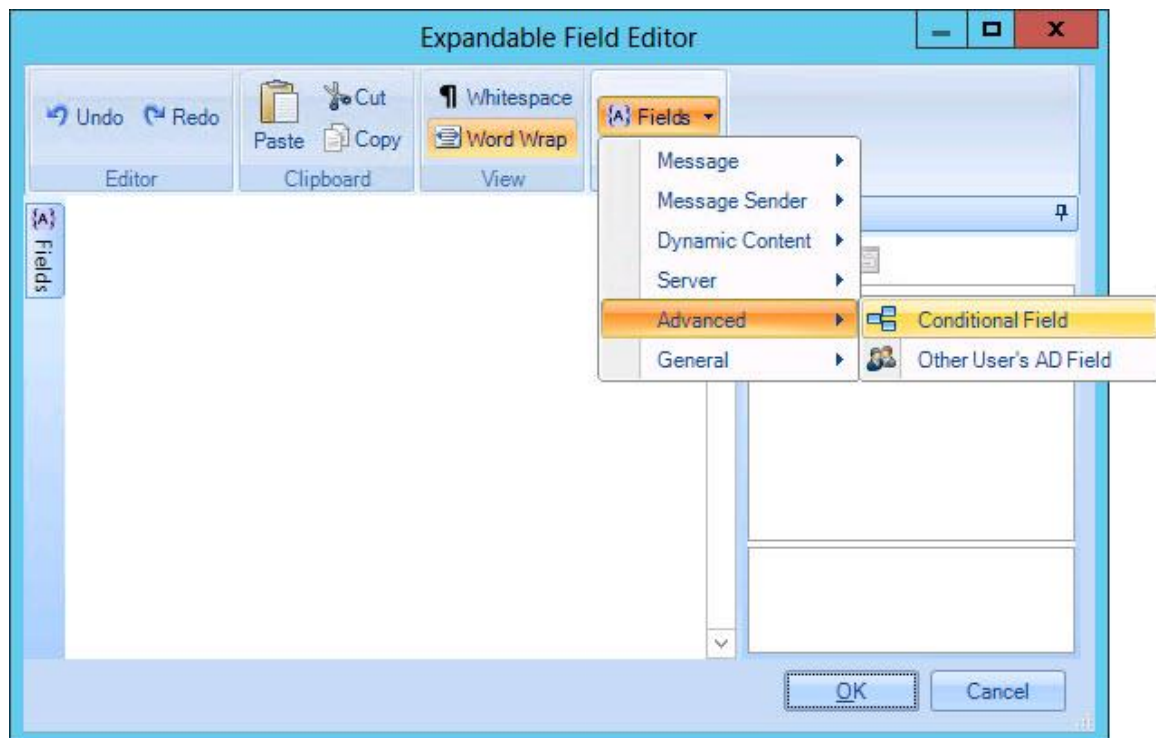
The **Add Condition** dialog box is shown with the "If" dropdown menu expanded. The first dropdown menu shows a list of categories: **User**, **Sequencers**, **Date and Time**, and **General**. The **User** category is selected, and its sub-menu is expanded, showing **General** and **Address**. The **Address** category is selected, and its sub-menu is expanded, showing a list of address fields: **Street**, **P.O. Box**, **City**, **State/province**, **ZIP/Postal Code**, **Country/region** (highlighted), and **Country/region (2 letters)**. A tooltip for **Country/region** says "The Country/region from the AD".

3. Leave the qualifier as the default **is equal to** and type **USA** into the associated value field:

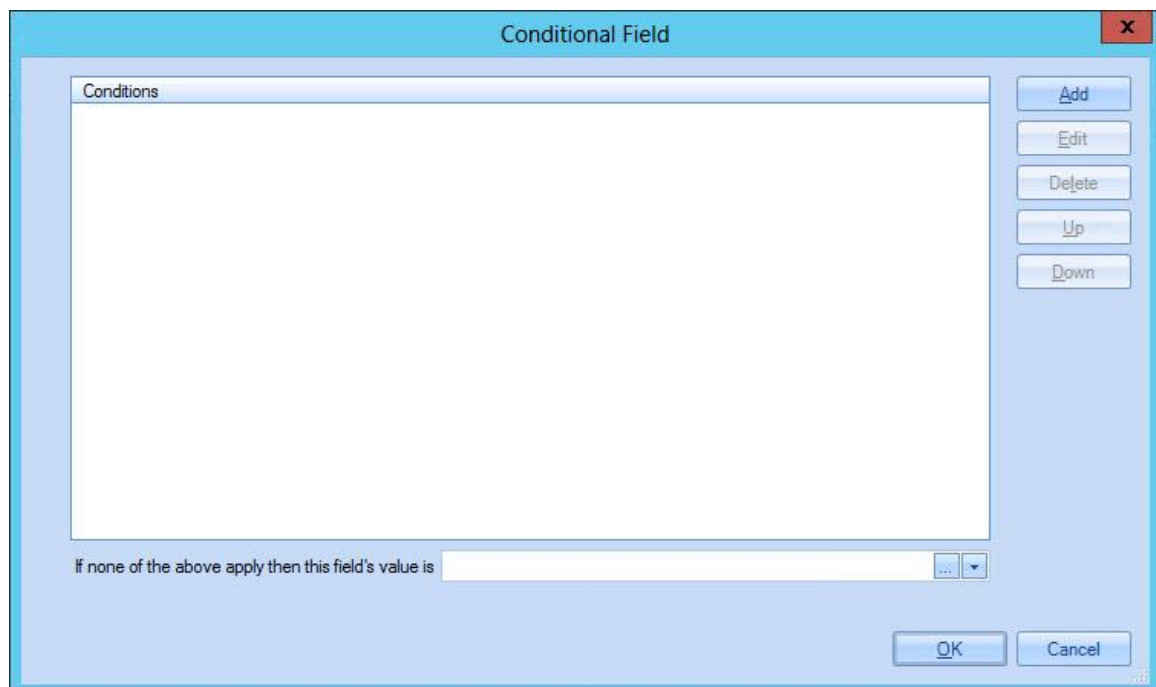


The **Add Condition** dialog box is shown with the "If" section filled. The first dropdown menu shows **{Country/region}**, the second dropdown menu shows **is equal to**, and the text input field contains **USA**. The "Then this conditional field's value is" section is empty. At the bottom right are **OK** and **Cancel** buttons.

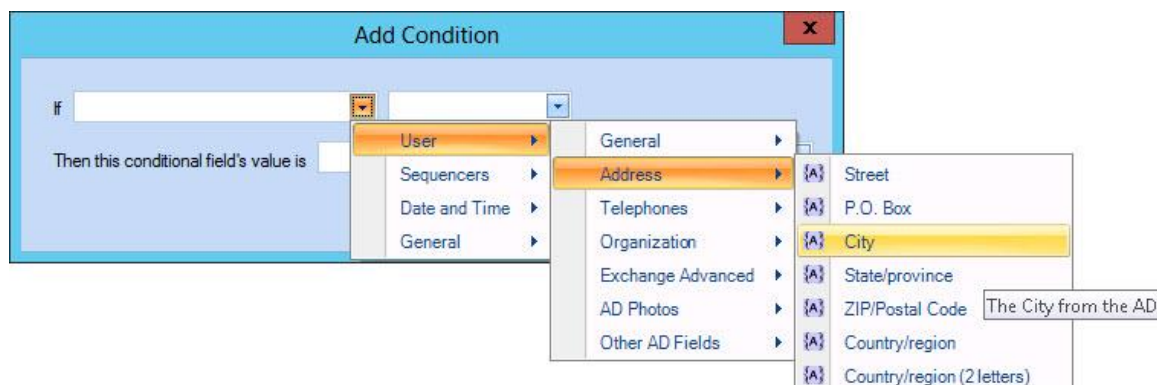
- Click the [...] button associated with the **then this conditional field's value is** field to open the **expandable field editor** window. Use this window to enter another **conditional field** to determine the city/state and thus signature content for users in the **USA**. First, navigate to select **advanced > conditional field**:



The **conditional field** window is displayed:



- Click the **add** button to enter the first condition (i.e. to add signature content and associated rules for users based in **New York**). The **add condition** window is displayed. Using the drop-down lists associated with the **if** field, navigate to select **message sender** > **address** > **city** field:

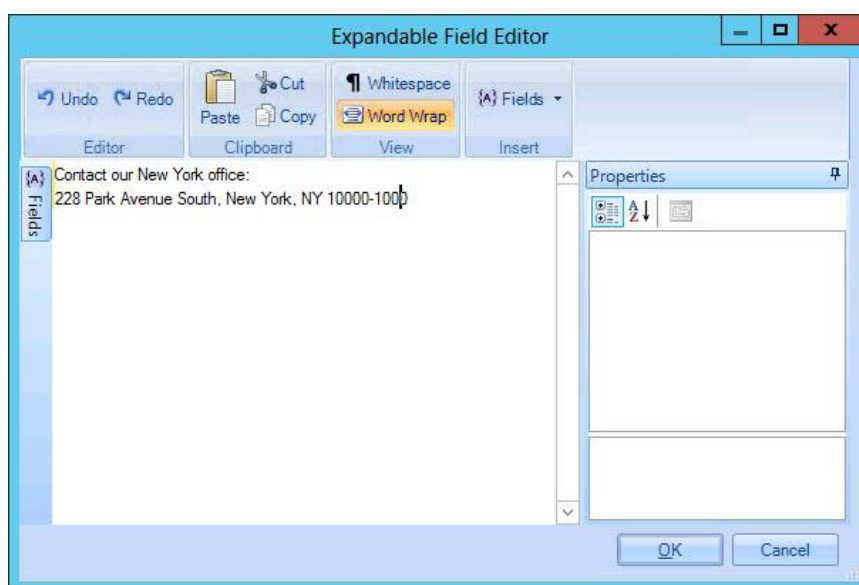


- Click **OK** to save changes and exit back to the **add condition** window, where your condition is now displayed. Change the qualifier to **contains** and type **York** into the associated value field:



Notice that we have only entered 'York' here because we know that no other cities contain 'York'. If you are not confident about this, be precise and use **equal to** / **New York** instead).

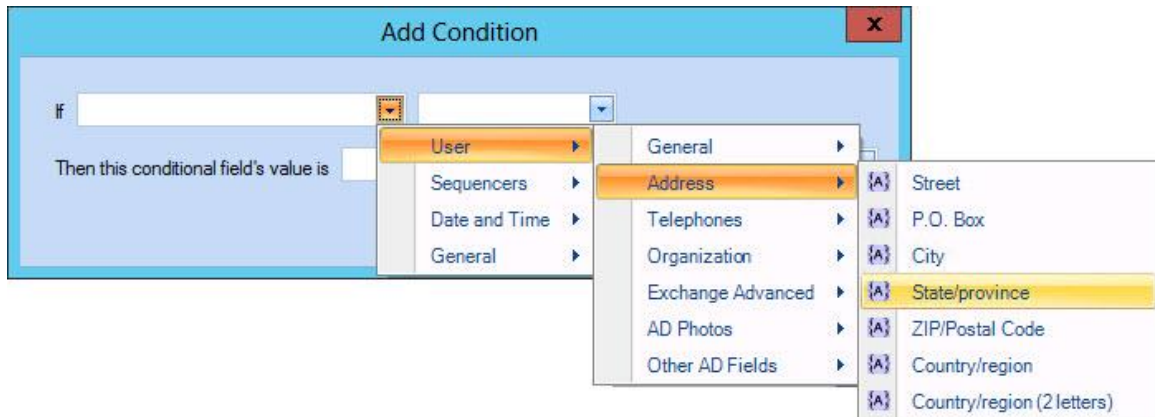
- Click the **[...]** button associated with the **then this conditional field's value is** field to open the **expandable field editor** window. Enter content to be inserted if the associated condition is met - i.e. for messages sent by users based in New York, USA. You can enter text and/or fields as required:



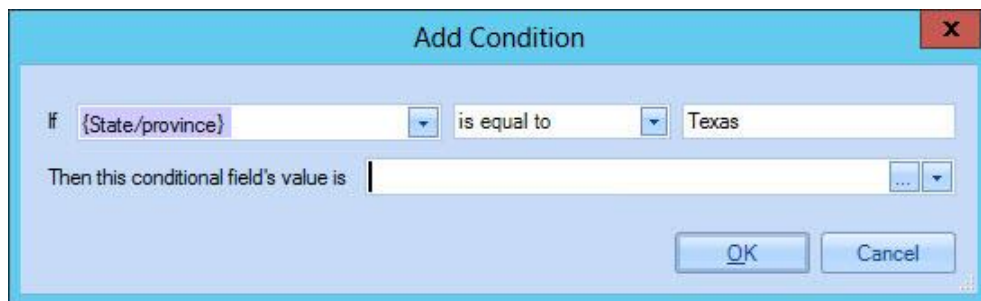
## NOTE

Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See [step 15](#) [pg.308] for details about changing these properties.

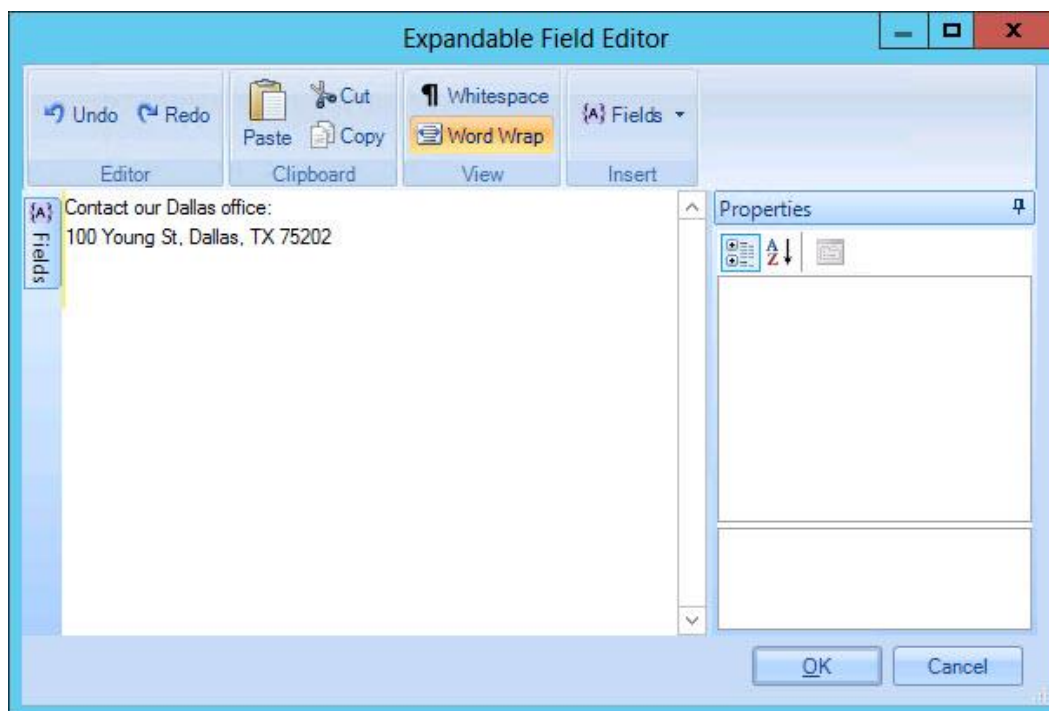
8. Click **OK** to save changes and exit back to the **add condition** window.
9. Click **OK** to exit back to the **conditional field** window.
10. Click the **add** button to enter the condition (i.e. to add signature content and associated rules for users based in **Texas**). The **add condition** window is displayed. Using the drop-down lists associated with the **if** field, navigate to select **message sender > address > state/province** field:



11. Click **OK** to save changes and exit back to the **add condition** window, where your condition is now displayed. Leave the qualifier as the default **is equal to** and type **Texas** into the associated value field:



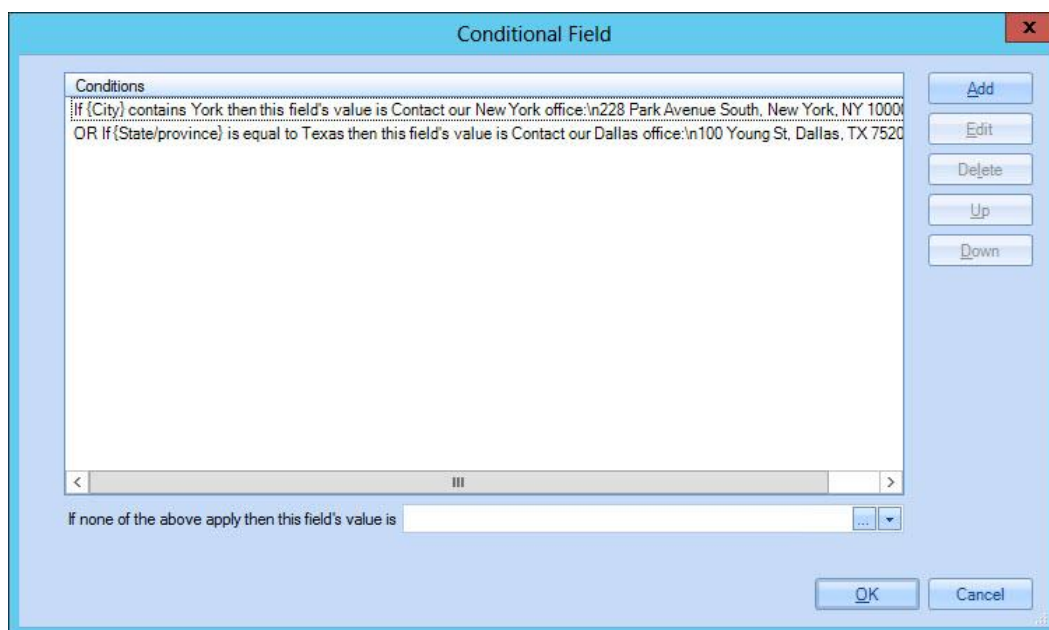
12. Click the [...] button associated with the **then this conditional field's value is** field to open the **expandable field editor** window. Enter content to be inserted if the associated condition is met (i.e. for messages sent by users based in Texas, America). You can enter text and/or fields as required:



NOTE

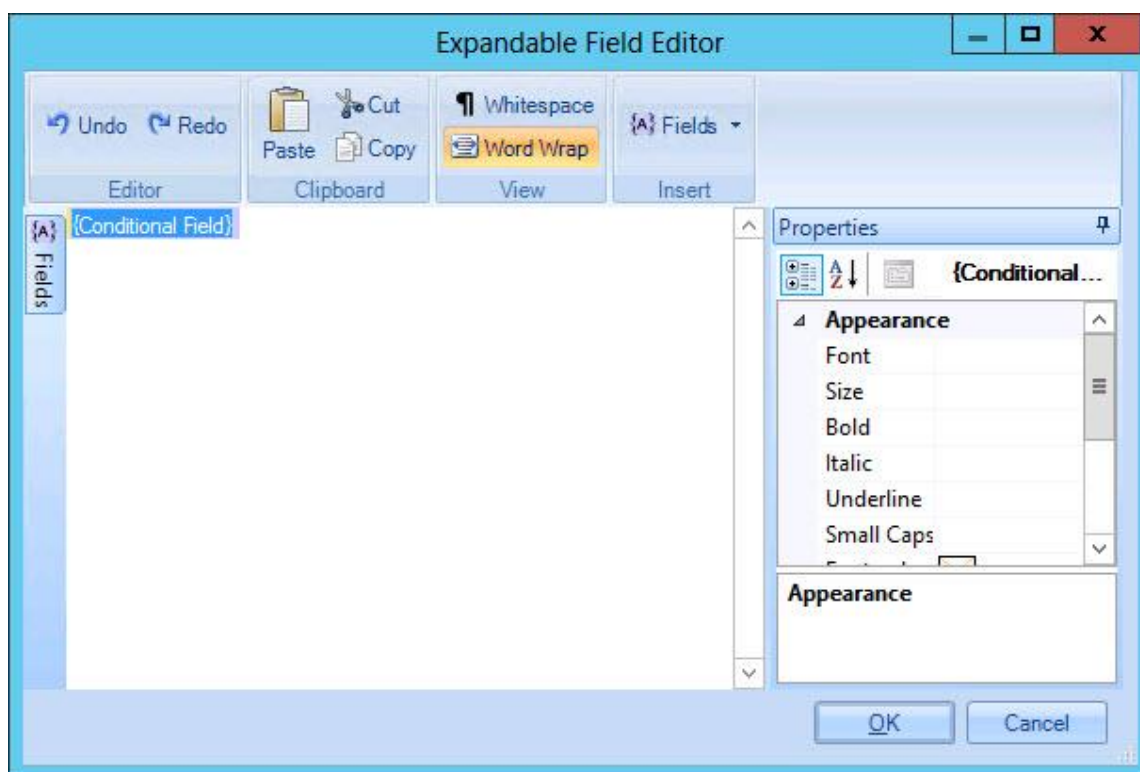
Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See [step 15](#) [pg.308] for details about changing these properties.

13. Click **OK** to save changes and exit back to the **add condition** window.
14. Click **OK** to exit back to the **conditional field** window:





15. Click **OK** to exit back to the [expandable field editor](#) for the [USA](#) condition, which now contains a [conditional field](#) element:



NOTE

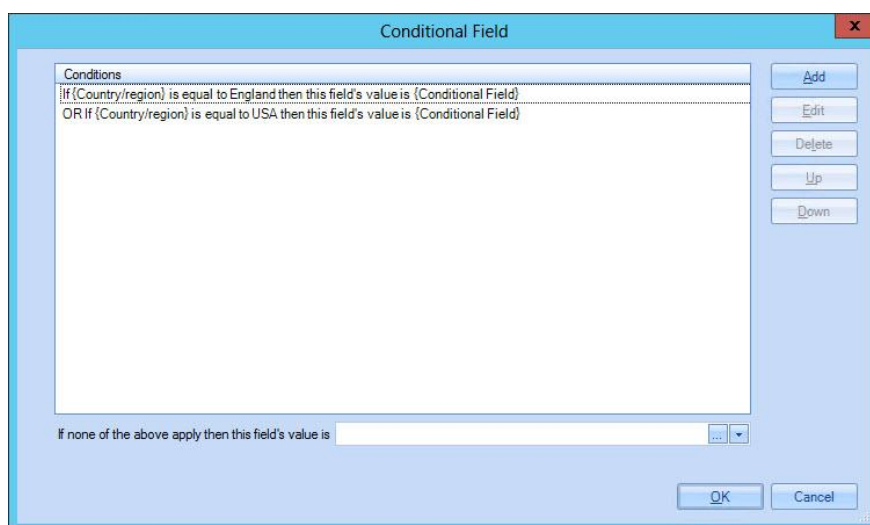
If required, select this field and use **appearance** settings in the **properties** pane (on the right-hand side of the window) to apply required formatting. Any properties specified here will be applied to the associated conditional content when it is used - i.e. to all 'English' signature content.

However, **appearance** property settings for nested fields are inherited from the 'master' **conditional field**, so if you intend to use the same formatting for all signature content (i.e. for users based in England, America or anywhere else) then you can leave these settings as they are and update properties for the final conditional field at the end of this process (see [stage 3, step 5](#) [pg.310]). For further information about how appearance properties for nested fields are inherited from the 'master' field, see [understanding inheritance of appearance properties](#) [pg.311].

16. Click **OK** to save changes and exit back to the [add condition](#) window.



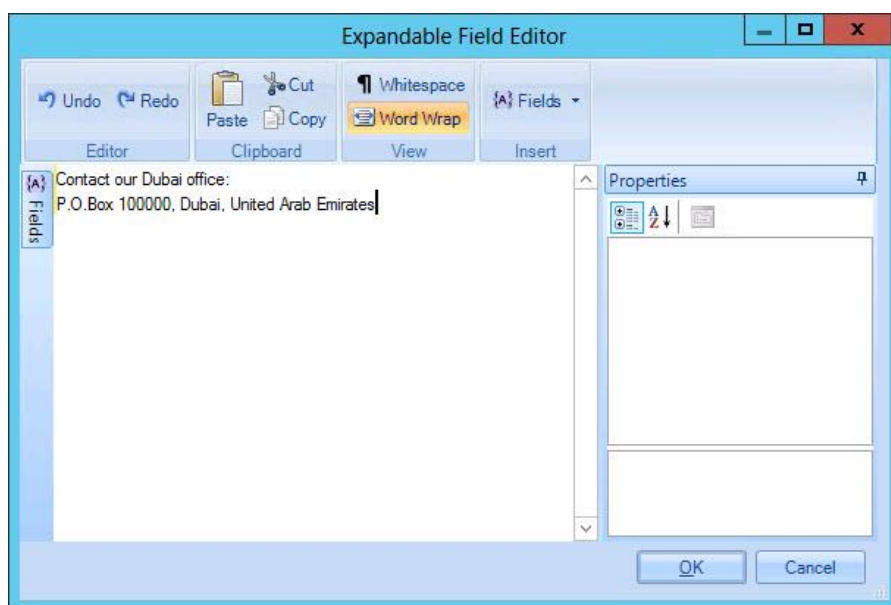
17. Click **OK** to exit back to the **conditional field** window, where the condition for **USA** is now shown:



### Stage 3: Specify Signature Content for All Other Users

With the 'master' **conditional field** window now defined with two conditions (one for England and the other for USA), the final requirement is to define signature settings for 'everyone else' - i.e. users who are not based in England, New York or Texas. To do this:

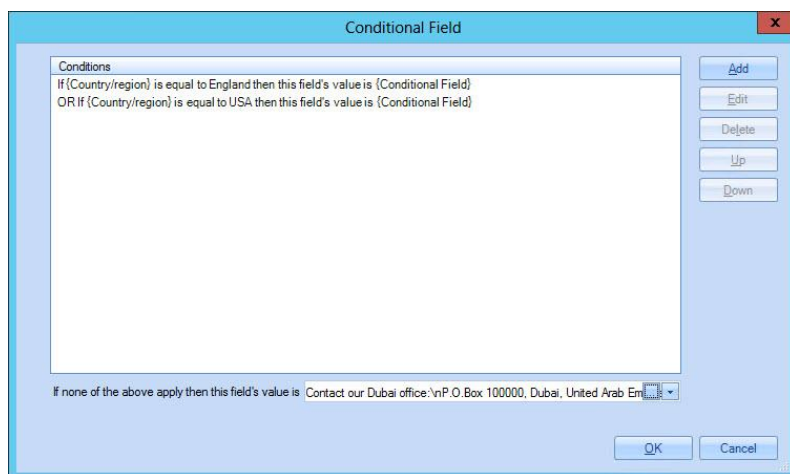
1. Move to the bottom of the **conditional field** window and click the [...] button associated with the **if none of the above apply then this field's value is** field. The **expandable field editor** window is displayed.
2. Use this window to enter content to be used if neither of the specified conditions is met (i.e. for messages sent by users who are not based in England, New York or Texas). You can enter text and/or fields as required:



## NOTE

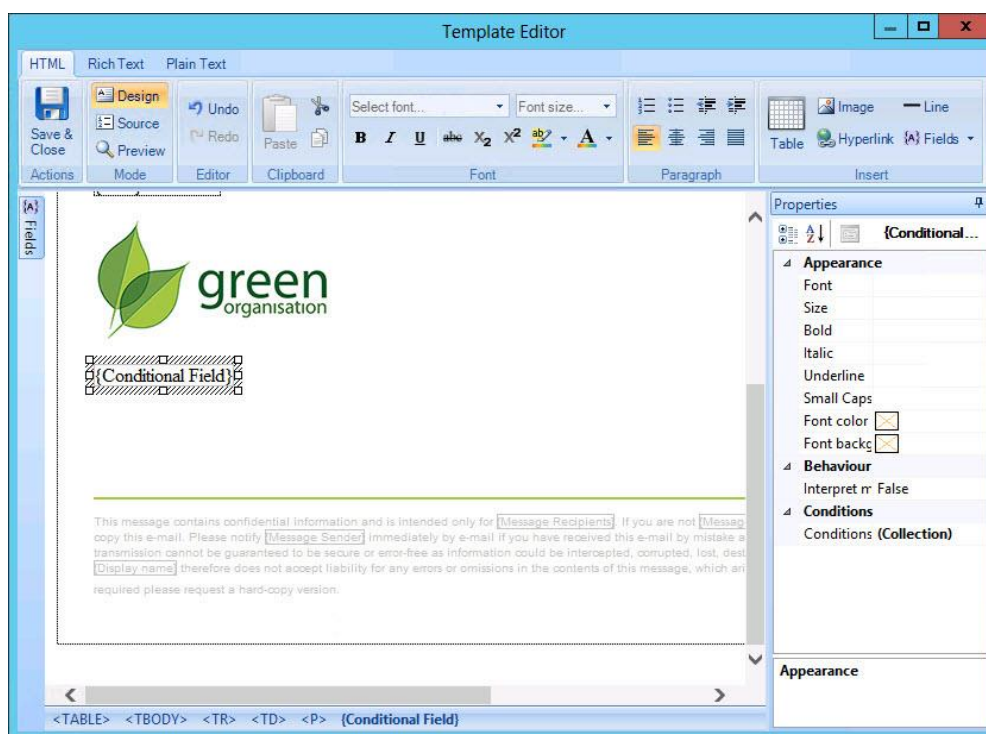
Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See [step 5](#) [pg.310] for details about changing these properties.

- Click **OK** to save changes and exit back to the **conditional field** window:



Settings for the conditional field are now complete, with two conditions (one for **England** users and one for **USA** users) and then required content for everyone else.

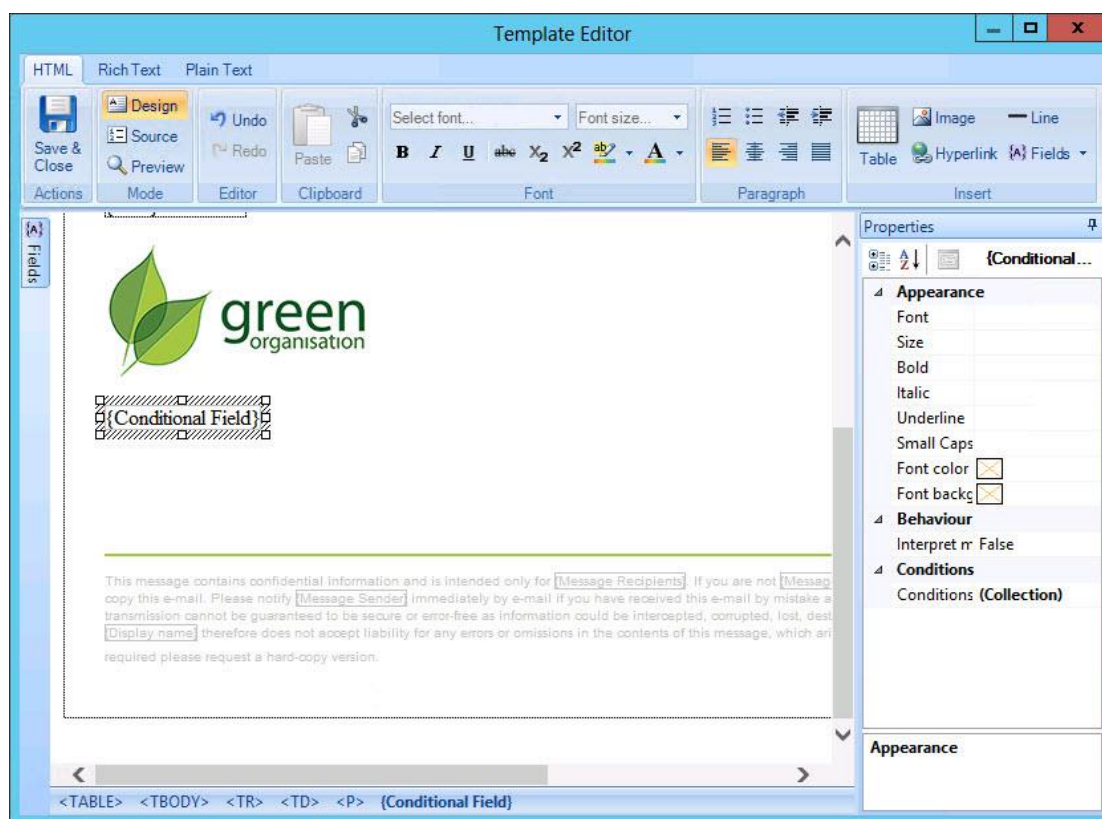
- Click **OK** to exit back to the template editor, where the **conditional field** is now shown:



- Select this field and use **appearance** settings in the **properties** pane (on the right-hand side of the template editor) to apply required formatting. Any properties specified here will be applied to the associated conditional content when it is used (see below for further information about how nested **conditional fields** inherit **appearance** properties).

## Understanding Inheritance of Appearance Properties

Having added the 'master' [conditional field](#) to the template, you can select it and then set [appearance](#) properties (on the right-hand side of the template editor) to apply required formatting:



Any properties specified here will be applied to the associated conditional content when it is used. However, in this case, we know that the [conditional field](#) contains other [conditional fields](#), so it is important to understand how nested fields inherit properties from the 'master' field.

If you choose to set [appearance](#) properties for nested [conditional fields](#), content for those nested fields will be formatted as per those properties - they will not inherit the appearance properties of this 'master' conditional field.

For example, suppose that you wanted to format signatures as follows:

- England address to be formatted as: Arial, 8pt, Green (you would define these properties at [stage 1, step 21 \[pg.301\]](#))
- USA address to be formatted as: Arial, 10pt, Red (you would define these properties at [stage 2, step 15 \[pg.308\]](#))
- Address for everyone else to be formatted as: Grey (you would define these properties at [stage 3, step 5 \[pg.310\]](#))

## General Fields

Fields in the [general](#) fields section are summarized below:

Field	Inserts...
Current Date	The current date (which may not necessarily be the same as the message sent date)

# Properties

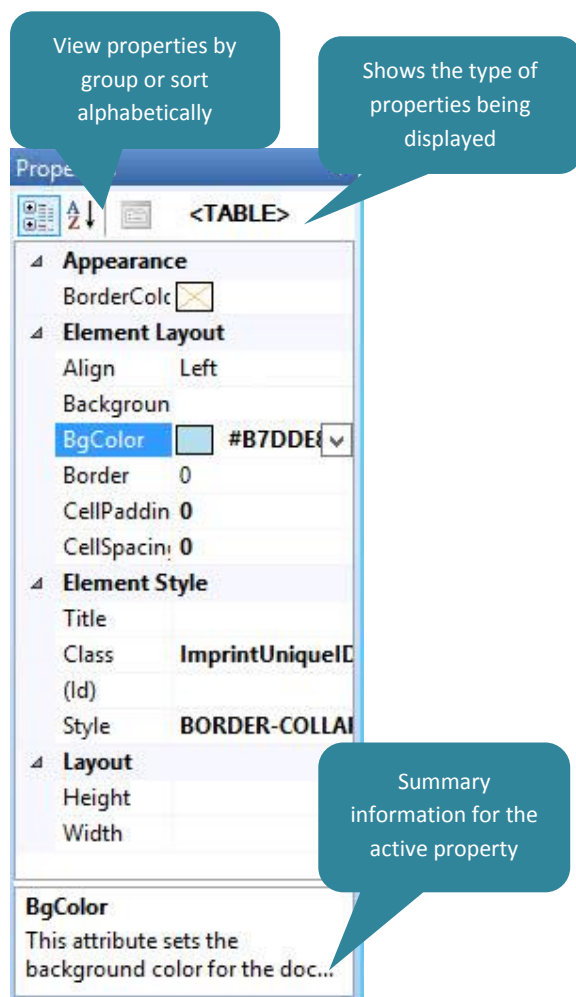
Properties are used to format and control template content. Almost every piece of content added to a template will have properties associated with it. For example, a section of text will have various font properties, a table cell will have border and background color properties and a hyperlink will have URL and target properties.

Properties are used in all template types - [HTML](#), [RTF](#) and [Plain Text](#). This section contains useful information for working with properties, including:

- [Working with the properties pane \[pg.313\]](#)
- [Examples of properties in use \[pg.317\]](#)

## Working With the Properties Pane

The [properties](#) pane updates to reflect the current selection in the template editor - for example:



The title at the top of the properties panel shows the type of properties displayed - i.e. the nature of the selected item of content. In the above example, a table was selected in the [HTML](#) editor, so the title of the property pane is displayed as `<table>`.

Many properties are associated with drop-down lists so you can select a pre-defined value, whilst others require direct input. At the bottom of the properties pane, a small information area displays summary text for the currently selected property.

NOTE

Remember - almost all items of content entered into the template editor will have properties associated with them. If you aren't sure how to change something, select it and check available properties.

# Understanding How Properties Are Inherited

As noted above, almost all items of content (i.e. text, images and fields) added to templates will have properties that can be used to define formatting and/or behavior. However, when you are working with content for templates, it is likely that you will encounter fields which are comprised of other fields. For example:

- The [contact block \[pg.223\]](#) field is typically comprised of multiple [user \[pg.223\]](#) fields
- The [address block \[pg.224\]](#) field is typically comprised of multiple [user > address \[pg.224\]](#) fields
- A [list of fields \[pg.261\]](#) is comprised of any range of other fields
- A [conditional field \[pg.270\]](#) might include other fields (and indeed other [conditional fields](#))

Where one field (i.e. the 'master' field) contains another field, any properties associated with the 'master' field will be inherited by the fields contained within it. This is illustrated in the example below, where a [list of fields](#) item contains a number of fields, including [telephone number](#).

When the [list of fields](#) item is selected, the [properties](#) pane shows that font settings for this item are set to [Arial, 9pt, Blue](#). Then, when the [fields](#) section of the [properties](#) panel is expanded, each of the fields contained within this item are shown with their own properties - by default, these are inherited from the main [list of fields](#) item and this is explicitly stated in the property values:

The screenshot shows the 'Properties' pane for a 'List Of Fields' item. The 'Appearance' section is expanded, showing font settings: Font (Arial), Size (9pt), Bold (False), Italic (False), Underline (False), Small Caps (False), Font color (#31859B), and Background Color (yellow). The 'Fields' section is also expanded, showing a 'Telephone number' field. This field's properties are listed with '(Inherited from List Of Fields)' for Font, Size, Bold, Italic, Underline, Small Caps, and Font color, while Word wrap is set to True. Two callout boxes provide context: one points to the top-level appearance settings, stating they apply to the master field and all elements within it; the other points to the inherited properties of the sub-field, stating that elements within the master field automatically inherit these properties but can be changed individually.

Properties	
<b>{List Of Fields}</b>	
<b>Appearance</b>	
Font	Arial
Size	9pt
Bold	False
Italic	False
Underline	False
Small Caps	False
Font color	#31859B
Font background color	Yellow
Background Color	Yellow
Border	
Label font	
<b>Fields</b>	
<b>Telephone number   phone</b>	
Font	Arial (Inherited from List Of Fields)
Size	9pt (Inherited from List Of Fields)
Bold	False (Inherited from List Of Fields)
Italic	False (Inherited from List Of Fields)
Underline	False (Inherited from List Of Fields)
Small Caps	False (Inherited from List Of Fields)
Font color	#31859B (Inherited from List Of Fields)
Font background color	Yellow (Inherited from List Of Fields)
Word wrap	True
Width	
Height	

If required, you can change the values associated with inherited properties on an individual basis, as shown below:

The screenshot shows the 'Properties' window with two sections: 'Appearance' and 'Fields'.

**Appearance Section:**

Property	Value
Font	Arial
Size	9pt
Bold	False
Italic	False
Underline	False
Small Caps	
Font color	#31859B
Font background color	
Background Color	

**Fields Section:**

Telephone number | phone

Property	Value
Font	Arial (Inherited from List Of Fields)
Size	9pt (Inherited from List Of Fields)
Bold	True
Italic	False (Inherited from List Of Fields)
Underline	False (Inherited from List Of Fields)
Small Caps	
Font color	#76923C
Font background color	
Word wrap	True

**Callout 1 (Top-level appearance):** Top-level appearance properties to be applied to the 'master' field and all elements within it.

**Callout 2 (Telephone field):** The **telephone** field has some inherited properties from the 'master' list of fields field but bold and font color properties have been changed.



## Examples of Properties in Use

The following examples show how the [properties pane](#) [pg.313] updates to reflect selected content in the template editor.

### Field Properties

Address block field is selected

Set properties for the output of the field - for example, font attributes

Properties

{Address Block}

**Appearance**

Display Name	Address Block
Field font	
Inner fields font	
Inner text font	
Multi-line	True
Regional Format	US Style

**Content**

Content	{Street}{City}{State/province}{ZIP/Postal Code}
Field separator	,
Include country	False

Appearance

### Hyperlink Properties

Hyperlink is selected

Update the link URL, name, hover text, etc. using the properties pane

Properties

{Web page (as hyperli...}

**Appearance**

Display Name	Web page (as hyperlink)
Field font	

**Content**

Address	http://{Web page}
Hover text	
Text to display	{Web page}

**Address**

The destination URL when the hyperlink is clicked

## Text Properties

The screenshot shows the Signature Manager interface with a signature template. A blue callout bubble points to the text "{Display name} - {Title}" with the text "Item of text is selected". Another blue callout bubble points to the Properties pane on the right, which is titled "<FONT>" and shows the "Element Layout" section with properties like Color, Face, and Size. A third blue callout bubble points to the same Properties pane with the text "Set properties for selected text". The status bar at the bottom shows the path: <TABLE> <TBODY> <TR> <TD> <P> <TABLE> <TBODY> <TR> <TD> <P> <FONT>.

## Table Properties

The screenshot shows the Signature Manager interface with a signature template. A blue callout bubble points to the entire table structure with the text "Entire table is selected". Another blue callout bubble points to the Properties pane on the right, which is titled "<TABLE>" and shows the "Element Layout" section with properties like Align, Background, BgColor, Border, and BorderColor. A third blue callout bubble points to the same Properties pane with the text "Set properties for the table". The status bar at the bottom shows the path: <TABLE>.

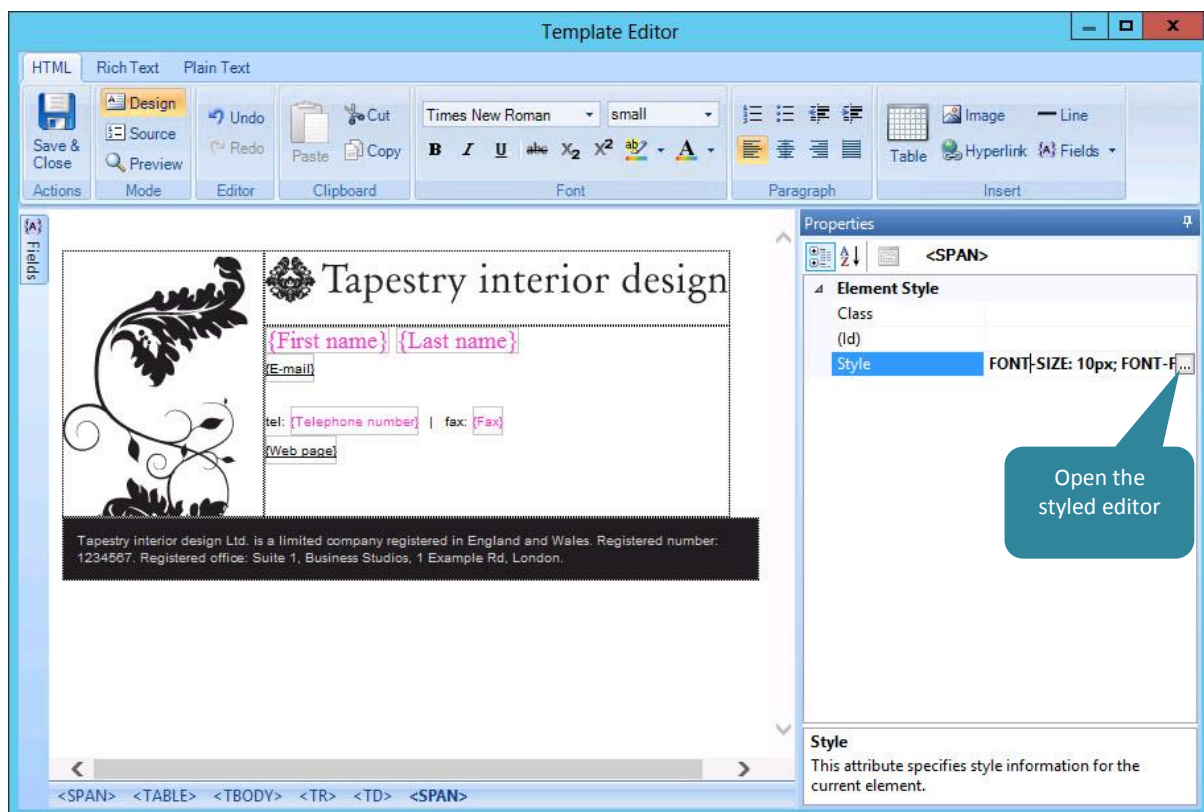
### NOTE

In some instances, content can be updated using the properties pane, or by using toolbar options. For example, if you need to update the URL for a hyperlink, you can select the link in the content pane and then either choose the **hyperlink** option from the toolbar - or you can just change the required property in the **properties pane**.

# The Style Editor

When adding or changing templates in [HTML](#) format, it is likely that you will want to apply style attributes to different items of content - for example, you might want to set font type, font color, borders, positioning, etc.

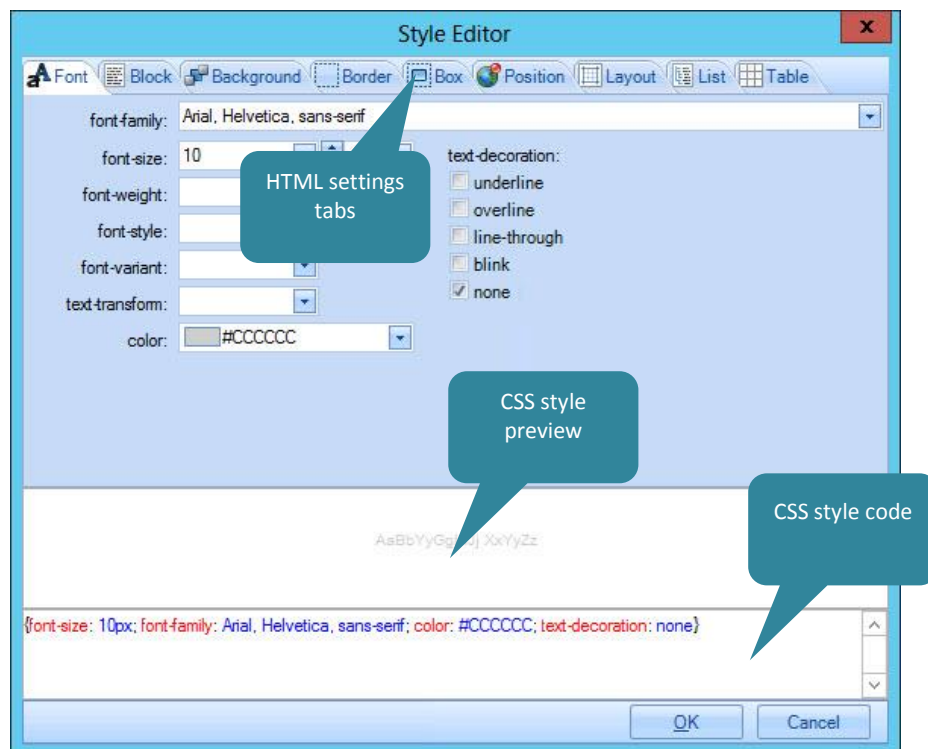
If you are not familiar with [HTML](#) markup, this can be a daunting prospect however, [Exclaimer Signature Manager Outlook Edition](#) includes an intuitive [style editor](#) which makes styling [HTML](#) content a simple task. The [style editor](#) is accessed from the [properties](#) pane when an item of content is selected:



Whenever the style property is shown, click the associated browse [...] button to open the style editor and make required style selections. For further information please see [understanding the style editor window](#) [pg.320].

## Understanding the Style Editor Window

The **style editor** is divided into upper and lower panes. The upper pane contains a series of tabs which are used to access different style settings. The lower section contains a preview pane which is used to preview how content will look when selected style properties are applied, and displays CSS markup:



Style properties are accessed via the following tabs:

- [Font](#) [pg.321]
- [Block](#) [pg.322]
- [Background](#) [pg.323]
- [Border](#) [pg.324]
- [Box](#) [pg.325]
- [Position](#) [pg.326]
- [Layout](#) [pg.327]
- [List](#) [pg.328]
- [Table](#) [pg.329]

All available options on these tabs relate to **CSS** properties. These options are summarized in the following sections however, for more detailed information you may wish to consult a **CSS** reference - for example <http://www.w3schools.com>.

## Font Properties

Use the [font](#) tab to set required font properties for the selected item:

Option	Summary
font-family	Use the drop-down list to select the required font.
font-size	Use the drop-down list to select the required font size ( <a href="#">x-small</a> , <a href="#">small</a> , <a href="#">medium</a> , etc.) or select ( <a href="#">value</a> ) to select a unit ( <a href="#">px</a> , <a href="#">pt</a> , <a href="#">mm</a> , <a href="#">in</a> , <a href="#">em</a> , etc.).
font-weight	Use the drop-down list to select the required font weight ( <a href="#">normal</a> , <a href="#">bold</a> , <a href="#">lighter</a> , etc.).
font-style	Use the drop-down list to select the required font style ( <a href="#">normal</a> , <a href="#">italic</a> , <a href="#">oblique</a> or <a href="#">inherit</a> ).
font-variant	Use the drop-down list to select the required font variant ( <a href="#">normal</a> , <a href="#">small caps</a> or <a href="#">inherit</a> ).
text-transform	Use the drop-down list to select the required transformation ( <a href="#">capitalize</a> , <a href="#">lowercase</a> , <a href="#">none</a> <a href="#">uppercase</a> or <a href="#">inherit</a> ).
color	Use the drop-down list to select the required color, or type a value into the field.
text-decoration	Use check boxes to select one or more text decoration options.

### NOTE

Where **inherit** is selected, the item of content will inherit the given attribute from its parent element. For example, if you are setting the **font-size** for a particular word in a paragraph, the word would inherit its size from the paragraph **<p>** element.

## Block Properties

Use the [block](#) tab to set required block properties for the selected item. In HTML, elements (i.e. items of content) can be 'block-level' or 'inline'. Typically, block-level elements may contain inline elements and other block-level elements. Inline elements may contain only data and other inline elements. Block-level elements generally start on a new line whilst inline elements do not. Available settings are summarized below:

Option	Summary
line-height	Use the drop-down list to select <a href="#">normal</a> or <a href="#">inherit</a> , or select <a href="#">(value)</a> to select a unit ( <a href="#">pt</a> , <a href="#">px</a> , etc.) and enter the required numeric value.
vertical-align	Use the drop-down list to select the required vertical alignment setting ( <a href="#">baseline</a> , <a href="#">bottom</a> , <a href="#">middle</a> , <a href="#">inherit</a> , etc.) or select <a href="#">(value)</a> to select a unit ( <a href="#">%</a> , <a href="#">pt</a> , <a href="#">px</a> , etc.) and enter the required numeric value.
text-align	Use the drop-down list to select the required text alignment setting ( <a href="#">center</a> , <a href="#">justify</a> , <a href="#">left</a> , <a href="#">inherit</a> , etc.).
text-indent	Use the drop-down list to select the required text indent setting. You can choose to <a href="#">inherit</a> settings from the parent element, or select <a href="#">(value)</a> to select a unit ( <a href="#">%</a> , <a href="#">pt</a> , <a href="#">px</a> , etc.) and enter the required numeric value.
white-space	Use the drop-down list to determine how white space should be handled ( <a href="#">normal</a> , <a href="#">nowrap</a> , <a href="#">pre</a> , <a href="#">pre-line</a> , etc.).
word-spacing	Use the drop-down list to select the required word spacing setting. You can choose <a href="#">normal</a> or to inherit settings from the parent element. Alternatively, or select <a href="#">(value)</a> to select a unit ( <a href="#">%</a> , <a href="#">pt</a> , <a href="#">px</a> , etc.) and enter the required numeric value.
letter-spacing	Use the drop-down list to select the required letter spacing setting. You can choose <a href="#">normal</a> or to inherit settings from the parent element. Alternatively, or select <a href="#">(value)</a> to select a unit ( <a href="#">%</a> , <a href="#">pt</a> , <a href="#">px</a> , etc.) and enter the required numeric value.

### NOTE

Where **inherit** is selected, the item of content will inherit the given attribute from its parent element. For example, if you are setting the **font-size** for a particular word in a paragraph, the word would inherit its size from the paragraph **<p>** element.

## Background Properties

Use the **background** tab to set required background properties for the selected item. Available settings are summarized below:

Option	Summary
background-color	Use the drop-down list to select the required color, or type a value into the field.
background-image	Use the drop-down list to select <b>none</b> or <b>inherit</b> . Alternatively, click the <b>browse</b> button to select an image file from your local / network drive.
background-repeat	Use the drop-down list to select if/how a background image should be repeated ( <b>no-repeat</b> , <b>repeat</b> , <b>repeat x</b> , <b>repeat y</b> or <b>inherit</b> ).
background-attachment	Use the drop-down list to determine whether a background image is fixed or if it scrolls with the rest of the page.
(x) background-position	Use the drop-down list to set the horizontal start position for a background image. Choose from standard options ( <b>normal</b> , <b>center</b> , <b>left</b> , <b>right</b> , <b>inherit</b> ) or select <b>(value)</b> to select a unit ( <b>%</b> , <b>pt</b> , <b>px</b> , etc.) and enter the required numeric value.
(y) background-position	Use the drop-down list to set the vertical start position for a background image. Choose from standard options ( <b>normal</b> , <b>center</b> , <b>left</b> , <b>right</b> , <b>inherit</b> ) or select <b>(value)</b> to select a unit ( <b>%</b> , <b>pt</b> , <b>px</b> , etc.) and enter the required numeric value.

### NOTE

Where **inherit** is selected, the item of content will inherit the given attribute from its parent element. For example, if you are setting the **font-size** for a particular word in a paragraph, the word would inherit its size from the paragraph **<p>** element.

## Border Properties

Use the **border** tab to define a border for the selected item. For each option, you can choose to define individual settings for **top**, **bottom**, **left** and/or **right** borders, or select the **same for all** check box to apply the first setting to all borders. Available settings are summarized below:

Option	Summary
border-style	Use the drop-down list to select the required type ( <b>dashed</b> , <b>dotted</b> , <b>double</b> , <b>groove</b> , <b>inherit</b> , etc.).
border-width	Use the drop-down list to select the required width ( <b>thin</b> , <b>medium</b> , <b>thick</b> , <b>inherit</b> ). Alternatively, select ( <b>value</b> ) to select a unit ( <b>%</b> , <b>pt</b> , <b>px</b> , etc.) and enter the required numeric value.
border-color	Use the drop-down list to select the required color, or type a value into the field.

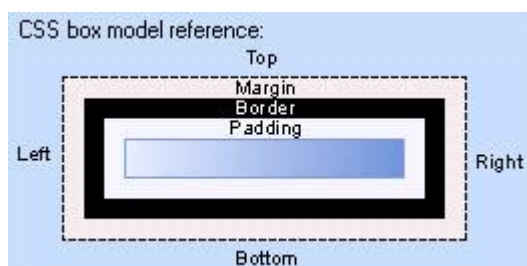
### NOTE

Where **inherit** is selected, the item of content will inherit the given attribute from its parent element. For example, if you are setting the **font-size** for a particular word in a paragraph, the word would inherit its size from the paragraph **<p>** element.



## Box Properties

In CSS, a 'box' model can be thought of as a box that wraps around HTML elements. It is typically used for design and layout since it allows the placement of a border around elements, and to space elements in relation to other elements. A box is comprised of margins, borders, padding, and actual content, as illustrated below:



Use the [box](#) tab to define [margin](#) and [padding](#) settings for the selected item (see [border properties \[pg.324\]](#) for border settings). For each option, you can choose to define individual settings for [top](#), [bottom](#), [left](#) and/or [right](#) borders, or select the [same for all](#) check box to apply the first setting to all borders. Available settings are summarized below:

Option	Summary
padding	Padding is used to clear an area around the content. Use the drop-down list if you wish to <a href="#">inherit</a> padding from the parent element, or select <a href="#">(value)</a> to select a unit ( <a href="#">%</a> , <a href="#">pt</a> , <a href="#">px</a> , etc.) and enter the required numeric value.
margin	Margins are used to clear an area around the border. Use the drop-down list to determine the margin size ( <a href="#">auto</a> , <a href="#">inherit</a> ) or select <a href="#">(value)</a> to select a unit ( <a href="#">%</a> , <a href="#">pt</a> , <a href="#">px</a> , etc.) and enter the required numeric value.

### NOTE

Where **inherit** is selected, the item of content will inherit the given attribute from its parent element. For example, if you are setting the **font-size** for a particular word in a paragraph, the word would inherit its size from the paragraph **<p>** element.

## Position Properties

**Positioning** properties are used to position an element. They can be used to place an element in front of or behind another, and to specify what should happen when an element's content is too big.

Here, you select a **positioning method** and (if required) define positioning using **top**, **bottom**, **left**, and **right** properties. Note that properties work differently depending on which **positioning method** is selected. The following positioning methods are available:

Option	Summary
absolute	An <b>absolute</b> position element is positioned relative to the first parent element that has a position other than <b>static</b> . If no such element is found, the containing block is <html>. Static elements can overlap other elements.
fixed	An element with a <b>fixed</b> position is positioned relative to the browser window - it does not move even if the window is scrolled. Fixed positioned elements can overlap other elements.
static	A <b>static</b> positioned element is always positioned according to the normal flow of the page. Static positioned elements are not affected by the <b>top</b> , <b>bottom</b> , <b>left</b> , and <b>right</b> properties.
inherit	Inherit positioning from the parent element.

The **z-index** property is used to control the behavior of overlapping elements - i.e. which element should be placed in front of or behind others).

### NOTE

Where **inherit** is selected, the item of content will inherit the given attribute from its parent element. For example, if you are setting the **font-size** for a particular word in a paragraph, the word would inherit its size from the paragraph **<p>** element.

## Layout Properties

Layout properties are used to determine if and how items are displayed on the page. Available options are summarized below:

Option	Summary
visibility	Use this option to determine the visibility of an item. Choose from <a href="#">collapse</a> (typically for table elements), <a href="#">hidden</a> , <a href="#">visible</a> or <a href="#">inherit</a> . Note that if an item is <a href="#">hidden</a> , its space on the page is still allocated.
display	Choose from a range of display options ( <a href="#">block</a> , <a href="#">inline</a> , <a href="#">none</a> , <a href="#">inherit</a> , etc.). Note that if display is set to <a href="#">none</a> , its space on the page is removed (i.e. there is no indication that the item was ever there).
float	Float properties are used to push an element to the left or right, allowing other elements to wrap around it. This technique is often used for images, but it is also useful when working with layouts. Use the drop-down list to select <a href="#">left</a> , <a href="#">none</a> , <a href="#">right</a> or <a href="#">inherit</a> .
overflow	The <a href="#">overflow</a> property determines what happens if content overflows an element's <a href="#">box</a> [pg.325]. Use the drop-down list to select <a href="#">auto</a> , <a href="#">hidden</a> , <a href="#">scroll</a> , <a href="#">visible</a> or <a href="#">inherit</a> .
clip [top / right / bottom / left]	Clip options are used to handle cases where an image is larger than its containing element. The <a href="#">clip</a> property allows you to specify the dimensions of an element so the element is clipped to this size when required. Use the drop-down list to select <a href="#">auto</a> or <a href="#">inherit</a> . Alternatively, select <a href="#">(value)</a> to select a unit ( <a href="#">%</a> , <a href="#">pt</a> , <a href="#">px</a> , etc.) and enter the required numeric value.

### NOTE

Where **inherit** is selected, the item of content will inherit the given attribute from its parent element. For example, if you are setting the **font-size** for a particular word in a paragraph, the word would inherit its size from the paragraph **<p>** element.

## List Properties

List properties are used to determine how a table is displayed. Available options are summarized below:

Option	Summary
list-style-type	This property is used to specify the type of list-item marker in a list. Choose from a range of types including <a href="#">disc</a> , <a href="#">circle</a> , <a href="#">square</a> , <a href="#">inherit</a> , etc.
list-style-image	Use the drop-down list to select <a href="#">none</a> or <a href="#">inherit</a> . Alternatively, use the <a href="#">browse</a> button to select your own image to be used as the marker in lists.
list-style-position	Use this property to specify whether list-item markers should appear inside or outside the content flow. Choose from <a href="#">inside</a> , <a href="#">outside</a> or <a href="#">inherit</a> .

### NOTE

Where **inherit** is selected, the item of content will inherit the given attribute from its parent element. For example, if you are setting the **font-size** for a particular word in a paragraph, the word would inherit its size from the paragraph **<p>** element.

## Table Properties

Table properties are used to determine how a table is displayed. Available options are summarized below:

Option	Summary
table-layout	Select <a href="#">auto</a> to adopt an automatic layout, where the column width is set by the widest unbreakable content in the cells. Alternatively, select <a href="#">fixed</a> , where the horizontal layout depends upon the table's width and the width of the columns, rather than the content of the cells. You can also choose <a href="#">inherit</a> , to inherit behavior of the parent element.
border-collapse	Choose whether table borders are collapsed into a single border, or detached. Select <a href="#">collapse</a> to collapse borders into a single border ( <a href="#">border-spacing</a> and <a href="#">empty-cells</a> properties are ignored). Alternatively, select <a href="#">separate</a> to display detached borders ( <a href="#">border-spacing</a> and <a href="#">empty-cells</a> properties are not be ignored). You can also choose <a href="#">inherit</a> , to inherit behavior of the parent element.
empty-cells	Use this property to determine whether or not to display borders and background for empty cells in a table (only when <a href="#">separated</a> borders are selected). Choose from <a href="#">hide</a> , <a href="#">show</a> or <a href="#">inherit</a> .
caption-side	This property is used to specify the placement of a table caption - choose from <a href="#">bottom</a> , <a href="#">top</a> or <a href="#">inherit</a> .

### NOTE

Where **inherit** is selected, the item of content will inherit the given attribute from its parent element. For example, if you are setting the **font-size** for a particular word in a paragraph, the word would inherit its size from the paragraph **<p>** element.

# How To...

This section contains instructions for completing a selection of common tasks with templates using Exclaimer Signature Manager Outlook Edition, including:

- [How do I create a dynamic signature template? \[pg.331\]](#)
- [How do I suppress blank lines if fields are not populated? \[pg.332\]](#)
- [How do I create a contact block? \[pg.334\]](#)
- [How do I set the font for text in a template? \[pg.337\]](#)
- [How do I insert a single banner ad for a campaign? \[pg.338\]](#)
- [How do I include images for an OWA signature? \[pg.340\]](#)
- [How can I tell which policies are using a specific template \[pg.341\]](#)

# How do I Create A Dynamic Signature Template?

To create a dynamic signature template, simply create a new template and add [Active Directory](#) fields in the required sequence and format. When working in [HTML](#) format, you can be as creative as you like with tables, images, shading, etc.

To provide ideas and help you get started, a number of custom designs are included with the [Signature Manager Outlook Edition](#) installation - an example is shown below.

## Tapestry Business Card Example

In this example, a template has been designed in tabular (business card) form. Font attributes are set for certain fields to be displayed in pink and images have been included within the table:

### Design mode

	 Tapestry interior design
	{First name} {Last name}
	<u>{E-mail (as hyperlink)}</u>
	tel: {Telephone number}   fax: {Fax} <u>{Web page (as hyperlink)}</u>
Tapestry interior design Ltd. is a limited company registered in England and Wales. Registered number: 1234567. Registered office: Suite 1, Business Studios, 1 Example Rd, London.	

### Preview mode

	 Tapestry interior design
	<b>Karen Green</b>
	<u>kareng@greenorg.net</u>
	tel: +44 (0) 1252 987 456   fax: +44 (0) 1252 987 456 <u>www.greenorg.net</u>
Tapestry interior design Ltd. is a limited company registered in England and Wales. Registered number: 1234567. Registered office: Suite 1, Business Studios, 1 Example Rd, London.	

# How do I Suppress Blank Lines If Fields Are Not Populated?

When using [fields](#) in templates, it is often useful to suppress an item if there is no data in the [Active Directory](#) to populate the field for a given user. There are a number of ways to suppress blank lines when defining templates - you can:

- [Use a contact block \[pg.332\]](#)
- [Use a smart table \[pg.332\]](#)
- [Use a field prefix \[pg.333\]](#)

## Using a Contact Block

A [contact block](#) is a pre-defined set of fields, presented in tabular form. For example:

Tel:	{Telephone number}
Fax:	{Fax}
Mobile:	{Mobile}
Email:	{E-mail (as hyperlink)}

...produces:

Tel: +44 (0) 1252 987 456  
Fax: +44 (0) 1252 987 456  
Mobile: +44 (0) 7733 102345  
Email: [kareng@greenorg.net](mailto:kareng@greenorg.net)

When a [contact block](#) is used, rows are not displayed if [Active Directory](#) data is not present. For further information please refer to the [user > general fields \[pg.223\]](#) section of this guide. Other 'block' fields (e.g. [address block \[pg.224\]](#) and [personal block \[pg.223\]](#)) work in the same way.

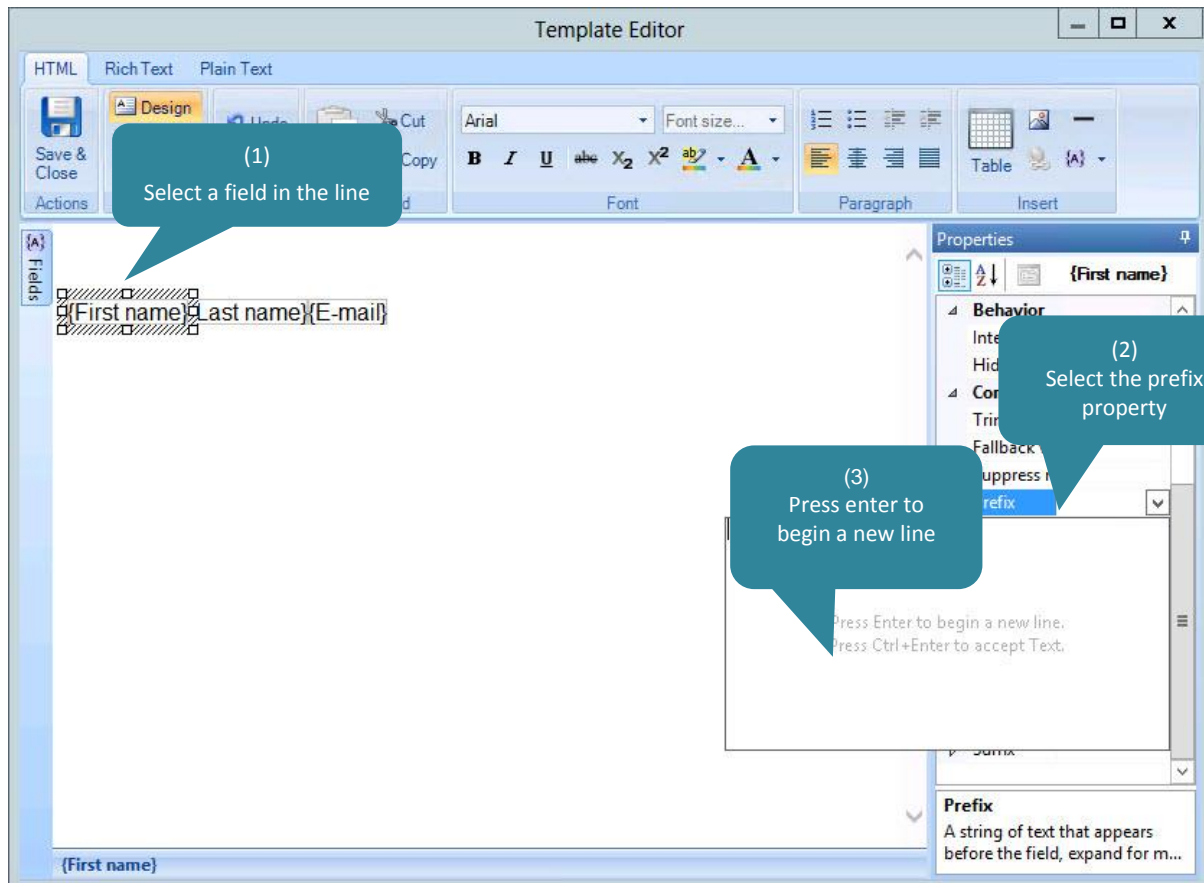
## Using a Smart Table

The [custom smart tables](#) field can be used to insert Active Directory information in tabular form, with options to suppress rows if associated information is not present. For further information please refer to the [smart tables \[pg.268\]](#) section.



## Using a Field Prefix

An alternative approach is to place all required fields on a single line, but use the [prefix](#) property to insert a carriage return before each one (shown below):



# How do I Create a Contact Block?

## Example of a contact block

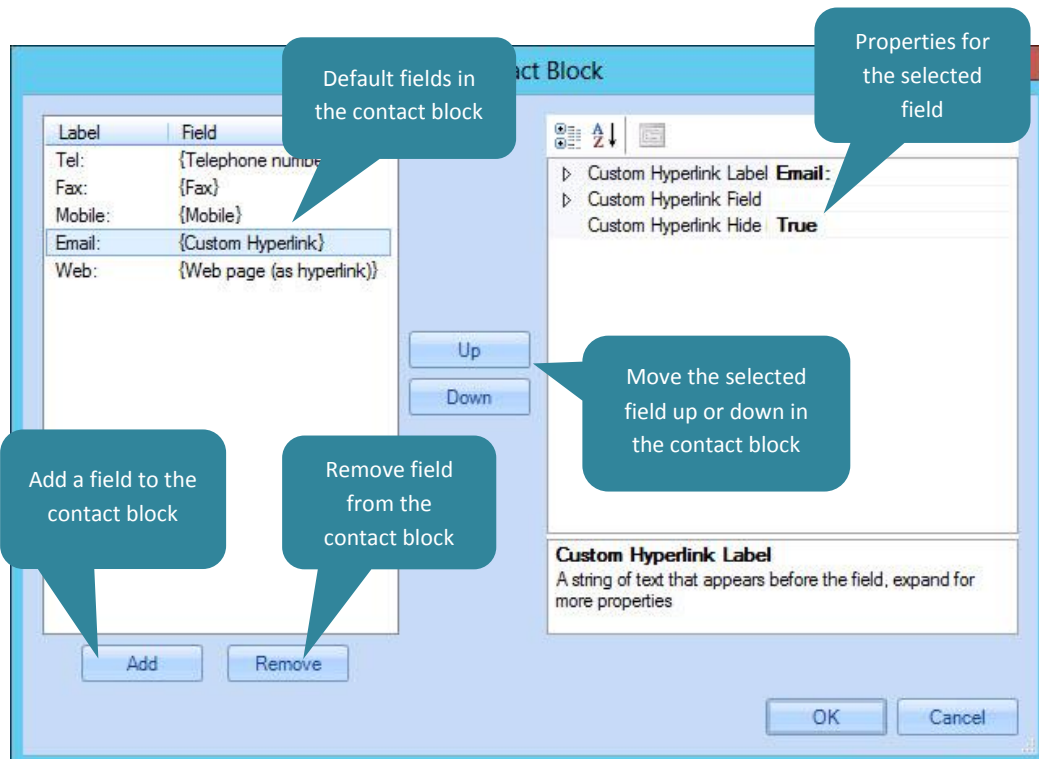
Tel:	{Telephone number}
Fax:	{Fax}
Mobile:	{Mobile}
Email:	{E-mail (as hyperlink)}

...produces:

Tel: +44 (0) 1252 987 456  
Fax: +44 (0) 1252 987 456  
Mobile: +44 (0) 7733 102345  
Email: [kareng@greenorg.net](mailto:kareng@greenorg.net)

## How it Works

When the **contact block** field is selected, the **smart table rows** window is displayed. Here, a number of default fields are included as a start point:



When a field is selected in the left-hand pane, its associated [properties](#) are displayed (and can be amended) in the right-hand pane. For further information, please refer to the [properties](#) [pg.313] section of this guide.

Contact blocks can be arranged as required but a typical layout has a field label in the left column and the corresponding field in the right column - for example:

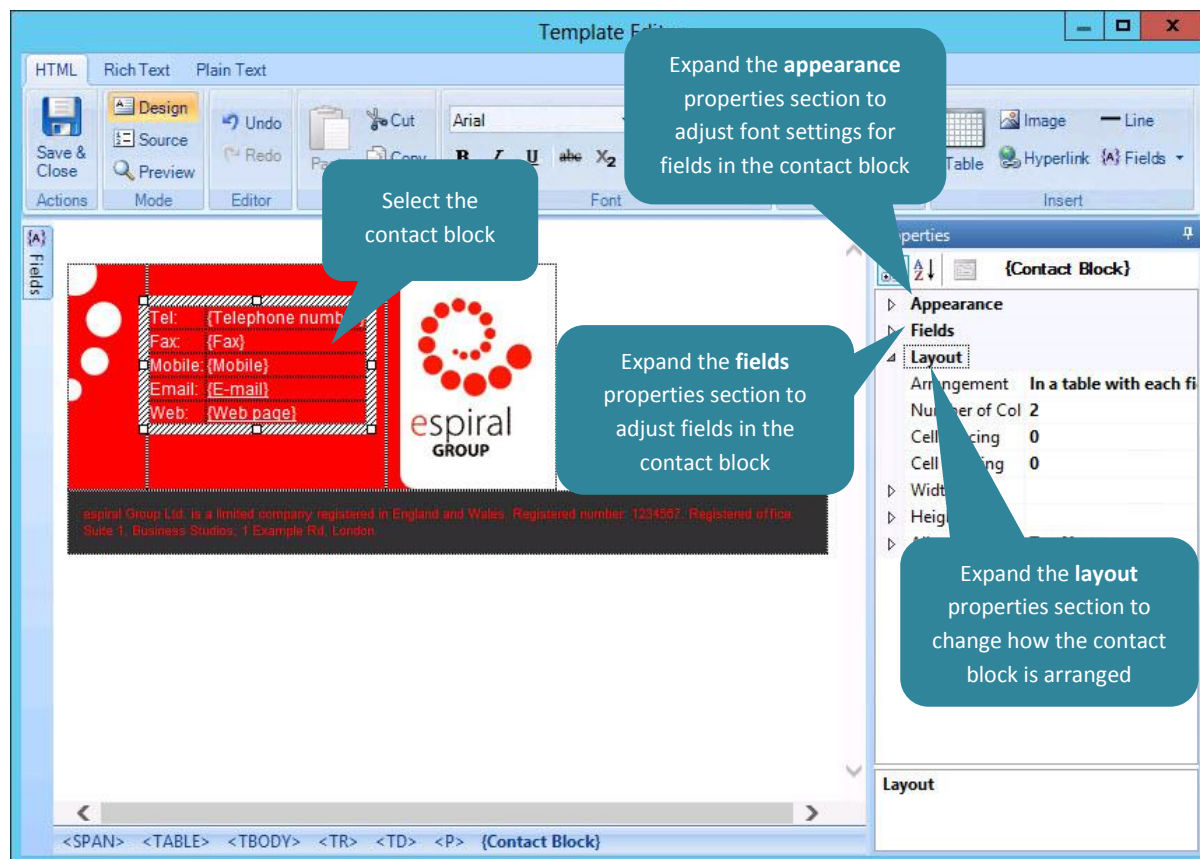


NOTE

Selecting the [table](#) option in the HTML editor [pg.216] displays an **insert table options** window, which includes the option to insert a **contact block**. If preferred, you can use this method to insert a **contact block** instead of adding the contact block field.

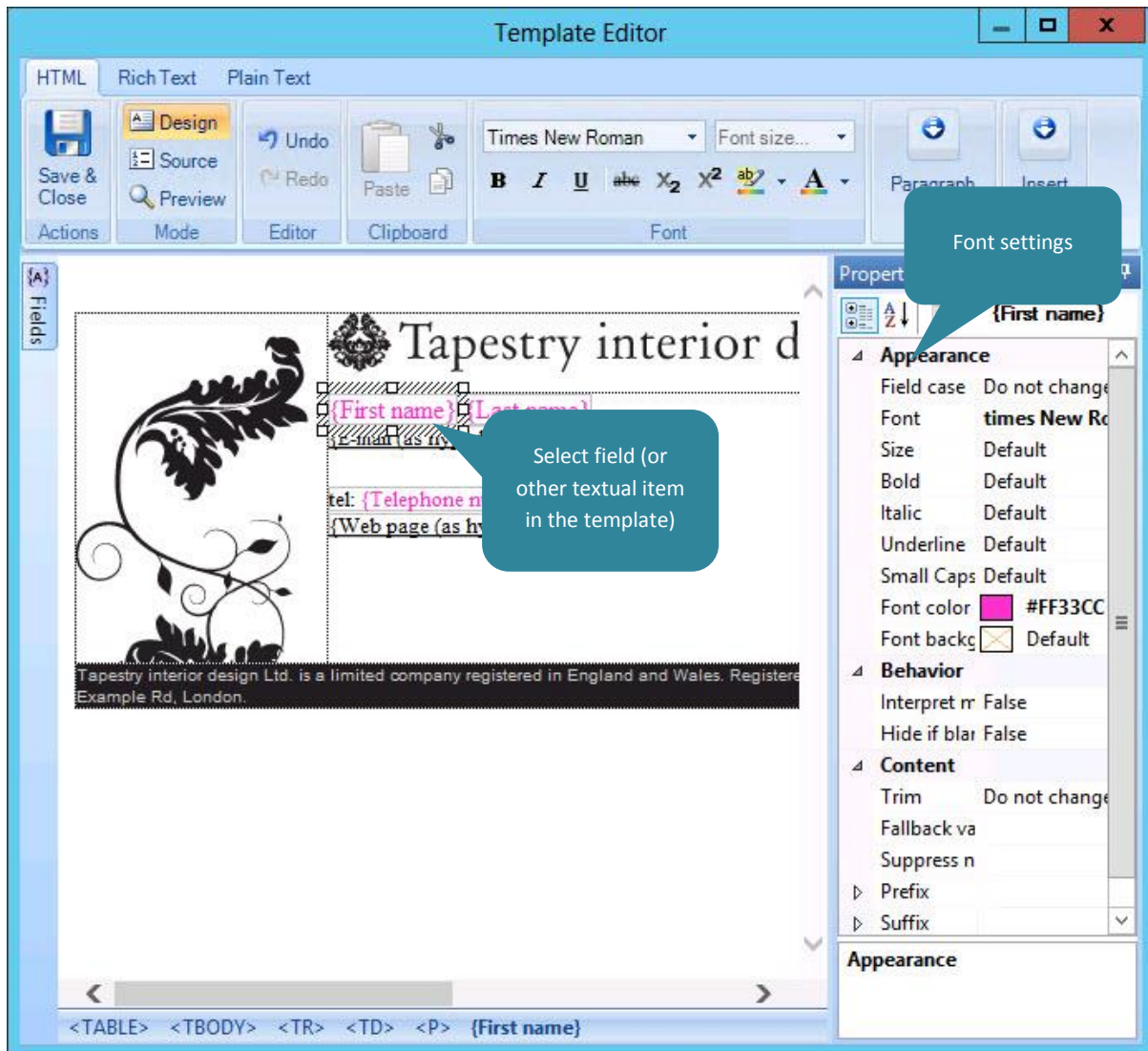
## Updating an Existing Contact Block

To update an existing **contact block** in a template, simply select and double-click the required block. Alternatively, select the entire **contact block** and expand the **appearance**, **fields** and/or **layout** section in the properties pane to make adjustments:



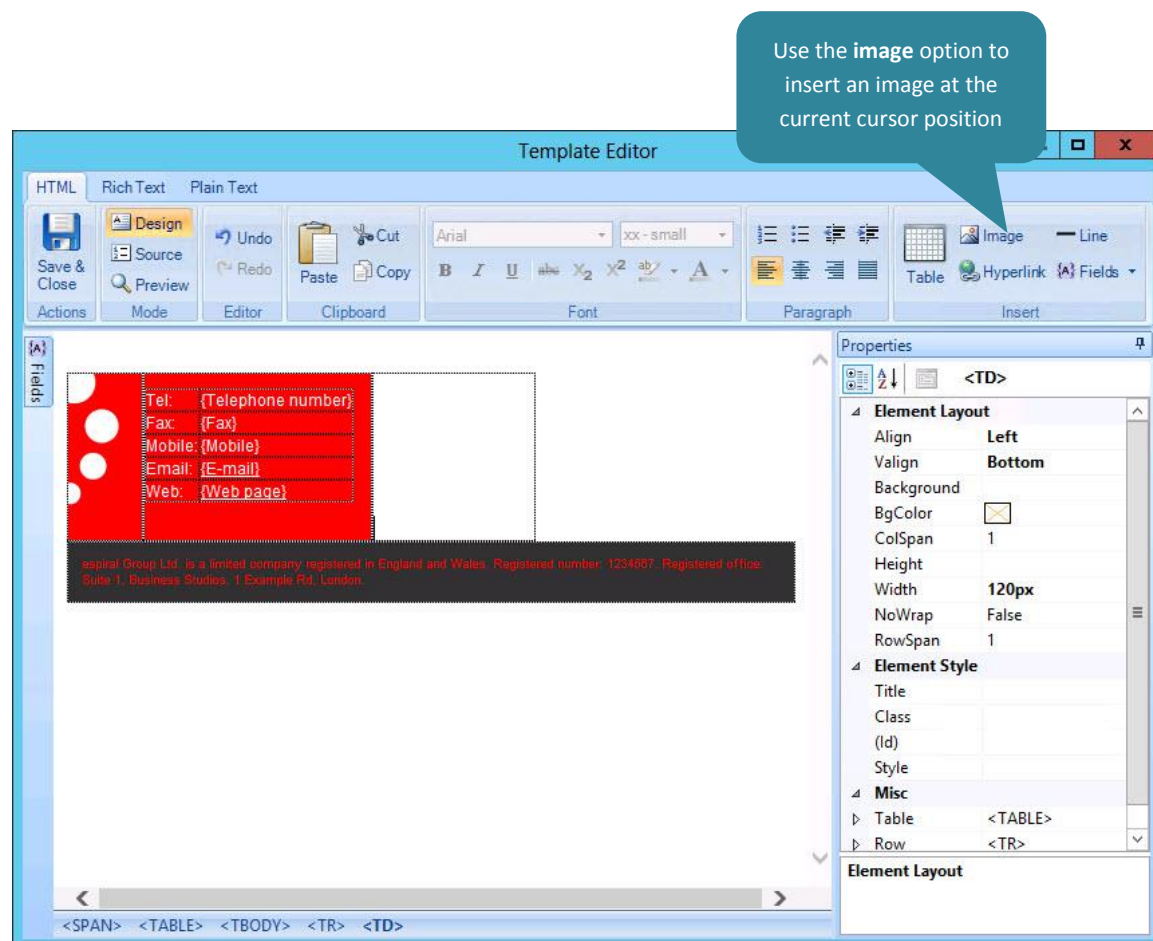
## How Do I Set the Font for Text in a Template?

To set the font (and any other formatting attributes) for field items in a template, select the required field and use [appearance](#) properties in the [properties panel](#) (shown below). You can also apply formatting via the [template editor toolbar](#) [pg.209].



# How Do I Insert a Single Banner Ad for a Campaign?

To insert a simple banner image in a template (for example, for a [campaign](#)), position the cursor at the very start of the template editor and use the [image](#) button to insert the required image:



The [image](#) window is displayed:



From here, you can:

- Use the [location](#) field to specify a physical location for the image. Click the browse [...] button to select a folder location, or use the arrow associated with the [location](#) to choose an [Active Directory](#) field (for example, you might wish to use an [AD thumbnail photo](#)).
- In the [hyperlink](#) field to enter a remote address for the image. Alternatively, if the required address is stored in an [Active Directory](#) field, you can use the arrow associated with the [hyperlink](#) to select the appropriate field.

## UNC Images

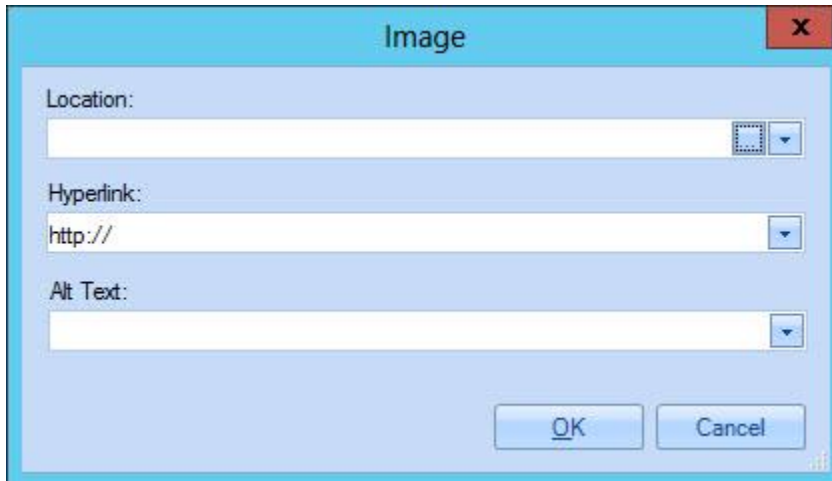
It is recommended that [Universal Naming Convention \(UNC\)](#) referenced images are **not** used. Where possible, we advise using [URL](#) referenced images (on a computer that can be viewed publicly) or that images are copied locally to the machine upon which [Exclaimer Signature Manager Outlook Edition](#) is installed. However, if you absolutely need to use UNC referenced images, you must ensure that the [Exclaimer Outlook Settings Connector Service](#) is set up to log on with an account that has appropriate network access permissions for the specified UNC path(s).

## Using Images in OWA Signatures

It is important to note that any images used in templates for [OWA signatures](#) [pg.101] must be linked using a URL and not embedded.

## How Do I Include Images for an OWA Signature?

Any images used in templates for [OWA](#) signatures must be linked using a URL and must not be embedded. To do this, choose the [insert image](#) option from the template editor toolbar to open the [image](#) window:



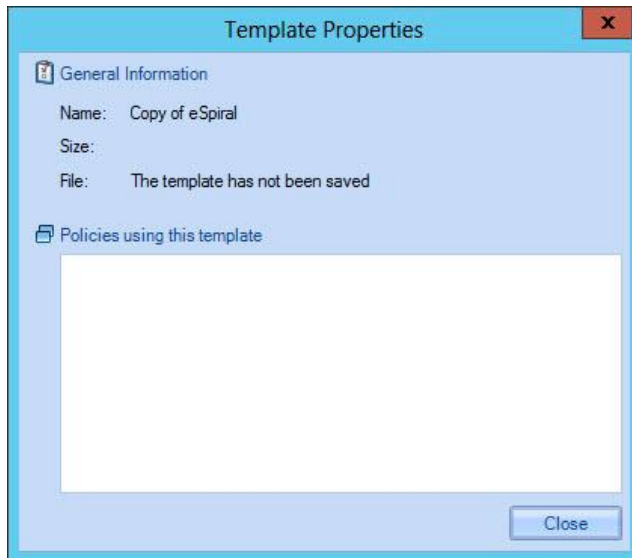
In the [location](#) field, type the required address for the image. Alternatively, if the required address is stored in an [Active Directory](#) field, you can use the arrow associated with the [location](#) to select the appropriate field.

Required images must be available on a computer that can be viewed externally - for example, on a web server.

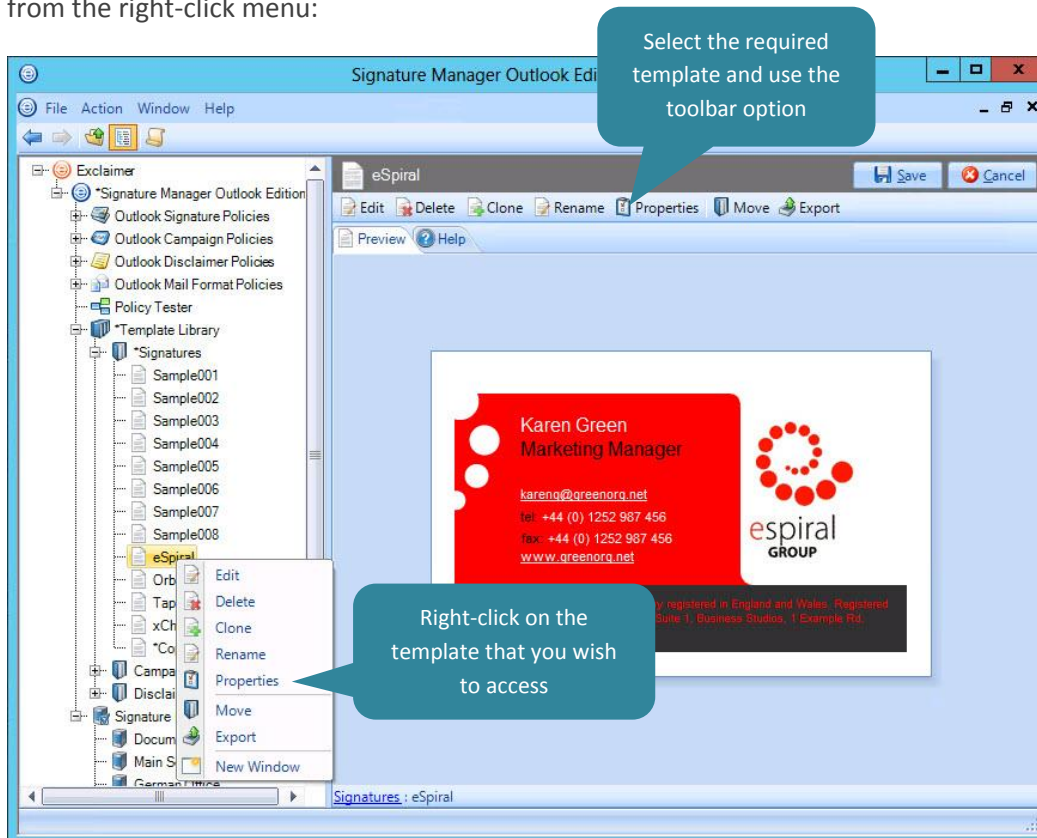


# How Can I Tell Which Policies Are Using A Specific Template?

Each template is associated with a [properties](#) [pg.204] window, which includes a list of any policies that are using the template:



When a template is selected, the [properties](#) option is available from the [template library](#) toolbar and from the right-click menu:



# Chapter 9

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## Signature Deployment Policies

# Signature Deployment Policies

## Introduction

Signature deployment policies are used to control the way in which signatures are updated and deployed to specified users. For each policy, you define settings including which [users](#) [pg.350] the policy is applied for, which [server](#) [pg.350] should be used, a [network share for deployed signatures](#), [how frequently ExSync checks for updates](#) [pg.354] and [whether OWA is updated from the server or from ExSync](#) [pg.354].

For many organizations, having one [signature deployment policy](#) which contains settings for all users is sufficient however; some organizations will have more complex requirements. Some examples might be:

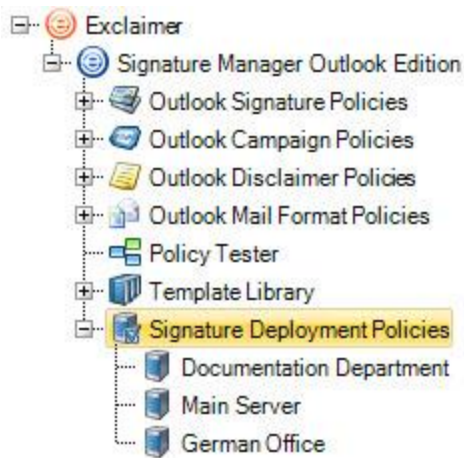
- Your organization has offices in London and New York. You could configure [Exclaimer Signature Manager Outlook Edition](#) to create signatures and deploy them to a single location for all users, but it might be more efficient to deploy signatures for London-based staff to a London-based server and for New York-based staff to a New York-based server. In this case, you would define one [signature deployment policy](#) for London and another for New York.

To achieve this, [Exclaimer Signature Manager Outlook Edition](#) should be installed at each site (London and New York), with [remote deployment](#) [pg.75] configured between them. The server in London then generates signatures for London locally and similarly, the server in New York generates signatures for New York locally - however, [remote deployment](#) between the sites ensures that [policies](#) and [templates](#) remain consistent.

- Different groups of users within your organization require signature updates more regularly than others. For example, it may be that signatures rarely change for one department, but change frequently for another. In this case, you might prefer to define one [signature deployment policy](#) which is set to check for signatures every 15 minutes and another which is set to check for signatures once a day.
- Your organization is particularly large, with a very high number of signatures. In this situation, you might choose to split the processing load between different servers for different groups of people. Since signatures are generated one after the other, utilizing multiple servers in this way means that signatures are generated in parallel according to the number of servers.

Signature deployment policies are associated with users via [organizational units](#) using [signature creation](#) [pg.350] options.

All work with [signature deployment policies](#) is completed from the [signature deployment policies](#) branch of the console tree:

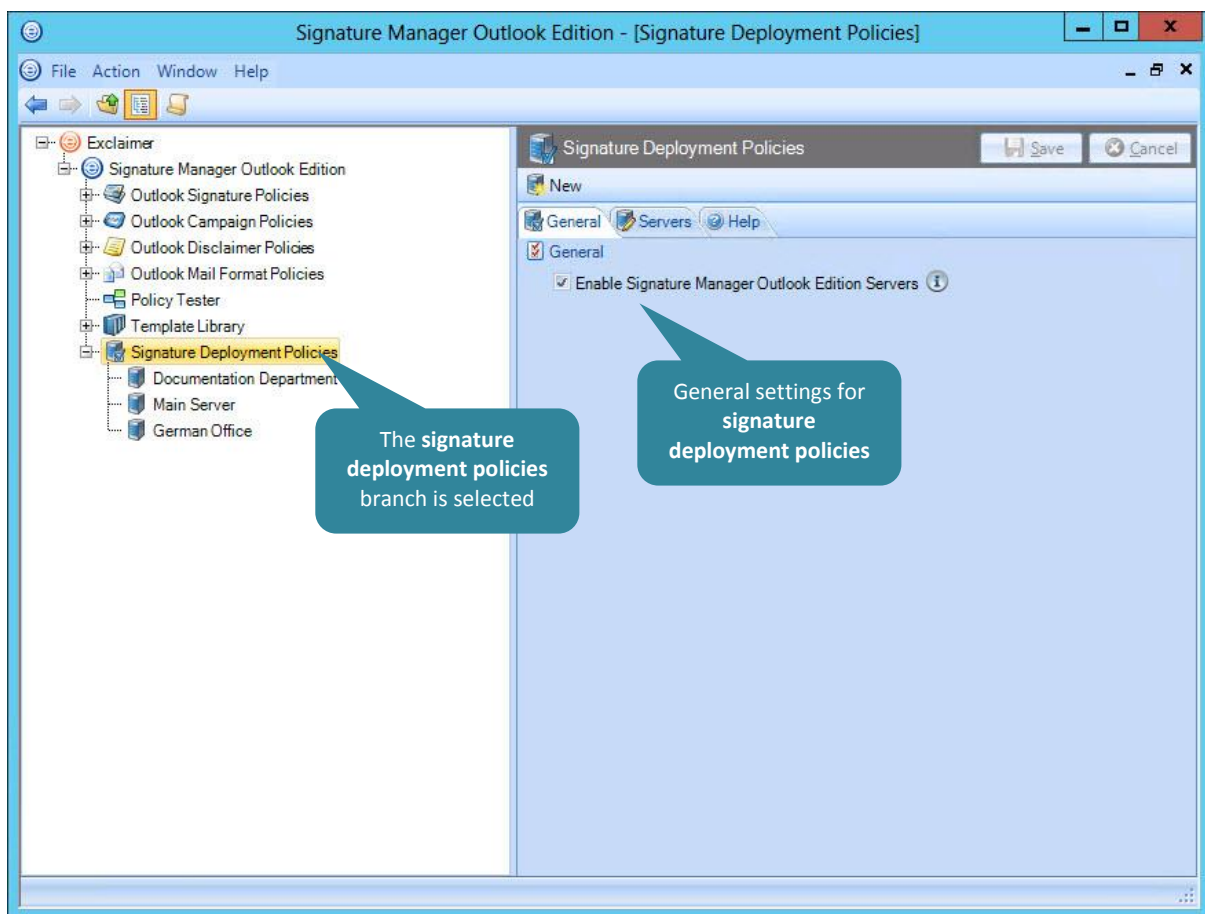


All existing policies are shown in the tree and from here you can:

- [View or update general settings for signature deployment policies](#) [pg.345]
- [View or update information and settings for an existing signature deployment policy](#) [pg.348]
- [Add a new signature deployment policy](#) [pg.360]
- [Change a signature deployment policy](#) [pg.362]
- [Cloning a signature deployment policy](#) [pg.363]
- [Remove an existing signature deployment policy](#) [pg.364]

# General Settings & Information for Signature Deployment Policies

When the [signature deployment policies](#) branch is selected (within the [Exclaimer console](#) [pg.66]), general settings and information for these policies are displayed:

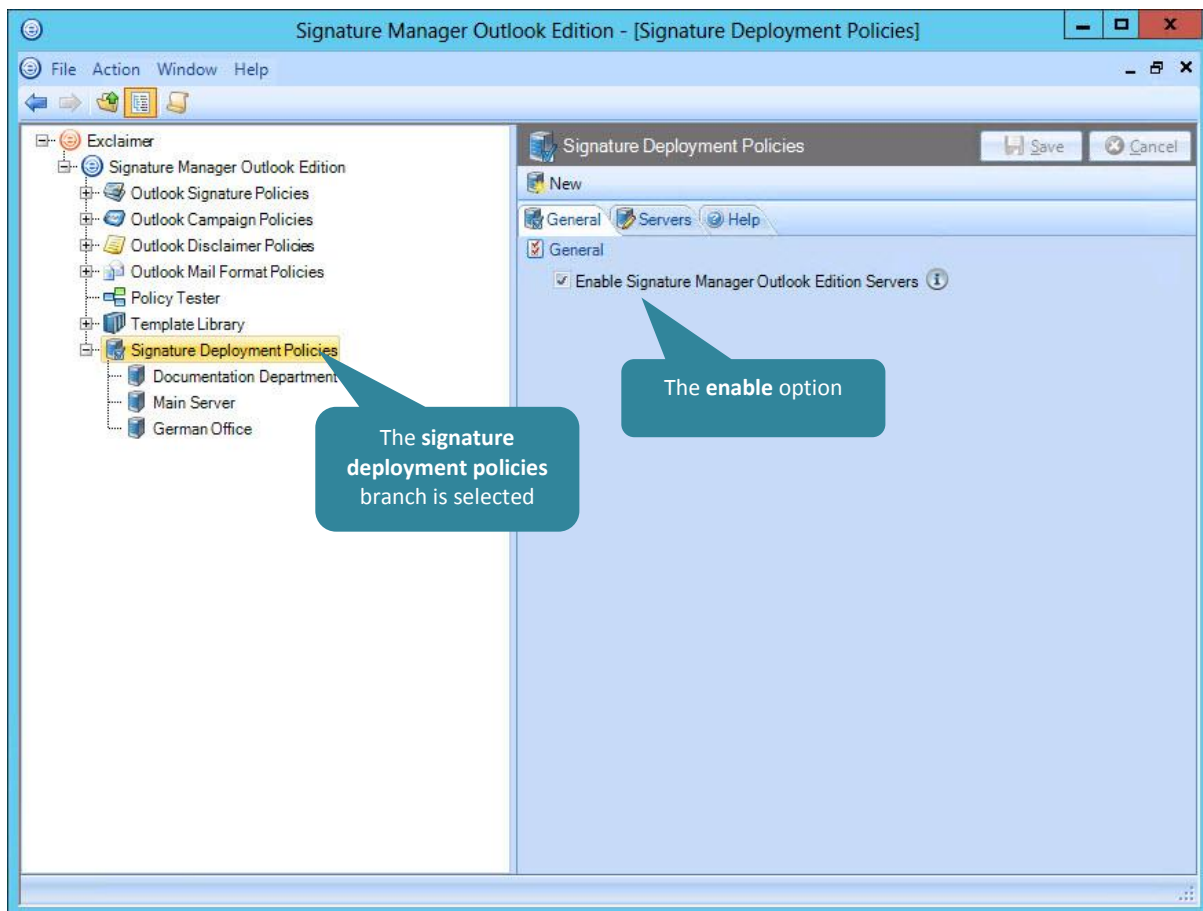


From here, you can:

- Update [general settings](#) [pg.346] from the [settings](#) tab
- [View existing policies](#) [pg.347] (and associated server settings) from the [servers](#) tab
- [Add a new policy](#) [pg.360] via the toolbar option

# Signature Deployment Policy Settings

The **general** tab is used to enable or disable all **signature deployment policies**:

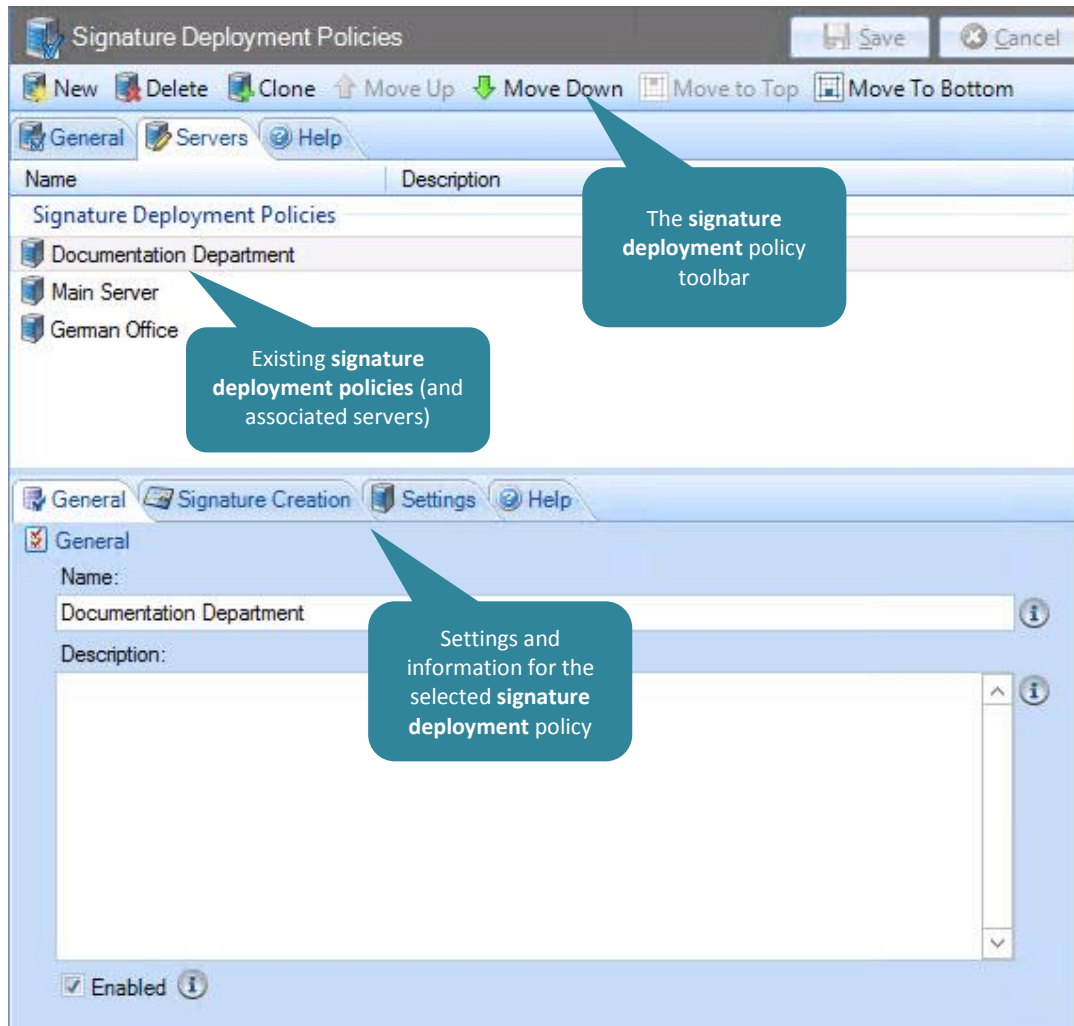


If this option is not set to enabled, no **signature deployment policies** will be processed - i.e. signature updates will not be deployed to any users.

If required, you can disable a specific **signature deployment policy** by accessing that policy and using the [enable/disable policy option](#) [pg.349] at that level.

# Signature Deployment Policy Servers

The [servers](#) tab contains quick access to existing policies (and associated [servers](#)) with options for completing key tasks:



From here, you can select any policy in the list to view [settings and information](#) [pg.348] in the lower pane. Using toolbar options, you can also:

- [Add a new signature deployment policy](#) [pg.360]
- [Remove an existing signature deployment policy](#) [pg.364]
- [Clone a signature deployment policy](#) [pg.363]

You can also select a policy and use [move](#) options to change the position of the policy in the list. Unlike [Outlook policies](#) [pg.94], the sequence in which [signature deployment policies](#) are listed does not affect processing.

# The Anatomy of a Signature Deployment Policy

A [signature deployment policy](#) contains settings which control the way in which signatures are updated for and deployed to specified users. . These settings are organized across a series of tabs, displayed in the content pane when a policy is selected:



Use links below to learn more about these options:

- [General](#) [pg.349]
- [Signature creation](#) [pg.350]
- [Settings](#) [pg.354]



# General

The **general** tab contains general settings for the **signature deployment policies**:

Options on this tab are summarized below:

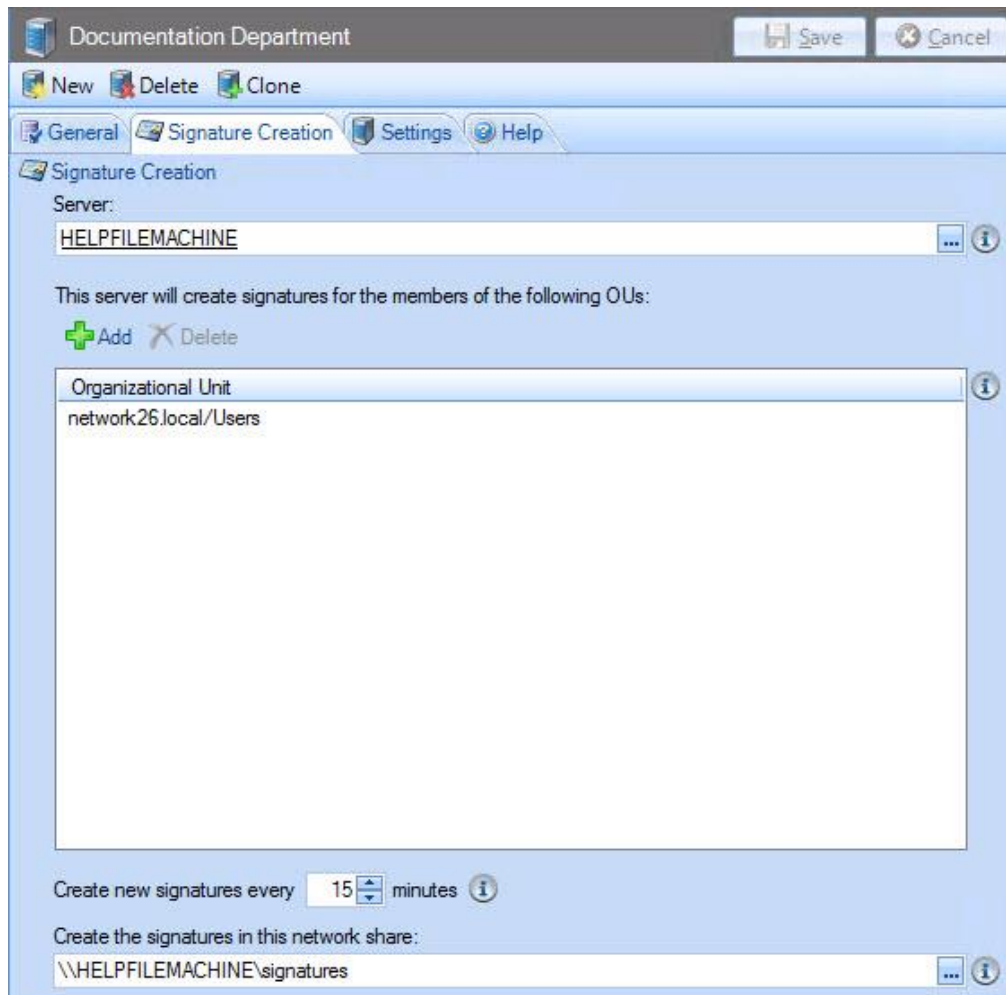
Option	Summary
Name	Each policy must have a unique name. The name entered here is displayed in the Exclaimer console tree, and on any other policy lists.
Description	This field can be used to add any useful information for the policy - for example, usage notes, version history, background or explanatory information. The first line of description text is displayed in any <a href="#">policy lists [pg.118]</a> (but not the console tree).
Enabled	Select this option to activate the policy. If a policy is not enabled, it will not run, therefore any <a href="#">associated users [pg.350]</a> will not receive signature updates.

## NOTE

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to [save changes \[pg.79\]](#) across all tabs. Alternatively, use the **cancel** button to abandon all changes.

# Signature Creation

The [signature creation](#) tab is used to specify the server that will process signatures for associated users, who those users are, the frequency with which signatures are created and where updated signatures are deployed on the given server:



These options are summarized below:

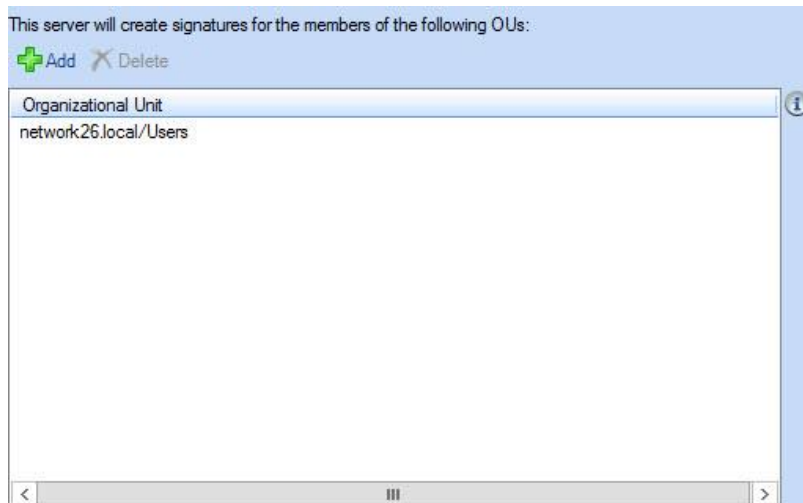
Option	Summary
Server	Specify (or browse and select) the required server.
The server will create signatures for members of the following OUs	Use <a href="#">add</a> and <a href="#">delete</a> options to manage <a href="#">organizational units</a> (and thus users within them) to be associated with this policy. For further information, please see <a href="#">associating organizational units with a signature deployment policy</a> [pg.352].
Create new signatures every <i>n</i> minutes	Signatures are generated and deployed at regular intervals, as specified here - specify the required frequency (in minutes).

.../continued

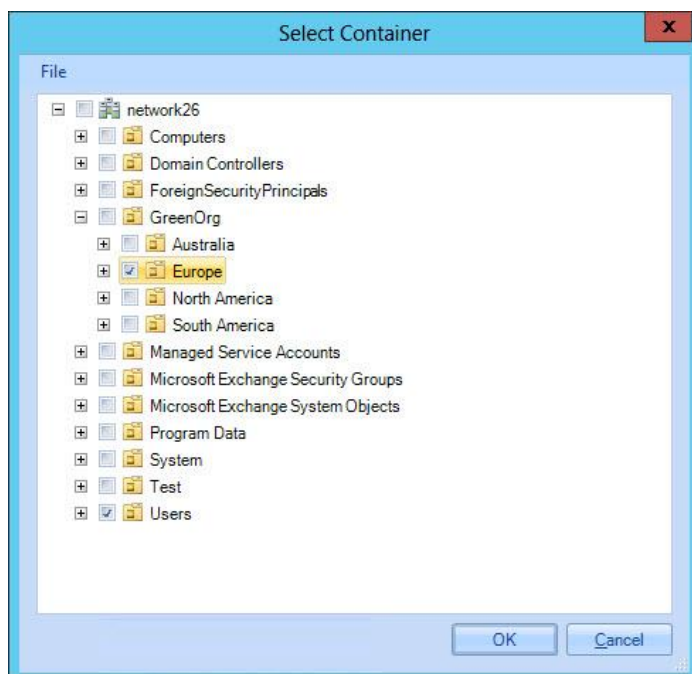
Option	Summary
Create the signatures in this network share	<p>The <a href="#">network share</a> is primarily used to store signatures (as generated by <a href="#">Signature Manager Outlook Edition</a>) in the form of a zip file. It is from here that signatures are deployed to specified users. Local paths (C:\, F:\, etc.) are not supported for deployment and you must specify a UNC path (<a href="#">\\servername\networksharedfoldername</a>).</p> <p>Note that When choosing a deployment folder you should ensure that specified drive has enough disk space to store signatures for specified users in your organization. Signatures are generated according to the update interval (see above) and stored in the <a href="#">deployment folder</a>. Therefore, if you have 1000 users, 1000 ZIP files will be created and stored.</p> <p>The specified network share is also used to deploy the <a href="#">ExSync</a> agent to users. The <a href="#">ExSync [pg.27]</a> agent must be run by each user at login so that local signatures and settings are updated. To achieve this, the <a href="#">ExSync</a> agent (<a href="#">ExSync.exe</a>) and its configuration file (<a href="#">ExSync.cfg</a>) should be available to users from a shared location on the network.</p> <p>When a <a href="#">deployment folder</a> is specified and the configuration is saved, these two files are automatically copied from your initial installation folder, into the <a href="#">deployment folder</a> specified here. For more detailed information about deployment see the <a href="#">installation and deployment [pg.15]</a> section of this guide.</p>

## Associating Organizational Units with a Signature Deployment Policy

Signature deployment policies are associated with users via [organizational units](#). Within a [signature deployment policy](#), [organizational units](#) are added and removed using options in the center of the signature creation tab:



To add an [organizational unit](#), click the [add](#) option to open the [select container](#) window. From here, you can navigate the structure of [organizational units](#) and make required selections:

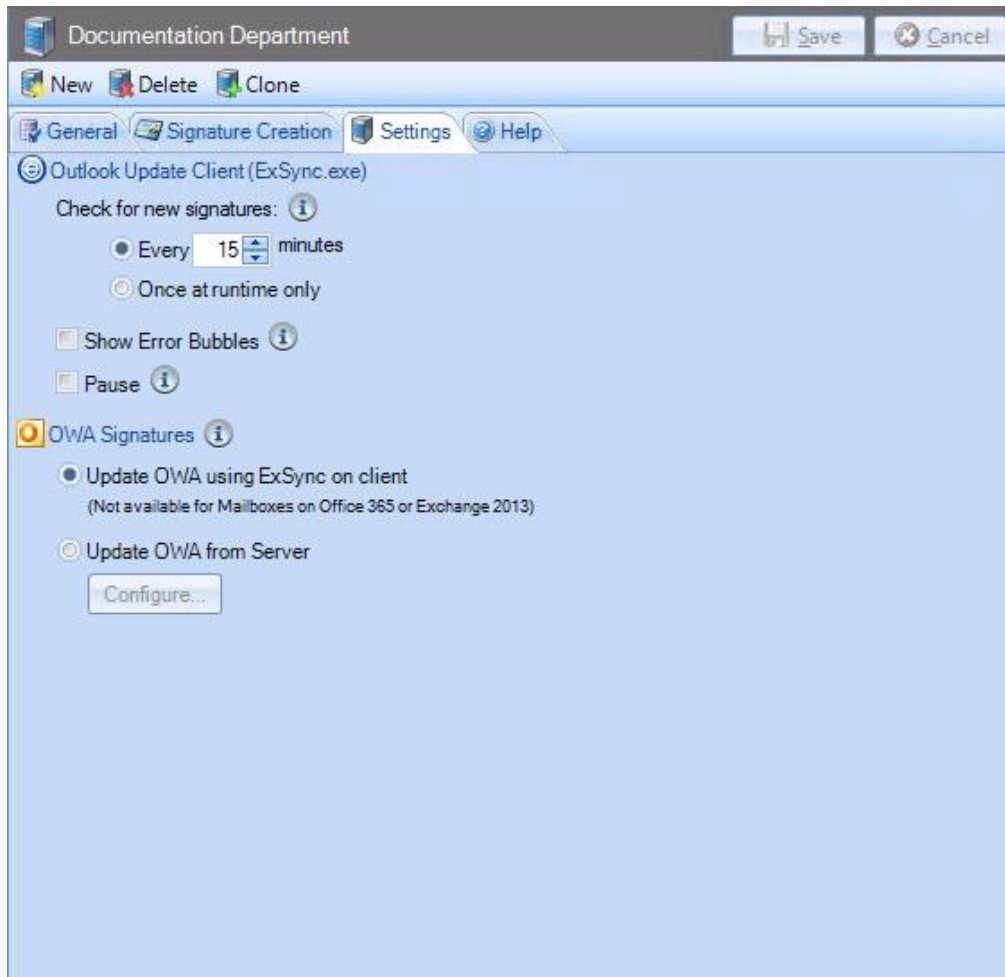


Once an [organizational unit](#) is added to a [signature deployment policy](#), all users within that unit will have their signatures processed according to settings defined in that policy.

To remove an [organizational unit](#) that has already been added, simply select the required entry from the list (within the [signature creation](#) tab) and select the [delete](#) option.

## Settings

The **settings** tab is used to determine how frequently **ExSync** checks for updated signatures, and whether **OWA** is updated from the server or from **ExSync**:



Options on this tab are summarized below:

Option	Summary
Outlook update client (ExSync.exe)	
Check for new signatures	<p>Choose how frequently user computers should check for new signatures (via <a href="#">ExSync [pg.27]</a>). You can either:</p> <ul style="list-style-type: none"> <li>• Update at continuous intervals - select the <a href="#">every n minutes</a> radio button and specify the required interval. Note that for large organizations, more frequent updates will increase network traffic between clients and the server.</li> <li>• Update once and then close down <a href="#">ExSync</a> - select <a href="#">once at runtime only</a> to work in this way. For further information please refer to <a href="#">setting up ExSync [pg.27]</a>.</li> </ul>
Show error bubbles	Select this option to show errors on user computers when signatures and settings fail to update. This is useful (for example) when diagnosing connection errors however, you are advised to disable this option under normal circumstances.
Pause	Select this option to pause signature and settings updates on user computers. This is useful (for example) if you are performing maintenance tasks on the server and wish to prevent errors being reported during this time.
OWA signatures	
Update OWA using ExSync on client	<p>Select this option to only update <a href="#">OWA</a> signatures via the <a href="#">ExSync [pg.27]</a> agent on client computers as part of the standard signature update process.</p> <p>Note that this option is not available for mailboxes on <a href="#">Office 365</a> or <a href="#">Exchange 2013</a>. If this is a requirement within your organization, you should use the <a href="#">update OWA from server option</a> instead (see below).</p>
Update OWA from server	<p>Select this option to update <a href="#">OWA</a> signatures via the server (which removes the need for <a href="#">OWA</a> users to log on to the domain to update their signatures). This method should only be used if most of your users always access their email via <a href="#">OWA</a> and rarely log on to your domain, or if their mailboxes reside on either an <a href="#">Exchange 2013 Server</a>, or on <a href="#">Office 365</a>.</p> <p>If this option is <b>not</b> selected, <a href="#">OWA</a> signatures are only updated by the <a href="#">ExSync [pg.27]</a> agent on client machines as part of the standard <a href="#">Outlook</a> signatures update process. If this option <b>is</b> selected, click the <a href="#">configure</a> button to <a href="#">configure OWA updates from server [pg.33]</a>.</p>

# Working with Signature Deployment Policies

This section contains topics for working with [signature deployment policies](#) [pg.343], including:

- [Understanding the difference between signature creation and update intervals](#) [pg.357]
- [Adding a new signature deployment policy](#) [pg.360]
- [Changing a signature deployment policy](#) [pg.362]
- [Cloning a signature deployment policy](#) [pg.363]
- [Removing a signature deployment policy](#) [pg.364]

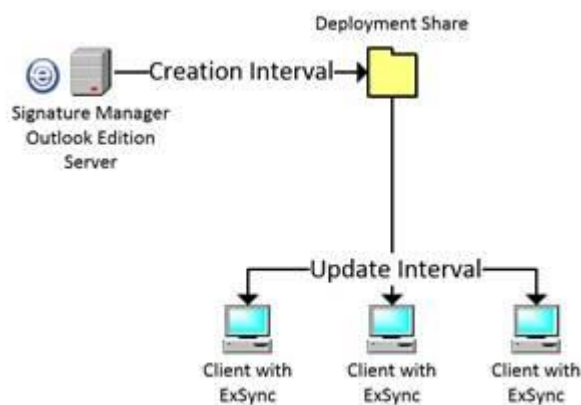


# Understanding the Difference between Signature Creation and Update Intervals

Within [Exclaimer Signature Manager Outlook Edition](#), signatures are created and copied to a specified [deployment share](#) as a ZIP file. To use these signatures, client computers run the [ExSync](#) agent; this pulls the ZIP file from the [deployment share](#), extracts the ZIP file and makes the new signatures available in [Outlook](#). Using settings within [Exclaimer Signature Manager Outlook Edition](#), you can control:

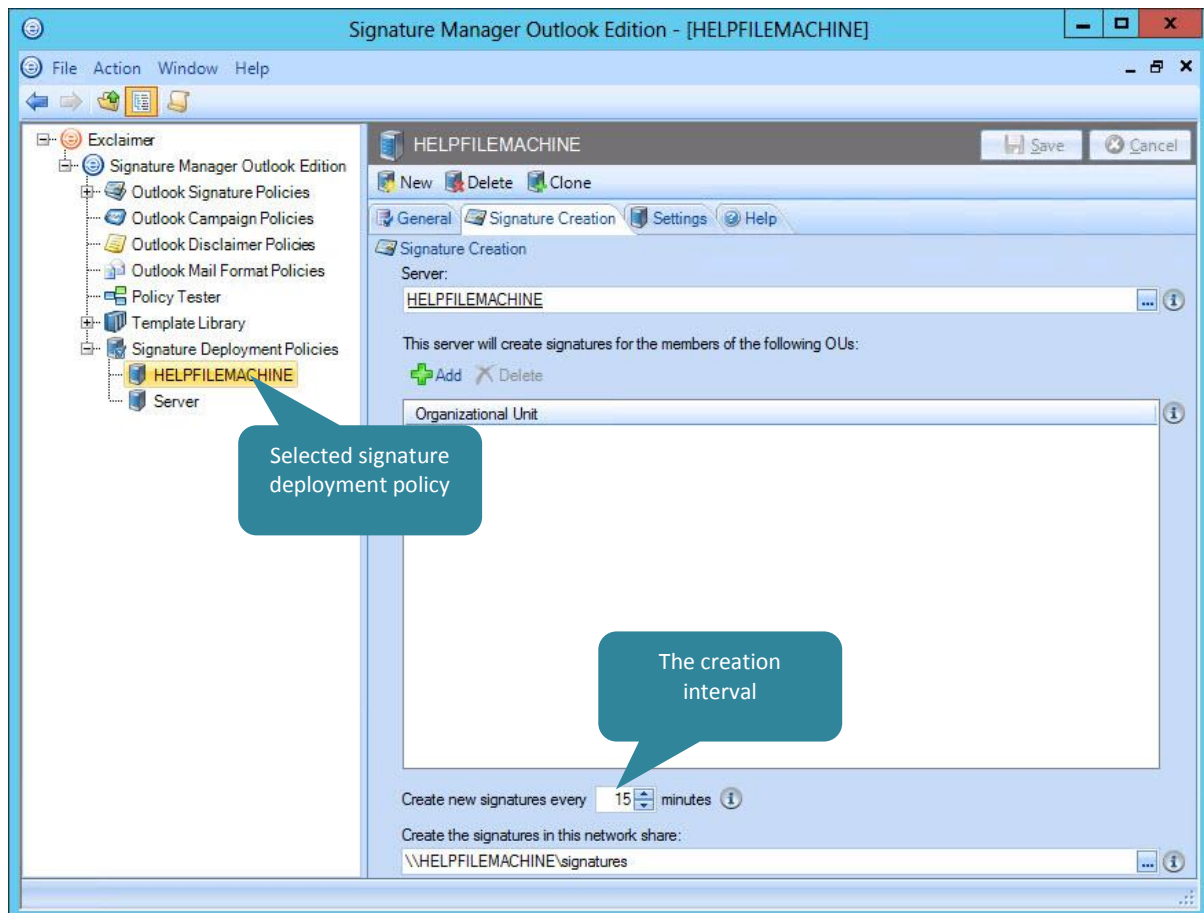
- How frequently [Exclaimer Signature Manager Outlook Edition](#) creates new signatures and copies them to the [deployment share](#) (the creation interval).
- How frequently the [ExSync](#) agent runs on users' computers to retrieve these signatures for use in [Outlook](#) (the update interval).

This process is illustrated below and described in the following sections:



# The Creation Interval

Signatures are created by the computer which has [Exclaimer Signature Manager Outlook Edition](#) installed (larger or and/or more complex systems may have the product installed on more than one computer). The frequency with which signatures are created (the [creation interval](#)) is defined for each [signature deployment policy](#), via the [signature creation](#) tab - for example:



The [creation interval](#) determines how often [Exclaimer Signature Manager Outlook Edition](#) creates new signatures (by processing [Outlook signature policies](#) [pg.104], [Outlook campaign policies](#) [pg.108], [Outlook disclaimer policies](#) [pg.110] and [Outlook mail format policies](#) [pg.112]). Generated signatures are added to the specified [deployment share](#) as a ZIP file.

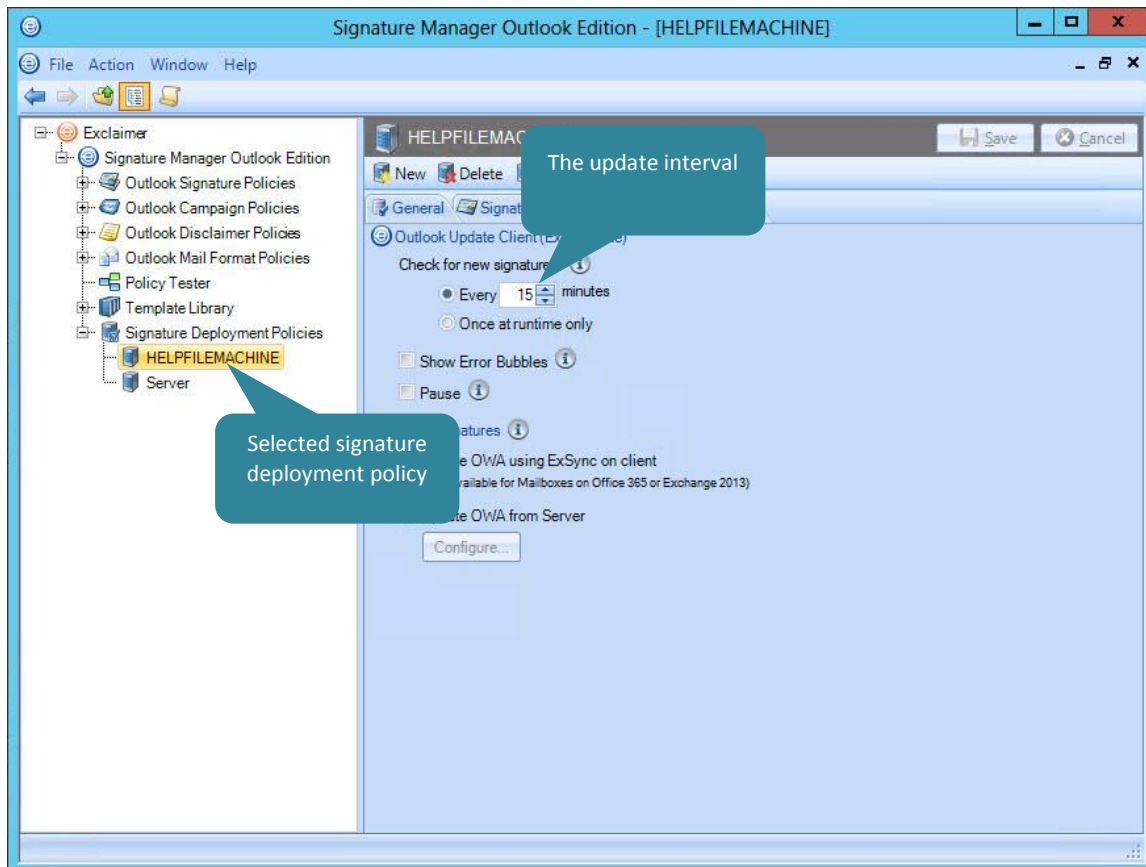
The [creation interval](#) also determines how often [OWA](#) signatures are updated if the [update from server](#) [pg.355] option is enabled.

## What Frequency Should I Use?

If your organization does not change its signatures very often, generating new signatures every few hours may be sufficient. However, if your signatures include dynamic content which may be time sensitive (for example, [RSS feeds](#) [pg.248] or [rotating banner ads](#) [pg.248]), it is advisable to generate new signatures more frequently - typically every 15 minutes.

# The Update Interval

The frequency with which users' computers are updated with new signatures (the [update interval](#)) can vary for each user or group of users. The [update interval](#) is defined for each [signature deployment policy](#), via the [settings](#) [pg.354] tab - for example:



The [update interval](#) determines how often client computers running [ExSync](#) check the specified [deployment share](#) for a new signatures and settings ZIP file. The frequency entered here will apply for any users associated with the [signature deployment policy](#).

The [update interval](#) also determines how often [OWA](#) signatures are updated using [ExSync](#) on client computers. This value should always be equal to or greater than the creation interval; otherwise the client computers running [ExSync](#) will simply be pulling the same ZIP file as the last update.

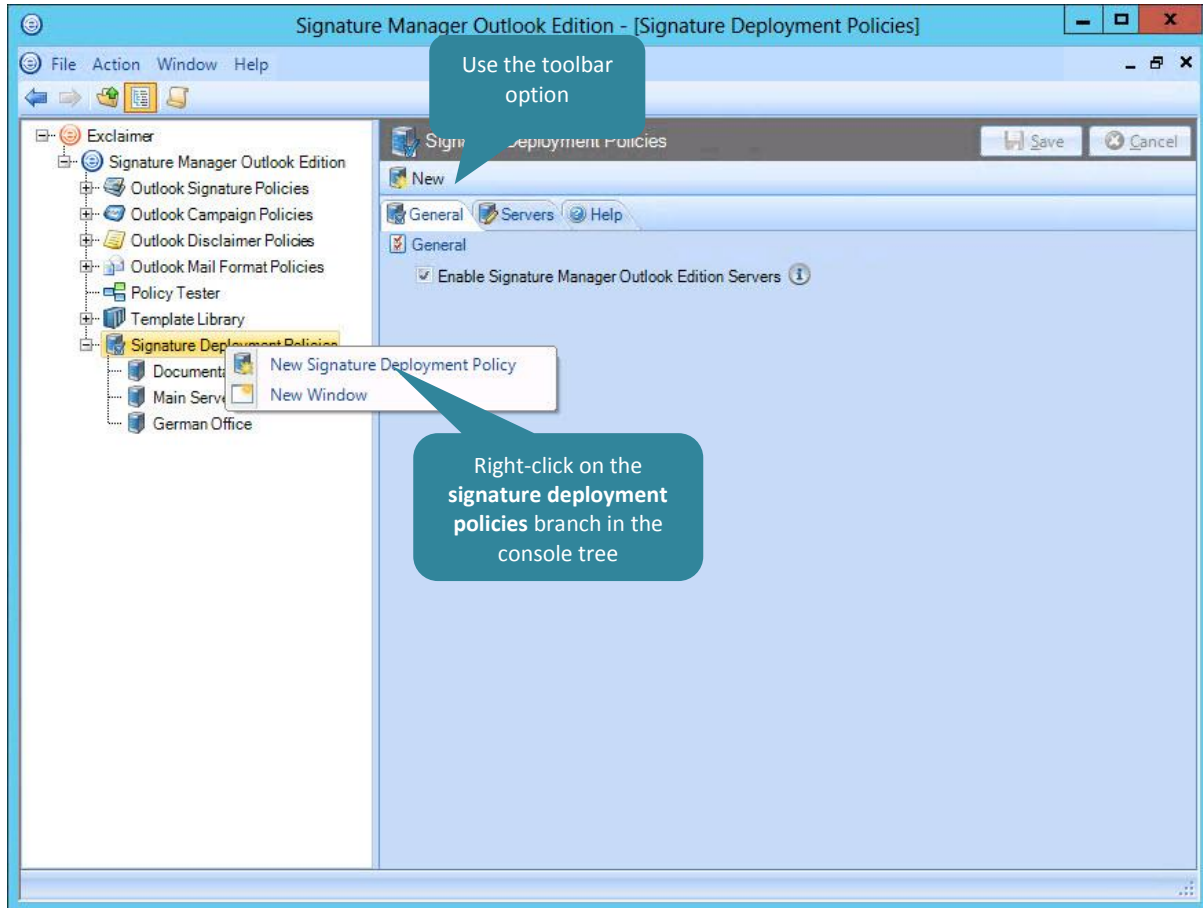
## What Frequency Should I Use?

If your organization does not change its signatures very often, using the [once at runtime only](#) option may be sufficient - or you could configure [ExSync](#) to run every few hours.

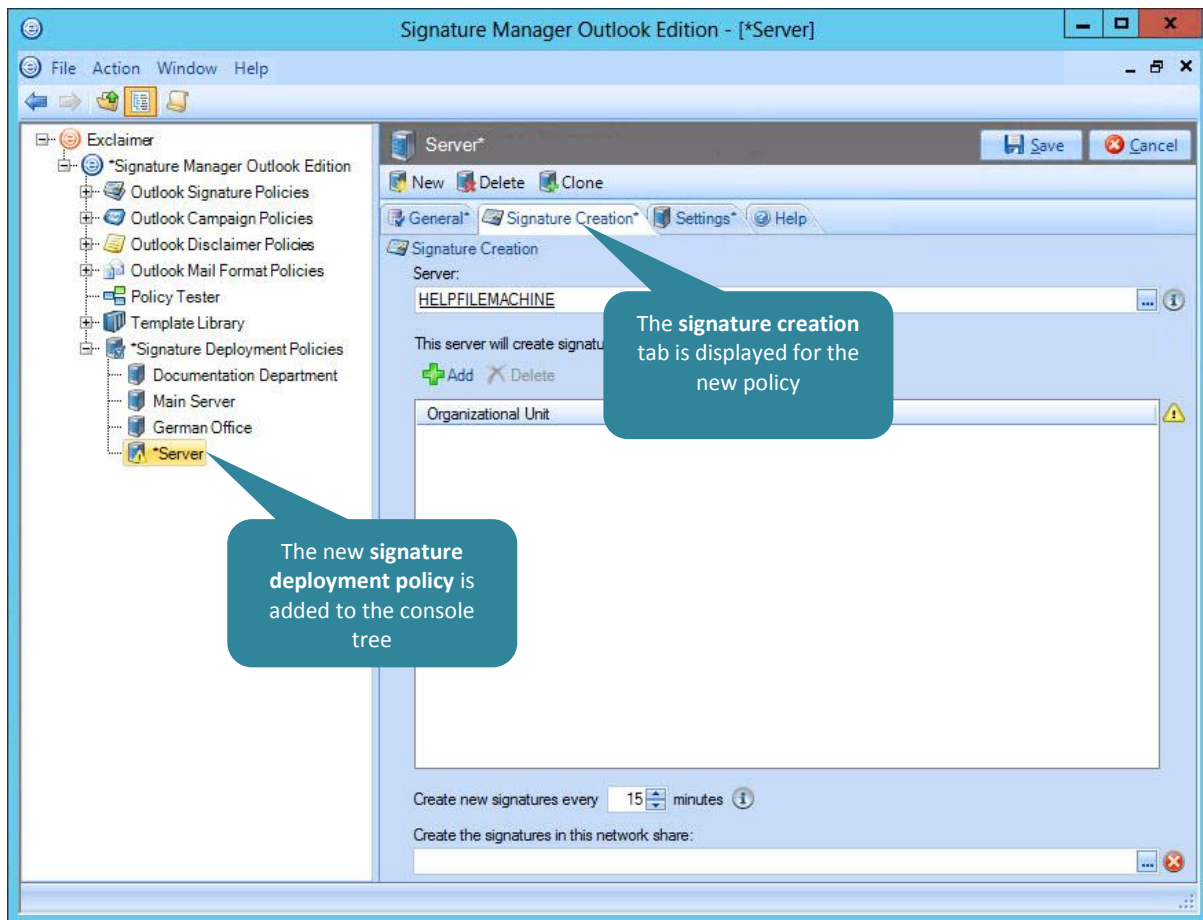
If it is likely that users may continue to create their own signatures (for example, if you have recently implemented [Exclaimer Signature Manager Outlook Edition](#) and users are still getting used to the new process), it may be helpful to run [ExSync](#) more frequently so you can be sure that any signatures and mail formatting applied locally are removed and replaced with signatures generated by [Exclaimer Signature Manager Outlook Edition](#).

# Adding a New Signature Deployment Policy

Signature deployment policies are added using the new signature deployment policy option; this option is available from the [console tree](#) [pg.70] and from the [console toolbar](#) [pg.69]:



Having selected this option, a new [signature deployment policy](#) is created. This policy is added to the console tree and the [signature creation](#) [pg.350] tab is displayed:



By default, the new [signature deployment policy](#) is created with:

- The name set to [server](#)
- The server used for signature creation set to the name of the local machine (upon which you created the policy)
- A warning symbol - this is because there are no organizational units (and therefore users) associated with it.

From here, you can:

- Use options on the [signature creation](#) tab to select a different [server](#), add [organizational units](#), change the [signature creation interval](#) and define a [network share](#) to determine where new signatures should be saved. For further information, please refer to the [signature creation](#) [pg.350] section of this guide.
- Select the [general](#) tab to change the name of the policy and (if required) disable it. For further information, please refer to the [general](#) [pg.349] section of this guide.
- Select the [settings](#) tab to check/update how often the [Outlook](#) update client ([ExSync](#)) should check for new signatures, and how [Outlook Web Access \(OWA\)](#) signatures are updated. For further information, please refer to the [settings](#) [pg.354] section of this guide.

# Changing a Signature Deployment Policy

To update an existing [signature deployment policy](#), simply select the policy (either from the [console tree \[pg.70\]](#) or the [server list \[pg.347\]](#)) and update settings on [selection tabs \[pg.348\]](#) as required.

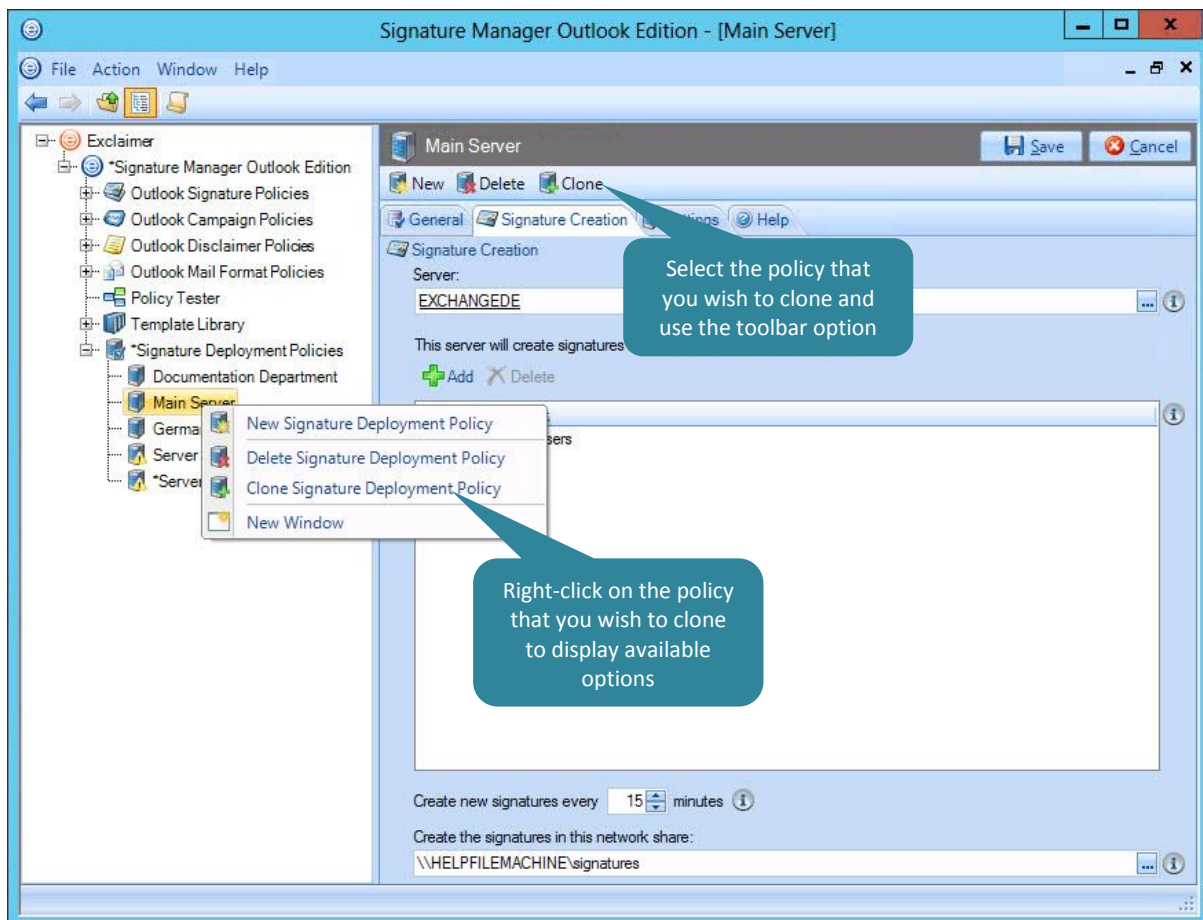
When a policy has been changed but not saved, the branch is displayed with an asterisk (\*) symbol. You can see which tabs contain these unsaved changes, by looking for an asterisk to the right of the tab name.

When you are satisfied that all required changes have been made correctly, click [save](#) to save the new settings. All asterisk symbols are cleared once changes have been saved.

# Cloning a Signature Deployment Policy

If you need to create a new [signature deployment policy](#) which has similar settings to an existing policy, it is quicker to take a copy of the existing version and then update required settings for that copy (as opposed to [creating a new policy from first principles](#) [pg.360]).

The [clone](#) option is used to create a copy of an existing [signature deployment policy](#) for this purpose, and is available from the [console toolbar](#) [pg.69], or the right-click menu:



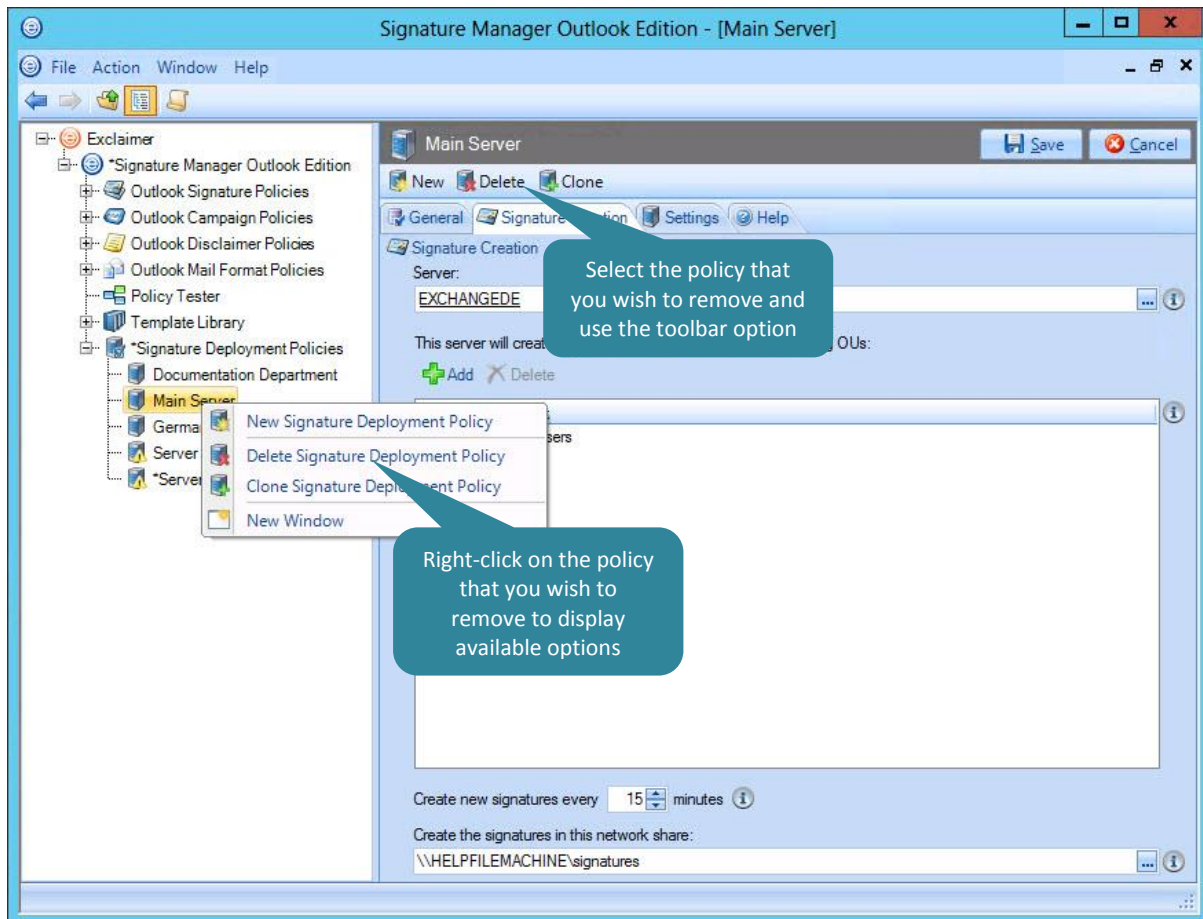
To clone an existing [signature deployment policy](#), select the policy to be copied from the console tree, then either click [clone](#) from the toolbar (or right click and select [clone](#) from the context menu). A copy of the selected policy is added to the console tree, ready to be updated - from here you can change the [name](#) [pg.349], [server and/or associated organizational units](#) [pg.350] and any other required [settings](#) [pg.348].

Having updated the cloned policy, click [save](#) to save changes.



## Removing a Signature Deployment Policy

To remove an existing [signature deployment policy](#), select the policy (either from the [console tree](#) [pg.70] or the [server list](#) [pg.347]). Then, either right-click and select [delete](#) from the context menu, or click [delete](#) from the toolbar:



Having chosen to delete a [signature deployment policy](#), you are asked [are you sure you want to delete this policy?](#)

Click [yes](#) to confirm the deletion or [no](#) to abandon the task. Finally, click [save](#) to save changes.

### NOTE

A policy is not permanently deleted until settings have been saved. If you exit without saving (or **cancel** changes), the policy will be reinstated in the console tree.



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