

This guide will help you start using Policy Patrol as quickly as possible. For more detailed instructions, consult the Policy Patrol manual.

## Step 1. Prepare for installation

### *System requirements*

Before installing Policy Patrol, check whether you meet the system requirements:

- Windows 2000 Professional/Server/Advanced Server, Windows Server 2003 or Windows XP Professional.
- Exchange 2003, Exchange 2000, Exchange 5.5, Lotus Domino R5/R6/R7 or other mail server.
- Microsoft .NET Framework 1.1 (If you do not have this installed the Policy Patrol installation program will download it for you)

⇒ If you have **Exchange 2000/Exchange 2003** you can install Policy Patrol on the Exchange server machine (recommended) or on a separate machine. If you are installing Policy Patrol on the same machine as Exchange, skip this section and proceed to 'Step 2. Install Policy Patrol'. If you install Policy Patrol on a non-Exchange Server machine, Policy Patrol will not process internal mails. Download the following document for instructions on how to install Policy Patrol on a separate machine:



[Installing Policy Patrol on a separate machine](http://www.policypatrol.com/docs/PP4-SeparateMachine.pdf)

(<http://www.policypatrol.com/docs/PP4-SeparateMachine.pdf>)

⇒ If you have **Exchange 5.5**, you must install Policy Patrol on a separate Windows 2000/2003/XP machine and forward your mail to the Windows SMTP service on the Policy Patrol machine. Policy Patrol does not offer internal mail filtering for Exchange 5.5. Policy Patrol can retrieve your users & groups from Active Directory or Exchange 5.5. Download the following document for instructions on how to install Policy Patrol with Exchange 5.5:



[Installing Policy Patrol with Exchange 5.5](http://www.policypatrol.com/docs/PP4-Exchange55.pdf)

(<http://www.policypatrol.com/docs/PP4-Exchange55.pdf>)

⇒ If you have **Lotus Domino R5/R6/R7 Mail Server** (or another mail server), you must install Policy Patrol on a separate Windows 2000/2003/XP machine. Policy Patrol does not offer internal mail filtering for Lotus Domino. Policy Patrol

can retrieve Lotus Domino users & groups and their user properties for the user merge fields. Download the following document for instructions on how to install Policy Patrol with Lotus Domino:

 [Installing Policy Patrol with Lotus Domino](http://www.policypatrol.com/docs/PP4-LotusDomino.pdf)  
(<http://www.policypatrol.com/docs/PP4-LotusDomino.pdf>)

⇒ If you wish to install Policy Patrol in an **Active/Passive cluster**, download the document below for further instructions:

 [Installing Policy Patrol in a cluster](http://www.policypatrol.com/docs/PP4-Clustering.pdf)  
(<http://www.policypatrol.com/docs/PP4-Clustering.pdf>)

Note: You need to purchase an additional server license for the clustered node. The additional server license cost is found in the price list at <http://www.policypatrol.com/pricing.htm>.

⇒ If you have **frontend and backend** Exchange servers you need to determine on which machine(s) you must install Policy Patrol according to the following guidelines:

- (1) If you use POP3 clients on the frontend server you must install Policy Patrol on the frontend server.
- (2) If you use Outlook, Outlook Web Access (connecting to the frontend or backend server), or POP3 clients connecting to the backend server you must install Policy Patrol on the backend server. Note: If you have the SMTP service installed on the frontend server and all outbound mails are relayed to the frontend server you can also only install Policy Patrol on the frontend server. However, this will mean that Policy Patrol will not process internal mails since these are routed internally on the backend server and will not pass through Policy Patrol.

Note: You need to purchase an additional server license for each additional Policy Patrol server installation. The additional server license cost is found in the price list at <http://www.policypatrol.com/pricing.htm>.

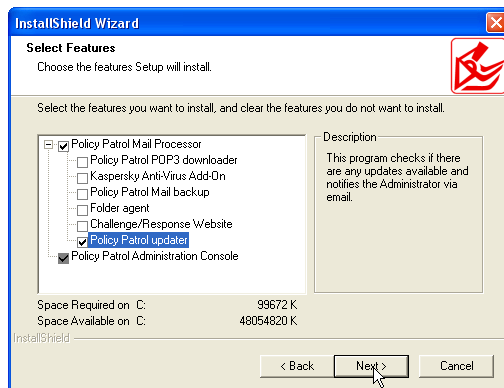
⇒ If you have **Policy Patrol 3.x** installed, you must uninstall Policy Patrol 3.x by going to Add/Remove programs. Since there have been many updates to the program, it is not possible to use your version 3 configuration files in version 4. To migrate your existing configuration to version 4, please consult our migration guide at <http://www.policypatrol.com/pp4migrationguide.htm> and follow the instructions on the page.

⇒ If you have **Policy Patrol 2.x** installed, you must uninstall Policy Patrol 2.x by going to Add/Remove programs. Since there have been many updates to the program, it is not possible to use your version 2 configuration files in version 4. To migrate to version 4, export your templates and filters and copy the descriptions of your rules. Import the templates and filters in version 4 and recreate the rules using your rule descriptions from version 2.

- ⇒ If you have **Policy Patrol 1.x** installed, you must uninstall version 1 before you install version 4. To do this, go to Start > Settings > Control Panel > **Add/Remove programs**. Select **Policy Patrol Disclaimers**. Click **Change/Remove**. Select **Remove** and click **Next**. Click **Yes** to confirm that you wish to uninstall Policy Patrol. After removing the Policy Patrol program you will need to restart the IIS services. Click **Yes** to restart the services. When the wizard is ready, click **Finish**. Before you uninstall you can export your disclaimer templates and import these into version 4.

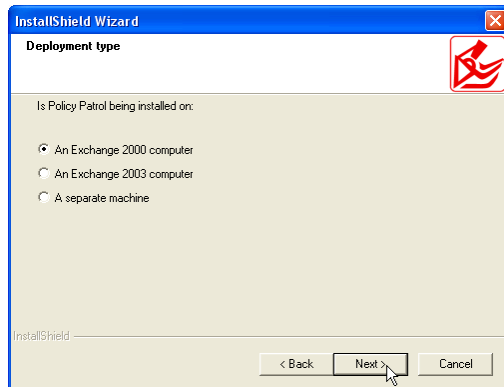
## Step 2. Install Policy Patrol

1. Double-click on **PolicyPatrol.exe**. The Install Program will start up. If you do not have Microsoft .NET Framework 1.1 installed, the Policy Patrol installation program will download it for you.
2. In the Welcome screen, click **Next**.
3. Read the License Agreement and select **Yes** to accept the agreement.
4. Enter the user name and company name. Click **Next**.
5. Select the setup type. To install only the components needed for Policy Patrol Disclaimers, select **Custom**. If you want to try out other features as well, such as anti-spam, archiving or content checking, select **Complete** and skip step 6. If you only wish to install the Administration console (for remote administration), select **Administration only**. Click **Next** to continue.
6. A list of features will appear. Select only the following features and click **Next**:
  - Policy Patrol Mail Processor
  - Policy Patrol Updater
  - Policy Patrol Administration Console

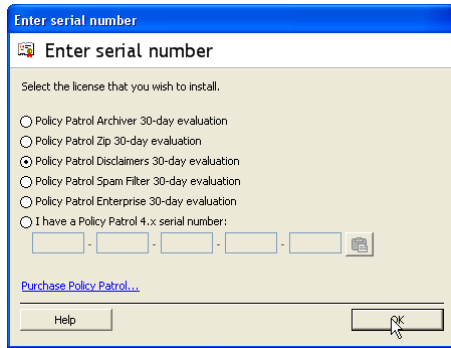


7. Select the destination folder for the Policy Patrol installation. By default the program is installed in C:\Program Files\Red Earth Software\Policy Patrol Email 4. If you wish to change the location, click **Browse** and select another folder. When you are ready, click **Next**.

- Specify whether Policy Patrol is installed on an Exchange 2003 machine, an Exchange 2000 machine or a separate machine (for Exchange 5.5 and Lotus Notes/Domino). Click **Next**.



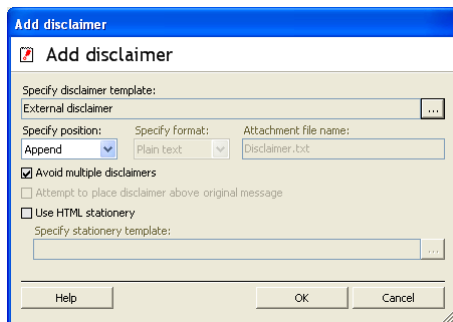
- If you have multiple virtual SMTP servers an additional dialog will be shown:** Select the virtual SMTP server(s) that you wish Policy Patrol to monitor. Click **Next**.
- Verify the location of your SMTP pickup directory. Policy Patrol automatically enters the path to the default pickup folder. If your pickup directory is located elsewhere, browse to the correct folder. Click **OK**.
- Specify the notification settings. Enter the From: , To: , Cc: and Bcc: fields for the Policy Patrol notification emails. The display name is already configured as Administrator, but you can change this as follows: "Display name" <email address>, i.e. "Joe Bloggs" <jbloggs@bloggsco.com>. Click **Next**.
- A list with your installation settings will appear. Confirm that you wish to proceed with the installation by clicking **Next**.
- Policy Patrol will now start copying the files. When Policy Patrol is ready, click **Finish** to exit the wizard.
- If you selected to run the Policy Patrol Administration console, a screen will pop up asking you to select a license. If you are evaluating Policy Patrol, select **Policy Patrol Disclaimers 30-day evaluation** (if you want to try out other features as well, such as anti-spam, archiving and content checking, select **Policy Patrol Enterprise 30-day evaluation**). If you have purchased Policy Patrol, enter your serial number or click on the **Paste** button to paste it from clipboard. Click **OK**.



15. The Import users wizard will pop up. Select your import source (Active Directory, Exchange 5.5, Lotus Domino or Manual input) and click **Next**. Specify the server or domain controller and select the users that you wish to license. You can either license all users or you can select only certain users to be licensed. Click **Next**. Uncheck the option **Enable junk mail folder**. This option only applies to spam filtering. Click **Finish**. You will now see your users in the Licensed user list in **Settings > Users**.

### Step 3. Configure disclaimers

To configure a disclaimer, go to **Rules > Disclaimer rules**. Select the appropriate folder and click **New**. The Rules wizard will guide you through the users, directions, conditions, exceptions and actions for the rule. The program already includes a number of sample disclaimers and signatures. You can edit these or create your own. If you wish to format your emails, Policy Patrol can do this by making use of HTML stationery. HTML stationery can be edited in XSLT. For more information, please consult the product manual.



### Step 4. More information

⇒ Below is a list of the most frequently asked disclaimer questions:

1. No disclaimers/signatures are being added
2. User merge field is not being replaced
3. What happens if I send a message on behalf of another user?
4. Avoid multiple disclaimers is not working
5. How can I adjust the disclaimer line breaks?

6. How can I avoid an empty line in a signature for non-existent fields?
7. My disclaimer is appearing centered in the message

The answers to these questions and more can be found in our knowledge base at:  
<http://www.policypatrol.com/kb.asp>

- ⇒ For more information on how to configure Policy Patrol, please download the product manual from:  
<http://www.policypatrol.com/download.htm>.
- ⇒ If you have any technical or configuration questions please send an email to:  
[support@reearthsoftware.com](mailto:support@reearthsoftware.com).
- ⇒ If you require any assistance, please contact us at one of the following offices:

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