

This guide will help you start using Policy Patrol Disclaimers 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:

Policy Patrol Email (32-bit version):

- Windows Server 2003 or Windows 2000 Server/Advanced Server (or Windows XP Professional, Windows 2000 Professional or Windows Vista (apart from the Home edition) for installation on a separate machine)
- Exchange 2003, Exchange 2000, Exchange 5.5 (or Windows Small Business Server 2003/2000), Lotus Domino R5/6/7/8 or other mail server.
- Microsoft .NET Framework 2.0 (If you do not have this installed the Policy Patrol installation program will install it for you)

Policy Patrol Email for Exchange 2007 (64-bit version):

- Windows Server 2003 or Windows Server 2008 (64-bit).
- Microsoft Exchange Server 2007 or Windows Small Business Server 2008
- Microsoft .NET Framework 2.0 (If you do not have this installed the Policy Patrol installation program will install it for you)


### ***Do I need the 32-bit version or the 64-bit version?***

- If you do not have Exchange 2007, you need the 32-bit version.
- If you are installing Policy Patrol on Exchange 2007, you need the 64-bit version.
- If you have Exchange 2007 but are installing Policy Patrol on a separate machine, you need the 32-bit version.


⇒ If you have **Exchange 2007**, you must install Policy Patrol for Exchange 2007 (64 bit). Policy Patrol for Exchange 2007 can be installed on the following roles (there is no difference in functionality for either role):

- Edge Transport Role
- Hub Transport Role

If you are not installing Policy Patrol on the same machine as Exchange 2007, you must download the 32-bit version and follow the instructions for installing Policy Patrol on a separate machine:

 [Installing Policy Patrol on a separate machine](http://www.policypatrol.com/docs/PP6-SeparateMachine.pdf)  
(<http://www.policypatrol.com/docs/PP6-SeparateMachine.pdf>)

⇒ 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/PP6-SeparateMachine.pdf)  
(<http://www.policypatrol.com/docs/PP6-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/PP6-Exchange55.pdf)  
(<http://www.policypatrol.com/docs/PP6-Exchange55.pdf>)

⇒ If you have **Lotus Domino R5/6/7/8 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/PP6-LotusDomino.pdf)  
(<http://www.policypatrol.com/docs/PP6-LotusDomino.pdf>)

⇒ Policy Patrol (32-bit and 64-bit) can be installed in a **clustered** environment. If you wish to install Policy Patrol 32-bit in an Active/Passive cluster, download the document below for further instructions (Policy Patrol 32-bit does not support Active/Active clusters):

 [Installing Policy Patrol in a cluster](http://www.policypatrol.com/docs/PP6-Clustering.pdf)  
(<http://www.policypatrol.com/docs/PP6-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 must always install Policy Patrol on the backend server. However if you use email clients that are using the frontend server to relay their email, you must install Policy Patrol on the frontend server as well as the backend server.

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 4 or 5** installed, you can perform an upgrade to version 6 whilst keeping your existing configuration. For further instructions on this, please consult the following document:



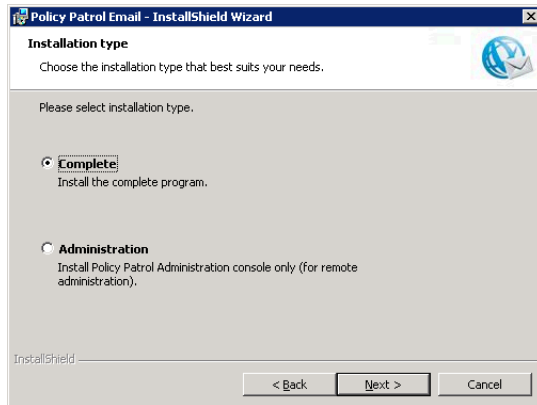
[Policy Patrol 6 Upgrade Guide](http://www.policypatrol.com/docs/PP6-UpgradeGuide.pdf)

(<http://www.policypatrol.com/docs/PP6-UpgradeGuide.pdf>)

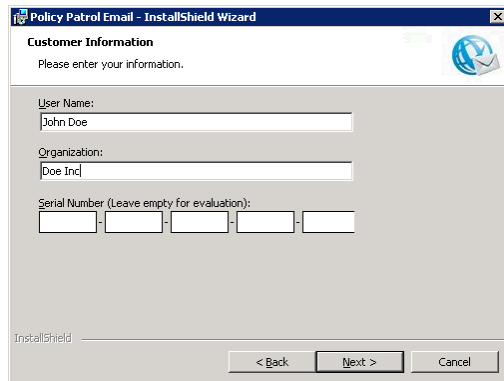
⇒ If you have **Policy Patrol 1, 2 or 3** installed, it is not possible to use your existing configuration files in version 6. To migrate your existing configuration to version 6, please consult our migration guide at <http://www.policypatrol.com/pp6migrationguide.htm> and follow the instructions on the page.

## Step 2. Install Policy Patrol

1. Double-click on **PolicyPatrol.exe** (32-bit version) or **PolicyPatrol2k7.exe** (64-bit version). The Install Program will start up. If you do not have Microsoft .NET Framework installed, the Policy Patrol installation program will install it for you.
2. In the Welcome screen, click **Next**.
3. Read the License Agreement and select **I accept the terms in the license agreement** and click **Next**.
4. Select the installation type. If you select **Complete**, the complete program will be installed. If you only wish to install the Administration console (for remote administration), select **Administration**.



5. Enter your user name, company name and Policy Patrol serial number. If you are evaluating Policy Patrol, leave the serial number field empty. Click **Next**.



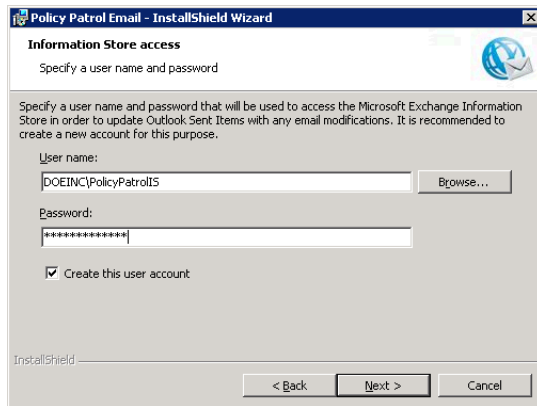
6. **If you did not enter a serial number:** A dialog will pop up asking you to select the evaluation license to be installed. Select **Policy Patrol Disclaimers** and click **Next**.

Note: If you are evaluating Policy Patrol and later wish to try out a different Policy Patrol edition you can go to **<server name> > Security > Licenses**, select the license and click **Remove**. Policy Patrol will warn that no valid license is found. Click **OK**. A dialog will now pop up allowing you to select a new evaluation license type.

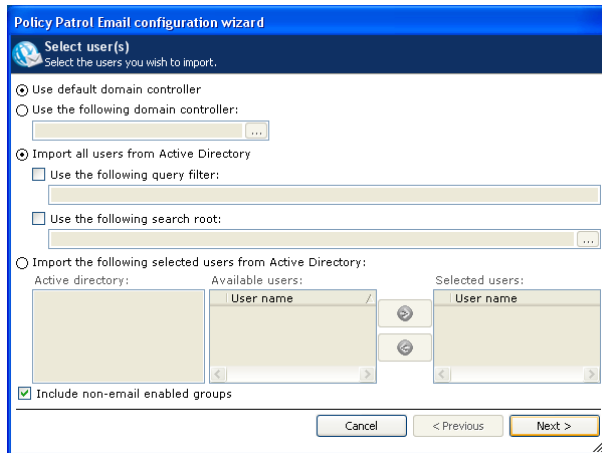
7. Select the destination folder for the Policy Patrol installation. By default the program will be installed in C:\Program Files\Red Earth Software\Policy Patrol Email (32-bit version) or C:\Program Files\Red Earth Software\Policy Patrol Email for Exchange 2007 (64-bit version). If you wish to change the location, click **Change** and select another folder. When you are ready, click **Next**.
8. Specify the notification settings. Enter the From:, To:, Cc: and Bcc: fields for the Policy Patrol notification emails. Policy Patrol notification emails inform you about evaluation expiry dates, licensing issues and new updates to the program. The From: display name is pre-configured as Administrator, but you can change this

by entering the following: "Display name" <email address>, i.e. "Joe Bloggs" <jbloggs@bloggsco.com>. Click **Next**.

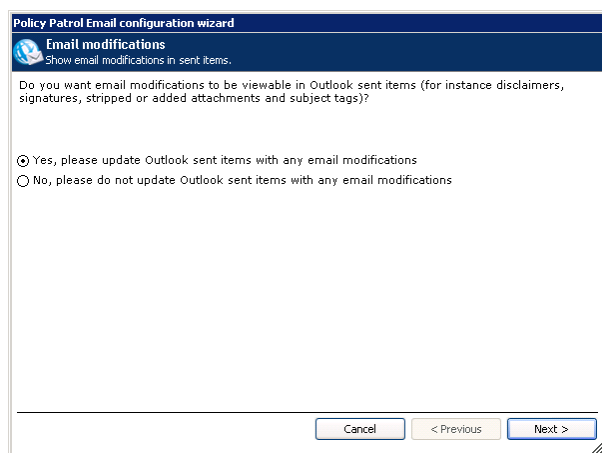
9. In order to gain access to the Exchange Information Store for updating Outlook Sent Items with email modifications, a new Policy Patrol user account must be created. Specify the User name and Password that Policy Patrol will use. The installation will automatically assign the correct rights. Please note that if you want to use an existing account instead of creating a new one, that this account cannot be a member of the Administrators group. If the account does not yet exist, leave the option **Create this user account** enabled so that Policy Patrol will automatically create the user account. When you are ready, click **Next**. Note that this dialog only appears if you are installing Policy Patrol on an Exchange Server 2007, 2003 or 2000 machine.



10. Click **Install** to start installing.
11. When the installation wizard has finished copying the files, click **Finish**.
12. The configuration wizard will now start up. Click **Next** in the Welcome screen.
13. Specify the location from where you would like to import your users (Active Directory, Exchange 5.5, Lotus Domino or Manual input). Click **Next**. (Note: the 64-bit version only includes the Active Directory and Manual Input options.)
14. 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. For more information on the different options, consult the product manual. Click **Next**.



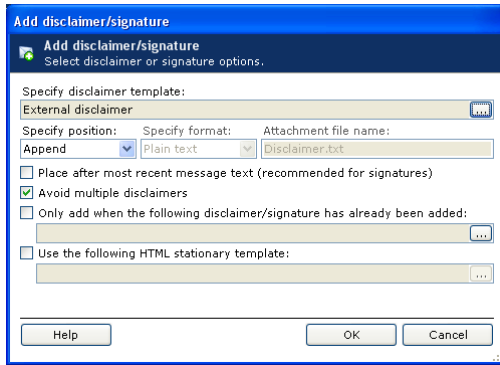
15. Select whether you wish to view email modifications in Outlook Sent items. If you select **Yes**, any modifications that are applied to outgoing emails by Policy Patrol, such as disclaimers, signatures and subject modifications, will automatically show in Outlook Sent Items (after a few seconds the message in Sent Items will be replaced with the actual message that was sent). Click **Next**. Note: This dialog does not appear if Policy Patrol is not being installed on Exchange Server 2007, 2003 or 2000.



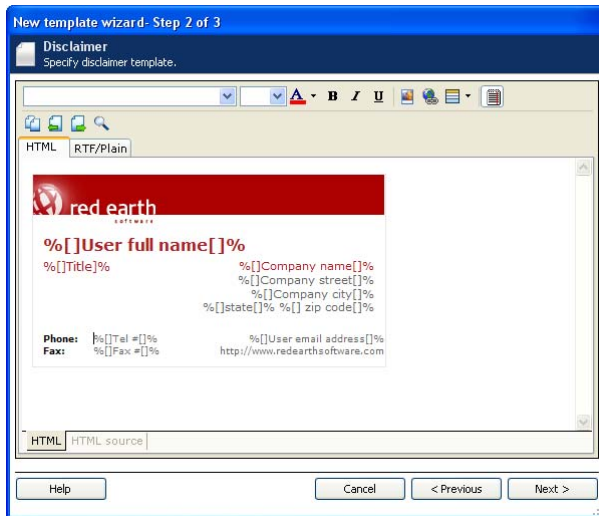
16. In the Configuration complete dialog, click **Finish**.

### Step 3. Configure disclaimers

To configure a disclaimer or signature, 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. To add a disclaimer, select the action **Add disclaimer/signature**. A dialog will pop up where you can select the Disclaimer template to be used. In this dialog there are further options, including avoiding multiple disclaimers and placing the disclaimer/signature after the most recent message text.



The program already includes a number of sample disclaimers and signatures in **Settings > Templates > Sample templates**. You can edit these or create your own. The disclaimer template can include formatting, pictures and Active Directory merge fields that are replaced with the user's Active Directory Properties.



#### 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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