

QS Disclaimer

part of the QS Mail Utilities

Version 4.1

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Using This Documentation

This documentation consists of a collection of "how to" topics organised by subject matter. You can access each topic directly from the table of contents in the left pane, from a link in another help topic, from the results of a search, or from your own custom list of favourites.

Interactive Document Conventions

This document includes many interactive features that you can use to open MMC snap-ins and navigate among the topics in the documentation set, to Web sites, and to other documentation sets.

Printing Topics

You can print single topics from this document by right-clicking the topic in the right pane or in the table of contents and clicking **Print** from the shortcut menu. You can print a group of related topics by right-clicking a node in the table of contents and clicking **Print** from the menu.

QS Disclaimer Information

QS Disclaimer is a system for adding disclaimers to e-mail messages.

Disclaimers are a useful feature that can ensure communications from your company in electronic format are acknowledged to be confidential and are susceptible to corruption, interception and unauthorised amendment.

A disclaimer allows you to remove any liability for electronic mail that has been modified. Disclaimer can also be used to inform the recipient that you are monitoring e-mail and its content.

Another option is to use the disclaimer as a banner or signature.

System requirements

QS Disclaimer can run in a number of configurations and environments, including on a Windows 2000/2003/2008 server with Exchange 2000/2003/2007/2010 or on a Windows 2000/2003/2008 server without Exchange installed.

Operating System

For Exchange 2000 and 2003:

Microsoft Windows Server 2000 (all versions), Windows Server 2003 x86 (all versions) and Windows Server 2008 x86 (all versions).

For Exchange 2007 and 2010:

Microsoft Windows Server 2003 x64 (all versions), Windows Server 2003 R2 x64 (all versions) and Windows Server 2008 x64 (all versions).

For non Exchange installations:

Microsoft Windows Server 2000 (all versions), Windows Server 2003 x86 and x64 (all versions) and Windows Server 2008 x86 and x64 (all versions).

Note: In a multi-server or clustered environment, QS Disclaimer can be remotely maintained from a Windows 2000, XP or Vista workstation.

Performance

In a standard mail configuration, the performance of the disclaimer server will depend upon a number of factors, from the e-mail load, to the disclaimer complexity. The performance will also be affected by the complexity of the set up you have.

QS Disclaimer can be installed on a SMTP or Exchange server with negligible impact on throughput and server performance. Minimal server performance degradation will occur if options such as; Duplicate disclaimers or very large disclaimers are used.

Installation and set up

QS Disclaimer is installed using a standard Windows installer package.

Once installed, upon the first run of the disclaimer manager, a wizard will guide you through the configuration of the basic settings needed to use QS Disclaimer.

Please note:

You need to log on as an Enterprise Administrator for the server where you intend to install QS Disclaimer.

Integration

For outbound disclaimers:

In order to add an outbound disclaimer, all your outbound mail must route through a server running QS Disclaimer. This can be in the form of a single mail server or multiple Exchange servers. When installing QS Disclaimer in a multiple Exchange environment. You will need to either already have one or more bridgehead servers through which all of your mail passes, or, you will need to install QS Disclaimer on each mail server.

For internal disclaimers:

In order to add an internal disclaimer, QS Disclaimer must be installed on each of the servers that handle the internal mail. This does not have to be the same as the server that handles outbound mail.

Please note:

Internal mail is any e-mail sent to a user with an e-mail domain listed in the disclaimer managers domains.

QS Disclaimer does not need to be installed on an Exchange server to allow integration with Exchange.

QS Disclaimer - What's new in version 4.0

The major improvements are:

An improved engine for Exchange 2003.

Added priority and sensitivity based disclaimer.

Improvements in the disclaimer manager, including the engine status as a Mail Server image.

Improvements in the embedding of images.

Set up wizard

This wizard will help you through the steps needed to set up QS Disclaimer on your system. The following steps are used:

1. **Add your license(s)** This page allows one or more licenses to be added.
2. **Set up the domain(s) used** This page allows one or more licensed domains to be added.
3. **Set up the default external disclaimer to use** If you require external (or outbound) disclaimers, then enable this option and add a Plain text disclaimer.
 Note A pre-defined external disclaimer is provided by default.
4. **Set up the default internal disclaimer to use** If you require internal disclaimers (i.e. for mail sent to the domains added in the domains step), then enable this option and add a Plain text disclaimer.
 Note A pre-defined internal disclaimer is provided by default.
5. **Add mail archiving** Mail archiving allows you to copy all the mail that flows through your mail server.
Archived mail can be saved to a folder or copied to an alternate e-mail address.
6. **Supply an administrator e-mail address** Enter the administrator e-mail address used to receive status messages and error reports.
 Note It is recommended that you use an e-mail address that you check regularly.
7. **Summary of your set up** This is a summary of the set up you have chosen prior to applying the settings to the system. If the settings are wrong you can go back to the previous pages and make changes.

After you have finished making the wizard, the engine will be started. If you are not using force updates, you will need to update the configuration data so that the disclaimer engine can use the new settings.

Running the wizard with settings

The set up wizard can be run again at any time after installation to replace some of the settings back to the defaults.


If you choose to do this, it is recommended that you export the current settings.

Mail server

The mail server node allows you to start, stop, pause and restart the **QS Disclaimer system**. From this node you can also check the current status of the system and change the *SMTP virtual server* used.

To change the state of the QS Disclaimer system:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, right-click **Mail server**, point to **All tasks**, and then select the state required.

 **Note:** Select refresh if the system does not show the correct state after an update time-out.

To change the SMTP virtual server used:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
 2. In **Disclaimer Manager**, click **Mail server**, in the results pane, right-click the server that corresponds to your mail server, point to **Properties**.
 3. In the **Virtual servers** select the required virtual server, or select **All** if all virtual servers should be used (this is the default).
 4. Click **OK** to finish changing the virtual servers.
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Getting Started with QS Disclaimer

To deploy QS Disclaimer you should have a thorough understanding of the following features and the use of the following components:

- **Start.** In this section you learn how to start the disclaimer manager. [More...](#)
- **Licensing.** In this section you learn how to manage the licenses required for each domain. [More...](#)
- **Domains.** In this section you learn how to create domains ready for deployment. [More...](#)
- **Disclaimers.** In this section you learn how to create disclaimers ready for deployment. [More...](#)
- **Groups.** In this section you learn how to add disclaimer groups. [More...](#)
- **Logging.** In this section you learn how to set the logging options. [More...](#)
- **Running.** In this section you learn how to start the QS Disclaimer service. [More...](#)

For problem-solving instructions, see [Troubleshooting](#).

For the set up wizard instructions, see [Set up wizard](#).

Starting QS Disclaimer Manager

The Disclaimer Manager is a Microsoft Management Console (MMC) common console file named Disclaimer Manager.msc. You can start the manager from the **Start** menu or by running the file.

The Manager can be customised by adding extra windows to the console and by creating *taskpads*, which are graphical representations of administrative tasks. Please note that creating extra windows and creating *taskpads*, requires the disclaimer manager to be run in author mode (see the MMC help for details of how to run in author mode).

Start Disclaimer Manager

- On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
-

Licenses - Getting started

To deploy the STMP Disclaimer system, at least one license must be present, as they have a direct bearing on how many domains can be used.

Getting a license

Licenses can be acquired by visiting [Licensing](#).


- If you have already purchased a license or received one with the product, continue on to **Adding a license**.

Adding a license

Licenses must be added before deployment as they affect domain use.

To add a license:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, right-click **Licenses**, point to **New**, and then click **Add license**.
3. In the **License**, enter the license number.
4. In the **Description**, add (if required) a brief description of the purpose for the license (e.g. *License for mydomain.com*).

 **Note** Once a license has been added, only the description of the license can be changed.

5. Click **Add** to finish adding the new license.
-


Domains - Getting started

After at least one license has been added (see [adding a license](#) for more information), one or more domains can be created.

To create a domain:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.

2. In **Disclaimer Manager**, right-click **Domains**, point to **New**, and then click **Add domain**.

 **Note** The number of domains that can be added is determined by the license(s).

3. In the **Name**, enter the domain name for the required SMTP server (e.g. *mydomain.com*)

4. In the **Description** add (if required) a description of the domain (e.g. *My main SMTP server*).

5. If the domain is not yet active or is to be used at a later date, it can be created disabled by checking the **Domain is disabled** check box.

 **Note** Disabling a domain, stops any disclaimers from being added to the mail from that domain.


6. Click **Create** to finish creating the new domain.

Disclaimers - Getting started


There are two types of disclaimer; plain text and HTML.

To create a plain text disclaimer:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, double-click **Disclaimers**, right-click **Plain text disclaimer**, point to **New**, and then click **New disclaimer**.

 **Note** A maximum of 20 disclaimers are allowed.

3. In the **Name**, enter an identifier for the disclaimer.
4. In the **Disclaimer**, enter the plain text disclaimer details that are to be added to the mail.

 **Note** A preview of the disclaimer is available after it has been created.


5. If a divider line is required to distinguish between the mail body and the disclaimer, select the **Add line divider** check box.
6. Click **Add** to finish creating the disclaimer.

To create a HTML disclaimer:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, double-click **Disclaimers**, right-click **HTML disclaimer**, point to **New**, and then click **New disclaimer**.

 **Note** A maximum of 20 disclaimers are allowed.

3. In the **Name**, enter an identifier for the disclaimer.
4. In the **Disclaimer**, enter the HTML disclaimer details that are to be added to the mail.

 **Note** A preview of the disclaimer is available after it has been created.

5. If a divider line is required to distinguish between the mail body and the disclaimer, select the **Add line divider** check box.
 6. Click **Add** to finish creating the disclaimer.
-

Groups - Getting started (requires Active directory)

After the advanced features license has been added (see [adding a license](#) for more information), one or more user-defined groups can be created.

To create a group:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, right-click **Groups**, point to **New**, and then click **New group**.

 **Note** Currently only 20 groups can be added.


3. In the **Setting**, click **Add** to enter the name of the group.
 4. Click **Create** to finish creating the new group.
-

Logging - Getting started

Logging is used to report errors, warnings and messages. To successfully use the logging feature, an admin e-mail address should be added.

To use logging:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, double-click **Events and logging**, click **Logging**, right-click **Admin e-mail**, and then click **Properties**.
3. In the **Setting**, enter the e-mail address for the administrator, or click **Add** to find the e-mail address using Active Directory.

 **Note** The administrator e-mail address should be an e-mail address that you check regularly.

4. Click **OK** to finish adding an admin e-mail address.
-

Running QS Disclaimer

The Disclaimer Manager has the ability to *start*, *pause* and *stop* the adding of disclaimers to mail from enabled domains.


To run (start) the QS Disclaimer service:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, right-click the applicable server (e.g. mailserver.mydomain.com), point to **All Tasks**, and then click **Start**.


The STMP Disclaimer will now add the created disclaimers to all mail for each of the created domains.

Domians

To create a domain:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, right-click **Domains**, point to **New**, and then click **New e-mail domain**.
 **Note** The number of domains that can be added is unlimited but defaults to 100.
3. The e-mail domain wizard will then be run.

The e-mail domain wizard:

1. The first page of the wizard lists the pages that will be shown.
Click **Next** to continue.
 2. In the **Add the e-mail domain** page you need to enter the domain that you would like to disclaim or add a signature, for example; to disclaim the sender auser@mydomain.com, you need to add *@mydomain.com* or *mydomain.com*.
Click **Next** to continue.
 3. In the **Set up the external disclaimer to use** page, you can enable or disable external disclaimers for this domain and also select the disclaimer to use.
Click **Next** to continue.
 4. In the **Set up the internal disclaimer to use** page, you can enable or disable internal disclaimers for this domain and also select the disclaimer to use.
 **Note** The internal disclaimer option is only available with the advanced license.
Click **Next** to continue.
 5. Finally in the **View a summary of your set up** page, you will be presented with the settings you chose so that you can go back and make changes if required.
Click **Finish** to apply the settings and close the wizard.
-

Disclaimers

This section provides information about creating disclaimers for use with QS Disclaimer:



- [Adding a disclaimer](#)
 - [Advanced disclaimer options](#)
 - [Example disclaimers](#)
-

Adding a disclaimer



Disclaimers can be created for the three different types of e-mail standard currently in use; Plain text, HTML and Enriched.

Please note: Enriched is not the same as Rich text which is not an e-mail standard.

To create a **plain text disclaimer**:


1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, double-click **Disclaimers**, right-click **Plain text disclaimer**, point to **New**, and then click **New disclaimer**.
 **Note** A maximum of 100 disclaimers are allowed.
3. In the **Name**, enter an identifier for the disclaimer.
4. In the **Disclaimer**, enter the plain text disclaimer details that are to be added to the mail.
 **Note** A preview of the disclaimer is available after it has been created.
5. If a divider line is required to distinguish between the mail body and the disclaimer, select the **Add line divider** check box.
6. Click **Add** to finish creating the disclaimer.


To create a **HTML disclaimer**:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, double-click **Disclaimers**, right-click **HTML disclaimer**, point to **New**, and then click **New disclaimer**.
 **Note** A maximum of 100 disclaimers are allowed.
3. In the **Name**, enter an identifier for the disclaimer.
4. In the **Disclaimer**, enter the HTML disclaimer details that are to be added to the mail.
 **Note** A preview of the disclaimer is available after it has been created.
5. If a divider line is required to distinguish between the mail body and the disclaimer, select the **Add line divider** check box.
6. Click **Add** to finish creating the disclaimer.

To create an **enriched disclaimer**:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, double-click **Disclaimers**, right-click **enriched disclaimer**, point to **New**, and then click **New disclaimer**.

 **Note** A maximum of 100 disclaimers are allowed.

3. In the **Name**, enter an identifier for the disclaimer.
4. In the **Disclaimer**, enter the enriched disclaimer details that are to be added to the mail.
 **Note** A preview of the disclaimer is available after it has been created.
5. If a divider line is required to distinguish between the mail body and the disclaimer, select the **Add line divider** check box.
6. Click **Add** to finish creating the disclaimer.

For some disclaimer examples, see [Disclaimer samples](#).

Example disclaimers

Below is a plain text disclaimer example

This e-mail is confidential and may contain legally privileged information. If you are not the intended recipient, you should not copy, distribute, disclose or use the information it contains, please e-mail the sender immediately and delete this message from your system.

Note: e-mails are susceptible to corruption, interception and unauthorised amendment; we do not accept liability for any such changes, or for their consequences. You should be aware that we may monitor your e-mails and their content.

Below is a HTML disclaimer example

``This e-mail is confidential and may contain legally privileged information. If you are not the intended recipient, you should not copy, distribute, disclose or use the information it contains, please e-mail the sender immediately and delete this message from your system.`
`

Note: e-mails are susceptible to corruption, interception and unauthorised amendment; we do not accept liability for any such changes, or for their consequences. You should be aware that we may monitor your e-mails and their content. ``

Below is an Enriched disclaimer example

`<fontfamily><param>Arial</param> <color><param>9992,9992,9992</param>` This e-mail is confidential and may contain legally privileged information. If you are not the intended recipient, you should not copy, distribute, disclose or use the information it contains, please e-mail the sender immediately and delete this message from your system.

Note: e-mails are susceptible to corruption, interception and unauthorised amendment; we do not accept liability for any such changes, or for their consequences. You should be aware that we may monitor your e-mails and their content. `</fontfamily>`

Note: Two carriage returns are used to signify a new line.

For more disclaimer samples, please visit our web site www.pa-software.com

Advanced disclaimer options

Character set

When disclaimers contain characters that require a specific character set, it is possible that the source e-mail client is not set to always create mail using the required character set.

If this happens, you can force the use of a character set from within QS Disclaimer by using the disclaimer **message encoding**.

- **Auto** Do not change the character set (this is the default).
- **US-ASCII** Change to US-ASCII to ensure messages are not reinterpreted.
- **ISO-8859-1** Change to Western character encoding ISO-8859-1 (latin 1). This provides the extended additional character assignments required for languages such as French and German.
- **UTF8** Forcing the change to UTF-8 (Unicode Transformation Format) character encoding will provide full Unicode disclaimer support. UTF-8 is able to represent any character in the Unicode standard, yet the initial encoding of byte codes and character assignments for UTF-8 is backwards compatible with ASCII.


Disclaimer positioning


Disclaimers can be positioned within the e-mail in three ways:

- **Bottom** Position the disclaimer at the bottom of the e-mail (this is the default).
 - **Top** Position the disclaimer at the top of the e-mail.
 - ✔ **Note:** Disclaimers at the top of an e-mail should be short and simple to avoid confusing the recipient.
 - **Signature** This option allows the disclaimer to be placed under the reply, and above the original message. This offers a disclaimer in a similar way to a signature.
-

Mail types

Mail can be disclaimed in three different formats:

- **Plain Text** This format of e-mail, is a format that all e-mail clients understand no matter what platform is used. The plain text e-mail standard does not support text formatting e.g. bold, italic, or coloured fonts. The standard also does not support images embedded in the message body (although you can include them as attachments).
 **Note:** You can set most clients to only use the plain text format, including Outlook.
- **HTML** The HTML format supports everything that is required for text formatting, including; numbering, bullets, alignment. It also supports much more, such as pictures (including backgrounds), HTML styles, and URLs. It is now possible to use HTML as a default due to all popular e-mail programs inclusion of HTML.
If you use Outlook, HTML is the recommended format, especially if you send most of your messages within a company that uses a Microsoft Exchange Server.
- **Enriched** This format is only used by a small number of e-mail clients and offers similar formatting to RTF. The Enriched format was designed to be extremely simple to parse, so that even teletype-oriented mail systems can easily strip away the formatting information and leave only the readable text.

 **Note:** Outlook Rich Text Format (RTF) is a Microsoft format that basically only Outlook can understand. With this in mind, it is recommended that you use HTML instead of RTF within Outlook or ensure Outlook is set to convert RTF to HTML when sending (this is set by default in Outlook).

QS Disclaimer will add a disclaimer in any of these three formats. All that is needed is for you to provide your disclaimer in the format required.

Fields

The Active Directory fields allow user based information to be added to the disclaimer.

- **Full name** The sender's full name (Name) field in Active Directory.
- **First name** The sender's first name (givenName) field in Active Directory.
- **Last name** The sender's last name (sn) field in Active Directory.
- **Initials**
- **Display name** The sender's display name (displayName) field in Active Directory.
- **Job title** The sender's job title (title) field in Active Directory.
- **Company** The sender's company field in Active Directory.
- **Office** The sender's office (physicalDeliveryOfficeName) field in Active Directory.
- **Department** The sender's department field in Active Directory.
- **Street** The sender's street (streetAddress) field in Active Directory.
- **P.O. box** The sender's P.O. box (postOfficeBox) field in Active Directory.
- **City** The sender's city (l) field in Active Directory.
- **State/province** The sender's state/province (st) field in Active Directory.
- **Zip/postcode** The sender's zip/postcode (postalCode) field in Active Directory.
- **Country** The sender's country (co) field in Active Directory.
- **Telephone** The sender's telephone number (telephoneNumber) field in Active Directory.
- **Home phone** The sender's home phone number (homePhone) field in Active Directory.
- **Postal address** The sender's postal address (postalAddress) field in Active Directory.
- **Mobile** The sender's mobile number (mobile) field in Active Directory.
- **Fax** The sender's fax number (facsimileTelephoneNumber) field in Active Directory.
- **E-mail** The sender's e-mail address (mail) field in Active Directory.
- **Home page** The sender's home page (wwwHomePage) field in Active Directory.
- **Notes** The sender's notes (info) field in Active Directory.
- **Photo** The sender's photo (jpegPhoto) field in Active Directory.
- **Thumbnail logo** The sender's thumbnail logo (thumbnailLogo) field in Active Directory.
- **Thumbnail photo** The sender's thumbnail photo (thumbnailPhoto) field in Active Directory.
- **More...** This option lists all the available attributes from Active Directory.

The fields are only valid if the sender exists in Active Directory and the field is set for the sender.

 **Notes:**

The Active Directory details are only available with the advanced license.

Fields

The server or global fields allow server based information to be added to the disclaimer.

- **Server name** The name of the mail server where QS Disclaimer is installed e.g. mailserver.
- **Server IP** The IP address of the mail server where QS Disclaimer is installed.
- **Server FQDN** The Fully Qualified Domain Name of the mail server where QS Disclaimer is installed e.g. mailserver.company.com.
- **Server domain name** The domain name of the mail server where QS Disclaimer is installed e.g. company.com.

Notes:

The server details are only available with the advanced license.

Fields

The mail fields allow information on the message itself to be added to the disclaimer.

- **Sender** The e-mail address of the sender.
- **Subject** The e-mail subject
- **Recipients** A comma separated e-mail address list of all recipients in the TO and CC fields e.g. usera@mail.com,userb@mail.com.
- **To** A comma separated e-mail address list of all recipients in the TO field.
- **CC** A comma separated e-mail address list of all recipients in the CC field.
- **BCC** A comma separated e-mail address list of all recipients in the BCC field.
- **Attachments** List of attachments with file names e.g. <file.jpg> <file2.jpg>.
- **Number of attachments** Total number of attachments.
- **Attachments size** Total size of all the attachments.
- **Message date** The time and date that the disclaimer is added in the format 'DD MMM YYYY HH:MM:SS' e.g. 10 Nov 2010 07:42:55.

Notes:

The mail details are only available with the advanced license.

Settings

This section provides information about the settings used with QS Disclaimer:



- [Settings that can be adjusted using the disclaimer manager](#)
 - [Importing and exporting of the configuration data](#)
 - [Advanced settings](#)
 - [Remote administration](#)
-

Settings

To get the most out of QS Disclaimer and provide a good working environment for your mail system, you can adjust the settings below, creating a simple and easy to use disclaimer system.

- **Add to external mail** This setting will enable the appending of disclaimers to all outbound mail i.e. to mail recipients whose domain is not listed in the disclaimer manager.
- **Add to internal mail** (advanced only) This setting will enable the appending of disclaimers to all internal mail i.e. mail to domains that are listed in the disclaimer manager.
- **Disclaimer size** This setting allows the use of very large disclaimers.
 Note: Very large disclaimers will impact system performance, especially when used with the option to remove duplicate disclaimers.
- **Use plain text for HTML** For simple disclaimers, this option allows you to use the plain text disclaimer for HTML mail instead of having to create a duplicate.
 Note: The HTML version will enclose the plain text disclaimer in the HTML preformatted text element `<pre></pre>`.
- **Use plain text for enriched** For simple disclaimers, this option allows you to use the plain text disclaimer for enriched mail instead of having to create a duplicate.
 Note: The Enriched version will enclose the plain text disclaimer in the enriched preformatted text token `<excerpt></excerpt>`.
- **Use plain text for rich text** As Outlook can still use the rich text format, this option allows the use of the plain text disclaimer.
- **Add to status** On some systems it is useful to also add a disclaimer to the automatically generated status messages, such as undelivered messages.
- **Fix HTML code** This setting allows the engine to try and fix some HTML errors and inconsistencies such as missing `<html>` and `<body>` elements.
- **Remove duplicate disclaimers** When on, this setting will attempt to remove a duplicate disclaimer before appending another disclaimer, thus reducing the size of the e-mail, and giving an overall simpler e-mail.
 Note: If the client returning the e-mail has altered the disclaimer it will not be removed.
- **Use tagged disclaimers** When duplicate disclaimers are being removed, this setting tags HTML disclaimers so that they can be removed even if the client returning the e-mail has changed the disclaimer or the HTML code.
You can choose from one of the following options:
Simple : Use a simple tagged disclaimer.
Complex : Use a more robust duplicate removal system.
Disabled : Do not use tagged disclaimers (using this option will sometimes cause duplicates to occur).
- **Use a unique tag** This option will use a unique tag for the HTML disclaimer, so that other users of QS Disclaimer will not remove the disclaimer.
- **Remove old images** When removing old HTML disclaimer, also remove images that were

embedded so the message does not have multiple versions of the same image (ignored if not removing duplicates).

- **Ignore TNEF mail** If enabled, this option does not change root TNEF mail by adding a disclaimer. This can be useful when internal RTF is used and a disclaimer would affect the message.
- **Ignore HTTP-DAV mail** If enabled, this option does not change HTTP-DAV mail by adding a disclaimer.
- **Add to calendar messages** When set to 'No' this setting stops a disclaimer from being added to calendar messages and task/meeting requests. These types of message do not require disclaiming.
- **Add to contact messages** When set to 'No' this setting stops a disclaimer from being added to TNEF messages containing an embedded contact.
- **Track IM recipients** When enabled, recipient lists are tracked internally rather than by embedding the list as headers. Embedding the recipient list as headers has a performance advantage, but it can be incompatible with some anti-virus/spam mail scanners that will not allow custom mail headers.
- **Exempt mailer** If set, this option checks each message's *X-Mailer* header for an exempt mailer prior to appending a disclaimer.
 **Note:** This option is not case sensitive.
- **Use header recipients for local** This settings uses the header fields *To*, *Cc* and *Bcc* from the message rather than the Exchange Active Directory recipients. This setting is intended for use in systems that contain complex Active Directory systems which cause problems with the sender and recipient checking used by QS Disclaimer.
- **Exempt recipient domain** This setting allows the disclaimer exemption of a recipient domains (separated by a comma e.g. *pa-software.com,microsoft.com*).
 **Note:** Do not including the @ e.g. for *anyusers@pa-software.com* use *pa-software.com*.
- **Ignore TNEF HTML element** When set, any TNEF HTML message that contains this header element will be classified exempt and will not have a disclaimer added. For example; to ignore messages with Excel sheets, you would add `<meta name=ProgId content=Excel.Sheet>`.
- **Exempt TNEF attachment** When set, any TNEF message that contains this attachment name will be classified exempt and will not have a disclaimer added. For example; to ignore messages with a certain picture attachment, you would add *exemptpic.jpg*.
- **Ignore Outlook voting** When set, any TNEF message that contains Outlook voting buttons will be classified exempt and will not have a disclaimer added.
- **AD update rate** This setting dictates how often the Active Directory groups should be updated. If this is set too low, the updates (if large groups are used) could impact system performance. The default of four hours (14400 seconds) is recommended.
- **Maximum message size** Use this option to prevent disclaimers from being added to very large e-mail messages. If a user tries to send an e-mail message that is larger than the maximum message size specified, it will be exempt from a disclaimer.
- **Maximum disclaimers** Use this option to prevent too many disclaimers from being created.
- **Maximum user groups** Use this option to prevent too many user groups from being created.
- **Maximum domains** Use this option to prevent too many e-main domains from being created.
- **Process TNEF and MAPI** Instead of translating TNEF messages, process them using the MAPI system to stop any translation issues.

- **Process AD/user fields** When enabled, all fields will be converted when the disclaimer is added e. g. {Full name} will be converted to Fred Bloggs.
 - **Exempt text** When set, the e-mail body is checked for the presence of the text and if it exists a disclaimer will not be added. The text can also be a HTML element.
 - **Convert plain text to HTML** When mail is sent as just plain text, convert this to HTML so that a HTML disclaimer can be added.
-

Import and export configuration data


When upgrading, copying or migrating to a new machine, it is an advantage to save the current configuration data so that it can be imported.

This also has the added advantage of allowing the easy backup of the configuration data.

To export the configuration data:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, right-click **QS Disclaimer**, point to **All Tasks**, and then click **Export settings**.
3. In the **Save As** window, enter the destination and name of the file.
4. Click **Save** to finish exporting the configuration data.


To import the configuration data:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
 2. In **Disclaimer Manager**, right-click **QS Disclaimer**, point to **All Tasks**, and then click **Import settings**.
 3. In the **Open** window, select the name of the file.
 4. Click **Open** to finish importing the configuration data.  **Note** You will need to update the engine configuration data once the data is loaded. See [updating the configuration data](#) for more information.
-

Advanced settings

QS Disclaimer's advanced settings allow you to configure the specialised settings.

- **Reply separators** This contains a semi-colon separated list of text strings that are used to separate replies from the original messages by your mail client. This is the text that is used by QS Disclaimer when it searches for a place to insert a disclaimer that is set to be used as a signature. A signature disclaimer should be inserted after a reply rather than at the end of the e-mail.

 **Note:** Adding arbitrary values to this setting could severely impact QS Disclaimer's performance.


- **Advanced plain text duplicate removal** These advanced settings allow more options to help remove duplicate plain text disclaimers, including when the disclaimer has been converted by the recipient to HTML.

The options are:

Ignore underscores ('_') : Do not compare underscores when checking duplicates. This is needed if recipients are converting underscores to dashes, or are replacing the line.

Ignore dashes ('-') : Do not compare dashes when checking duplicates. This option is needed if recipients are converting dashes to underscores, or are replacing the line.

Ignore HTML elements inside the disclaimer : This option will help remove plain text duplicates that have been converted to HTML and have had extra HTML elements embedded in the text.

 **Note:** Enabling these options will increase the load on the mail server

- **Use SMTP service** This option allows the SMTP service to process mail rather than Exchange (this has performance advantages for high mail systems).

Notes:


To access the advanced settings:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
 2. In **Disclaimer Manager**, right-click **Settings**, and then click **Properties**.
-

Remote administration

To set up remote administration on a workstation:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, right-click **QS Disclaimer**, and then click **Connect to another computer**.
3. In the **This snap-in will always manage**, select either **Local computer: (the computer this console is running on)** or **Another computer**.
If **Another computer** is selected click **Browse** to search Active Directory for the server to administer.
4. Click **OK** to finish and connect to the server (locally or remotely).

 **Note:** Remote administration requires that the destination server has a *remote administration and clustering license* before a connection can be made.

Groups

QS Disclaimer provides mechanisms for adding disclaimers based on Active Directory groups. The groups options are available in two types:

- [Built-in groups](#)
 - [User-defined groups](#)
-

Groups

The built-in groups option allows disclaimers to be added to a specific group either, by making users exempt from a disclaimer, or by using a group of users that have a disclaimer added.

- **Exempt users** Use the group *Disclaimer exempt users* for the list of users that are exempt from a disclaimer.
- **Disclaimer users** Use the group *Disclaimer users* for the list of users that have a disclaimer added.
- **Exempt recipients** Use the group *Disclaimer exempt recipients* for the list of recipients that are exempt from a disclaimer.

Notes:

The standard groups must be created in the **Users** section of Active Directory (the default container for user accounts) and not in an **Organization Unit**.


The default groups cannot be enabled unless the group actually exists in Active Directory.

You cannot enable both the **Disclaimer users** group and the **Disclaimer exempt users** group.

Groups

The groups option allows specific disclaimers to be added based on which group the member belongs to.

To add a user-defined group:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, right-click **Groups**, point to **New**, and then click **New AD group** or **New e-mail list group**.
 **Note** The number of groups that can be added is unlimited but defaults to 100.
3. For the AD group, click **Add** to enter the name of the Active directory group required.
4. For the e-mail list group, enter the required e-mail addresses in **E-mail list** (each address must be separated by a comma).
5. In the **Description** (if required) add a description of the group (e.g. *Company sales group*).
6. If the group is not yet active or is to be used at a later date, it can be created disabled by checking the **Group is disabled** check box.
7. Click **Create** to finish creating the new group.

The user-defined groups can also base disclaimers on the message priority and sensitivity.

To use the group importance and sensitivity disclaimers:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, select the required group, right-click and point to **Properties**.
3. In the **Group properties**, click either **Importance** or **Sensitivity**.
4. For **Importance** check either *Disclaimer based on a high priority message* or *Disclaimer based on a low priority message* and then select the disclaimers to use from the drop down list.
5. For **Sensitivity** check *Disclaimer based on a personal message*, *Disclaimer based on a private message* or *Disclaimer based on a confidential message* and then select the disclaimers to use from the drop down list.
6. Click **OK** to save the settings.

Please note: The groups option is only available with the advanced license.

Fields

Built-in groups using either Active Directory or an e-mail list.

- **Active Directory group** Selecting this option will require the group 'Disclaimer exempt users', 'Disclaimer users' or 'Disclaimer exempt recipients' to exist in the Users section of Active Directory.
- **Remote Active Directory** Use a remote Active Directory server for the group. Note: The group must still be present in the Users section.
- **Server/IP** The server name or IP address of the remote server running Active Directory.
- **DN** The distinguished name of the server which when used with the server name or IP will for the GC address. For example using a server name of srv1 and the DN dc=company,dc=local the resulting address for the disclaimer users group would be 'GC://srv1:3268/CN=Disclaimer users, CN=Users,dc=company,dc=local'.
- **E-mail list group** Selecting this option will use a comma separated e-mail address list e.g. user1@site.com,user2@site.com.
- **E-mail list** A list of comma separated e-mail addresses that this group covers e.g. user1@site.com,user2@site.com.

User defined groups using either Active Directory or an e-mail list.

- **Group name** The name of the group or the Active Directory group name if an AD path is not set.
- **Add AD group** Add a group using the Active Directory group object selector.
- **AD path** The full GC or LDAP distinguished name of the Active Directory group. Note: If this is not set the name field will be used against the local Active Directory.
- **Group name** The name of the group to distinguish it from other groups.
- **E-mail list** A list of comma separated e-mail addresses that this group covers e.g. user1@site.com,user2@site.com.
- **Apply group to** If this option is set to external only, the group will only be used if the mail is considered external. For internal only the group will only be checked if the mail is local. For both the group will always be checked.

Built-in groups using either Active Directory or an e-mail list.

- **Use authentication** This option allows the use of a user name and password to connect to a remote Active Directory server from a computer that is not trusted e.g. in a DMZ.
- **User name** User name of an account with privileges to connect to the Active Directory server.

- **Password** Password of the account that is used to connect to the Active Directory server.

Please note: Authentication is only required if the Active Directory group is on a remote server which does not trust this computer e.g. if this computer is in a DMZ. Standard Active Directory groups will not require authentication.

- **Test group** Ensure that the group is valid and it exists in Active Directory.

 **Notes:**

The groups are only available with the advanced license.

Events and logging

QS Disclaimer provides mechanisms for monitoring how it is operating on your server. This is performed by system events, logging and statistics.

- [Events and error procedures](#)
 - [Standard logging](#)
 - [Advanced logging](#)
 - [Log files](#)
 - [Statistics](#)
 - [Logging settings](#)
-

Events and error procedures

To provide feedback for messages, warnings and errors for your mail system, you can adjust the settings below.

- **Log errors** Send any errors that occur within the disclaimer engine to the event log.
 - **Log warnings** Send any warnings that occur within the disclaimer engine to the event log.
 - **Log messages** Send information (or non-critical) messages to event log.
 - **Error procedure** Sets the way errors are dealt with.
You can choose from one of the following options:
 - Ignore* : Ignore all errors (errors will still be logged in the event log if set).
 - Return to sender* : Send all mail that fails to have a disclaimer appended (due to an error) back to the sender.
 - Redirect* : Send the failed message to the archive option only.
 - Return and copy to Admin* : Send the failed message back to the sender and also send a copy to the admin address.
 - Create mini dump only* : Just create a mini dump of the current system.
 - Send to Admin* : Send the error to the admin and create a mini dump of the current system.
 - **Report exceptions** Send error reports to the Admin e-mail address. The dumps created should be sent to support@pa-software.com.
 - **Report handled exceptions** When a handled exception occurs, create a mini dump for further analysis. The mini dump should be sent to support@pa-software.com.
 - **Admin e-mail** Administrator e-mail address that receives reports and error messages.
 - ✔ **Note:** The administrator e-mail address should be an e-mail address that you check regularly.
 - **Stopped status** Enabling this option will send the Administrator an e-mail if the engine is stopped due to a system failure that requires attention.
 - ✔ **Note:** Normal stopping and starting will not produce a status e-mail.
 - **Monitor log** Enabling this option will send the Administrator an e-mail if the engine creates a log entry containing the value set.
 - ✔ **Note:** An e-mail will be sent every time the entry is produced so common entries could cause a large volume of status messages.
-

Events and logging

To configure the standard logging options, use the settings below:

- **Save mail details** For statistical analysis and logging, this option will output a line in a CSV file for each e-mail sent through the disclaimer engine. The file is stored in the QS Disclaimer installation folder.
The fields used are: *Date and time, To, From, Subject*. file.
 - **Save mail details folder** Folder used to store the mail details CSV file.
 - **Log mail processed** Log the *From* and *Subject* of each e-mail processed in the log files.
-

Events and logging

To configure the advanced logging options, use the settings below:

- **Send copy** When enabled, this option sends a copy of each e-mail to an alternative address (the *Send copy e-mail*).
- **Send copy e-mail** The e-mail address used for send copy option.
- **Archive mail** Save each e-mail into an archive folder (as full source with or without the appended disclaimer).
You can choose from one of the following options:
Yes : Archive the mail without a disclaimer.
With disclaimer : Archive the mail after a disclaimer has been appended.
Without disclaimer : Archive the mail before a disclaimer has been appended.
No : Do not archive mail.
- **Archive folder** The destination used to save the archived mail.
 Note: If no folder is set, the installation folder is used.

Notes:

The advanced logging is only available with the advanced license.

Logging and logs

QS Disclaimer provides logs for monitoring how mail is being processed on your server.

Log files

The log files section lists the log files created by QS Disclaimer so that they can be easily accessed. We recommend that you check the logs on a regular basis. This way, warnings and errors that are logged during operation may be passed to technical support for further investigation.

Statistics

QS Disclaimer provides performance statistics for monitoring how mail is being processed on your server.

Name	Description
Disclaimer up time	The length of time the disclaimer engine has been running
Disclaimer run count	The amount of times the disclaimer engine has been started
Com up time	The length of time the com service has been running
Com run count	The amount of times the com service has been started
Internal disclaimers	Number of internal disclaimers added
External disclaimers	Number of external disclaimers added
Total disclaimers	Total number of both internal and external disclaimers added
Failed disclaimers	Number of times a disclaimer was not added
Archived messages	Number of messages that were archived
Internal mail processed	Number of internal messages that have been processed even if a disclaimer was not added
External mail processed	Number of external messages that have been processed even if a disclaimer was not added
Total mail processed	Total number of both internal and external messages processed
Exempt sender	Number of messages that were exempt due to the sender
Exempt mailer	Number of messages that were exempt due to the X-Mailer
Exempt recipient	Number of messages that were exempt due to the recipient domain
Disclaimer group processed	Number of messages that were disclaimed due to the disclaimer group
Group disclaimers processed	Number of messages that were group disclaimed due to a user-defined group
Active Directory timing (ms)	Time spent accessing Active Directory
Categorize timing (ms)	Time spent categorizing mail prior to sending

Disclaimer timing (ms)	Time spent adding a disclaimer
Archive timing (ms)	Time spent archiving mail

Logging and logs

To configure the logging settings, use the options below:

- **Refresh the results pane** When enabled this setting allows automatic refreshing of the logs and statistics.
You can set the length of time between refreshes by setting the option:
Refresh every 'n' seconds
- **Advanced logging settings** This option allows you to generate logs for errors and warnings or even a verbose mode for tracing issues.
The available options are:
No logging Minimum (log only errors) Normal (log only warnings and errors) (recommended) Maximum log level
Note: When changed, you will also need to restart the disclaimer.

Notes:

To access the logging settings:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
 2. In **Disclaimer Manager**, right-click **Events and logging**, and then click **Properties**.
-

Clustering

In a multi-server environment you may find maintaining configuration data on all the servers inconvenient. The clustering option allows you to configure your settings on a host computer and then deploy them to each server in your organisation.

This section provides information about clustering with QS Disclaimer:



- [Cluster settings that can be adjusted using the disclaimer manager](#)
- [Managing the cluster](#)

Note: The clustering option does not require a Windows cluster, any group of servers can be administered as a cluster.

Cluster management

Cluster nodes can be either a true cluster node or a server that will be using the same configuration data.

To add a new node:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, right-click **Cluster**, point to **All tasks**, and then click **Add new cluster node**.
 **Note:** Windows allows a maximum of 8 nodes.
3. In the **Name**, enter an identifier for the node.
4. In the **Cluster node**, enter the UNC address for the node or the server acting as a node.
5. In the **Description** add (if required) a description of the node (e.g. *Node 1 of 3*).
6. If the node is not yet active or is to be used at a later date, it can be created disabled by checking the **Cluster node is disabled** check box.
 **Note:** Disabling a node, stops any updating of that nodes configuration data.
7. Click **Add** to finish adding a new cluster node.

Notes:

It is recommend that in a multi-server environment a single workstation is used to centralise the server management.

If you wish to configure QS Disclaimer from your workstation, you will only need a remote administration and clustering license present on the destination server.


Cluster settings

The cluster settings allow the configuration of how the nodes are updated and where the configuration data is held.

- **Do not automatically update cluster nodes** When updating configuration data, checking this option stops the nodes from being updated.
To update the node, you must select the node, right-click and then click **Update node configuration data**.
 - **Default node for configuration data** The setting sets where the configuration data is going to be stored, either locally or using one of the nodes.
 - **Only update enabled nodes** If checked, this will only allow automatic updating of nodes that are enabled.
 - **Ignore node update errors** This setting allows updating of all nodes, even if a node is not available (i.e. is currently down).
-

Licenses

To add a license:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, right-click **Licenses**, point to **New**, and then click **Add license**.
3. In the **License**, enter the license number.
4. In the **Description**, add (if required) a brief description of the purpose for the license (e.g. *License for mydomain.com*).
 **Note** Once a license has been added, only the description of the license can be changed.
5. Click **Add** to finish adding the new license.

Getting a license


Licenses can be acquired by visiting [QS Disclaimer home page](#).


Updating configuration data


After you have finished making changes, you will need to update the configuration data so that the disclaimer engine can use the new settings.

Updating the configuration data:

1. Start Disclaimer Manager: On the **Start** menu, point to **Programs**, point to **QS Disclaimer**, and then click **Disclaimer Manager**.
2. In **Disclaimer Manager**, right-click the applicable server (e.g. mailserver.mydomain.com), point to **All Tasks**, and then click **Update**.

You can also update the configuration data using the toolbar by clicking on the  button.

 **Note:** If you do not update the configuration data before you close the manager, you will be asked to update before the manager is actually closed.

Note: You can also remove any unsaved changes to the configuration data by using the toolbar by clicking on the  button.

Updating cluster nodes

Updating the configuration data will update each of the cluster nodes when clustering is enabled. You can change this behaviour by changing the [cluster settings](#).

Using the IIS SMTP service

This section of the documentation is a "how to" topic for installing and testing Microsoft IIS SMTP service.

Install Microsoft Internet Information Services (IIS) and Microsoft SMTP Service

This step-by-step guide describes how to set up a Simple Mail Transfer Protocol (SMTP) virtual server on a Windows 2000-based computer.

Microsoft SMTP Service uses the Internet-standard SMTP to transport and deliver mail messages. Microsoft SMTP Service does not support the use of individual mailboxes; it places incoming messages in a Drop folder or it forwards them to other SMTP servers (if the message is addressed to a remote domain). This feature allows Microsoft SMTP Service to be used as a mail receiver for other programs.

Install IIS and SMTP service

Because Microsoft SMTP Service is a component of Microsoft Internet Information Services (IIS), you must install IIS to use Microsoft SMTP Service. To install IIS and Microsoft SMTP service, follow these steps:

1. Click **Start**, point to **Settings**, and then click **Control Panel**.
2. Double-click **Add/Remove Programs**.
3. Click **Add/Remove Windows Components**.
4. In the Windows Components Wizard, click **Internet Information Services (IIS)**, and then click **Details**.
5. Click to select the following check boxes:
 - **Common Files**
 - **Documentation**
 - **Internet Information Services Snap-In**
 - **Internet Services Manager (HTML)**
 - **SMTP Service**
 - **World Wide Web Server**
6. Click **OK**, and then click **Next** on the **Windows Components** page.
7. On the **Completing the Windows Components Wizard** page, click **Finish**.
8. Click **Close**.

Configure the SMTP Virtual Server

When you install Microsoft SMTP Service, a default SMTP virtual server is created to handle basic mail delivery functions. The SMTP virtual server is automatically configured with default settings that enable it to accept local client computer connections and to process messages. You can either accept the

default settings or change the SMTP virtual server configuration.

Below are topics that describe basic configuration and security settings that you may want to consider.

How to assign an Internet Protocol (IP) address

To assign an IP address to your SMTP virtual server, follow these steps:

1. Click **Start**, point to **Programs**, point to **Administrative Tools**, and then click **Internet Services Manager**.

Alternatively, start the IIS snap-in.

2. Right-click **Default SMTP Virtual Server**, and then click **Properties**.
3. Click the **General** tab.
 - o If you want the SMTP virtual server to respond to connection requests for all IP addresses that are configured on the computer, click **(All Unassigned)**. This is the default setting.
 - o If you want to assign a specific IP address to the SMTP virtual server, click the IP address that you want to use in the **IP address** box.
 - o If you want to assign additional IP addresses to the virtual server, follow these steps:
 - a. Click **Advanced**, and then click **Add**.
 - b. Specify the IP address and the Transmission Control Protocol (TCP) port number.
NOTE: The default TCP port is 25.
 - c. Click **OK**, and then click **OK**.
4. Click **OK**.

How to Configure the Default Domain

SMTP virtual servers must have one local default domain. The default domain is used to stamp messages from addresses that do not contain a domain. By default, the name that you specify on the **Network Identification** tab of the System tool in Control Panel is used as the default domain name.

All incoming mail messages that are designated for the default domain are placed in the Drop folder. By default, the Drop folder is located in the Inetpub\Mailroot folder.

To change the location of the Drop folder, follow these steps:

1. Click **Start**, point to **Programs**, point to **Administrative Tools**, and then click **Internet Services Manager**.

Alternatively, start the IIS snap-in.

2. Double-click **Default SMTP Virtual Server**, and then click **Domains**.
3. Right-click the default domain, and then click **Properties**.
4. Click **Browse**, locate a folder that you want to use for your Drop folder, and then click **OK**.
NOTE: You must place the Drop folder in a folder on the local computer on which Microsoft SMTP Service is installed.
5. Click **OK**.

How to Enable Transaction Logging

Log files keep a record of all of the messages that are received and sent on your computer. To turn on logging, follow these steps:

1. Click **Start**, point to **Programs**, point to **Administrative Tools**, and then click **Internet Services Manager**.

Alternatively, start the IIS snap-in.

2. Right-click **Default SMTP Virtual Server**, and then click **Properties**.
3. Click the **General** tab.
4. Click to select the **Enable logging** check box.
5. In the **Active log format** box, click the log format in which you want to record information. The default log format is W3C Extended Log File Format.
6. Click **Properties**.
7. Specify the settings that you want to use. You can specify settings to include log time period and the location and the name of the log file.
8. Click **OK**, and then click **OK**.

How to Set Relay Restrictions

By default, all computers are denied relay access. Microsoft SMTP Service does not allow computers to relay unwanted mail through the virtual server. Also, all computers are denied relay access except those that meet the authentication requirements that are specified in the **Authentication** box on the **Access** tab, by default. If your virtual server is on the Internet, it is not recommended that you grant relay access. If you do so, unsolicited mail may be propagated.

To grant or deny permissions to relay messages through the SMTP virtual server, follow these steps:

1. Click **Start**, point to **Programs**, point to **Administrative Tools**, and then click **Internet Services Manager**.

Alternatively, start the IIS snap-in.

2. Right-click **Default SMTP Virtual Server**, and then click **Properties**.
3. Click the **Access** tab.
4. Under **Relay restrictions**, click **Relay**.
5. Do one of the following steps:
 - Click **Only the list below**.
 - or-
 - Click **All except the list below**.
6. Click **Add**.
7. Click the settings that you want to use, add the computers, the group of computers, or the domain that you want to specify as exceptions to the access setting that you selected in step

6, and then click **OK** three times.

How to Set Up a Smart Host

If you want to designate another SMTP server to handle all outgoing messages, you can set up a smart host to perform this task. After you set up the smart host, all outgoing messages that are designated for remote domains are routed through it.

To configure a smart host, follow these steps:

1. Click **Start**, point to **Programs**, point to **Administrative Tools**, and then click **Internet Services Manager**.

Alternatively, start the IIS snap-in.

2. Right-click **Default SMTP Virtual Server**, and then click **Properties**.
3. Click the **Delivery** tab, and then click **Advanced**.
4. In the **Smart host** box, type either the fully qualified domain name (FQDN) or the IP address of the smart host server.

If you type an IP address, enclose the address in brackets (for example, [192.168.188.228]). When you do so, you can increase performance because Microsoft SMTP Service does not perform name resolution.

5. If you want Microsoft SMTP Service to attempt to deliver the remote messages directly before it forwards them to the smart host, click to select the **Attempt to direct delivery before sending to smart host** check box. By default, this check box is not selected.
6. Click **OK**, and then click **OK**.

Troubleshooting

Issue: Messages are not sent to the Drop folder.

This issue can occur because of either of the following conditions:

- The path to the Drop folder is incorrect.
To troubleshoot this issue, follow these steps:
 1. Click **Start**, point to **Programs**, point to **Administrative Tools**, and then click **Internet Services Manager**.
Alternatively, start the IIS snap-in.
 2. Double-click **Default SMTP Virtual Server**, and then click **Domains**.
 3. Right-click the default domain, and then click **Properties**.
 4. In the **Drop directory** box, verify that the path to the Drop folder is valid.
- Either the Drop folder or the hard disk in which the Drop folder is located is full.
To troubleshoot this issue, free hard disk space in either the Drop folder or on the hard disk in which the Drop folder is located.

See [Testing Windows 2000 IIS SMTP Services Manually](#) for further information.

Testing the Windows IIS SMTP services manually

To test, perform the following:

1. On Windows 2000/XP/2003, at a command prompt, type **Telnet** and press ENTER.
2. At the telnet prompt, type **set Local_Echo** and press ENTER, and then type **open <machinename> 25** and press ENTER. The output resembles the following:

```
220 computername.microsoft.com ESMTP Server (Microsoft Exchange
Internet Mail Service 5.5.2651.58) ready
```

3. Type **helo me** and press ENTER. The output resembles the following:

```
250 OK
```

4. Type **mail from:email@domain.com** and press ENTER. The output resembles the following:

```
250 OK - mail from <email@domain.com>
```

5. Type **rcpt to:youremail@yourdomain.com** and press ENTER. The output resembles the following:

```
250 OK - Recipient <youremail@yourdomain.com>
```

6. Type **Data** and press ENTER. The output resembles the following:

```
354 Send data. End with CRLF.CRLF
```

7. Type **Subject:This is a test** and press ENTER twice.
8. Type **Testing** and press ENTER.
9. Press ENTER, type a period (.), and press ENTER. The output resembles the following:

```
250 OK
```

10. Type **quit** and press ENTER. The output resembles the following:

```
221 Closing Port / Mail queued for delivery
```

Troubleshooting

This section provides information about troubleshooting with QS Disclaimer:

- [Updating configuration data](#)
- [How to troubleshoot disclaimer problems](#)
- [Troubleshooting removal of duplicates](#)

For issues that have not been covered in the troubleshooting guide, please visit [Pa-software support Web Page](#).

Troubleshooting

This section provides information about troubleshooting the disclaimer that is added to mail.

Mail is sent without a disclaimer:

- Check if mail is sent correctly in other formats with a disclaimer.
For example: if a plain text disclaimer is produced correctly but HTML is failing, check that a HTML disclaimer has been created.

If the problem is still present:

- Check that the mail is not being sent in an unknown MIME format. Such as *text/richtext* when the setting **Rich text as enriched** has not been set.

If the problem still exists:

- Check that updated configuration data has been propagated.
See [troubleshooting updates](#) for further information.

Notes

- Setting the option **Using plain text for HTML** or **Using plain text for enriched** will help trace problems with incorrect disclaimers in non-plain text formats.
 - See [troubleshooting updates](#) for further information.
-

Troubleshooting

This section provides information about troubleshooting the configuration data when using the QS Disclaimer Manager.

To update the disclaimer engine after changes have been made but are not showing in the end mail:

- Ensure the domain name is correct e.g. for mail from admin@pa-software.com, the domain name is *pa-software.com* or *@pa-software.com*.
- Check that the disclaimer service is running: In **Disclaimer Manager**, right-click the applicable server (e.g. mailserver.mydomain.com), point to **All Tasks**, and then click **Start**.
- Have you only set a HTML disclaimer and are sending plain text or vice versa?

If the problem is still present:

- Restart the disclaimer service.
In **Disclaimer Manager**, right-click the applicable server (e.g. mailserver.mydomain.com), point to **All Tasks**, and then click **Restart**.

If the problem still exists:

- Restart the IISAdmin service. This ensures that the disclaimer service is using up to date configuration data.

If the problem still persists, send [support](#) the exported settings (right-click on the **QS Disclaimer** node in the manager, point to **All tasks** and select **Export settings**), so that we can check everything is set up correctly.

Troubleshooting

This section provides information about troubleshooting the removal of duplicate disclaimers.

Reasons for duplicates

When a duplicate disclaimer is found the old disclaimer is removed, then a new disclaimer is added. This may seem odd in regards to a simple bottom disclaimer, but ensuring that the old disclaimer is still correct and has not been altered would be an error prone and a very CPU intensive task, especially when considering that if part was removed during the reply and only a section was checked, it could be invalidated. Under this premise, having a duplicate is better than an incorrect disclaimer being left.

With HTML and plain text top or signature disclaimers, leaving the old disclaimer would not be correct. If the signature disclaimer was left, it would be below a previous message, if a top disclaimer was left, the reply may have been inserted before the disclaimer, and thus it would no longer be at the top.

Plain text duplicates are not removed:

- This is usually due to client re-write problems, where the client returning the e-mail has altered the disclaimer in such a way that it can not confidently found. This can also happen if plain text e-mails are returned as HTML. To help to stop this happening, check the difference between the returned disclaimer and the one created in the **Disclaimer Manager** and alter the sections which are causing the conflict.

If plain text duplicates still are not being removed:

- The duplicate system that checks for a duplicate, does not check for carriage returns, tabs, spaces, etc. but it will get stuck if the '-' is used but comes back with '_' or when ASCII characters are changed to ISO characters. If this is the problem, enable the advanced plain text duplicate removal settings. See [Advanced settings](#) for more information.

HTML duplicates are not removed:

- Check that the HTML mail is not being altered by the client when replying. For example; in Outlook, right-clicking within the message window and selecting **View Source** will enable you to check how the disclaimer will be formatted before QS Disclaimer checks for duplicates. Also check that the option **Use tagged disclaimers** is not disabled.

If HTML duplicates still are not being removed:

- Change the **Use tagged disclaimers** setting in the disclaimer manager to *Complex* to stop clients, such as Outlook 2007, removing the disclaimer tag when it rewrites the HTML code. See [Settings](#) for more information.

Notes

- Plain text client re-write problems:

When adding a line divider, the returned e-mail does not contain the divider or it has been altered.

- HTML client re-write problems (when not tagging disclaimers):

Element tags such as `size='1.5'` can be changed to `size='1'`.

Outlook can move sections of elements, for example: `` would be changed to ``.

Event logging

If you want to assign specific logging levels, such as Log Errors and Log Messages, use QS Disclaimer to record events in the Windows event log.

Event logging begins automatically whenever you start QS Disclaimer, and you can view logs in Event Viewer. Event Viewer maintains logs about application, security, and system events on your computer. You can use Event Viewer to view and manage event logs and gather information about hardware and software problems.

To use event logging:

- [Configure Event Logging](#)
 - [Using the Event Viewer](#)
 - [Logging IDs used in QS Disclaimer](#)
-

Using the Event Viewer

After you have enabled logging, you can view the log entries in Event Viewer. Event Viewer is a Windows component that you can use to monitor hardware and software activities. Within each Event Viewer log, QS Disclaimer records informational, warning, and error events. For each type of log, you can specify the maximum size, how long to save entries, and whether to automatically overwrite existing events when the log is full or to manually clear entries.

Monitor these logs closely to keep track of the kinds of transactions being conducted on your servers. Periodically archive the logs to avoid running out of space. Because log files can occupy only a finite amount of space, clear the logs occasionally so that your servers can continue to write new events.

To use Windows Event Viewer:

1. Start Event Viewer: On the **Start** menu, point to **Programs**, point to **Administrative Tools**, and then click **Event Viewer**.
 2. Navigate to **Application Log**.
 3. To sort the log alphabetically and quickly locate an entry for QS Disclaimer, in the details pane click **Source**.
 4. To open a service's Property page and retrieve detailed information, double-click the log entry.
 5. To filter the log to list entries for a specific counter, from the **View** menu, click **Filter**. In **Application Log Properties**, in **Event Source**, choose QS Disclaimer.
-

Logging IDs

This section provides information about the logging IDs used by QS Disclaimer in the Event Viewer.

Event ID: 1201

- This event ID is logged when the QS Disclaimer engine fails to retrieve the e-mail from the SMTP service.

Event ID: 1202

- This warning ID is logged when the QS Disclaimer engine fails to process parts of the e-mail body. As some parts of the body are not used by QS Disclaimer, this warning can occur even when everything is functioning correctly. This warning can safely be ignored.

Event ID: 1203

- This event ID is logged when the QS Disclaimer engine fails to load the settings from the Disclaimer manager. Restarting IISAdmin will resolve this error.

Event ID: 1204

- This event ID is logged when the mail details can not be created or written to the CSV file.

Event ID: 1205

- This event ID is logged when the mail body contains an attachment that can not be processed. As QS Disclaimer does not process attachments, you can safely ignore this error.

Event ID: 1206

- This event ID is logged when the mail type can not be processed. Although this can cause problems, it will usually only affect delivery status messages if this setting is used.

Event ID: 1207

- This event ID is logged when the mail domain can not be processed. If this error occurs, no disclaimer will be attached. Check that the sender is valid and that the domain set in the Disclaimer manager is valid.

Event ID: 1208

- This event ID is logged when the recipients mail domain can not be processed. If this error occurs, it can allow local mail to have a disclaimer attached. Check that the domain set in the Disclaimer manager is valid. Or turn off the 'Check for local domains' setting.

Event ID: 1209

- This event ID is logged when the sender can not be processed for the exemption group. If this error occurs, it will mean that the mail will have a disclaimer added even if the sender is in

the exempt group.

Event ID: 1210

- This event ID is logged when the sender can not be processed for the disclaimer group. If this error occurs, it will mean that the mail will not have a disclaimer added even if the sender is in the disclaimer group.

Event ID: 1211

- This event ID is logged when the sender can not be processed for the user-defined group. If this error occurs, it will mean that the mail will have a disclaimer added based on the senders domain, rather than the groups disclaimer.

Event ID: 1212

- This event ID is logged when the message has been corrupted by the system. If this error occurs, it will mean that the mail has been truncated by the system after a disclaimer was added. The default action is to return the affected e-mail to the sender.

Event ID: 1213

- This event ID is logged when the message body has a TNEF attachment, but the system can not parse the attachment, i.e. the attachment is corrupt or invalid. This error will result in a message not having a disclaimer added.

Event ID: 1214

- This event ID is logged when a fatal error has occurred and the system was not able to process the message. The message will be moved to the system badmail folder.

Event ID: 1215

- This event ID is logged when the system could not check if the message was a calendar message e.g. a task request. This can result in a disclaimer being added, which can cause message formatting issues.

Event ID: 1216

- This event ID is logged when the message could not be sent. This happens when there are permission issues for localhost when using the 'Use SMTP service' setting or the message has invalid envelope entries. Messages that produce this error are moved to the system badmail folder.

Event ID: 1217

- This event ID is logged when the message is best processed by the post categorization thread and indicates a system fault. If this error occurs, restart the IISAdmin service before sending any more messages. Message that produce this error are usually delivered correctly.

Event ID: 1218

- This event ID is logged when the message headers can not be processed to check the X-Mailer header for an exempt mail client. If a message produces this error, it will be processed normally and will not be exempt.

Event ID: 1219

- This event ID is logged when the message headers can not be processed to find out if the recipient is part of an exempt domain. Messages that produce this error will be processed normally and will not be exempt.

Event ID: 1220

- This event ID is logged when the message can not be checked for a HTTP-DAV message.
A message that produces this error, will not have a disclaimer added.

Event ID: 1221

- This event ID is logged when system would not finish the message processing and send the message.
This can happen when Exchange has removed a TNEF message during the processing, or when the server will not allow messages to be sent due to incorrect envelope entries.

Event ID: 1222

- This event ID is logged when the mail type can not be processed.
A message that produces this error, will not have a disclaimer added.

Event ID: 1223

- This event ID is logged when a translated message could not be sent.
This happens when there are permission issues for localhost when using the 'Use SMTP service' setting or the message has invalid envelope entries.
Messages that produce this error are moved to the log files folder.

Event ID: 1224

- This event ID is logged when a translated message could not be created.
This happens when the message has invalid envelope entries.
Messages that produce this error are moved to the system badmail folder and the message headers are saved to the log files folder.

Event ID: 1225

- This event ID is logged when the TNEF content of a message could not be read or validated.
This happens when the message has an invalid TNEF structure.
A message that produces this error, will not have a disclaimer added.

Event ID: 1226

- This event ID is logged when the message domain can not be processed.
If this error occurs, no disclaimer will be attached.
Check that the message sender is valid and that the domain set in the Disclaimer manager is valid.

Event ID: 1227

- This event ID is logged when the message sender can not be processed for the exemption group.
If this error occurs, it will mean that the mail will have a disclaimer added even if the sender is in the exempt group.

Event ID: 1228

- This event ID is logged when the message sender can not be processed for the disclaimer group.
If this error occurs, it will mean that the mail will not have a disclaimer added even if the sender is in the disclaimer group.

Event ID: 1229

- This event ID is logged when the message headers can not be processed to find out if the recipient is part of an exempt domain.
Messages that produce this error will be processed normally and will not be exempt.

Event ID: 1230

- This event ID is logged when the message sender can not be processed for the user-defined group.
If this error occurs, it will mean that the mail will have a disclaimer added based on the senders domain, rather than the groups disclaimer.

Event ID: 1231

- This event ID is logged when a fatal error has occurred and the system was not able to process the message.
The message will either be returned or sent without a disclaimer depending on the Error procedure.

Event ID: 1232

- This event ID is logged when the message has failed to save the new content.
If this error occurs, it will mean that the e-mail has failed to save the new content after a disclaimer was added. The default action is to return the affected e-mail to the sender.

Event ID: 1233

- This event ID is logged when the message monitor has timed out and can no longer track the message.
If this error occurs, it will mean that the e-mail may be sent without a disclaimer added.

Event ID: 1234

- This event ID is logged when a fatal error has occurred and the system was not able to process the message.
The message, depending on the error procedure, will be either ignored and no disclaimer will be added or the message will be returned.

Event ID: 1235

- This event ID is logged when the system could not check if the message was encrypted or signed.
This can result in a disclaimer being added, which may invalidate the signing or encryption.

Event ID: 1236

- This event ID is logged when the system was not shut down correctly.
If this happens more than three times the engine will be disabled.

Event ID: 1237

- This event ID is logged when the engine has been disabled due to multiple restarts.
This is protection measure for the server which stops any instability. Restarting the system in the manager is required.

This section provides information about the generic logging IDs used by QS Disclaimer in the Event Viewer.

Each event will contain additional information that explains the event.

Event ID: 1020

- This informational ID is used for basic information about the QS Disclaimer engine and will contain a specific message in the event description section.

Event ID: 1021

- This event ID is used for basic errors that have occurred in the QS Disclaimer engine and will contain a specific message in the event description section.

Event ID: 1022

- This warning ID is used for basic problems that have occurred in the QS Disclaimer engine and will contain a specific message in the event description section.

Event ID: 2001

- This warning ID is logged when generic issue occurs and can safely be ignored.
-

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