



Email Disclaimers

Admin Guide

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Configuring Email Disclaimers

About Email Disclaimers

An email disclaimer is the text in the footer of an email that passes through the Email Services infrastructure.

Using a combination of default and custom email disclaimers, for inbound and outbound emails, at global, domain, and group level, you can configure your disclaimers to your requirements. Plan your disclaimers so that your users have the appropriate disclaimer applied to their emails.

Email disclaimers are also known as banners and footers.

Email disclaimers can be used for several reasons. These include:

- An email disclaimer informs the recipient that the email has been scanned for security purposes. A typical message reassures the email recipients that their emails are legitimate and free of viruses.
- In many countries there is a legal requirement for business email to include the company name, registered office address, and company registration details. You can use email disclaimers to ensure that this information is appended to all email that leaves your organization. Email disclaimers are more reliable than using email signatures that are set up in each user's email client.
- Use email disclaimers to limit employer's liability. For example, you can state that any views or opinions that are presented in an email are solely those of the author and do not necessarily represent those of the company.
- Some industries may require organizations to make certain disclosure statements when communicating by email.
- You can create separate groups for each region and apply a specific disclaimer for each group.

Unless you have configured custom disclaimers, the default disclaimer is applied to all of the emails going out and within your organization. The default disclaimer uses the generic text that we have predefined. Or you can define the text to your requirements. You can also choose not to have a disclaimer appended for your inbound email or outbound email, or both.

A custom email disclaimer can be applied for a specific group – custom, or domain. You can define the text for your custom disclaimers and the groups they apply to. You can also define **No disclaimer** for your inbound email or outbound email or both.

An inbound email is an email that is sent from an external email address to a recipient that is within your organization. An outbound email is an email that is sent from an email address within your organization to an external email address.

Email disclaimers are configured in the portal. They are listed in the portal in priority order. You can only assign a group to one disclaimer. However, a user may be a member of multiple groups. The disclaimer that is applied depends on the order of disclaimers in the list.

The primary user can configure disclaimers by default. For other users, provided they have **Edit configuration** permission for at least one domain, they can edit disclaimers for the whole organization.

NOTE: Depending on your organization's configuration, you may not be able to define all types of Email Disclaimer.

NOTE: When the body of an email contains no text, some versions of Microsoft Exchange remove the *text/plain* part within the MIME to reduce the overall size of the email. In these circumstances, a disclaimer is not displayed.

Defining Email Disclaimers – Process Overview

Using a combination of default and custom email disclaimers, for inbound and outbound emails, at global, domain, or group level, you can configure your disclaimers to your requirements. Plan your disclaimers so that your users have the appropriate disclaimer applied to their emails.

The following steps must be performed to configure your email disclaimers policy.

Action	Description
Enable a portal user to define email disclaimers	To define an email disclaimer, portal users must have the Disclaimers service added to their permissions, and Edit configuration permission for at least one domain.
Define the default email disclaimer	Key decisions for inbound and outbound default email disclaimers: <ul style="list-style-type: none"> • Use the predefined text • Use custom text • Do not use a disclaimer
Define custom email disclaimers	Key decisions for inbound and outbound custom email disclaimers: <ul style="list-style-type: none"> • Which domain, custom groups, require a custom disclaimer • If a group requires a custom disclaimer, whether this is required for inbound or outbound emails, or both • Whether any groups do not require a disclaimer <p>NOTE: When you create a new disclaimer, it is disabled until you turn it on.</p>
Define the priority order for your email disclaimers	A user may be a member of more than one group. The email disclaimer that is assigned to their email is the one that has the highest priority in the list.
Enable your disclaimers	Turn the required disclaimers on.
Check the email disclaimer that applies to a user	Check that the expected email disclaimer applies to an individual user with the Lookup Tool. <p>NOTE: Email disclaimers that are turned off do not display in the Lookup Tool's results.</p>

Viewing a List of Existing Email Disclaimers

Your existing email disclaimers are listed in **Services > Email Services > Email Disclaimers > Current Disclaimers**.

Email disclaimers are listed in the portal in priority order. A user may be assigned to more than one group. The disclaimer that is applied depends on the order of disclaimers in the list.

The default disclaimer is always at the bottom of the list. If the list extends over multiple pages, the default disclaimer is shown on the final page. You can change the number of disclaimers visible on the page.

Click the name of a disclaimer in the list to view or edit the details of the disclaimer.

To view the list of existing email disclaimers:

- A list of the current disclaimers displays on the **Services > Email Services > Email Disclaimers > Current Disclaimers** tab.

The following table shows the details in the disclaimers list.

Checkbox	Use the checkbox to select an email disclaimer to delete or to change its priority.
Name	The name of the email disclaimer. Click the name to view or edit the detail of the disclaimer.
Priority	The email disclaimer that is applied for a user depends on the priority order. Each disclaimer is assigned a priority number. Use the priority number when changing the priority of a disclaimer.
Type	<ul style="list-style-type: none"> • Inbound – the disclaimer is applied to inbound emails. No disclaimers are applied for outbound emails. An inbound email is an email that is sent from an external email address to an email address that is within your organization • Outbound – the disclaimer is applied to outbound emails. No disclaimers are applied for inbound emails. An outbound email is an email that is sent from an email address within your organization to an external email address • Inbound & Outbound – the disclaimer contains custom text for inbound and outbound emails. The text may be different for both. • No disclaimer – no disclaimer is applied for either inbound or outbound emails.
Applied to	The number of domains or groups to which the email disclaimer applies. NOTE: If you have not applied any groups to the disclaimer, it is not added to any emails.
On/Off button	Shows whether the email disclaimer is on or off (active or disabled). The On and Off indicators also function as buttons to turn the disclaimer on and off. NOTE: To ensure that no disclaimer is applied for a specific user group, the custom disclaimer that is assigned to the user group must be On and set to No disclaimer . Turning the disclaimer off may result in a lower priority disclaimer being applied.

Viewing the Detail of an Email Disclaimer

To see the detail of an email disclaimer, click through to it from the list of disclaimers. From there you can view or edit the name and text of the disclaimers, and the groups that it is applied to.

To view the detail of an email disclaimer:

- On the **Services > Email Services > Email Disclaimers > Current Disclaimers** tab, locate the disclaimer to view, and click its name.
The details of the disclaimer display.

Detail	Email disclaimer
Name	The name of the disclaimer.
Inbound disclaimer	An inbound email is an email that is sent from an external email address to an email address that is within your organization. <ul style="list-style-type: none"> Custom – shows the text that is applied to inbound emails No disclaimer – no email disclaimer is applied to inbound emails <p>NOTE: The disclaimer must be On or the next disclaimer in the list applies.</p>
Outbound disclaimer	An outbound email is an email that is sent from an email address within your organization to an external email address. <ul style="list-style-type: none"> Custom – shows the text that is applied to outbound emails No disclaimer – no email disclaimer is applied to outbound emails <p>NOTE: The disclaimer must be On or the next disclaimer in the list applies.</p>
This disclaimer currently applies to:	The groups or domains to which the email disclaimer applies.

Viewing the Default Email Disclaimer

Unless you have configured custom disclaimers, the default disclaimer is applied to all of the emails going out and coming in to your organization.

NOTE: The default disclaimer is always at the bottom of the priority list. Any custom disclaimers are applied instead of the default disclaimer for their associated users or domains.

The default email disclaimer is always called **Default**.

The default disclaimer uses the generic text that we have predefined. Or you can define the text to your requirements.

Your disclaimers policy may require some custom disclaimers for specific groups and the default disclaimer for the rest of your users.

NOTE: To turn off the default disclaimer for inbound email or for outbound email, select **No disclaimer** for each direction. To deactivate the default disclaimer completely, either turn the disclaimer **Off**, or select **No disclaimer** for inbound and for outbound email. The result is the same.

To view the default email disclaimer:

- On the **Services > Email Services > Email Disclaimers > Current Disclaimers** tab, locate the disclaimer that is called **Default**.

You cannot apply specific domains or groups to this disclaimer. The message **This disclaimer will be used when a custom disclaimer does not apply** displays at the bottom of the page.

Viewing the Email Disclaimers that Apply to a User

The Lookup Tool enables you look up the domains and groups that a user belongs to and the email disclaimer that is applied to their emails. Look up a user by their email address. If a user belongs to more than one group, multiple email disclaimers may be associated with their email address. The disclaimer that is applied to their emails depends on the order the disclaimers appear in the list. The highest inbound disclaimer and the highest outbound disclaimer are applied.

Look up a user by their email address. If a user does not belong to any groups or domains, only the default email disclaimer is applied to their emails.

Any email disclaimers that are turned off, are not shown in the Lookup Tool's results.

To find the email disclaimers that apply to a user:

1. On the **Services > Email Services > Email Disclaimers > Lookup Tool** tab, enter the full email address of the user.
2. Click **Search**.
The groups and domains to which the user is currently a member are listed.
The disclaimers that apply to the user's groups and domains are listed in order of priority.
Only one disclaimer is applied per email.
3. To see the details of a disclaimer, click its name in the list.
The **Edit disclaimer** page displays.

Changing the Priority of an Email Disclaimer

Only one email disclaimer is applied per email. For an email address that belongs to multiple groups, the order in the list determines which disclaimer is applied.

The default disclaimer always occupies the last place in the list. Therefore, custom disclaimers always take priority. The default disclaimer is applied to all users that are not in any of the groups that have custom disclaimers applied.

To change the priority of an email disclaimer:

1. On the **Services > Email Services > Email Disclaimers > Current Disclaimers** tab, locate the row for the disclaimer to move up or down the list.
2. Identify the priority number in the list to which you want the disclaimer to move.
3. Check the checkbox of the disclaimer to move.
You can only move one disclaimer at a time
4. In the **Change priority to** box, enter the required priority number for the disclaimer to move to.
If you move the disclaimer to a lower position in the list, all of the disclaimers above it move up a place in the list. For example, if you move disclaimer 1 to position 8, the previous disclaimer at position 8 moves up to position 7. The rest of the list updates accordingly.

If you move the disclaimer to a higher position in the list, all of the disclaimers below it move down a place in the list. For example, if you move disclaimer 8 to position 2, the previous disclaimer at position 2 moves down to position 3. The rest of the list updates accordingly.

If you enter a greater number than the final number in the list, the disclaimer is moved to the bottom of the list – just above the default disclaimer.

Turning an Existing Email Disclaimer On or Off

You can turn an email disclaimer on or off. The disclaimer still remains at its position in the list.

If you turn a disclaimer off, it is not applied to emails. You can turn it on again at any time. An active disclaimer is shown with a green light. A disabled disclaimer is shown with a red light. The next applicable disclaimer in the priority list is used.

NOTE: To ensure that no disclaimer is applied for a specific user group, the custom disclaimer that is assigned to the user group must be **On** and set to **No disclaimer**. Turning the disclaimer off may result in a lower priority disclaimer being applied.

When you create a new custom disclaimer, it is turned off until you turn it on.

To turn on an existing email disclaimer:

1. On the **Services > Email Services > Email Disclaimers > Current Disclaimers** tab, locate in the list the disclaimer to turn on.
2. On the right of the row, click **Turn on**.
The disclaimer is now active for the groups that it is applied to.

To turn an existing email disclaimer off:

1. On the **Services > Email Services > Email Disclaimers > Current Disclaimers** tab, locate in the list the disclaimer to turn off.
2. On the right of the row, click **Turn off**.
The disclaimer is now inactive.

Creating a Custom Email Disclaimer

You define the name and the custom text, and the groups that are applied to an email disclaimer.

You can define different text for your inbound and your outbound emails. You can also define **No disclaimer** for your inbound email or outbound email or both. No disclaimer text is applied.

An inbound email is an email that is sent from an external email address to an email address that is within your organization.

An outbound email is an email that is sent from an email address that is within your organization to an external email address.

You select the groups that the disclaimer applies to from the groups that are defined in **Services > Email Services > Platform > Users Groups**. Your user groups can be custom groups or domains.

A newly created disclaimer is set to the lowest priority in the list of disclaimers – just above the default disclaimer. When you first create a custom disclaimer, it is turned off until you turn it on. If you have many email disclaimers, you might not immediately see the new disclaimer in the list. It may be on another page.

NOTE: To define a disclaimer, portal users (other than the primary user) must have the Disclaimers service added to their permissions.

To create a custom email disclaimer:

1. On the **Services > Email Services > Email Disclaimers > Current Disclaimers** tab, click **Create a new disclaimer**.
2. In the **Disclaimer name** box, enter a name for the disclaimer.
You can enter up to 255 characters. You can use double-byte characters. Angle brackets are not allowed: < >
3. Choose the type of inbound disclaimer:
 - To use a custom disclaimer, select **Custom**.
Enter the text for the custom disclaimer.
The text can contain up to 4000 characters. You can use double-byte characters. Angle brackets are not allowed: < >
 - To define no disclaimer, select **No disclaimer**.
The disclaimer text box is not editable. For the members of each group that is assigned to this disclaimer, no disclaimer is applied to the emails that are sent to them from an external email address.
4. Choose the type of outbound disclaimer:
 - To use a custom disclaimer, select **Custom**.
Enter the text for the custom disclaimer.
The text can contain up to 4000 characters. You can use double-byte characters. Angle brackets are not allowed: < >
 - To define no disclaimer, select **No disclaimer**.
The disclaimer text box is not editable. For the members of each group that is assigned to this disclaimer, no disclaimer is applied to the emails that they send to an external email address.
5. To add the required groups or domains, click **Add group**.
The groups and domains that are available to add are visible in the list. Use the search box to help you locate the groups to add.

The list only displays the groups that are not already assigned to another custom disclaimer. The search box is not case-sensitive. You cannot enter angle brackets (< >) in the search box.

You can search according to group type.

All	All groups display: custom and domain.
Custom	Custom groups are those that you create manually in the portal or by uploading a CSV file to the portal.
Domain	A domain group contains all email addresses associated with a domain.

6. Check the checkboxes next to the groups to add, and click **Add Selected**.
7. Click **Save**.
A confirmation message displays.

Editing an Email Disclaimer

You can edit the name and the email disclaimer text, and groups that are applied to an existing disclaimer.

To edit an email disclaimer:

1. On the **Services > Email Services > Email Disclaimers > Current Disclaimers** tab, locate the disclaimer to view, and click its name.

The details of the disclaimer display:

Name	The name of the disclaimer.
Inbound disclaimer	<p>An inbound email is an email that is sent from an external email address to an email address that is within your organization.</p> <ul style="list-style-type: none"> • Default – this setting is only available for the default disclaimer. This text can be the predefined generic text or the text that you define for your organization. • Custom – shows the text that is applied to inbound emails • No disclaimer – no email disclaimer is applied to inbound emails
Outbound disclaimer	<p>An outbound email is an email that is sent from an email address within your organization to an external email address.</p> <ul style="list-style-type: none"> • Default – this setting is only available for the default email disclaimer. This text can be the predefined generic text or the text that you define for your organization. • Custom – shows the text that is applied to inbound emails • No disclaimer – no email disclaimer is applied to inbound emails
This disclaimer currently applies to:	The groups or domains to which the email disclaimer applies.

2. Edit the details as required.
3. Click **Save changes**.

Deleting an Email Disclaimer

You can delete an existing email disclaimer. For an email address that is associated to the deleted disclaimer, the next disclaimer in the list that applies is used.

If you might want to use the disclaimer again, instead of deleting it you can turn off the disclaimer. You can turn it on again when you want.

You can delete multiple disclaimers at a time.

You cannot delete the default disclaimer.

To delete an email disclaimer:

1. On the **Services > Email Services > Email Disclaimers > Current Disclaimers** tab, locate in the list the disclaimer to delete.
2. Check the checkbox to the left of the disclaimer's name.
3. Click **Delete selected**.
4. Confirm that you want to delete the disclaimer.
The disclaimer is removed from the list.

Enabling an Administrator to Configure Email Disclaimers

You must enable a portal user to configure email disclaimers. Add the Disclaimers service to the required user's standard or custom role.

The primary portal user can configure disclaimers by default. For other users, provided they have permission to edit configuration for at least one domain, they can edit disclaimers for the whole organization.

You can enable a user with the **Edit configuration** and **View configuration** roles.

Users with the **View configuration** role, can see email disclaimers, but not edit them.

To enable an administrator to configure email disclaimers:

1. Select **Administration > User Management**.
2. Either edit an existing user or create a new user, as appropriate.
3. On the **User Roles** tab, select either **Use standard role** or **Create custom role**.
If you create or edit a custom role, choose the **Edit configuration** role.
4. In the **Service** section, ensure that the **Disclaimers** service is selected.
5. To save the configuration, click **Add Role** or **Append Role**, depending on whether a custom role or a standard role is configured.

Working with User Groups

About User Groups

A user group is a set of users to apply to in sender and recipient conditions in your Content Control rules and for your Email Disclaimers.

Users and groups can derive from these sources:

- Custom users and groups
- Domains

Custom users and groups

Create and edit custom users and user groups in the portal. Custom user groups can be viewed in the portal. You can also upload a CSV file listing custom users in a group. Custom groups are useful if you want to include users in the groups that are not stored in your directory data. For example, you can add external email addresses to your custom groups.

The following characteristics apply to user groups:

- A group can consist of a single user
- A user may belong in more than one group
- If a group is defined at global level, it can contain users from different domains
- A group must have at least one user assigned to it
- A group can contain up to 1,000,000 users

You can manage custom groups and users, at global and domain level:

- **Global level** – enables groups to be managed across all domains
- **Domain level** – enables you to manage user groups specific to that domain.

You can use a group that is defined at the global level in a Content Control rule that is specific to an individual domain. A Content Control rule set for a domain applies only to those members of the user group who belong to that domain.

Only groups defined at global level can be assigned to Email Disclaimers.

NOTE: For Content Control rules, you can also detect email according to the domains that it is sent to or from. For this, use domain lists in your sender and recipient conditions.

Viewing User Groups

You can view your custom user groups in the portal.

To view your user groups:

1. Select **Services > Email Services > Platform**.
2. Click the **User Groups** tab.

The custom user groups available at the level you have selected (global or domain) are listed with the following details:

Group Name	For custom groups, click the group name to view full details of the group and its members in the Edit User Group page.
Group Type	Displays whether the group is a custom group.
Members	Displays the number of users in the group.
Content Control Rules	Displays whether the group is used in any rules.
Disclaimers	Displays whether the group has a custom email disclaimer applied to it. You can only assign a group to a single custom disclaimer.
Last Updated	Displays the date and time the group was last edited.

Only 500 groups are displayed at a time. To avoid too long a list, search using the **Group name** box and the **Group type** filter. The **Group name** search box accepts wildcards for partial matching. The wildcard * is interpreted as zero or more unknown characters, for example, W*d finds words including **Wild** and **Withheld**.

To view the members of a custom user group:

1. Select **Services > Email Services > Platform**.
2. In the **User Groups** tab, click the name of the group to view in the **Group name** column. The **Edit User Group** page displays. The users in the group are listed in the **Group members** box. To locate a specific group member, use the **Email address search** box. Enter a full email address or a partial email address to search for.

Creating a Custom User Group

You can create a user group manually in the portal and add existing or new email addresses (users) to it.

You can also create and edit the users in a group in a CSV file and upload the file to the portal.

To create a custom user group:

1. Select **Services > Email Services > Platform**.
2. In the **User Groups** tab, click **Create new group**. The **Create Group** page displays.
3. Enter a name for the user group. The user group name must be unique, contain alphanumeric characters and spaces (but no other character types), and begin with an alphabetic character. Double-byte characters are not supported.
4. Search for an existing user by using the **Email address search** box.
5. Select the required user in the **Available users** box. The search affects both the **Available users** and **Group members** boxes. Up to 500 users display. To display fewer users, refine your search criteria.

The available users are those harvested from the emails that are sent from your organization, and those previously added manually or uploaded to a group.

6. Click **Add**.
The email address is added to the **Group members** box.
7. Click **Save**.

Creating a User for a Custom Group

You can create a new user to add to a custom group.

To create a new user for a custom group:

1. Select **Services > Email Services > Platform**.
2. In the **User Groups** tab, locate and select the group for which to create the new user.
The **Edit User Group** page is displayed.
3. Add the new email address in the **New users** box.
4. Click **Save**.

Editing a Custom User Group Using a CSV File

You can maintain a custom user group using a CSV file. Use a CSV (comma-separated values) file to create or edit a list of the users that belong to a user group. You can add new email addresses or edit existing ones offline. Then upload the list to the portal. The file to upload must be a CSV file.

You can download the list again at any time, to make further changes.

To download a list of users in a custom user group:

1. Select **Services > Email Services > Platform**.
2. In the **User Groups** tab, locate the name of the group to download and click the **[Download]** button.
A dialog box asks you whether to open or save the CSV file.
The download operation may take some time to complete depending on the size of the list.

To edit a CSV list of users in a group:

1. Open a new or a previously downloaded CSV file.
2. Edit the file to your requirements.
The file contains a list of your users' email addresses in the first column. You can use the second column for associated descriptions (optional).
To simplify the list, use wildcards to detect email addresses with slight differences in spelling, for example, `fre*@domain.com` represents `fred@domain.com` or `freda@domain.com`.
3. Save the file as a CSV file.

To upload a list of users for a custom user group:

1. Select **Services > Email Services > Platform**.
2. In the **User Groups** tab, select the Upload button next to the name of the group to upload the

email addresses to.

The **Upload users** window displays.

3. In the **Select file to upload** field, enter the file path and file name to upload or click **Browse** to locate the file.
4. Select either:

Delete existing addresses and replace with uploaded addresses

The uploaded list replaces the existing list. Any entries in the existing list that are not in the uploaded list are lost.

Merge existing addresses with uploaded addresses

The uploaded list merges into the existing list. This is a useful way to add new entries to an existing list.

5. Click **Upload**.
If the file contains invalid entries, an error message displays the first 100 invalid addresses but continues to upload all the valid addresses. If this displays, click **OK**.
A confirmation message displays.
6. Click **OK**.

Editing a Custom User Group Manually

You can maintain a custom user group manually in the portal. You can edit the group name, and add and remove users from the group.

You cannot delete a user group if it is in use in a Content Control rule or has a custom email disclaimer applied to it. Deleting a user from a group does not permanently delete the user, but merely removes it from the user group or groups that it is associated with.

To edit a custom user group manually:

1. Select **Services > Email Services > Platform**.
2. In the **User Groups** tab, click the name of the required group.
The **Edit User Group** page displays.
3. Edit the group name if required.
4. Edit the group details as required.
Locate a user using the **Email address** search box. Add or remove the users as required.
Only 500 users are displayed at a time. To avoid too long a list, narrow your search criteria.
5. Click **Save**.

To delete a custom user group:

1. Select **Services > Email Services > Platform**.
2. In the **User Groups** tab, select the checkbox next to the name of the group to delete.
3. Click the **[Delete selected group(s)]** button.
4. Click **OK** to confirm.

To delete a user from a custom user group:

1. Select **Services > Email Services > Platform**.
2. In the **User Groups** tab, select the checkbox next to the group name that contains the user to delete.
3. Click **Delete users**.
The **Delete Users** window displays.
4. Locate an existing user, using the **Search existing users** box.
If you leave the box blank, an alphabetical list of all available users displays in the **Existing users** box. To avoid the list becoming too long, only the first 500 users are shown.
If more than 500 users are available, use the search facility to reduce the list size.
5. Highlight the required user and click **Delete Users**.
The address of the user to delete is displayed in the **Deleted users** box.
6. When you have selected the users to delete, click **Delete Users** at the bottom of the page.