Stationery Management

Mimecast Training

Student Workbook

V 1.2
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Chapter 1: Mimecast Infrastructure

What is Mimecast?

Mimecast delivers cloud-based email management services, including Security, Archiving and Continuity. By unifying disparate and fragmented email environments into one holistic solution that is always available from the cloud, Mimecast minimizes risk and reduces cost and complexity, while providing total end-to-end control of email. Founded in the United Kingdom in 2003, Mimecast serves thousands of customers worldwide and has offices in Europe, North America, Africa, and the Channel Islands.

Software-as-a-Service (SaaS)

Mimecast provides email services from the internet, also referred to as the cloud, delivered through a SaaS model. In simple terms, this means that Mimecast will handle your email data in a secure way, and deliver it to your existing infrastructure. The benefit of this SaaS model is that it is always accessible, 100% of the time, and all you need is an internet connection to access your emails.

The SaaS solution is made available through two physically separate data centers. In the event of infrastructure outage, emails will continue to flow to the alternative data center. This event is completely seamless, and ensures 100% email Continuity.
Mimecast Services

The available service features will depend on your specific Mimecast service subscription. Mimecast’s current service portfolio is outlined in the table below, and shows which areas of email management are included in each service.

<table>
<thead>
<tr>
<th>Service</th>
<th>Security</th>
<th>Continuity</th>
<th>Archiving</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mimecast UEM Enterprise</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Mimecast UEM Express</td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mimecast Email Security</td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mimecast Email Continuity</td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mimecast Email Archive</td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mimecast File Archive</td>
<td></td>
<td></td>
<td>Add-On</td>
</tr>
</tbody>
</table>

Mimecast Stationery

In addition to the core services, Mimecast offers additional functionality for email branding components to be applied to regular day-to-day emails. Features include the standardization of your email branding, and dynamic assignment of brand elements for brand promotion. Some of these components are:

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disclaimers</td>
<td>A text component designed to mitigate risk for the organization and adhere to compliance regulations</td>
</tr>
<tr>
<td>Images</td>
<td>Graphic elements to improve the look and feel of email messages</td>
</tr>
<tr>
<td>Click Actions</td>
<td>Activity-based tools that serve to redirect users on click, and to track click activity</td>
</tr>
<tr>
<td>Micro Sites</td>
<td>Simple web pages hosted within Mimecast</td>
</tr>
<tr>
<td>Clickable Links</td>
<td>Text links that can have Click Actions assigned to them</td>
</tr>
</tbody>
</table>

Note: Mimecast branding components can only be applied to emails that are processed by Mimecast. Internal emails do not normally pass through the data centers before they are delivered, and it is therefore not possible to apply Mimecast branding components to these communications.

Note: Mimecast is not intended as a bulk email service. For more information, contact your Mimecast representative.
Chapter 2: Navigation

Logging In

To access the Mimecast Administrator Console, visit our website: http://www.mimecast.com. Click on the Log In link on the top right side of the screen.

The Log In dialogue box is displayed. Select the Mimecast Administrator Console from the list, then enter your email address in the available field. Click the Continue link.

The Administrator Console login page is displayed. Complete your password, and click the Log In button.

Note: Your password could be your network password (this is dependent on Directory Sync configuration), or it could be your local Mimecast password.
General Navigation

The Administrator Console is based on a number of Application menus, which are displayed at the top of the screen. Top-level menus can be selected directly, or hover over the top tab to display sub-menus. The selected tab is highlighted in orange.

Icons and Buttons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Refresh Icon" /></td>
<td>The Refresh button will reload current page information</td>
</tr>
<tr>
<td><img src="image" alt="Back Icon" /></td>
<td>The Back button displays the previously viewed page. The back button in the browser window should not be used.</td>
</tr>
<tr>
<td><img src="image" alt="Selection Icon" /></td>
<td>Selection menus are displayed for some areas at the top of the screen in the grey toolbar, and are used for context options for that area.</td>
</tr>
<tr>
<td><img src="image" alt="Close Icon" /></td>
<td>The Close button will close a tab, or delete search parameters</td>
</tr>
<tr>
<td><img src="image" alt="Search Icon" /></td>
<td>The Search field is displayed at the top of list screens for context searches.</td>
</tr>
<tr>
<td><img src="image" alt="Depth Selector Icon" /></td>
<td>The Depth Selector controls the number of records, or rows, displayed in a list.</td>
</tr>
<tr>
<td><img src="image" alt="Page Selector Icon" /></td>
<td>Page Selector buttons navigate between pages of displayed list items.</td>
</tr>
<tr>
<td><img src="image" alt="Calendar Icon" /></td>
<td>Calendar Controls are used to set date parameters as a filter.</td>
</tr>
</tbody>
</table>

Folder Control

Folders are used to keep your Mimecast account organized, so items can be stored in logical folders for easy reference. Folders will display to the left side of the screen for specific tabs only, and are created from a Root folder.
When working with Stationery, folders will typically be used to contain Stationery Layouts, and can also be used to store user/domain addresses. Folders that store addresses are called Groups.

Note: The folder content depends on the area in which the folder is created.

Use the icons and buttons below to modify folders:

<table>
<thead>
<tr>
<th>Icon/Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>+</td>
<td>Create a new folder or sub-folder</td>
</tr>
<tr>
<td></td>
<td>Expand a folder to display sub-folders</td>
</tr>
<tr>
<td>X</td>
<td>Delete an empty folder</td>
</tr>
<tr>
<td></td>
<td>Rename a highlighted folder</td>
</tr>
<tr>
<td></td>
<td>Move an existing folder to a different location</td>
</tr>
</tbody>
</table>

The number of items within the folder is displayed to the right of the folder name.

Groups, located within the Directories menu, are folders that contain user email addresses or domain names. These lists of users can be referenced by Stationery Assignment or Stationery Exclusion Policies, which makes the management and upkeep of these policies very simple.
Building Groups

Addresses can be added to Groups by using the Build button in the toolbar. Individual addresses or domain names can be added, and a spreadsheet can be used for bulk imports. A Group Builder is also available to populate Groups based on several types of rules.

AD Groups

Mimecast can synchronize Directory Groups from the network Directory, such as Microsoft Active Directory. These AD Groups can also be referenced by Mimecast Policies, just like the local Groups.

Note: AD Groups are synchronized only if a Directory Sync connector has been configured.

Exercise: Stationery Navigation

- Log in to Mimecast
  1. Visit the Mimecast website: http://www.mimecast.com
  2. Click on the Log In link
  3. Select Mimecast Administration Console
  4. Enter your email address
  5. Click the Continue link
  6. Complete your password
  7. Click the Log In button

- Navigate to different Application menus
  1. Click on the Stationery menu
  2. Click on the Reports menu

- Work with Groups
  1. Navigate to the Layouts menu
  2. Click on the Add Folder icon to the left of the Root folder
  3. Select the New Folder created in the list
  4. Use the Viewing Group field at the top of the folder list to rename the folder
  5. Delete the empty folder using the Delete icon
Chapter 3: Planning Stationery

Stationery Brief

Before a Stationery Layout is created, it is important to plan:

1) The structure of the Stationery Layout
2) The resources required to prepare the Layout

The Brief will help identify and map the required resources that need to be in place before creating the Stationery Layout, and reduces the build time to produce a successful Layout.

Creating a Brief

The components to be used in the Layout have to be planned in two formats: HTML and Plain Text. It is a requirement to create both formats when building a Stationery Layout, as some mail servers do not accept HTML content. A Policy is used to apply Stationery Layouts to emails and should also be scoped.

Note: The table below contains some suggestions for a Layout. It is important to keep in mind that the design of your Layout is completely dependent on what the organization wants to achieve.

<table>
<thead>
<tr>
<th>HTML Brief</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>HTML Design Example 1:</td>
<td>Message Body:</td>
</tr>
<tr>
<td></td>
<td>- Tag: <code>&lt;MC Type='body'&gt;</code></td>
</tr>
<tr>
<td></td>
<td>- Text format</td>
</tr>
<tr>
<td></td>
<td>Logo:</td>
</tr>
<tr>
<td></td>
<td>- Tag: <code>&lt;MC Type='clickimage' code='name'&gt;</code></td>
</tr>
<tr>
<td></td>
<td>- Image: JPG, JPEG, PNG AND GIF format</td>
</tr>
<tr>
<td></td>
<td>- Click Action:</td>
</tr>
<tr>
<td></td>
<td>- Redirect to Website URL</td>
</tr>
<tr>
<td></td>
<td>- Collect email address when clicked</td>
</tr>
<tr>
<td></td>
<td>Signature:</td>
</tr>
<tr>
<td></td>
<td>- Tag: <code>&lt;MC Type='variable' source='from' attribute='attributename'&gt;</code></td>
</tr>
<tr>
<td></td>
<td>- Attributes: Signature elements to include</td>
</tr>
<tr>
<td></td>
<td>Vertical Banner:</td>
</tr>
<tr>
<td></td>
<td>- Tag: <code>&lt;MC Type='clickimage' code='name'&gt;</code></td>
</tr>
<tr>
<td></td>
<td>- Image: JPG, JPEG, PNG AND GIF format</td>
</tr>
<tr>
<td></td>
<td>- Click Action:</td>
</tr>
<tr>
<td></td>
<td>- Redirect to Micro Site</td>
</tr>
<tr>
<td></td>
<td>- Direct link to Micro Site</td>
</tr>
<tr>
<td></td>
<td>- Don’t record email address</td>
</tr>
<tr>
<td>HTML Design Example 2:</td>
<td>Disclaimer:</td>
</tr>
<tr>
<td></td>
<td>- Text content</td>
</tr>
<tr>
<td></td>
<td>- Text Format</td>
</tr>
</tbody>
</table>
### TEXT Brief:

<table>
<thead>
<tr>
<th>Plain Text Example 1:</th>
<th>Resources</th>
</tr>
</thead>
</table>
| **Message Body (1)** | - Message Body:  
  o Tag: `<MC Type='body'>`  
| **Signature (2)**    | - Signature:  
  o Tag: `<MC Type='variable' source='from' attribute='attributename'>`  
| **Disclaimer (4)**   | - Attributes: Signature elements to include  
|                      | - Promotional Text  
|                      |  o Text content  
|                      | - Disclaimer:  
|                      |  o Text content |

Note: Only Mimecast HTML tags can be used in the Plain Text Layout.

<table>
<thead>
<tr>
<th>Plain Text Example 2:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Message Body (1)</strong></td>
</tr>
<tr>
<td><strong>Promotional Text (3)</strong></td>
</tr>
<tr>
<td><strong>Signature (2)</strong></td>
</tr>
<tr>
<td><strong>Disclaimer (4)</strong></td>
</tr>
</tbody>
</table>

### POLICY Brief:

<table>
<thead>
<tr>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Policy Application: Senders/Recipients</td>
</tr>
<tr>
<td>2) Policy Validity: Start and End Dates</td>
</tr>
<tr>
<td>3) Policy Exclusion: Bypass rules</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) User Groups or Distribution Lists</td>
</tr>
<tr>
<td>2) Consideration: Policy randomization</td>
</tr>
<tr>
<td>3) User Groups or Distribution Lists</td>
</tr>
</tbody>
</table>

Note: During the design phase, the Short Code override can be used for testing purposes. This is described in greater detail later in this module.

### Exercise: Stationery Brief

- **Create a Brief**
  1. Draw out a Brief for your Stationery Layout. Include the HTML and Plain Text versions, and review the Policy options.

- **Considerations:**
  1. If images are going to be used, they must be prepared in JPG, JPEG, PNG AND GIF format
  2. If clickthrough action is required, what is the destination:  
    i. Internet URL
    ii. Mimecast Micro Site
  3. Is statistical tracking a requirement?
  4. Should the recipient email address be collected?

- **Detail the required resources in light of the considerations above.**
Chapter 4: Images

Working with Images

Images can be used to greatly improve the look and feel of email, and are important components to relay your branding elements to the recipient. The use of images depends on the needs of the organization, but elements such as company logos, or promotional banners (vertical or horizontal) can also be used.

When designing Stationery Layouts, an important consideration is that of using embedded images (which form part of the message body), or to use linked images (which are called for from a web server when the message is read). Although embedded images do impact on the physical size of the email, linked images may be blocked by the security systems of your email client, and do not automatically display.

In order to reduce the possibility of the images being blocked, the following image parameters should be used:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Format: JPG, JPEG, PNG AND GIF (Required)</td>
<td>JPG, JPEG, PNG AND GIF images are natively less dangerous than other image types, as they cannot contain malicious code. Many security devices are configured to block or strip other image types.</td>
</tr>
<tr>
<td>Color Scale: RGB</td>
<td>JPG, JPEG, PNG AND GIF images are created using RGB as a default color scale, which assists to reduce the physical size.</td>
</tr>
<tr>
<td>Resolution: 72 dpi</td>
<td>For print purposes, a high resolution is best for maximum quality output of the image, but for on-screen viewing, a lower resolution will be sufficient. A high resolution also increases the physical size of the image.</td>
</tr>
<tr>
<td>Horizontal Size: 270 px</td>
<td>For most viewers, the landscape takeover for images larger than 270 pixels in width or 100 pixels in height will result in the image falling off the edge of the screen – requiring the use of a scrollbar to view the entire image.</td>
</tr>
</tbody>
</table>

Images are stored in the Image Library, which is located in the Stationery menu | Images. As a clickable HTML component, it is also possible to assign a Click Action to the image for tracking and redirect purposes. More information on Click Actions is available later in this module.
Exercise: Stationery Images

- Prepare an image that can be imported to the image library, using the following parameters:
  - JPG, JPEG, PNG AND GIF format
  - 72 dpi

- Upload an image
  - Navigate to the Stationery menu
  - Select the Images menu
  - Create a new folder to save the image, e.g. Training Folder

  Note: If a folder is not created, the image is stored in the root folder

  - Click on the New Stationery Image button
  - Click on the Browse button
  - Select the image to be imported
  - Click on the Upload Image and Preview button

  Note: The physical landscape size is displayed at this point

  - Click on the Save button
  - A thumbnail of the image is displayed

  Note: Distortions of the image may occur – this only affects the thumbnail

  - Repeat this process for any additional images that are required
Chapter 5: Click Actions

Clickable HTML components

Some HTML components, such as images and text, can be used to redirect recipient clicks or collect recipient email addresses. A Click Action is required for this purpose, and is assigned to the HTML component.

Working with Click Actions

Click Actions can be assigned to multiple components across several Stationery Layouts. For example, an Action used in one Stationery Layout for the company logo can also be used in several other Layouts that contain the same logo. The following table outlines the functionality provided by a Click Action:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Log Click Activities</td>
<td>Ensures that statistical data is retained for reporting purposes</td>
</tr>
<tr>
<td>Log Unique Clicks Only</td>
<td>Records activity for unique recipients only</td>
</tr>
<tr>
<td>Click Destination Type</td>
<td>Redirects the user to the supplied URL or to a pre-defined Micro Site</td>
</tr>
<tr>
<td>Profile Group Settings</td>
<td>Adds/Removes email address entries in a pre-defined Group</td>
</tr>
<tr>
<td>Set Attribute</td>
<td>Configures Attribute data for the recipient user profile</td>
</tr>
</tbody>
</table>

Note: It is possible to create re-direct links for components such as images, so that a Click Action does not have to be used. However, no tracking or statistical information is gather for these direct links.

Exercise: Click Actions

- Create a Group
  1. Navigate to the Directories menu, and select the Groups menu
  2. Create a Group that can be used to store email addresses, e.g. Newsletter Subscribers

- Create a Click Action
  1. Navigate to the Stationery menu, and select the Actions menu
  2. Click on the New Click Action button
  3. Complete the fields as follows:
     i. Check both the Log Click Activities and the Log Unique Clicks Only checkboxes
     ii. Click Destination Type: Select Re-direct to Internet URL, and specify the destination address. Note: The full URL must be used, e.g. http://www.mimecast.com
  4. For the Click Adds to Group field, use the Lookup button to select the Group created earlier
  5. Click the Save and Exit button to save the Action.
Chapter 6: Micro Sites

Micro Sites

Mimecast Micro Sites are small HTML pages that are hosted within our infrastructure. These pages are useful to redirect users to, in order to deliver compact but effective messages. Some examples of use would be a landing page for newsletter subscribers to confirm their subscription status, or a simple product promotion page.

A Micro Site is assigned to a Click Action, and the Click Action is in turn assigned to a clickable HTML component included in a Stationery Layout. When a recipient receives an email which includes this component, they are redirected to this Micro Site if they click on the component.

Note: Micro Site content can be purely HTML code only, or it can include a JPG, JPEG, PNG AND GIF image.

The fields used to configure a Micro Site are detailed below.
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>The Micro Site name</td>
</tr>
<tr>
<td>Page Title</td>
<td>The title of the web page displayed at the top of the web browser when the page is viewed</td>
</tr>
<tr>
<td>Background Color</td>
<td>The Site background colour (this field supports HTML Hex codes)</td>
</tr>
<tr>
<td>Site URL</td>
<td>This automatically generated URL is the internet link used to access the Site</td>
</tr>
<tr>
<td>Image Alternate Text</td>
<td>The tooltip displayed when the mouse pointer is hovered over the Micro Site image</td>
</tr>
<tr>
<td>Clickthrough URL</td>
<td>The URL that is redirected to when the Micro Site image is clicked</td>
</tr>
<tr>
<td>Upload Site Image</td>
<td>The image, in JPG, JPEG, PNG AND GIF format, that is uploaded to display above the Micro Site</td>
</tr>
<tr>
<td>Upload Site HTML</td>
<td>The HTML or HTM document to be used as the contents of the site</td>
</tr>
</tbody>
</table>

**Exercise: Stationery Micro Sites**

- Create a Micro Site
  1. Create an HTML document
- Upload the Micro Site
  1. Navigate to the Stationery menu | select the Micro Sites menu
  2. Click on the New Micro Site button
  3. Add a Description for the new Site
  4. Add the Page Title to be used
  5. Use the Browse button for the Upload Site HTML field to select your HTML document
  6. Click the Site Preview button to upload the Site content and preview the output
  7. Click on the Save and Exit button to save the Micro Site.
Chapter 7: Layouts

Stationery Layouts

Each Layout is created in two formats: HTML and Plain Text. Both of these formats contain components, which should be scoped by using a Brief as discussed earlier in this module.

Note: Only one Layout can be applied to one email message.

When a Layout is created, it must be completed with all its components. It will be necessary to create the required components before beginning the process of creating the Layout, as follows:

- **Resource Requirements:**
  1. Groups
  2. Images
  3. Micro Sites
  4. Click Actions

- **Create Stationery Layout**
  1. Customize HTML code
  2. Configure HTML components
  3. Configure Plain Text components

- **Testing Layout**

**Resource Requirements**

Not all of the resources mentioned above are required. Resources should be prepared in accordance to the brief, which is based on the requirements of the organization for this Stationery Layout.

**Create Stationery Layout**

Once the required resources are in place, a new Stationery Layout is created within the Stationery menu | Layouts.

The default HTML Layout template is displayed. First, the Layout properties must be completed, as detailed in the following table.
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>A descriptive name for this Layout. It is recommended to list the components used in the Layout for ease of reference, e.g. Logo with redirect to website, disclaimer.</td>
</tr>
<tr>
<td>Unique Identification Text</td>
<td>The UIT is used to identify an email that has already had a Stationery Layout applied to it. This Unique Text ensures that the same Layout is not applied repeatedly to a chain of email responses.</td>
</tr>
<tr>
<td>Short Code</td>
<td>A unique reference for this Layout which is especially useful for the testing phase.</td>
</tr>
<tr>
<td>Create Missing HTML Body</td>
<td>Ensures that Mimecast will transmit the HTML content by default. If not selected, the Plain Text content is transmitted by default.</td>
</tr>
<tr>
<td>Link Images (Embedded by Default)</td>
<td>If checked, images are not placed within the message body, but are instead linked to. An active internet connection is required to download and view the images, each time the message is opened.</td>
</tr>
</tbody>
</table>

Once the Layout properties are completed, the HTML design of the Layout can be customized. Click on the Edit HTML button to access the HTML code editor.

Note: Mimecast provides pre-defined Layout Templates for easy implementation. Use the Select Layout button to access the template library, and select a suitable template.

Use the HTML editor to customize the content of the Layout, and if required, the legal disclaimer and other HTML components can be added. Click on the Save and Exit button to save the changes made to the HTML. The included components must now be configured, and are represented in the HTML Construction View. To configure a component, such as an image, click on it, and complete the component properties.

Once the components have been saved, the Plain Text version of the Layout must be completed. Click the Toggle – Plain Text button to switch to the Plain Text View.

Note: The properties of the Layout remain the same, as the Plain Text view is part of the same Layout as the HTML content.

Click the Edit Plain Text button to edit the Plain Text editor. Customize the components, such as Attributes and disclaimers, then click the Save and Exit button. A Plain Text preview is displayed. If the output is correct, click the Save and Exit button again to save the Stationery Layout.

Note: Only Mimecast HTML tags are supported by the Plain Text editor – regular HTML tags cannot be used, and line spacing is created manually.
Testing Layouts

When the Stationery Layout has been saved successfully, it is important to test the Layout to ensure that the components are displayed correctly, and that any clickable actions function as expected. Create a new email message, and send a test email to an external email address. Modify the subject line to use the Short Code of the Layout, so that the Layout is applied to this specific instance of the message:

<ins shortcode>Regular Subject line</ins>

Signatures

It is possible to insert Attributes for signatures. More information is provided in our online training videos.

Exercise: Stationery Layouts

- **Prepare required resources**
  1. Create a Group called Logo Click
  2. Upload an Image for use as a Logo
  3. Create a Click Action to assign to the Logo. The Action should be configured to redirect to an internet URL (such as the organization’s website), and to capture the email address in the Logo Click Group
- **Create a Layout**
  1. Navigate to Stationery menu | Layouts
  2. Click the New Stationery Layout button
  3. Add a Description for the Layout, e.g. Training Logo with Redirect and Disclaimer
  4. Add a Short Code for the layout, e.g. logodisc
  5. Click the Edit HTML button
  6. Replace the second `<mc type=clickimage code=imagebottom>` tag with the HTML disclaimer
  7. Click on the Save and Exit button
  8. Click on the yellow image placeholder
  9. Configure the image properties to utilize the Click Action and Image configured within the resources above
  10. Click on the Save and Exit button
  11. Click the Toggle Plain Text button
  12. Click the Edit Text button
  13. Add the disclaimer to the text editor
  14. Click the Save and Exit button
  15. Click the Save and Exit button to save the Stationery Layout
- **Test the Layout**
  1. Compose a new email message
  2. Address the email to an external address
  3. Modify the subject line as follows: <ins logodisc>Mimecast Stationery Test</ins>
  4. Add some message body, and send the email
  5. Check the received email and verify the output. Click on the Logo to verify the click activity redirects successfully.
  6. Check the Group to ensure that the email address has been captured.
Chapter 8: Policies

Policy Lists

Mimecast Policies are a set of rules that affect the flow of email traffic, and are applied to either Inbound or Outbound messages. The available Policies allow an Administrator to apply granular control to the flow of email messages as they are processed by Mimecast.

Policies can be set to affect emails in many ways - email flow can be halted (Hold for Review, or Block Policies), data leaks can be prevented (Content Examination, or Document Conversion Policies), and Attachment Handling and Spam Policies can also be applied.

All available Policies are consolidated in a dedicated Gateway Policy Editor within the Gateway menu. By selecting any of the Policy types, an Administrator is able to create new policies, and amend or remove existing policies. The Policy Editor should also be used to configure Policy definitions which are used to apply even more granular control to certain policies.

Policy Editor

The Policy Editor is used to create or amend Policies in Mimecast. If the policy is set to Active, as soon as the changes are Saved, the Policy will take effect based on the parameters specified in the Policy.

Navigate to the Gateway menu, and select the Stationery Assignment or Stationery Exclusion Policy that you would like to manage. Click on an existing Policy to edit it, or click on the New Policy button to create a new Policy.
Specificity

Specificity relates to the order in which Mimecast applies Policies to emails. The more specific a Policy is, the higher the priority. For example, a Policy specifying a single individual email address is very specific and will be applied first, in contrast to a Policy applied to Everyone which is the least specific of all, and will therefore be applied last.

Validity

Validity parameters control the application of a Policy to an email. An Active Policy is applied to emails, and an Expired Policy is ignored by Mimecast. Validity can be controlled manually, and Policies can also be automatically set to expire on a certain date. By default policies are set to apply Eternally.

Policy Validity also allows certain options to be applied to Policies, e.g. bi-directional Policy application, Policy override, and adding Source IP addresses.

An Override changes the order of selection for a list of Policies. When an Administrator needs to force Mimecast to ignore specificity, they can apply the Override option - Mimecast will apply the Policy with the Override before it applies the other Policies.

Policy Order

Mimecast Policies are applied in a specific order to emails that are processed for delivery. A full Policy Processing flowchart is available from download from our Knowledge Base. The table below outlines a high-level view of the Policy flow:
Exercise: Stationery Policies

- Use a Policy to assign a Stationery Layout for your outbound email
  1. Navigate to the Gateway menu, and select the Policies menu
  2. Select the Stationery Assignment Policy, and click on the New Policy button
  3. Add a description in the Narrative field: Test Stationery Layout
  4. Use the Policy Options field to select the required Layout
  5. Within the Emails From section, change the Applies From field from the Everyone option to Individual Email Address. The page refreshes to display the Specifically field
  6. Enter your internal email address within this field (i.e. the email address from where you will send the test email message)
  7. Within the Emails To section, change the Applies To field from the Everyone option to Individual Email Address. The page refreshes to display the Specifically field
  8. Enter your external email address within this field (i.e. the email address to which you will send the test email message)
  9. Use the Date Range calendar control to adjust the Policy Validity so that the Policy applies for today’s date only
  10. Click the Save and Exit button to save the Policy
  11. Using the email address specified in the Emails From section, send a test email to the address specified in the Emails To section. The email should be delivered including your Layout
  12. Return to the Policy in the Mimecast Administration console, and right-click it to remove it.

- Create a Stationery Exclusion Policy
  1. Navigate to the Gateway menu, and select the Policies menu
  2. Select the Stationery Exclusion Policy, and click on the New Policy button
  3. Add a description in the Narrative field: Test Stationery Layout
  4. Use the Select Option field to Exclude Stationery from Email
  5. Within the Emails From section, change the Applies From field from the Everyone option to Individual Email Address. The page refreshes to display the Specifically field
  6. Enter your internal email address within this field (i.e. the email address from where you will send the test email message)
  7. Within the Emails To section, change the Applies To field from the Everyone option to Individual Email Address. The page refreshes to display the Specifically field
  8. Enter your external email address within this field (i.e. the email address to which you will send the test email message)
  9. Use the Date Range calendar control to adjust the Policy Validity so that the Policy applies for today’s date only
  10. Click the Save and Exit button to save the Policy
  11. Using the email address specified in the Emails From section, send a test email to the address specified in the Emails To section. The email should be delivered excluding your Layout
  12. Return to the Policy in the Mimecast Administration console, and right-click it to remove it.
Chapter 9: Reports

Stationery Reports

Mimecast provides detailed reports on Stationery statistics, such as the number of Stationery Layouts sent, and the number of clicks that were generated through the Stationery Layouts. Reports can be generated for individual Stationery Layouts, or for all overall Layouts. Customized reports are also available.

Note: It is also possible to record email addresses of recipient clicks. More information is detailed in the Groups section of this module.

Reports can be accessed in several ways:

1) Open an existing Layout that has had click activity, and use the Reports menu
2) Right-click an existing Layout and select from the contextual menu
3) Click the Reports menu within the Stationery menu to access report information across multiple Layouts.

Exercise: Stationery Reports

- Navigate through the available reports within the Stationery | Reports menu, and view available report data
- Right-click an existing Stationery Layout, and access available reports
- Open an existing Stationery Layout, and use the Reports button to access available reports
Appendix: Knowledge Base and Resources

Knowledge Base

This manual refers to several Knowledge Base (KB) articles which can be directly accessed by replacing the relevant ID number in the URL:
http://www.mimecast.com/knowledgebase/MimecastKB.htm#KBIDxxxxx.htm

• Where xxxx represents the ID of the article.

To access the Knowledge Base, use the direct link: http://www.mimecast.com/knowledgebase

Training Courses

Visit our website to view the latest information on our available training courses:


Available Online Course Titles:
• Mimecast Product Overview
• Mimecast Account Tour
• Mimecast Continuity
• Mimecast Security
• Mimecast Archiving
• Mimecast Admin Tasks
• Mimecast Exchange Tasks
• Mimecast Stationery

Available Classroom Course Titles:
• Mimecast Service Management
• Mimecast Power Tools
• Mimecast Stationery Management

Other useful links

• Mimecast Community: http://community.mimecast.com/
• Mimecast TV: http://www.youtube.com/user/mimecast
• Mimecast Blog: http://blog.mimecast.com/
• Mimecast Twitter: http://twitter.com/mimecast