
Manage Communication Policies

Adding a new Communication policy

To add new communication policies navigate to the Communication Policies in the Verba web interface **Policies > Communication Policies**.

On the top right corner of the page click on *Add New Communication Policy* as shown on the image below:

Find and List Communication Policies

[Add New Communication Policy](#)
[Apply Communication Policy Configuration](#)
[Show Inactive Policies](#)

Defining a Communication Policy

The Communication Policy screen consists of multiple panels:

- Communication Policy
- Validity
- Participants
- Chaperones
- Presence Policies
- Presence blocking
- Contact List blocking
- Session Policies
- Content Policies
- Notifications
- Disclaimers

Communication Policy

- **Enabled** - If set, then the policy is active, it will be evaluated by the engine
- **Sequence** - The policies will be evaluated one by one based on the sequence number assigned to them. The evaluation starts with the lowest sequence number and goes in ascending order.
- **Name** - You can set any name, only visible for policy administrators
- **Description** - Short description for the administrators to know what the policy does

Validity

You can specify when the policy should be evaluated and when it is not.

You can leave this block empty - and all days of the week checked - in that case, the policy will always be evaluated by the engine. (This is the default setting)

- **Time Zone** - Your time zone (Needs to be set, because the Verba servers may reside in another time zone, based on your system topology)
- **Valid From-Until** - You can set the exact dates, or you can click on *Never expires*
- **Time of Day** - You can set when it should be active every day
- **Days of Week** - The policy will be active on these days every week

In the example shown below, this policy will only be evaluated from 2015.05.22 to 2016.05.22, every workday from 8:00 to 17:00. (Outside of this period the engine will skip this policy)

[Add New Communication Policy](#)
[Back to Previous Communication Policy List](#)

Communication Policy Configuration

▼ Communication Policy

Enabled*

Seq.*
Communication Policies with the lower Sequence value will be evaluated first.

Name*

Description

▼ Validity

Timezone*
Eastern Standard Time 10:45:42

Valid From

Valid Until Never expires

Time of Day : - :

Days of Week Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Participants

You can define **Participant A** and **B** here.

- **Users** - To select **Users** start typing their name, and a drop-down list will appear with the available options.
- **Groups** - To include **Groups**, move them from the left pane (all groups in the system) to the right pane (selected groups) with the >> button. To delete the selection, use the << button.
- **Addresses** - You can define any **Phone number** or **SIP URI** here, even if it is not present in the Verba system (Outside phone numbers, calls coming from the PSTN network, for instance)
- **Domains** - Ability to set a **specific domain** (For example in the case of federated calls you want to block calls to the microsoft.com domain)
- **Regex** - Standard Regular Expressions

▼ Participants

	Participant A	Participant B
	<input type="radio"/> Select Participants <input checked="" type="radio"/> Everyone	<input type="radio"/> Select Participants <input type="radio"/> Everyone
Users	<input type="text"/>	<input type="text" value="Thomas Powell (thomas)"/> x <input type="text" value="Jerry Jones (jerry)"/> x
Groups	<input type="text" value="Default"/> <input type="text" value="Global Compliance Office"/> <input type="text" value="US Billing"/> <input type="text" value="US Legal - Microsoft Team"/>	<input type="text"/> <input type="text"/>
Addresses	<input type="text"/>	<input type="text" value="john@microsoft.com"/> <input type="text" value="1475689"/> <input type="text" value="peter@live.com"/>
Domains	<input type="text"/>	<input type="text" value="onedrive.com"/>
Regex	<input type="text"/>	<input type="text" value="[0-5]*"/>

Extension, User and Group selection for **Session** and **Content Policies** is not available with Starter User licenses, only with full Ethical Wall User licenses.

With Starter licenses the Session and Content Policies can only be defined for all employees.

Chaperones

Under Chaperones, you can define **Users** and **Groups** whose **presence in conferences enables all communication**, even those that would otherwise be blocked by this policy.

You can select Users and Groups the same way as in the case of Participants.

The Chaperones feature is available from **Verba release 8.9**

In the table below, the different modalities are shown per communication system and what modality can the chaperones feature be utilized with.

Cisco	Action allowed if Chaperone is present	Session terminated if Chaperone leaves
voice	No	No
video	No	No
IM	Yes	Yes
file transfer*	Not Applicable	Not Applicable
screen share	Yes	No

*The file transfer operation is not available in Cisco Jabber conferences.

SfB/Lync	Action allowed if Chaperone is present	Session terminated if Chaperone leaves
voice	Yes	Yes
video	Yes	Yes
IM	Yes	Yes
file transfer	No	No
screen share	Yes	Yes
content share	Yes	Yes

In the example below, if Global Compliance Office is the host, then there is no restriction in communications between Participant A and B. (If this policy is evaluated)

Chaperones

Communication blocking in conferences is not enforced if a chaperone is the host.

Select Participants
 Everyone

Users

Groups

Default
 US Billing
 US Legal - Microsoft Team
 US Legal - Samsung Team

>>
 <<

Global Compliance Office

Addresses

Domains

Regex

Presence Policies

In the Verba Ethical Wall solution, [Communication Policies](#) include Presence Blocking and Contact List Blocking functionality.

Presence blocking

The presence status of users in Cisco Jabber and Lync/SfB clients can be hidden from other people. This means that users will always show up as offline for other users if their presence should not be shown.

Contact List blocking

When using the Contact List blocking functionality, users are not able to see specific blocked users in their SfB client when running searches for contacts. This means that the existence of certain users can be hidden from others.

Contact List blocking prevents adding blocked contacts to the contact list by default. Turning off the prevention will result that the user will be able to add the remote user in possession of the remote user's full SIP URI.

The Contact List blocking functionality is only available for Lync/SfB deployments. If the Contact List search goes through the Lync/SfB IIS contact list service.

You can set the presence or contact list blocking mode:

-  **Block**
-  **Allow** - used to explicitly allow presence even if lower priority rules would block presence between two users

You can also set the direction of the rule:

- Bidirectional between A and B
- A to B
- B to A



Read more in the [Presence Policies](#) article.

Session Policies

In the Verba Ethical Wall solution, [Communication Policies](#) include Session Policy functionality.

You can set session policy mode

-  **Block**
-  **Warn** - session will be allowed, but a notification will be sent
-  **Block and Warn** - session will be blocked, and a notification will be sent
-  **Allow** - used to explicitly allow presence even if lower priority rules would block presence between two users

You can also set the direction of the rule:

- Bidirectional between A and B
- A to B
- B to A

The following example allows IM and voice calls, but blocks all other modalities between the Participant A and B groups:

Instant Messaging	<input checked="" type="checkbox"/>	A	<input type="checkbox"/>	<input type="checkbox"/>	B
Voice	<input checked="" type="checkbox"/>	A	<input type="checkbox"/>	<input type="checkbox"/>	B
Video	<input checked="" type="checkbox"/>	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	B
File Transfer	<input checked="" type="checkbox"/>	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	B
Screen Sharing	<input checked="" type="checkbox"/>	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	B
Data Share in Conference	<input checked="" type="checkbox"/>	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	B
Explanation in Notifications	<input type="text"/>				

Please note, that for conferences the direction of the session policies works in a different way. If they are set to bidirectional, then all communication will be blocked, even in conferences. If they are set in one direction, then that rule will not be evaluated for conferences.

Read more in the [Session Policies](#) article.

Content Policies

In the Verba Ethical Wall solution, [Communication Policies](#) include Content Policy functionality.

You can add **multiple Content Policies** to a Communication Policy.

Content policy actions include

- **Block**
- **Notify** - message will be allowed, but a notification will be sent
- **Redact** - allow the communication, but redact/edit the message to mask the matching information

An example list of Content Policies set on a Communication Policy:

Banking - SWIFT codes (Regex filter) ...	Redact	<input type="checkbox"/>
Files - Windows - Executable (Filename and size check) ...	Block	<input type="checkbox"/>
PII - US - Social Security Number (SNN) (Regex filter) ...	Redact	<input type="checkbox"/>
PII - Credit Card Number (Regex filter) ...	Redact	<input type="checkbox"/>
<input type="button" value="+"/>		

In the case of content policies, you can also set the direction in which you want the policies to take effect between Participant A and B (unidirectional or bidirectional).

To see how to manage and configure your Content Policies, read the [List Content Policies](#) and [Manage Content Policies](#) articles.

For the Content Policies to take effect, the IM session policy needs to be set (any setting)

Read more in the [Content Policies](#) article.

Notifications

As you can see in the *Session Policies* section, you can define for each modality if you want to send notifications when the given communication takes place.

Under the *Notifications* tab, you can set in what way notifications should be sent and to whom. If both IM and email notification are selected, then the email modality will only be used if an IM cannot be sent.

Possibilities include

- **A** - Participant A
- **B** - Participant B
- **Chaperone** - The Chaperone of this policy
- **From Party** - The party that started the call/initiated the action
- **To Party** - The Party that received the call/was the target of the action
- **3rd Party** - If you select this checkbox, you can set any email address or IM address to where the notifications should be sent

These settings only apply when this policy is evaluated and triggered by a conversation.

For example, you have two policies that apply to the same modalities and are

#1 Participant A is John Doe, under notifications only the instant message for Participant A is set (Sequence number 10)

#2 Participant A is John Doe, under notifications only the email message for Participant B is set (Sequence number 20)

In this case above an instant message will be sent to Participant A (John Doe), but no email will be sent to Participant B, as the first policy is evaluated only.

▼ Notifications	
Notification uses the first selected mode that succeeds (left to right) for each target. Presence blocking does not trigger notifications.	
A	<input checked="" type="checkbox"/> Instant Message <input type="checkbox"/> E-mail
B	<input checked="" type="checkbox"/> Instant Message <input checked="" type="checkbox"/> E-mail
Chaperone	<input type="checkbox"/> Instant Message <input checked="" type="checkbox"/> E-mail
From Party	<input type="checkbox"/> Instant Message <input type="checkbox"/> E-mail
To Party	<input type="checkbox"/> Instant Message <input type="checkbox"/> E-mail
3rd Party	<input type="checkbox"/> Instant Message <input type="checkbox"/> E-mail
Template*	Default ▼
Language	English ▼
Show relevant notification templates	

Select the [Notification Template](#) that you want to assign to this communication policy.

The language of the notification will mainly be the **language of the user** that the notification is being sent to. This can be set for each user at the **user properties page**.

The language selection that you see here **defines a default language**, which applies when the notification template does not have messages defined in the language of the user.

In this case, the default language will be used.

Disclaimers

In the Verba Ethical Wall solution, [Communication Policies](#) include Disclaimer functionality.

You can set [Disclaimer Templates](#) to be attached to all Instant Message communications of various parties.

▼ Disclaimers	
Send Disclaimer to Participant A*	<input checked="" type="checkbox"/>
Send Disclaimer to Participant B*	<input type="checkbox"/>
Template*	Default ▼
Language	English ▼
Show relevant notification templates	

Select the [Disclaimer Template](#) that you want to assign to this communication policy.