

# **Installation Guide**

Personal Email Manager

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# **Contents**

Chapter 1	Introduction	5
	Language support	6
	Online Help	6
	Technical Support	6
Chapter 2	Pre-installation	9
	Supported platforms	
	Minimum system requirements	10
	Upgrade paths	
Chapter 3	Installation	13
	Installing Personal Email Manager	13
	Upgrading Personal Email Manager	25
	Rolling back to the prior version	26
	Uninstalling Personal Email Manager	26

1

# Introduction

Personal Email Manager is an optional component of Websense® Email Security. Other components include:

- Websense Email Security: The core email filtering application
- **Report Central**: The report creation application

Personal Email Manager monitors specially configured Websense Email Security queues and notifies users if they have blocked inbound or outbound email. It also provides end users a facility for managing their blocked email. The end-user facilities are described in *Personal Email Manager User Help*.

To access Websense Email Security product documentation and other Websense documentation, go to:

www.websense.com/content/KnowledgeBase

Installation and configuration information in this guide applies only to Personal Email Manager.



### Warning

Install Personal Email Manager only *after* Websense Email Security has been installed and configured.

To install and use Personal Email Manager, the host computer must meet the minimum requirements specified in Chapter 2, *Pre-installation*.

Chapter 3 provides instructions for downloading the Personal Email Manager installation package and running the installer. For the best results, read all of the installation steps before starting the installation procedure. See Chapter 3, *Installation*.

After installation is complete, run the Personal Email Manager Configuration Tool to test Personal Email Manager connectivity, control the Personal Email Manager service, and update configuration settings. See the *Personal Email Manager Configuration Tool* guide.

To achieve the desired behavior and results, Personal Email Manager must be administered on an ongoing basis. These tasks include:

- Configuring queues
- Customizing the notification email templates

- Setting general options
- Setting up administration accounts

See the *Personal Email Manager Administrator Help*.

### Language support

Some elements of Personal Email Manager include adaptive language support for Spanish, Portuguese, Italian, and German.

### **Blocked email notifications**

The language used in blocked email notifications is determined by the Windows Locale setting of the computer on which Personal Email Manager is installed. When the setting is Spanish, Portuguese, Italian, or German, that language is used in the generation of blocked email notifications. For all other settings English is used.

### The Personal Email Manager facility

When an end user or administrator logs into the Personal Email Manager facility, the language preference setting of the browser determines the language displayed in the user interface and Help system, limited to Spanish, Portuguese, Italian, and German. All other settings result in English.

Other elements of Personal Email Manager are presented in English only.

### **Online Help**

Select the **Help** option within the program to display detailed information about using the product.



### **Important**

Default Microsoft Internet Explorer settings may block operation of the Help system. If a security alert appears, select **Allow Blocked Content** to display Help.

If your organization's security standards permit, you can permanently disable the warning message on the Advanced tab of the Tools > Internet Options interface. (Check Allow active content to run in files on My Computer under Security options.)

### **Technical Support**

Technical information about Websense products is available 24 hours a day at:

### www.websense.com/content/support/

- the latest release information
- the searchable Websense Knowledge Base
- ◆ show-me tutorials
- product documents
- ◆ tips
- answers to frequently asked questions
- in-depth technical papers

For additional questions, click the Contact Support tab at the top of the page and fill out the online support form.

If your issue is urgent, please call one of the offices listed below. You will be routed to the first available technician, who will gladly assist you.

Location	Contact information
North America	+1-858-458-2940
France	Contact your Websense Reseller. If you cannot locate your Reseller: +33 (0) 1 5732 3227
Germany	Contact your Websense Reseller. If you cannot locate your Reseller: +49 (0) 69 517 09347
UK	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 20 3024 4401
Rest of Europe	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 20 3024 4401
Middle East	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 2030 244 401
Africa	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 20 3024 4401
Australia/NZ	Contact your Websense Reseller. If you cannot locate your Reseller: +61 (0) 2 9414 0033
Asia	Contact your Websense Reseller. If you cannot locate your Reseller: +86 (10) 5884 4200
Latin America and Caribbean	+1-858-458-2940

For telephone requests, please have ready:

- Websense subscription key
- Access to Websense Email Security and its components
- Familiarity with your network's architecture, or access to a specialist
- Specifications of machines running Websense Email Security and its components

To get the version number of the Personal Email Manager release installed on your system, open the Windows **Add or Remove Programs** application and click on the entry for Personal Email Manager. Click the link for support information.

2

# **Pre-installation**

This version of Personal Email Manager is intended for use with Websense Email Security v7.0 and later.

Before installing Personal Email Manager, verify that the host computer meets the minimum requirements specified in this chapter.

# **Supported platforms**

Personal Email Manager is compatible with the following operating systems and applications.

Component	Requirement
Operating systems	Windows 2000 Server SP4
	Windows 2000 Advanced Server SP4
	Windows Server 2003 Standard Edition SP2
	Windows Server 2003 Enterprise Edition SP2
	Windows Server 2008 Service Pack 2 (Standard or Enterprise Edition)
	Windows Server 2008 x64 Service Pack 2 (Standard or Enterprise Edition)
Applications	Internet Explorer 6.0 and later
	Firefox 1.5 and later
Database	SQL Server 2000 SP4
	SQL Server Express 2005 SP3
	SQL Server 2005 SP3
	SQL Server 2008
LDAP	Active Directory for Windows Server 2000, 2003, and 2008
	Lotus Domino 6.5



### Note

If you plan to install SQL Server Express 2005, you must first install Windows Installer 3.1 and .NET Framework 2.0 or later.

## Minimum system requirements

Personal Email Manager may be installed on the same computer as Websense Email Security or on a separate system. If you are running Websense Email Security on a virtual machine, Websense, Inc., recommends that you run PEM in its own virtual machine instance.

If the number of end users in your organization is greater than 250, or the volume of email is unusually large or heavy with spam, or the Websense Email Security filtering policies are especially resource intensive, it is recommended that Personal Email Manager be installed on a separate computer. For assistance in determining the minimum system requirements to meet your organization's needs, contact your Websense Sales representative.

When both Personal Email Manager and Websense Email Security are installed on the same computer, the minimum system requirements are greater. The table below describes the minimum requirements for each configuration.



### **Note**

During installation, the System Checker verifies that the computer meets the minimum requirements for Personal Email Manager installed on a separate machine (the less demanding requirements).

The following are the minimum system requirements.

PEM = Personal Email Manager WES = Websense Email Security

Component	Requirement
Processor	
PEM alone	Intel Pentium IV processor 2 GHz or higher
PEM with WES	Intel Pentium IV processor 3 GHz or higher
Memory	
PEM alone	1 GB RAM minimum, 2 GB recommended
PEM with WES	2 GB RAM minimum, 4 GB recommended
Disk Space	
PEM alone	500 MB Minimum Disk Space, 1 GB recommended
PEM with WES	15.5 GB Minimum Disk Space, 21 GB recommended
Display	Super VGA (800 x 600) or higher resolution video adaptor and monitor
Networking	TCP/IP installed and configured with an Internet connection
Email	Email system with SMTP gateway or MTA installed
Email security software	Websense Email Security v7.0 or later

Because Personal Email Manager is an end-user-accessible Web application, performance benefits from extra system resources such as memory.

# **Upgrade paths**

Personal Email Manager v7.2 can be installed as an upgrade to the following versions:

- 2.0
- 7.1

# 3

# Installation

Follow the procedures in this chapter to install, upgrade, rollback, or remove Personal Email Manager.



#### Note

This guide and the installer screens are provided in English only.

To locate the Personal Email Manager installation package, go to the directory where you extracted the installation files for Websense Email Security and locate the Personal Email Manager installer (typically, C:\Websense).

Personal Email Manager uses an InstallShield Wizard to manage the installation process. Throughout the installation procedure click:

- Next to go to the next step in the process.
- Back to return to the previous screen.
- ◆ Cancel to abort the installation.

After installation, use the Personal Email Manager Configuration Tool to test Personal Email Manager connectivity, control the Personal Email Manager service, and set up some of Personal Email Manager's functions. For detailed information, see the *Configuration Tool* guide.

For information about the ongoing administration of Personal Email Manager, see the *Administrator Help*.

# **Installing Personal Email Manager**

Personal Email Manager v7.2 is intended for use with Websense Email Security v7.0 and later. You must install and configure Websense Email Security before installing Personal Email Manager.

To install Personal Email Manager, the host computer must meet the minimum requirements specified in Chapter 2, *Pre-installation*.

To have the best installation experience, read all of the instructions before starting the install process.



#### Note

If you plan to install the bundled version of SQL Server Express 2005, you must install Windows Installer 3.1 and .NET Framework 2.0 or later before you begin this installation. Go to Microsoft.com to download the components.

### **About LDAP**

During installation, you will have the option to integrate with your LDAP server (if one is used at your site). Please review Step 17, page 21. If you plan to integrate with LDAP but you are not familiar with it, consult with your LDAP administrator prior to starting the installation.

#### **About IMAP**

During installation, you will have the opportunity to establish a connection to your IMAP server. You will want to do this if you want your Personal Email Manager users to be able to release blocked email from text-based devices, such as a Blackberry®. To establish a connection to the IMAP server, you must first create a dedicated mailbox on the IMAP server for this (and no other) purpose. Please review Step 18, page 23.

### To install Personal Email Manager:

- 1. Log onto the host computer using an account that has Administrator privileges.
- 2. Locate the Personal Email Manager installer in the folder to which you extracted the Websense Email Security installation file (typically, C:\Websense).
- 3. Start the Setup Wizard by double-clicking **setup.exe** in the folder where you extracted the installation package.
- 4. The **Welcome screen** is displayed.

From the Welcome screen you can open:

- **Readme** Contains details of technical improvements in this release
- **Installation Guide** This Installation Guide in PDF

Click Next.

- 5. To accept the terms of the Websense subscription agreement, select **I accept the terms of the subscription agreement** and click **Next**.
- 6. To accept the terms of the 3rd party license agreements, select **I accept the terms** of the license agreements and click Next.
- 7. By default, Personal Email Manager is installed in:

C:\Program Files\Personal Email Manager

On the x64 platform, the installation location is

C:\Program Files(X86)\Personal Email Manager

You can either:

- Click Next to accept the default location.
- Click Browse to select an alternate location and then click Next.
- 8. The System Checker inspects the computer for compliance with the minimum and recommended system requirements. If the system meets the requirements, no special information is displayed. If the system does not meet the requirements, one or more of the following messages is displayed:
  - Error A required component is missing and the installation must be cancelled. An incorrect Operating System or Service Pack level causes this message.
  - Warning A warning is displayed if the system meets the minimum, but not the recommended memory or disk space. The installation is *not* stopped.
  - Install A component, such as an MDAC component, has not been detected and will be installed as part of the process. As a result, you may be instructed to reboot.

Please see *Minimum system requirements*, page 10.

9. The Connect to the Websense Email Security Server screen is displayed.



Enter the details of your Websense Email Security server.

If Websense Email Security is installed on the local computer, you do not have to supply a user name or password.

If Websense Email Security is installed on a remote computer, you need to enter administrator credentials for a login that you have already configured in the Server Configuration console for the Websense Email Security server. For more information, see the "Configuring administrators for remote access" topic in the *Websense Email Security Administrator Help*.

Click Next.



10. The **SQL Server Connection details** screen is displayed.

These connection details are for the SQL Server that hosts the Websense Email Security databases.

- Enter the SQL server port number. Default = 1433.
- Enter the SQL instance name, if applicable. Leave the field blank if not applicable.

Select an authentication method.

- Windows NT Authentication
- **SQL Authentication** Enter a user name and password for the SQL account. Click **Next** to continue.

11. The **Create Databases** screen is displayed. Personal Email Manager uses SQL Server to create databases for logging and configuration information.



Select the location of your SQL 2000/2005/2008 compatible server. You can create the Personal Email Manager databases on either:

- Your local computer
- A remote computer Websense Email Security installs tools on your local computer that enable you to connect to the remote SQL server database.

If no SQL compatible server is detected on the local computer, there is an option to install SQL Server 2005 Express.



### **Note**

To install SQL Server 2005 Express, you must first install Microsoft Windows Installer 3.1 and Microsoft .NET Framework 2.0 or later. If those components are not already installed, click Cancel to quit this install. Download and install the Microsoft components and then start the Personal Email Manager install from the beginning.



12. The Connect to SQL server screen is displayed.

You can connect to the SQL server in either of two ways:

- If you have elected to use a local SQL server, click Next to accept the defaults.
- If you have elected to connect to a remote SQL server, select or enter the name.

If the port number the SQL server is using is other than the default (1433), enter the port number.

If you select SQL authentication, enter the login ID and password.

Make sure the SQL Server is running in mixed mode. (For instructions on how to confirm the SQL Server authentication mode, consult your SQL Server documentation, or go to the online Microsoft Support Knowledge Base and search for "SQL Server mixed mode authentication".)

13. The **Configure JBoss Application Server** screen is displayed. JBoss Application Server is installed as a service on the local computer. It enables the Personal Email Manager application to run in a browser.



The JBoss application server must log into Windows using an account that is a member of the domain or the local computer's administrator group.

This account must be the account you are currently logged in as.

### Specify:

- A port number that the JBoss application server can use. Default = 8282.
- The name of the domain or computer
- The Windows login details for the account

14. The **Security Certificate Information** screen is displayed. You must generate a temporary security certificate that enables Personal Email Manager to use encrypted communication using Secure Socket Layer (SSL). The temporary certificate is valid for 90 days. In the future, use the Personal Email Manager Configuration Tool to create a new self-signed certificate or to import a purchased certificate.



Enter the appropriate information in each field.

Click **Next** to continue.

15. The **Configure Default Administrator** screen is displayed. Enter and confirm a password for the PEMAdmin account.

PEMAdmin is the preset administrator account. It cannot be renamed or deleted. You must use the PEMAdmin account when you log into Personal Email Manager for the first time. The PEMAdmin password is case sensitive.

If required, you can use only this account for Personal Email Manager administration and not enable any other administrator accounts.

16. The **Configure SMTP Server** screen is displayed. Personal Email Manager connects to your email server to send blocked email notifications.



Enter the server name or IP address and port number for the SMTP server. Click **Next**.

17. The **Connect to LDAP Server** screen is displayed. If your organization uses LDAP, you can enable LDAP integration with Personal Email Manager.

LDAP integration allows users and administrators to log into Personal Email Manager using their Windows user name and password. Also, for some administrative functions, it allows administrators to specify and select users from lists returned from LDAP lookups.

When LDAP is not used, users and administrators use their email address to log into Personal Email Manager; lists are built with email addresses.



#### Note

The choice you make now to use or not use LDAP cannot be changed later without a complete reinstall of Personal Email Manager.

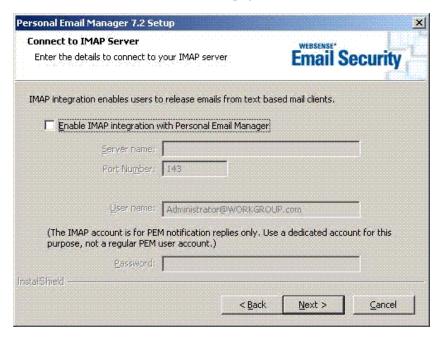


If you do *not* want to use LDAP, click **Next**.

To integrate with LDAP, check Enable LDAP integration...

- a. Enter the LDAP server name or IP address.
- b. Enter the port number. Default = 389.
- Select the LDAP server type from the drop-down list. Only Microsoft Active Directory and Lotus Domino are supported.
- d. To access the LDAP server using credentials, check **Log on to the server** and specify the log on details. Enter:
  - The Domain name
  - A user name with sufficient privileges to query and view LDAP records
  - The user password
- e. To access the LDAP server anonymously, clear the **Log on to the server** check box. Anonymous connections are not usually supported because they can compromise system security.
- f. Click **Get Default** to fill the **Search base** field. A list of base DNs (distinguished names) is retrieved from the LDAP server. The base DN is used for all searches and for authentication of Personal Email Manager users. Select the DN that contains the LDAP users who will be using Personal Email Manager. If necessary, consult your LDAP administrator.

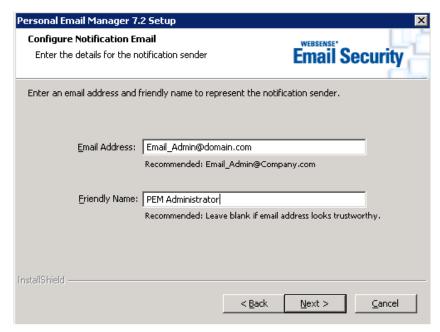
18. The **Connect to IMAP Server** screen is displayed. If you want your users to be able to release email from text-based email clients (such as a Blackberry®), you need to connect to your IMAP server. To do so, you must have already created a dedicated mailbox for this purpose. See the notice at the beginning of this section (*Installing Personal Email Manager*, page 13).



### Enter:

- The server name or IP address of the IMAP server
- The port number (default = 143)
- The user name and password for the IMAP mailbox. This mailbox is used only for Personal Email Manager notification replies. You should enter an IMAP account that is not associated with a valid mailbox.

19. The **Configure Notification Email** screen is displayed. This is the sender from whom blocked email notifications are sent. Specify an address that is easily recognized by your users and that makes clear that the notification email is coming from within your organization.



If the email address is easily recognized and trusted, it is recommended that you not specify a Friendly Name.

Click Next to continue.

20. Personal Email Manager is ready to complete the installation.

This is the last point at which you can review the options you have selected. If necessary, click **Back** to change installation details, or click **Cancel** to cancel the installation.

Click **Next** to complete the installation.

- 21. A progress bar shows the status of the file copy and setup process.
- 22. When the process is done, the **Installation Complete** screen is displayed. Click **Finish**.

Personal Email Manager is now installed on your system.

Start the Personal Email Manager Configuration Tool to test connectivity, start and stop the Personal Email Manager service, and continue the Personal Email Manager configuration process. To access the Personal Email Manager Configuration Tool Guide click Start > Programs (or All Programs) > Personal Email Manager > Documentation > Configuration Tool Guide. To start the Configuration Tool click Start > Programs (or All Programs) > Personal Email Manager > Configuration Tool.

To open the *Personal Email Manager Administrator Help* click **Start > Programs** (or **All Programs**) > **Personal Email Manager > Documentation > Administrator's Guide**.

## **Upgrading Personal Email Manager**

Personal Email Manager v7.2 can be installed as an upgrade to versions 2.0 and 7.1.



#### Note

Personal Email Manager v7.2 is intended for use with Websense Email Security v7.0 and later. You must upgrade Websense Email Security before upgrading Personal Email Manager.

### To upgrade Personal Email Manager:

- Log onto the host computer using an account that has Administrator privileges and is the same logon account that is currently running the Personal Email Manager service.
- 2. Locate the Personal Email Manager installer in the folder to which you extracted the Websense Email Security installation file (typically, C:\Websense).
- 3. Start the Personal Email Manager Setup Wizard by double-clicking **setup.exe** in the folder where you extracted the installation package.
  - a. If the installation wizard detects a version that cannot be upgraded, a message is displayed stating that you must upgrade to v2.0 or v7.1 before upgrading to v7.2.
  - b. If the installation wizard detects a version that can be upgraded, the upgrade option is offered. Select **Upgrade to Personal Email Manager 7.2** and click **Next**. Click **Yes** to confirm your selection.
- 4. The System Checker inspects the computer for compliance with the minimum and recommended system requirements. If the system meets the requirements, no special information is displayed. If the system does not meet the requirements, one or more of the following messages is displayed:
  - Error A required component is missing and the installation must be cancelled. An incorrect Operating System or Service Pack level causes this message.
  - Warning A warning is displayed if the system meets the minimum, but not the recommended memory or disk space. The installation is *not* stopped.
  - Install A component, such as an MDAC component, has not been detected and will be installed as part of the process. As a result, you may be instructed to reboot.

See Minimum system requirements, page 10.

- 5. Click **Next**. The installation wizard:
  - a. Stops the Personal Email Manager service.
  - b. Backs up Personal Email Manager data.
  - c. Updates the Personal Email Manager database.
  - d. Copies new Personal Email Manager files. Updates are made in the same folder as the previous version.

e. Restarts the Personal Email Manager service.

A sequence of progress screens keeps you informed as to what action is being performed. Click **Next**.

6. An Installation Complete screen displays when the process is done. Adjust the Launch the Personal Email Manager Configuration Tool check box to suit your needs and click Finish.

Should you want to roll back to your previous version of Personal Email Manager, you can do so. See *Rolling back to the prior version*, page 26.

### Rolling back to the prior version

You can easily roll back to your prior version of Personal Email Manager.

To roll back to the prior version of Personal Email Manager:

- 1. From the Windows Start menu select **Programs** (or **All Programs**) > **Control Panel** > **Add or Remove Programs**.
- 2. Select Personal Email Manager and click Remove.
- 3. Select Rollback to Personal Email Manager 2.0 or 7.1 and click Next. Click Yes to confirm the action.
- 4. The maintenance manager:
  - a. Stops the Personal Email Manager service
  - b. Removes the v7.2 database changes
  - c. Reinstalls the previous version's files
  - d. Restarts the Personal Email Manager service

A sequence of progress screens informs you as to what action is in progress.

Click **Next**.

5. A Rollback Complete screen displays when the process is done. Adjust the Launch the Personal Email Manager Configuration Tool check box to suit your needs and click Finish.

## **Uninstalling Personal Email Manager**

To uninstall Personal Email Manager:

- 1. From the Windows Start menu select **Programs** (or **All Programs**) > **Control Panel** > **Add or Remove Programs**.
- 2. Select Personal Email Manager and click Remove.
- 3. Select **Uninstall Personal Email Manager 7.2**, click **Next** and then click **Yes** to confirm the action.

- 4. You are prompted to choose whether to delete the Personal Email Manager SQL databases. Click **Yes** to remove them. Click **No** to retain them.
- 5. One or more screens indicate the progress of the removal process.
- 6. The **Uninstall Complete** screen displays when removal is complete. Click **Finish**.