



Installation Guide

Personal Email Manager

v2.0

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Contents

Chapter 1	Introduction	5
	Language support	6
	Online Help	6
	Technical Support	7
Chapter 2	Pre-installation	9
	Supported platforms	9
	Minimum system requirements	10
	Upgrade paths	11
Chapter 3	Installation	13
	Configuration after installation	13
	Upgrading Personal Email Manager	14
	Installing Personal Email Manager	16
	Rolling back to the prior version	27
	Uninstalling Personal Email Manager	28

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/SupportPortal/Documentation.aspx

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's Guide*.

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 online 24 hours a day, including:

- ◆ latest release information
- ◆ searchable Websense Knowledge Base
- ◆ show-me tutorials
- ◆ product documents
- ◆ tips
- ◆ in-depth technical papers

Access support on the Web site at:

www.websense.com/SupportPortal/

For additional questions, fill out the online support form at:

www.websense.com/SupportPortal/Contact.aspx

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 1573 232 27
Germany	Contact your Websense Reseller. If you cannot locate your Reseller: +49 6951 709 347
UK	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 2030 244 401
Rest of Europe	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 2030 244 401
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) 2030 244 401
Australia/NZ	Contact your Websense Reseller. If you cannot locate your Reseller: 1-800-881-011, Access Code 800-542-8609
Asia	Contact your Websense Reseller. If you cannot locate your Reseller: +86 (10) 5884-4200
Latin America and Caribbean	Contact your Websense Reseller.

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 v6.1.

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
Applications	Internet Explorer 6.0 and 7.0 Firefox 1.5 and later
Database	MSDE 2000 SP4 SQL Server Express 2005 SP2 SQL Server 2005 SP2
LDAP	Active Directory for Windows Server 2000 and 2003 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.

Minimum system requirements

Personal Email Manager may be installed on the same computer as Websense Email Security or on a separate system.

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 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	2.2 GB Minimum Disk Space, 3.2 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 v6.1

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 v2.0 can be installed as an upgrade to the following versions:

- ◆ 1.2, with the latest service pack
- ◆ 1.0, with the latest service pack

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 download the Personal Email Manager installation package, go to www.websense.com and proceed to the Download page.

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.

Configuration after installation

After installation, use the Personal Email Manager Configuration Tool to test Personal Email Manager connectivity, control the Personal Email Manager service, and setup 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's Guide*.

Upgrading Personal Email Manager

Personal Email Manager v2.0 can be installed as an upgrade to versions 1.2 and 1.0 SP2.

**Note**

Personal Email Manager v2.0 is intended for use with Websense Email Security v6.1. You must install and configure Websense Email Security before upgrading Personal Email Manager.

To upgrade Personal Email Manager:

1. Log onto the host computer using an account that has Administrator privileges.
2. If you have not already downloaded the Personal Email Manager installation package, do so now.
 - a. Go to www.websense.com.
 - b. Click **Downloads** in the top menu.
 - c. Log into the Downloads page.
 - d. Select **Websense Email Security** and then **Personal Email Manager**.
 - e. Save the installation package to your hard drive.
3. Extract the installation files from the .zip file.
4. 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 v1.2 or v1.0 SP2 before upgrading to v2.0.
 - b. If the installation wizard detects a version that can be upgraded, the upgrade option is offered. Select **Upgrade to Personal Email Manager 2.0** and click **Next**. Click **Yes** to confirm your selection.
5. 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.

6. 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.

7. When prompted, provide the JBoss application server log in password.

Personal Email Manager Maintenance Setup

Configure JBoss Application Server
Enter the password for the service logon account

WEBSENSE®
Email Security

JBoss application server is installed as a service on the local machine using an available HTTP port and must log on to Windows using an account that is a member of the domain or local machine administrator group.

Domain/Machine name: SYD-DEV-05-VM1

User name: Administrator

Password:

InstallShield

OK Cancel

Click **OK** to continue.

8. 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 **Finished**.

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 27.

Installing Personal Email Manager

Personal Email Manager v2.0 is intended for use with Websense Email Security v6.1. 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 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 18, page 23](#). 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 Blackberrys®. 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 19, page 25](#).

To install Personal Email Manager:

1. Log onto the host computer using an account that has Administrator privileges.
2. If you have not already downloaded the Personal Email Manager installation package, do so now:
 - a. Go to www.websense.com.
 - b. Click **Downloads** in the top menu.
 - c. Log into the Downloads page.
 - d. Select **Websense Email Security** and then select **Personal Email Manager**.
 - e. Save the installation package to your hard drive.
3. Extract the installation files from the .zip file.
4. Start the Setup Wizard by double-clicking `setup.exe` in the folder where you extracted the installation package.
5. 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**.

6. To accept the terms of the Websense subscription agreement, select **I accept the terms of the subscription agreement** and click **Next**.
7. To accept the terms of the 3rd party license agreements, select **I accept the terms of the license agreements** and click **Next**.

8. By default, Personal Email Manager is installed in:

C:\Program Files\Personal Email Manager

You can either:

- Click **Next** to accept the default location.
 - Click **Browse** to select an alternate location and then click **Next**.
9. 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.

Click **Next**.

10. 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.

Click **Next**.

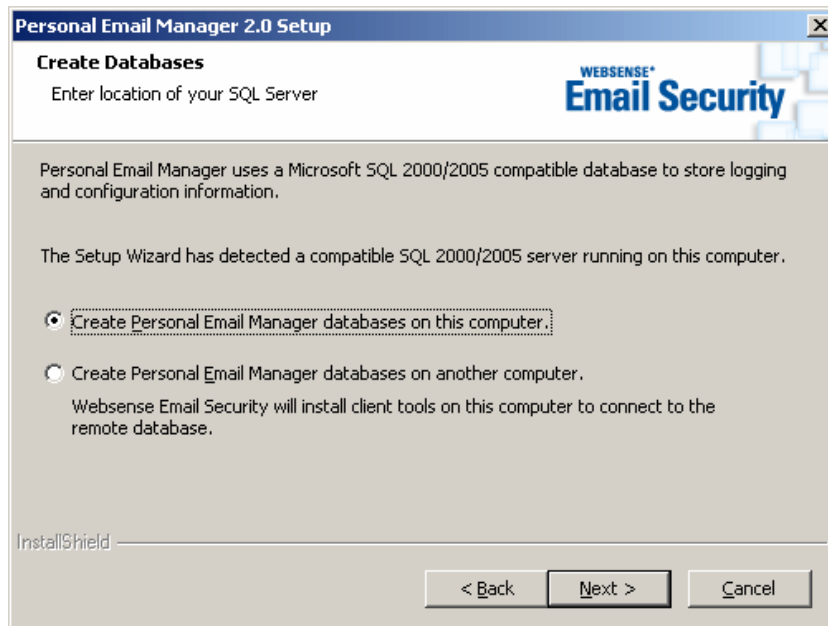
11. The **SQL Server Connection details** screen is displayed.

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

- Enter the SQL server port number. Default = 1433.
- Select an authentication method.

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

12. 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 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. 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.

Click **Next** to continue.

13. The **Connect to SQL server** screen is displayed.

Personal Email Manager 2.0 Setup

Connect to SQL server
Enter details to connect to your SQL server

Select the SQL Server and port number where Personal Email Manager databases will be installed:

Server name: SYDQADELLWORK02

Port number: 1433

Connect to the SQL server using:

Windows NT Authentication: Use windows network account.

SQL Authentication:
Log on to the SQL server using this username and password:

Login ID: _____

Password: _____

InstallShield

< Back Next > Cancel

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.

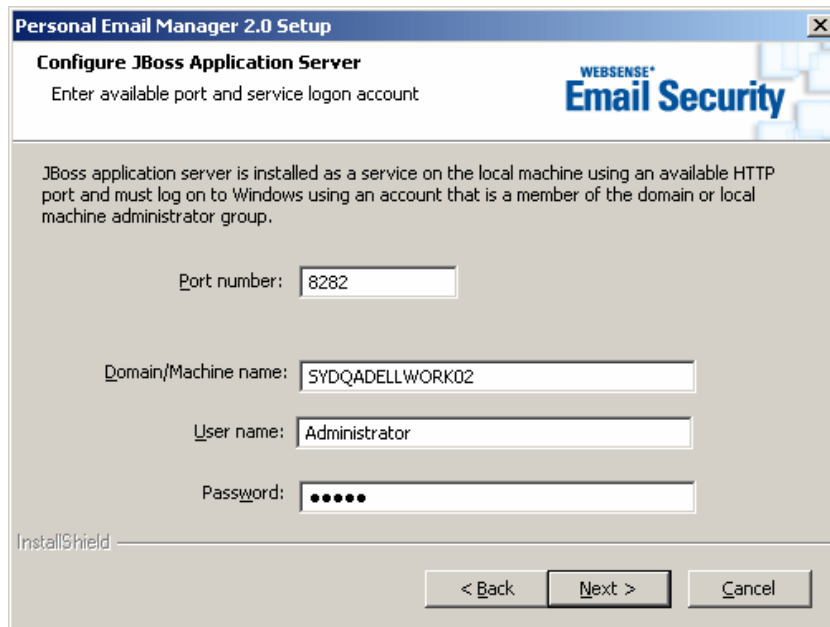
If the port number the SQL server is using is other than the default (1433), enter the port number.

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”.)

Click **Next** to continue.

14. 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 screenshot shows a Windows-style dialog box titled "Personal Email Manager 2.0 Setup". The main heading is "Configure JBoss Application Server" with a sub-instruction "Enter available port and service logon account". In the top right corner, there is a logo for "WEBSENSE® Email Security". Below the heading, a paragraph of text reads: "JBoss application server is installed as a service on the local machine using an available HTTP port and must log on to Windows using an account that is a member of the domain or local machine administrator group." There are four input fields: "Port number:" with the value "8282", "Domain/Machine name:" with the value "SYDQADELLWORK02", "User name:" with the value "Administrator", and "Password:" with five dots. At the bottom left, it says "InstallShield". At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

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

Click **Next** to continue.

15. 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.



The screenshot shows a window titled "Personal Email Manager 2.0 Setup" with a close button in the top right corner. The main heading is "Security Certificate Information" with a sub-heading "Enter organization identity information for default security certificate". To the right is the "WEBSENSE® Email Security" logo. Below the heading, a paragraph states: "Setup will generate a default security certificate to enable secure and encrypted communication. The certificate is valid for 90 days and signed with the information requested below." The form contains the following fields:

- Server name: SYDQADELLWORK02
- Organization unit: Personal Email Manager
- Organization: Websense
- City: San Diego
- State/Province: California
- Country Code: US - United States (dropdown menu)

At the bottom left is the "InstallShield" logo. At the bottom right are three buttons: "< Back", "Next >", and "Cancel".

Enter the appropriate information in each field.

Click **Next** to continue.

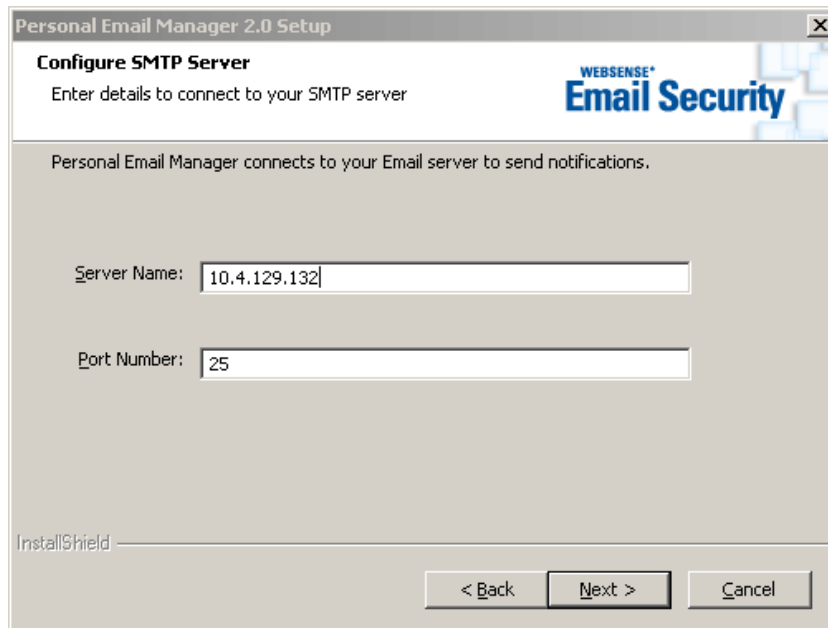
16. The **Configure Default Administrator** screen is displayed. Enter and confirm a password for the PEMAdmin account.

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.

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

Click **Next** to continue.

17. 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**.

18. 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.

Personal Email Manager 2.0 Setup

Connect to LDAP Server
Enter details to connect to your LDAP server

Enable LDAP integration with Personal Email Manager

Server name: 10.4.129.132

Port number: 389

Server type: Active Directory

Log on to the server:

Domain: sydqamail020

User name: administrator

Password: •••••

Search base: DC=sydqamail02,DC=com

Get Default

InstallShield

< Back Next > Cancel

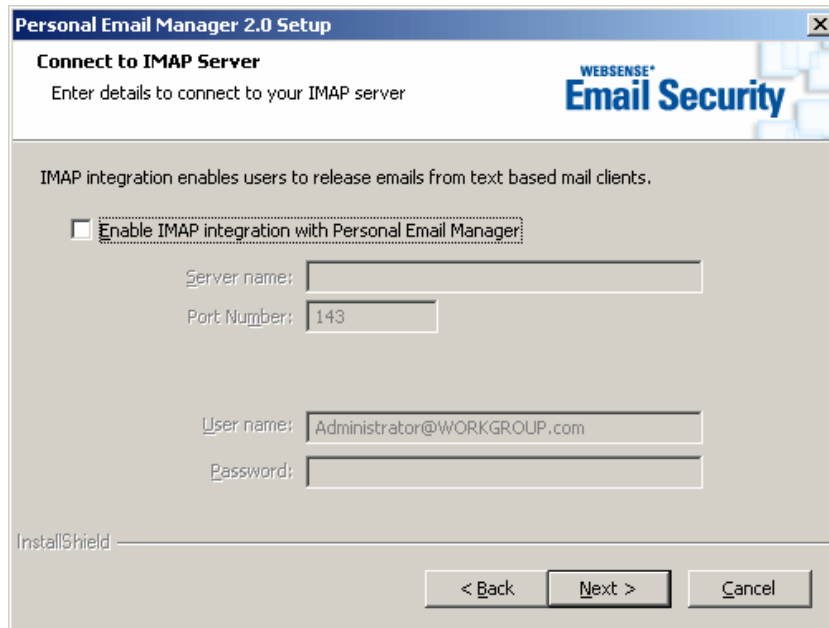
If you do *not* want to use LDAP, click **Next**.

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

- a. Enter the LDAP server name or IP address.
- b. Enter the port number. Default = 389.
- c. Select the LDAP server type from the drop down list. Only Microsoft Active Directory and Lotus Domino are supported. To inquire about support for other LDAP server types, contact Websense Technical Support.
- 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 DN's (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.

Click **Next** to continue.

19. 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 16).



The screenshot shows a Windows-style dialog box titled "Personal Email Manager 2.0 Setup" with a sub-header "Connect to IMAP Server". The dialog contains the following elements:

- A logo for "WEBSENSE® Email Security" in the top right corner.
- Text: "Enter details to connect to your IMAP server".
- Text: "IMAP integration enables users to release emails from text based mail clients."
- A checkbox labeled "Enable IMAP integration with Personal Email Manager" which is currently unchecked.
- Input fields for "Server name:", "Port Number:" (containing "143"), "User name:" (containing "Administrator@WORKGROUP.com"), and "Password:".
- Buttons for "< Back", "Next >", and "Cancel" at the bottom right.
- The "InstallShield" logo in the bottom left corner.

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

Click **Next** to continue.

20. 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.

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

This is the last point at which you can click **Back** to change installation details, or click **Cancel** to cancel the installation.

Click **Next** to complete the installation.

22. A progress bar shows the status of the file copy and setup process.

23. 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 > Personal Email Manager > Documentation > Configuration Tool Guide**. To start the Configuration Tool click **Start > Programs > Personal Email Manager > Configuration Tool**.

To open the *Personal Email Manager Administrator's Guide* click **Start > Programs > Personal Email Manager > Documentation > Administrator's Guide**.

Rolling back to the prior version

You can easily roll back to your prior version of Personal Email Manager. This feature only applies to versions 1.2 and 1.0.

To rollback to the prior version of Personal Email Manager:

1. From the Windows Start menu select **Programs > Administrative Tools > Add/Remove Programs**.
2. Select **Personal Email Manager** and click **Change/Remove**.
3. Select **Rollback to Personal Email Manager 1.x** and click **Next**. Click **Yes** to confirm the action.
4. The maintenance manager:
 - a. Stops the Personal Email Manager service
 - b. Removes the v2.0 database changes
 - c. Reinstalls the v1.x files
 - d. Restarts the Personal Email Manager service

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

5. When prompted, provide the JBoss application server log in password.

Click **OK** to continue.

6. 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 > Administrative Tools > Add/Remove Programs**.
2. Select **Personal Email Manager** and click **Change/Remove**.
3. Select **Uninstall Personal Email Manager 2.0**, 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**.