

SOPHOS

PureMessage for Microsoft Exchange, version 3 upgrade guide

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About this guide

This guide is for customers who want to upgrade PureMessage for Microsoft Exchange as follows:

- From version 2.6.1 to version 3.0.x.
- From version 3.0 to version 3.0.x.

The guide tells you:

- What's new.
- System requirements.
- How to upgrade on a non-clustered server.
- How to upgrade on clustered servers.
- How to navigate to common menu options in the new version.
- How to contact technical support.

1 What's new

1.1 New features

The following features are new:

- Supports Microsoft Exchange 2007.
- Supports 64-bit versions of Windows 2003.
- Integrates with Microsoft Active Directory.
- Provides group-level and user-level policies for anti-virus, anti-spam, and email content settings.
- Provides the option to define different policies for inbound, outbound, and internal email flows.
- Provides the option to discard inbound email sent to non-existent users (recipient validation).
- Allows multiple PureMessage servers to be managed from a single management console.
- Offers additional management reports.
- Provides a new Dashboard containing an overview of the PureMessage server status and key email statistics.
- Provides better searching within central quarantine.
- Improves handling of TNEF-formatted emails, allowing policy rules to be applied accurately to internal email.
- Has a new user interface.

1.2 Features that have been removed or replaced

- NNTP scanning is no longer supported.
- The option to scan inside Macintosh files has been removed from the user interface, as this is now enabled by default.
- Screen alerts are no longer supported.
- **Skip mail to following recipients** feature is no longer supported. You should make a note of the email addresses specified in PureMessage 2.6, and create appropriate exceptions to the policies in PureMessage 3. Refer to the *PureMessage for Microsoft Exchange 3 user manual*.

2 System requirements

Note that system requirements have increased since PureMessage 2.6. Make sure the computer you intend to upgrade meets the system requirements for PureMessage 3 before you begin the upgrade process.

2.1 Network requirements

- Anti-spam updates are only available directly from Sophos, so the computer you install PureMessage on will need internet access (via HTTP).
- If you have any upstream email servers that forward email to the server where PureMessage is being installed then you will need to specify these during installation.

2.2 System requirements

Hardware for PureMessage on Exchange Server 2000/2003, IIS SMTP gateway or administration console

Component	Requirement
Disk space	1 GB minimum
Memory	1 GB minimum, 2 GB or higher recommended
CPU	1.5 GHz minimum, 2 GHz or higher recommended

Hardware for PureMessage on Exchange Server 2007

Component	Requirement
Disk space	1 GB minimum
Memory	2GB minimum, 4 GB or higher recommended
CPU	2 GHz minimum, 2 GHz Dual Core or higher recommended

IIS SMTP gateway

Platform	Minimum SP
Windows 2000 (Professional or Server)	SP4
Windows 2003 (32-bit or 64-bit)	SP1
Windows 2003 R2 (32-bit or 64-bit)	No SP required
Windows XP Professional (32-bit or 64-bit)	SP2
Windows Small Business Server 2000	SP1a
Windows Small Business Server 2003	SP1
Windows Small Business Server 2003 R2	No SP required

Exchange Server 2000/2003

Platform	Minimum SP
Windows 2000 (Professional or Server)	SP4
Windows 2003	SP1
Windows 2003 R2	No SP required
Windows Small Business Server 2000	SP1a
Windows Small Business Server 2003	SP1
Windows Small Business Server 2003 R2	No SP required
Microsoft Exchange 2000	SP3
Microsoft Exchange 2003	SP1

Exchange Server 2007

Platform	Minimum SP
Windows 2003 (64-bit)	SP1
Windows 2003 R2 (64-bit)	No SP required
Microsoft Exchange 2007	No SP required

Administration console

Platform	Minimum SP
Windows 2000 (Professional or Server)	SP4
Windows 2003 (32-bit or 64-bit)	SP1
Windows 2003 R2 (32-bit or 64-bit)	No SP required
Windows XP Professional (32-bit or 64-bit)	SP2
Windows Small Business Server 2000	SP1a
Windows Small Business Server 2003	SP1
Windows Small Business Server 2003 R2	No SP Required
Microsoft Vista (32-bit or 64-bit)	No SP Required

Database

Platform	Minimum SP
Microsoft SQL Server 2005 (all editions including Express)	No SP required
Microsoft SQL Server 2000 (all editions including MSDE)	SP3

Non-clustered installations

New installation	If no database is available, PureMessage will install SQL Server 2005 Express Edition.
Upgrade	PureMessage will continue to use the existing configured database.

Clustered installations

New installation	<p>PureMessage cannot use a local instance of MSDE or SQL Server 2005 Express Edition on a cluster. You must install a database before installing PureMessage. PureMessage can use either:</p> <ul style="list-style-type: none">■ A local clustered virtual SQL Server instance■ A remote SQL Server instance (can also be MSDE or SQL Server 2005 Express Edition)
Upgrade	<p>PureMessage will continue to use the existing configured database.</p>

3 Before you upgrade

This section gives you information you need before upgrading.

3.1 Upgrading PureMessage

Before you upgrade PureMessage, you should do as follows.

- Ensure you are upgrading from PureMessage version 2.6.1 or later. Other upgrades are not supported.
- Read the release notes supplied with this set of documentation.
- Review the system requirements specified in section 2.

Your existing database and configuration options will be preserved. However, you may want to upgrade your database. See section 3.2 for advice.

3.2 Upgrading the database

When you upgrade, your existing MSDE database and configuration options will be preserved. However, you may prefer to upgrade to SQL Server Express 2005 for the following reasons:

- SQL Server Express 2005 has a maximum database size of 4 GB (as opposed to 2GB for MSDE).
- SQL Server Express 2005 is supported on Windows Vista and Windows Server 2008.
- Microsoft are due to withdraw support for MSDE in 2008.

If you want to use SQL Server Express 2005, see Knowledgebase Article 31157 for details of how to upgrade PureMessage manually, install SQL Server Express and migrate your configuration options.

4 Upgrading on a non-clustered server

Before you start the upgrade, ensure that you have chosen a time when it would not be inconvenient to restart the computer. You may be prompted to restart to complete the process.

Depending on which version of PureMessage you upgrade from, some of the dialog boxes described below may not be displayed.

1. If you have downloaded the PureMessage self-extractor from the Sophos website, click **Install** to extract and launch the PureMessage installer.

If you are installing from a CD, run the PureMessage installer from the CD.

- ❗ Ensure that the installer is not run from a network share.
2. In the **Welcome** dialog box, click **Next**.
 3. In the **License Agreement** dialog box, read the agreement. If you agree with the terms, click the radio button **I accept the terms of the license agreement** and click **Next**.
 4. In the **Select Features** dialog box, select the components you want to install. Click **Next**.
- ❗ You cannot install the PureMessage server without an administration console.
5. If the **Database Settings** dialog box is displayed, specify the database (SQL server) where PureMessage will store reporting data, central quarantine, and policy configuration information. Click **Next**.

6. In the **PureMessage Configuration Group** dialog box, you specify which group of PureMessage installations this installation belongs to. Installations that are in the same group share the same policy configuration and can be managed from a single administration console. Select an existing group from the drop-down list or create a new group by entering a new name. Click **Next**.

If you join an existing group, the configuration settings of the group will apply to the server.

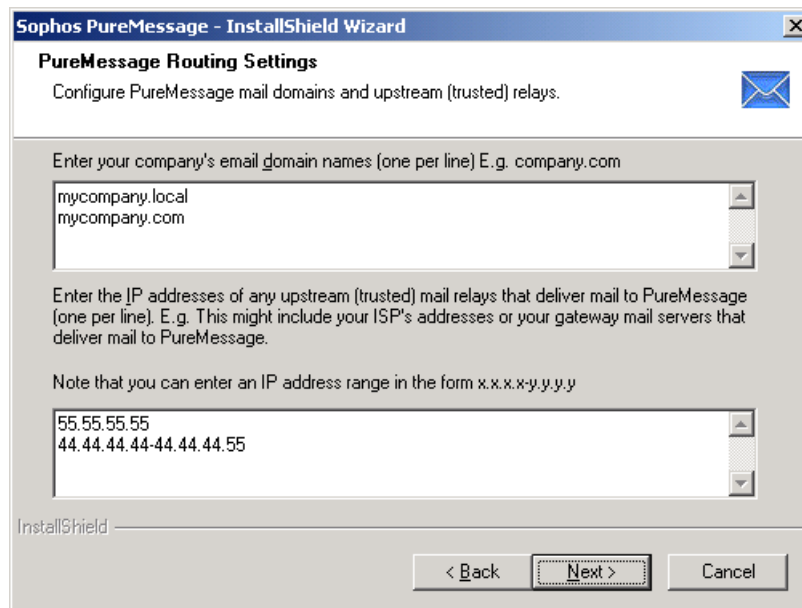
- ❗ If you create a new group, PureMessage will not preserve your previous policy configuration.

If you change the group or create a new group, continue to step 7. If you keep the configuration group unchanged, go to step 10.

7. If the **PureMessage Administration Settings** dialog box is displayed, enter an Administrator email address. PureMessage will send alerts to this email address. You can change this address later on. Click **Next**.
- 💡 PureMessage creates a security group in Active Directory called Sophos PureMessage Administrators, which includes all PureMessage administrators. By default, the current user will be added to this group.

8. In the **PureMessage Routing settings** dialog box, enter your company's email domain(s), such as mycompany.com, in the top panel.
 - ❗ You should not specify sub-domains. When you specify a domain, the sub-domains are included automatically.

Enter the IP addresses of any trusted email relays, such as your ISP's SMTP server and any email gateway server or appliance upstream of your Exchange servers. Click **Next**.
 - ❗ PureMessage uses the trusted email relays settings to determine mail direction. If you do not specify them, PureMessage may classify messages from upstream relays as internal and fail to scan them. For more information, see Appendix B of the *PureMessage for Microsoft Exchange 3 startup guide*.



9. If the **Company Information** dialog box is displayed, you can enter details relating to the size, location, and market sector of your company or organization. This valuable feedback helps SophosLabs analyse email security trends. Click **Next**.
10. In the **Start Copying Files** dialog box, make sure the settings are correct. If they are not, use the back button to return to previous dialog boxes and change the settings. When they are correct, click **Next**.

11. In the **InstallShield Wizard Complete** dialog box, select **Restart your computer now** and click **OK**. When the computer restarts, installation will resume automatically.
- 💡 If there is no **Restart your computer now** option, go straight to step 12.
12. In the **InstallShield Wizard Complete** dialog box, click **Finish** to complete the installation.

5 Upgrading from PureMessage 2.6 on clustered servers

This section describes how to upgrade from PureMessage 2.6 on clustered servers.

- ❗ If you want to upgrade from PureMessage 3.0 to PureMessage 3.0.x, see section 6.

5.1 About upgrading on a cluster

The following instructions apply to a cluster containing one group. If you have a more complicated cluster network, contact Sophos technical support for information and advice.

We recommend that you read Appendix A of the *PureMessage for Microsoft Exchange 3 startup guide* before starting.

- ❗ Sophos does not support installation when Exchange 2007 is installed in Cluster Continuous Replication mode.

The main steps in upgrading are:

- Creating a copy of your PureMessage settings (section 5.2).
- Uninstalling PureMessage from the cluster (section 5.3).
- Installing the new version of PureMessage (section 5.4).

5.2 Creating a copy of PureMessage settings

To create a copy of your PureMessage settings, ensure you are at an active node and run the PureMessage installer, as follows:

1. If you have downloaded the PureMessage self-extractor from the Sophos website, click **Install** to extract and launch the PureMessage installer.

Alternatively, if you are installing from a CD, run the PureMessage installer from the disc.

- ❗ Ensure that the installer is not run from a network share.

2. Follow the on-screen instructions. When PureMessage has created a copy of your current settings, the upgrade program finishes.

5.3 Uninstalling PureMessage

You use **Add | Remove programs** to remove PureMessage 2.6 from all nodes of your cluster.

Uninstallation has similar requirements to installation.

- The PureMessage service should be uninstalled from each node within the cluster in turn.
- Before uninstallation from a node, a PureMessage group must be moved to that node.
- There must be at least one uninstallation for each PureMessage group.
- The final uninstallation from each group must be identified as the last. All other uninstallations must not.

In order meet these criteria, proceed as follows.

5.3.1 Uninstall PureMessage from each passive node in turn

1. Move any PureMessage group to a passive node.
2. Uninstall PureMessage from that node.
3. When asked whether the removal is from the last node in the group, select **No**.
4. Repeat for each remaining passive node.

5.3.2 Return PureMessage groups to the active nodes

Ensure each PureMessage group is active on a different active node. This will require that any groups moved in section 5.3.1 are returned to their usual active nodes.

5.3.3 Uninstall PureMessage from each active node in turn

1. Uninstall PureMessage from an active node.
2. When asked whether the removal is from the last node in the group, select **Yes**.
3. Repeat for each remaining active node.

5.4 Installing PureMessage

1. Ensure that the node with the saved settings which was initially active is still active; if it is not, move the cluster group to make it active again.
2. Starting with the active node and then progressing to the passive nodes, install PureMessage 3 as if it were a fresh installation on to a clustered server. See the *PureMessage for Microsoft Exchange 3 startup guide* for full instructions.

6 Upgrading from PureMessage 3.0 on clustered servers

This section describes how to upgrade from PureMessage 3.0 to PureMessage 3.0.x on clustered servers.

- ❗ If you want to upgrade from PureMessage 2.6 on clustered servers, see section 5.

6.1 About upgrading on a cluster

The following instructions apply to a cluster containing one group. If you have a more complicated cluster network, contact Sophos technical support for information and advice.

We recommend that you read Appendix A of the *PureMessage for Microsoft Exchange 3 startup guide* before starting.

- ❗ Sophos does not support installation when Exchange 2007 is installed in Cluster Continuous Replication mode.

When you upgrade from PureMessage 3.0 to PureMessage 3.0.1:

- You do not have to manually uninstall the current installation of PureMessage.
- You can upgrade the nodes in any order.
- You do not have to fail-over the nodes.

6.2 Upgrading clustered servers

On each server, do as follows:

1. If you have downloaded the PureMessage self-extractor from the Sophos website, click **Install** to extract and launch the PureMessage installer.

If you are installing from a CD, run the PureMessage installer from the CD.

- ❗ Ensure that the installer is not run from a network share.

2. In the **Welcome** dialog box, click **Next**.
3. In the **License Agreement** dialog box, read the agreement. If you agree with the terms, click the radio button **I accept the terms of the license agreement** and click **Next**.
4. In the **Select Features** dialog box, select the components you want to install. Click **Next**.

 You cannot install the PureMessage server without an administration console.

5. In the **PureMessage Cluster Settings** dialog box, select the shared cluster disk associated with the server. Click **Next**.

If you select an active disk, continue to step 6. If you select a passive disk, go to step 12.

6. In the **Database Settings** dialog box, specify the database (SQL server) where PureMessage will store reporting data, central quarantine, and policy configuration information. Click **Next**.
7. If you are upgrading PureMessage on an Exchange 2007 server that is configured as a mailbox-only role, the **PureMessage Mailbox Role Settings** dialog box is displayed. Select the Exchange 2007 transport server which PureMessage will use to send alert email messages. Click **Next**.
8. In the **PureMessage Configuration Group** dialog box, you specify which group of PureMessage installations this installation belongs to. Installations that are in the same group share the same policy configuration and can be managed from a single administration console. Select an existing group from the drop-down list or create a new group by entering a new name. Click **Next**.

If you keep the configuration group unchanged, go to step 12. If you change the group or create a new group, continue to step 9.

9. In the **PureMessage Administration Settings** dialog box, enter an Administrator email address. PureMessage will send alerts to this email address. You can change this address later on. Click **Next**.

- ❗ PureMessage creates a security group in Active Directory called Sophos PureMessage Administrators, which includes all PureMessage administrators. By default, the current user will be added to this group.
10. In the **PureMessage Routing settings** dialog box, enter your company's email domain(s), such as mycompany.com, in the top panel.
 - ❗ You should not specify sub-domains. When you specify a domain, the sub-domains are included automatically.

Enter the IP addresses of any trusted email relays, such as your ISP's SMTP server and any email gateway server or appliance upstream of your Exchange servers. Click **Next**.
 - ❗ PureMessage uses the trusted email relays settings to determine mail direction. If you do not specify them, PureMessage may classify messages from upstream relays as internal and fail to scan them. For more information, see Appendix B of the *PureMessage for Microsoft Exchange 3 startup guide*.
 11. In the **Company Information** dialog box you can enter details relating to the size, location, and market sector of your company or organization. This valuable feedback helps SophosLabs analyse email security trends. Click **Next**.
 12. In the **Start Copying Files** dialog box, ensure the settings are correct. If they are not, use the back button to return to previous dialog boxes and change the settings. When they are correct, click **Next**.

7 Navigating to common menu options

This section compares the location of common menu options in PureMessage 2.6 and PureMessage 3.

Task or function	PureMessage 2.6	PureMessage 3
Set up mail domain for which PureMessage accepts incoming messages	Not applicable	Configuration System Routing
Set up a trusted relay (2.6) Set up an upstream (trusted) relay (3)	Jobs Mail (SMTP): Spam tabbed page	Configuration System Routing: select Upstream (trusted) relays
Synchronize with your server or Active Directory	Not applicable	Configuration Users and groups Active Directory
Alerting for SMTP scanning	Alerting Mail (SMTP): sub-menus for administrators, senders, recipients	Configuration Transport (SMTP) Scanning policy select Anti-spam, Anti-virus, or Content
Alerting for Administrator events in the Exchange Information store	Alerting Exchange information store Administrator	Configuration Exchange store scanning policy
Setting up global details for alerts	Alerting	Configuration System Alert configuration
Configure outbreak alerting	Alerting Mail (SMTP) Administrator Outbreak	Configuration System Virus outbreak settings
Start email scanning	Jobs Mail (SMTP) Status page	Configuration Transport (SMTP) scanning policy Anti-virus
Configure SMTP scan settings	Jobs Mail (SMTP) Scan page	Configuration Transport (SMTP) scanning policy Anti-virus Change anti-virus settings

Task or function	PureMessage 2.6	PureMessage 3
Configure Exchange Store scan settings	Jobs Exchange Information Store Scan page	Configuration Exchange store scanning policy Change Exchange store scan settings
Skip scanning for specified recipients	Jobs Mail (SMTP) Filter page	Use exception policies for each type of event. See the PureMessage user manual
Block content which may be an email threat	Jobs Mail (SMTP) Content page	Configuration Transport (SMTP) scanning policy Content click the Define link for each event.
Specify actions against viruses or spam	Jobs Mail (SMTP) Actions page	Configuration Transport (SMTP) Scanning policy select Anti-virus or Anti-spam
Specify actions against viruses in Exchange Store	Jobs Exchange Information Store Actions page	Configuration Exchange store scanning policy
Add comments to email (subject tags)	Jobs Mail (SMTP) Subject Tags page	Configuration System Email tagging
Configure or enable Exchange store scanning	Jobs Exchange information store Status page	Configuration Exchange store scanning policy
Set up a disclaimer	Disclaimer	Configuration Transport (SMTP) scanning policy Disclaimer
Check health of all servers	Not applicable	Dashboard

Technical support

For technical support, visit www.sophos.com/support

If you contact technical support, provide as much information as possible, including the following:

1. Sophos software version number(s)
2. Operating system(s) and patch level(s)
3. The exact text of any error messages.

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Part of PureMessage uses:

Regex++, Index.

(version 3.04, 18 April 2000)

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Dr John Maddock

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