

SurfControl Enterprise Threat Shield version 4.0 Upgrade Instructions

Please Read All Sections:

From Enterprise Threat Shield v3.5.x

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From Enterprise Threat Shield v3.0.x

From Enterprise Threat Shield 3.5.x

Before upgrading

SurfControl recommends that you backup a copy of the following files:

- ThreatShield .ini file (located in ETS subdirectory called "Data")
- Standalone .ini file (located in ETS subdirectory called "Data")
- ThreatShield .cfg file (located in Sys32 directory)
- ThreatShieldServer.cfg file (located in Sys32 directory)

Also consider backing up any custom databases (adb files) located in the Data subdirectory.

Download

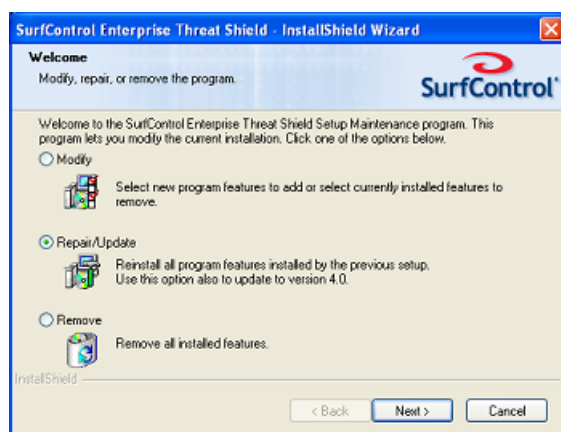
Download SurfControl Enterprise Threat Shield Server version 4.0 from our website at <https://www.surfcontrol.com/Download.aspx?Id=1021&mid=9>

You may also download the MSI Agent Installer at this time as well.

Server Installation

Once you have saved the executable file, you may simply run setup and the SurfControl installation wizard will walk you through the configuration windows.

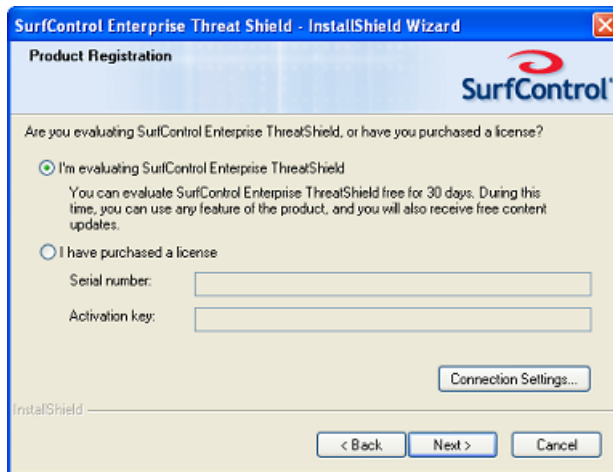
When prompted, choose "Repair/Update" to upgrade.



If you are an existing ETS customer with a non-expired product license, you should receive a Serial Number/Activation Code pair that will unlock ETS for the duration of your contract. If you have this key, choose "I have purchased a licensee and use copy/paste to insert the Serial Number and Activation Code into the appropriate registration fields.

If you do not yet have a new Serial Number & Activation Code, you may still upgrade by choosing "I'm evaluating SurfControl Enterprise Threat Shield".

In either case, all of your settings and rules should be migrated to version 4.0



Licensing

SurfControl Enterprise Threat Shield v4.0 uses a new license key as noted above. Upon a successful upgrade, without entering new license details upon installation, ETS will run as an evaluation version for 30 days. For this period, the product is fully functional and a maximum of 100 clients can be managed. To verify that ETS is installed in evaluation mode, you will see the following:



Important Notes:

The server that ETS is being installed on must have a valid internet connection in order to receive a valid license. Each ETS Server must have its own unique Serial Number/Activation Code key. Please contact SurfControl Client Services if you require additional License Keys.



Installing the Agent

Agent Options

Enterprise Threat Shield (ETS) 4.0 offers two deployment choices for installing the agent:

1. The Stand Alone agent. This installs up to a 18 MB client onto the workstation, and can enforce policy even when the workstation is not part of the LAN.
2. The Connected agent. This installs a 250-750K agent onto the workstation. This agent resides in memory, is invisible to the end user, and relies on communication with the ETS server in order to enforce policy.

Remote Deployment

"Remote deployment" refers to pushing the agent out to workstations via the Workstation Deploy and Status Window, launched within the ETS Manager. You can deploy both agent types using remote deployment.

You can also deploy the ETS Agent using other methods such as an MSI file installed via Windows group policy or a logon script. For more information about agent options and methods of deployment, refer to Knowledge Base article #1832, Enterprise Threat Shield Deployment Checklist.

From Enterprise Threat Shield 3.0.x

Direct upgrades from v3.0.x to v4.0 are NOT SUPPORTED.

Important Notes:

Threat Shield 3.0.x is an "End of Life" product, and SurfControl will be phasing out list updates for this product by August 1, 2007

To upgrade from v3.0.x you should Uninstall and perform a full installation of v4.0. This will involve re-creating all rules, reports and other configuration options:

If you are running SETS version 3.0.x please contact Technical Support.