websense®

Appliance Upgrade Guide

Websense® V-Series™ Appliance
V10000 G2/G3 and V5000 G2

**Upgrades to
Versions 7.7.x and 7.8.x**

Trademarks

WinPcap

Contents

1 | Upgrading Websense V-Series Appliances

Related topics:

◆ *Upgrading the appliance from v7.6.x to 7.7.x*, page 4

◆ *Upgrading the appliance from v7.7.x to 7.8.1*, page 14

◆ *Upgrading the appliance from v7.8.1 to 7.8.2 and from v7.8.1, v7.8.2 or 7.8.3 to 7.8.4*, page 25

Use this information to perform the following upgrades to your Websense® V-Series™ appliances:

Current Version	End Version (direct upgrade supported)
7.6.0 7.6.1 7.6.2 7.6.5 7.6.7	7.7.0
7.7.0	7.7.3
7.7.0	7.8.1
7.7.3	7.8.1
7.8.1	7.8.2
7.8.1 7.8.2 7.8.3	7.8.4

Your appliances must be in one of these modes:

◆ Web and Email mode
  ■ Web Security and Email Security Gateway (Anywhere)
  ■ Web Security Gateway (Anywhere) and Email Security Gateway (Anywhere)
◆ Web only mode
  ■ Web Security

- ■ Web Security Gateway (Anywhere)
- ◆ Email only mode
  - ■ Email Security Gateway (Anywhere)

> **Important**
>
> In addition to upgrading your appliances, you must also upgrade Websense components installed on other servers. The sequence of the upgrade steps is essential to a successful upgrade.

Follow the steps in the Deployment and Installation Center that are prescribed for each solution or combination of solutions.

Upgrading the appliance from v7.6.x to 7.7.x

Appliance Upgrade Guide | Upgrades to v7.7.x

Related topics:

- ◆ *Versions supported for upgrade*, page 4
- ◆ *Estimates of time to complete upgrade*, page 5
- ◆ *Preparing for the appliance upgrade*, page 7
- ◆ *Upgrade instructions*, page 9
- ◆ *Upgrading multiple V-Series appliances*, page 11
- ◆ *Post-upgrade activities*, page 12

This upgrade process applies to version 7.6.x for the following Websense solutions and platforms:

- ◆ Web Security, Web Security Gateway, and Web Security Gateway Anywhere
- ◆ Email Security Gateway and Email Security Gateway Anywhere
- ◆ V10000*, V10000 G2, and V5000 G2, V10000 G3

*The latest version available for the V10000 appliance is 7.7.3. No later versions are planned for the V10000 appliance.

Versions supported for upgrade

Appliance Upgrade Guide | Upgrades to v7.7.x

You must upgrade to version 7.7.0 before upgrading to 7.7.3. At version 7.7.3, you can then upgrade to 7.8.1 (See *Upgrading the appliance from v7.7.x to 7.8.1*, page 14).

Direct upgrade to version 7.7.0 is supported from these versions:

- 7.6.0
- 7.6.1
- 7.6.2
- 7.6.5
- 7.6.7

Appliances running versions earlier than v7.6.0 must be upgraded to 7.6.0. Once upgraded to 7.6.0, they can be upgraded directly to 7.7.0.

To upgrade from version 7.6.0 to 7.7.0, follow the same steps shown in this guide for upgrading to version 7.7.x, except use a 7.6.x patch wherever a 7.7.x patch is mentioned.

At sites wishing to stay on the 7.7 series, we recommend upgrading to the latest version of 7.7.x, which is 7.7.3, so that you have the latest fixes and features.

> **Note**
>
> The upgrades to version 7.7.3 are applied to V-Series appliances via a software patch. Patches are installed via the Appliance Manager under the **Administration > Patches/Hotfixes > Patches** page. You must be running version 7.7.0 to use the version 7.7.3 patch.

Estimates of time to complete upgrade

Appliance Upgrade Guide | Upgrades to v7.7.x

The table below provides estimates of the time needed for the 7.7.x patch to be installed on an appliance. The amount of time varies, as indicated. Not all V-Series configurations are shown.

System	Configuration	Elapsed time
V10000 G2 V10000 G3	Web Security Gateway and Email Security Gateway User directory and filtering	20 - 30 minutes
V10000 G2	Web security only: Web Security Gateway Full policy source	70 - 90 minutes
V10000 G2 V10000 G3	Web Security and Email Security Gateway Full policy source	70-90 minutes
V10000 G2 V5000 G2	Web security only: Web Security Gateway User directory and filtering	90 - 110 minutes

System	Configuration	Elapsed time
V10000 G2	Dual mode: Web Security Gateway and Email Security Gateway	70 - 90 minutes
V10000 G2 V5000 G2	Email security only	20 - 30 minutes
V5000 G2	Web Security Gateway filtering only	30 minutes

The following provides a basic sample scenario:

Approximate total upgrade time, beginning to end, for all upgrade tasks:

◆ 1 Dual mode V10000 G2 appliance

◆ 2 Windows R2 2008 servers: 1 for the TRITON console, 1 for Web and Email Log Server

Approximately 3 to 4 hours

The download speed for each patch that you're going to apply depends on your network environment and can vary significantly.

Activity breakout:

◆ 1 hour to download the version 7.7.x appliance upgrade (patch) file (if the download speed is 512 kibibytes per second). This is the estimated time per patch. Depending on the upgrade path you take, your upgrade may involve more than one patch.

◆ 10 minutes to back up the V-Series appliance

◆ 70 to 90 minutes for the patch to perform the upgrade

◆ 10 minutes to restart the V-Series and verify that the upgrade was successful

◆ 20 minutes to download the version 7.7.x Websense TRITON Unified Installer

◆ 40 to 60 minutes to run the installer to upgrade the TRITON management server and the Log Server host

◆ 5 minutes to restart the Windows servers and verify that the upgrade was successful

Service disruption during upgrade

Appliance services are disrupted while the upgrade is applied and until the appliance completes restarting. See *Estimates of time to complete upgrade*, page 5.

> ✓ **Note**
> Service is not disrupted while the off-box components are upgraded.

At completion of the V-Series upgrade, the appliance must be restarted.

Preparing for the appliance upgrade

Appliance Upgrade Guide | Upgrades to v7.7.x

Before applying the 7.7.x patch, perform these tasks and be aware of the following issues.

If you are not already familiar with the preparation required for upgrade of off-appliance components, review those requirements before upgrading your appliances.

◆ For Web Security solutions, see <u>Before upgrading Web Security to v7.7</u>.

◆ For Email Security Gateway (Anywhere), see <u>Preparing for the upgrade</u>.

Back up appliance configuration and settings

Perform a **full appliance configuration** backup:

1. Log on to Appliance Manager and go to the **Administration > Backup Utility** page.

2. Under Perform Backup, select **Full Appliance Configuration** as the backup type.

3. Click **Run Backup Now**.

4. When the backup file appears in the **Local Backup Files** list, click the backup file name. When prompted, save the backup file in another location off the appliance.

Content Gateway logs

If the appliance hosts Web Security Gateway (Anywhere), during the upgrade, depending on their size, older Content Gateway logs may be automatically removed by the upgrade procedure to make room for the new version.

To ensure that all Content Gateway logs are retained, you can download the Content Gateway logging directory.

1. In the Appliance Manager, go to **Administration >Logs**.

2. Select the **Websense Content Gateway** module and then **Download entire log file**.

3. Click **Submit** and specify a location to save the file.

Policy databases and Websense databases are not affected by the upgrade.

Content Gateway Integrated Windows Authentication (IWA) settings

IWA settings are not preserved in the upgrade.

If your deployment uses Content Gateway IWA user authentication, log onto Content Gateway and record the IWA settings, including the name of the domain to which IWA is joined. Keep this record where you can easily retrieve it after upgrade is complete.

Network Agent settings

In the majority of deployments, upgrade preserves all Network Agent settings.

However, when the following conditions are both true, the upgrade process does not preserve several Network Agent settings:

◆ There is a Filtering only appliance that is configured to get policy information from the Policy Broker machine (either the Full policy source appliance or an off-appliance software installation).

◆ There is an off-appliance Network Agent installation that uses the Filtering Service on the Filtering only appliance, and uses the Policy Server on the Policy Broker machine.

When the above conditions are both true and the upgrade is performed, the settings for the off-appliance Network Agent installation are not retained.

In this case, record your Network Agent settings (configured in TRITON - Web Security) before performing the upgrade. Go to the Local Settings page for each Network Agent instance (**Settings > Network Agent** > *agent_IP_address*) and record **all** of its settings.

The following local settings are not preserved.

◆ Filtering Service IP address

◆ If Filtering Service is unavailable

◆ Proxies and Caches

◆ Port Monitoring

◆ Ignore Port

◆ Debug Setting

NIC Configuration settings (from the **Settings > Network Agent > NIC Configuration** page for each NIC) are also not preserved:

◆ Use this NIC to monitor traffic

◆ Monitor List

◆ Monitor List Exceptions

Save your record where you can easily access it when the upgrade is complete.

Websense administrator accounts

Make sure Websense administrator accounts authenticated by a directory service have an email address specified in the directory service. In version 7.7, an email address is required for each administrator account (except group accounts).

Content Gateway changes

See the [Content Gateway Release Notes](#) for information about enhancements and changes in version 7.7.0.

If you are upgrading to version 7.7.3, see the <u>Content Gateway Release Notes</u> for information about enhancements and changes in version 7.7.3.

SSL Manager

SSL Manager has been enhanced in several ways. See the release notes for more information.

Of particular note, a few Certificate validation options have changed. Users of Certificate validation should review the changes and adjust their settings.

IPv6

Incremental support is added in version 7.7.0. See the release notes for more information.

Upgrade instructions

Appliance Upgrade Guide | Upgrades to v7.7.x

> **Important**
>
> V-Series appliance services are not available while the patch is being applied and until the appliance completes restarting. See *Estimates of time to complete upgrade*, page 5.
>
> It is best to perform the upgrade at a time when service demand is low.

1. If you have multiple V-Series appliances, read *Upgrading multiple V-Series appliances*, page 11, **before** following this procedure.
2. Take all precautions to ensure that power to the V-Series appliance is not interrupted during the upgrade. Power failure can result in operating system and software component corruption.
3. Back up appliance configuration and settings. See *Back up appliance configuration and settings*, page 7.
4. If Policy Broker and Policy Database are installed on an off-appliance server, make sure they're upgraded to version 7.7.x and are running. You should simultaneously upgrade all Websense services that are installed on the off-box server with Policy Broker and Policy Database.
5. Restart the appliance (in Appliance Manager: **Status** > **General** > **Restart Appliance**).
6. To download the upgrade patch, in the Appliance Manager, go to the **Administration > Patches/Hotfixes > Patches** tab. The 7.7.x upgrade patch should be listed in the **Table of available patches**. If it's not, click **Check for Patches**. The 7.7.x patch should be listed as available.

Alternatively, the patch can be downloaded from websense.com and uploaded to the appliance.

a. Go to MyWebsense.com, and select the **Downloads** tab. Click **Get Hotfixes & Patches**. Select your appliance model and version.

b. Download the upgrade patch.

c. Log on to the Appliance Manager, and navigate to **Administration > Patches /Hotfixes**.

d. Click **Browse**, and select the v7.7.x upgrade file.

e. Click **Upload**. After a few seconds, the upgrade is listed in the **Available patches** list.

This is an efficient method when your deployment has many appliances because the download from Websense occurs only once. Other appliances can upload the patch from the local location.

7. Click **Install** to apply the upgrade.

> **Important**
>
> When patch installation begins, a dialog box indicates that the patch will take 5 to 10 minutes to apply. This is incorrect. The time is significantly longer. See *Estimates of time to complete upgrade*, page 5.

While the upgrade is being applied, services are **unavailable** to users.

8. When patch installation is complete, the appliance restarts automatically.

9. When the appliance has restarted, log on to the Appliance Manager and verify on the **Configuration > System** page that the V-Series version is 7.7.x.

On the **Configuration > System** page, you can also confirm and adjust, if necessary, the **Time and Date** settings, paying particular attention to the time zone setting.

In rare cases, when logging onto the Appliance Manager for the first time after upgrade, your browser may show an **HTTP Status - Internal Error** page. If this occurs, cycle the power to the appliance. Once the appliance has restarted, you should be able to log in.

10. If you have multiple appliances, after identifying the Policy Broker and Policy Database machine and upgrading that machine, you can move on to upgrading the next appliance and then the next one, and so forth. See *Upgrading multiple V-Series appliances*, page 11.

11. Upgrade all Websense components that run off the appliance. These may include Web and Email Security Log Server, transparent identification agents, and the TRITON manager. If Policy Broker and Policy Database are on the same off-box server as the TRITON manager, you should have already upgraded all components on that box earlier.

See Upgrading Websense Web Security Solutions and Upgrading Email Security Gateway to v7.7 for instructions.

If the upgrade fails, contact Technical Support.

Upgrading multiple V-Series appliances

Appliance Upgrade Guide | Upgrades to v7.7.x

When multiple V-Series appliances are deployed in the same network, it is very important that they be upgraded in the prescribed order.

If the appliance is an Email mode (only) appliance

Apply the 7.7.x upgrade patch before upgrading the off-appliance components.

If the appliance includes Web Security mode

It is a best practice to upgrade the *Full policy source* appliance first, then the *User directory and filtering*, then *Filtering only* appliances, and finally the off-appliance Websense components.

Best practice for upgrade sequence if Full policy source is on V-Series appliance

Follow this sequence whether the Full policy source is a Web mode (only) or Web and Email mode appliance.

Upgrade the **Full policy source** V-Series appliance. Each time the upgrade completes, the appliance automatically restarts.

1. Sequentially apply the upgrade to all **User directory and filtering** appliances.
2. Sequentially apply the upgrade to all **Filtering only** appliances.
3. After all appliances have been upgraded, upgrade off-box components.

Best practice for upgrade sequence if Full policy source is not on V-Series appliance

If you have multiple V-Series appliances and the policy source (Policy Broker and Policy Server) is located off-appliance:

1. Make sure Policy Broker and Policy Server are upgraded to version 7.7.x and are running. You should simultaneously upgrade all Websense services that are installed on the off-appliance server with Policy Broker and Policy Server. Use the version 7.7.x Websense TRITON Unified Installer to upgrade the Policy Broker system. See [Upgrading Websense Web Security Solutions](#) for instructions.
2. Sequentially apply the upgrade to all **User directory and filtering** appliances. Each time the upgrade completes on an appliance, the appliance automatically restarts.
3. Sequentially apply the upgrade to all **Filtering only** appliances.
4. Use the version 7.7.x Websense TRITON installer to upgrade remaining off-appliance components. See [Upgrading Websense Web Security Solutions](#) for instructions.

If the Full policy source appliance is down or unavailable

Best practice is to upgrade the *Full policy source* appliance first, then the *User directory and filtering*, then *Filtering only* appliances, and finally the off-appliance Websense components.

However, if your site must upgrade a *User directory and filtering* or *Filtering only* appliance before the *Full policy source* appliance, or if your *Full policy source* appliance is unavailable, is being replaced, or is being re-imaged, then set a *User directory and filtering* or *Filtering only* appliance (temporarily) to be the Full policy source. To do this:

1. Back up the Full backup file of the User directory and filtering or Filtering only appliance in case changing the policy source fails.

2. On that secondary appliance, in the V-Series console, navigate to **Configuration > Web Security Components**.

3. For **Policy Source**, select **Full policy source**. Save the setting.

4. Upgrade this appliance to version 7.7.x. The appliance automatically restarts when the upgrade finishes.

After the original *Full policy source* appliance has been upgraded, replaced, or re-imaged, change the upgraded temporary *Full policy source* machine to point to the original *Full policy source* again for its policy information. To do this:

1. Upgrade the primary appliance. When the upgrade is done, the appliance automatically restarts.

2. On the previously upgraded secondary appliance, in the V-Series console, navigate to **Configuration > Web Security Components**.

3. For **Policy Source**, select **User directory and filtering** or **Filtering only** and enter the IP address of the primary appliance. Save the setting.

4. Use the version 7.7.x Websense installer to upgrade remaining off-appliance components. See Upgrading Websense Web Security Solutions for instructions.

To see all upgrade instructions go to *Upgrading the appliance from v7.6.x to 7.7.x*, page 4.

Post-upgrade activities

Appliance Upgrade Guide | Upgrades to v7.7.x

◆ If your appliance includes Email Security Gateway (Anywhere), perform the Email Security Gateway Post-upgrade activities.

◆ If your appliance hosts a Web Security Policy Server (is a user directory and filtering appliance), log onto the TRITON console, go to the Web Security manager **Settings > General > Policy Servers** page, and add the Policy Server instance. Next, go to the TRITON console **Appliances** tab and register the appliance.

◆ If your appliance includes Web Security Gateway (Anywhere), perform the Content Gateway Post-upgrade activities.

◆ If your appliance uses the Network Agent module, *Verify Network Agent settings*, page 13.

◆ Review the Release Notes for the Websense solutions on your appliances (links provided below). There are several new features that may require some configuration to put into effect.

Web Security users will be especially interested in the Threats dashboard (no configuration needed). Web Security Gateway (Anywhere) users will be interested in the enhanced outbound scanning options. It is recommended that all of the Scanning Options be reviewed.

- [Web Security Release Notes](#)
- [Content Gateway Release Notes](#)
- [Email Security Gateway Release Notes](#)

If you are upgrading to version 7.7.3, see the [Content Gateway Release Notes](#) for information about enhancements and changes in version 7.7.3.

Verify Network Agent settings

If you had to record your Network Agent settings prior to upgrade (*Network Agent settings*, page 8), restore them after the TRITON console has been upgraded.

Log on to TRITON - Web Security and go to **Settings > Network Agent > Local Settings**.

Select the IP address of the affected Network Agent installations and check and restore all values, paying particular attention to:

◆ Filtering Service IP address

◆ If Filtering Service is unavailable

◆ Proxies and Caches

◆ Port Monitoring

◆ Ignore Port

◆ Debug Setting

Also, check the **Settings > Network Agent > NIC Configuration** page for each NIC:

◆ Use this NIC to monitor traffic

◆ Monitor List

◆ Monitor List Exceptions

When your changes are complete, click **OK** and then **Save and Deploy**.

Upgrading the appliance from v7.7.x to 7.8.1

Appliance Upgrade Guide | Upgrades to v7.8.1

Related topics:

◆ *Versions supported for upgrade*, page 14
◆ *Estimates of time to complete upgrade*, page 15
◆ *Preparing for the appliance upgrade*, page 16
◆ *Upgrade instructions*, page 19
◆ *Upgrading multiple V-Series appliances*, page 22
◆ *Post-upgrade activities*, page 24

This upgrade process applies to version 7.7.x for the following Websense solutions and platforms:

◆ Web Security, Web Security Gateway, and Web Security Gateway Anywhere
◆ Email Security Gateway and Email Security Gateway Anywhere
◆ V10000 G2 and G3 and V5000 G2 appliances

> ✔ **Note**
> For an overview of this upgrade process, see the support video, Upgrading a Websense V-Series appliance to v7.8.1.
>
> For high-level flow diagrams for upgrading from v7.7.x, see:
>
> Web Security Gateway and Email Security Gateway on V-Series: Upgrade to 7.8.1
>
> Web Security and Web Security Gateway on V-Series Upgrade to 7.8.1
>
> Email Security Gateway on V-Series: Upgrade to 7.8.1

Versions supported for upgrade

Appliance Upgrade Guide | Upgrades to v7.8.1

You can upgrade directly to version 7.8.1 from these versions of 7.7.x:

◆ 7.7.0, 7.7.3

Appliances running earlier versions must be upgraded to version 7.7.0 first before upgrading to version 7.8.1.

Estimates of time to complete upgrade

Appliance Upgrade Guide | Upgrades to v7.8.1

The table below provides estimates of the time needed for the 7.8.1 patch to be installed on an appliance. The amount of time varies, as indicated. Not all V-Series configurations are shown.

System	Configuration	Elapsed time
V10000 G2/G3	Web security only: Web Security Gateway Full policy source	40-50 minutes
V10000 G2/G3 V5000 G2	Web security only: Web Security Gateway User directory and filtering	40-50 minutes
V10000 G2/G3	Dual mode: Web Security Gateway and Email Security Gateway	40-50 minutes
V10000 G2/G3 V5000 G2	Email security only	40-50 minutes

The following provides a basic sample scenario:

Approximate total upgrade time, beginning to end, for all upgrade tasks:

◆ 1 Dual mode V10000 G2 appliance

◆ 2 Windows R2 2008 servers: 1 for the TRITON console, 1 for Web and Email Log Server

Approximately 5.5 to 6 hours

The download speed for the patch depends on your network environment and can vary significantly.

Activity breakout:

◆ 90 seconds to download the pre-upgrade hotfix

◆ 10 minutes to apply the hotfix and restart the appliance. After the hotfix is applied, you must manually restart it.

◆ 3.5 hours to download the version 7.8.1 appliance upgrade (patch) file (if the download speed is 512 kibibytes per second)(the patch size is 6 gibibytes)

◆ 10 minutes to back up the V-Series appliance

◆ 50 minutes for the patch to perform the upgrade, which includes automatically restarting the appliance twice

◆ 5 minutes to log onto the Appliance manager to verify that the upgrade was successful

◆ 20 minutes to download the version 7.8.1 Websense TRITON Unified Installer

◆ 40 to 60 minutes to run the installer to upgrade on the TRITON management server and the Log Server host

◆ 5 minutes to restart the Windows servers and verify that the upgrade was successful

Service disruption during upgrade

Appliance services are disrupted while the upgrade is applied and until the appliance finishes automatically restarting twice. See *Estimates of time to complete upgrade*, page 15.

Preparing for the appliance upgrade

Appliance Upgrade Guide | Upgrades to v7.8.1

Before applying the 7.8.1 patch, perform the following tasks and be aware of the following issues.

If you are not already familiar with the preparation required for upgrade of off-appliance components, review those requirements before upgrading your appliances.

◆ For Web Security solutions, see <u>Before upgrading Web Security to v7.8</u>.

◆ For Email Security Gateway (Anywhere), see <u>Preparing for the upgrade</u>.

Back up appliance configuration and settings

Note that at the start of the upgrade process, you are given the chance to run the backup and save the backup file to a remote machine. But if you wish to perform a **full appliance configuration** backup in advance:

1. Log on to Appliance Manager and go to the **Administration > Backup Utility** page.

2. Under Perform Backup, select **Full Appliance Configuration** as the backup type.

3. Click **Run Backup Now**.

4. When the backup file appears in the **Local Backup Files** list, click the backup file name. When prompted, save the backup file in another location off the appliance.

To see all upgrade instructions go to *Upgrading the appliance from v7.7.x to 7.8.1*, page 14.

Content Gateway logs

If the appliance hosts Web Security Gateway (Anywhere), during the upgrade, depending on their size, older Content Gateway logs may be automatically removed by the upgrade procedure to make room for the new version.

To ensure that all Content Gateway logs are retained, you can download the Content Gateway logging directory.

1. In the Appliance Manager, go to **Administration >Logs**.

2. Select the **Websense Content Gateway** module and then **Download entire log file**.

3. Click **Submit** and specify a location to save the file.

Policy databases and Websense databases are not affected by the upgrade.

Content Gateway Integrated Windows Authentication (IWA) settings

The upgrade process backs up and restores the IWA configuration, preserving the pre-existing domain memberships (joins).

Network Agent settings

> **Important**
>
> If your appliance has a Network Agent module that is temporarily disabled, enable or permanently disable it. If you do nothing, the module is permanently disabled.

In the majority of deployments, upgrade preserves all Network Agent settings.

However, when the following conditions are both true, the upgrade process does not preserve several Network Agent settings:

◆ There is a Filtering only appliance that is configured to get policy information from the Policy Broker machine (either the Full policy source appliance or an off-appliance software installation).

◆ There is an off-appliance Network Agent installation that uses the Filtering Service on the Filtering only appliance, and uses the Policy Server on the Policy Broker machine.

When the above conditions are both true and the upgrade is performed, the settings for the off-appliance Network Agent installation are not retained.

In this case, record your Network Agent settings (configured in the Web Security manager) before performing the upgrade. Go to the Local Settings page for each Network Agent instance (**Settings > Network Agent** > *agent_IP_address*) and record **all** of its settings.

The following local settings are not preserved.

◆ Filtering Service IP address

◆ If Filtering Service is unavailable

◆ Proxies and Caches

◆ Port Monitoring

◆ Ignore Port

◆ Debug Setting

NIC Configuration settings (from the **Settings > Network Agent > NIC Configuration** page for each NIC) are also not preserved:

- Use this NIC to monitor traffic
- Monitor List
- Monitor List Exceptions

Save your record where you can easily access it when the upgrade is complete

Websense administrator accounts

Make sure Websense administrator accounts authenticated by a directory service have an email address specified in the directory service. In version 7.8.1, an email address is required for each administrator account (except group accounts).

Content Gateway changes

See the [Content Gateway Release Notes](#) for information about enhancements and changes in version 7.8.1.

Disable on-appliance TRITON console

In version 7.8.1, the Web Security manager cannot reside on an appliance. If your deployment uses an on-appliance TRITON console, disable it and create a Windows-based TRITON management server before upgrading.

To disable the on-appliance TRITON console:

1. Log on to the Appliance Manager (https://*<C interface IP address>*:9447/ appmng)
2. Under **Configuration**, select **Web Security Components**.
3. Under **TRITON - Web Security**, select **Disabled**.
4. Click **Save**.

   The disabling process may take several minutes. Wait for it to complete.
5. When the process completes successfully, a **TRITON Configuration** link appears below the **Disabled** option. Use this link to create a backup of TRITON settings that can be restored to the off-appliance TRITON Unified Security Center:
   a. Click the backup file link that is displayed below the Disabled button.
   b. If a certificate error is displayed, click the continue or accept option to start the download.
   c. Save the TRITON backup file (**EIP_bak.tgz**) in a convenient location.
   d. Create a TRITON management server on Windows Server 2008 R2 or Windows Server 2012.

If Full policy source is not on V-Series appliance

If Policy Broker and Policy Server are installed on an off-appliance server, make sure they're upgraded to version 7.8.1 and are running. You should simultaneously upgrade all Websense services that are installed on the off-appliance server with Policy Broker and Policy Server.

Integration mode

If you are using Web Security (no Gateway) appliances, make sure your integration mode is one of these supported modes:

◆ Stand-alone (Network Agent only)

◆ Microsoft TMG

◆ Citrix

◆ Cisco ASA

Upgrade instructions

Appliance Upgrade Guide | Upgrades to v7.8.1

> **Important**
>
> V-Series appliance services are not available while the patch is being applied and until the appliance finishes automatically restarting twice. See *Estimates of time to complete upgrade*, page 15.
>
> It is best to perform the upgrade at a time when service demand is low.

1. If you have multiple V-Series appliances, read *Upgrading multiple V-Series appliances*, page 22, **before** following this procedure.

2. Take all precautions to ensure that power to the V-Series appliance is not interrupted during the upgrade. Power failure can result in operating system and software component corruption.

3. Back up appliance configuration and settings. See *Back up appliance configuration and settings*, page 16. You can also do a backup at the start of the upgrade process.

4. If Policy Broker and Policy Database are installed on an off-appliance server, make sure they're upgraded to version 7.8.1 and are running. You should simultaneously upgrade all Websense services that are installed on the off-box server with Policy Broker and Policy Database.

5. The upgrade involves two steps: installing a hotfix that goes with your appliance version, and then installing a patch. The patch consists of an **rpm** file and an **img** file. The hotfix enables you to download and upload these very large patch files.

> **Important**
>
> You **must install the appropriate Hotfix 90** for your version before you upload or download the upgrade patch files to the appliance, or the upgrade will not succeed.

Note that some sites who are storing years of snapshots and backups on their V-Series appliances have noticed that the upgrade to v7.8.1 (where the underlying operating system becomes 64-bit) does not have enough space, due to the excess of backup files. If you have a large number of old backups or snapshots that might prevent a successful upgrade, please consider Hotfix 91 for 7.7.0 (or 7.7.3, whichever version you are running). Hotfix 91 enables you to eliminate old files and expands a partition used during the 7.8.1 upgrade. See Knowledge Base article 7158 for additional details.

6. To get the hotfix, in the Appliance manager, go to **Administration** > **Patches/Hotfixes** > **Hotfixes** tab. Enter the name of the hotfix to download and install it on the appliance.

   - For example, APP-7.7.0-090 if you're upgrading from version 7.7.0 and APP-7.7.3-090 if you're upgrading from version 7.7.3.

      a. Click **Find** to locate the hotfix.

      b. Click **Download**. When the download is done, the hotfix appears in the table of downloaded hotfixes with the status **Ready to install**.

      If you have several appliances and do not want to download the hotfix from websense.com multiple times, you can use the **Save to network location** link to copy the downloaded hotfix to a convenient location on your network, and then, on each appliance, use the **Upload Hotfix Manually** button to upload the file to the appliance.

      Note that if you copy the downloaded hotfix from one appliance to a local server, for use with other appliances, you must do this **before** installing the hotfix.

      c. Click **Install** to apply the hotfix. The installation may temporarily interrupt some services.

      d. Click **OK** to continue. It may take more than 5 minutes to install the hotfix.

7. After the hotfix is installed, manually restart the appliance in the Appliance manager by going to **Status** > **General**. Under Appliance Controller, click **Restart Appliance**. Restarting the appliance takes from 5 to 8 minutes. The appliance has successfully restarted when you're returned to the Appliance manager logon page.

   > ✓ **Note**
   >
   > There are two ways to get the patch itself. Steps 8, 9, and 10 describe one method. At the end of step 10 is an alternative method.

8. To download the upgrade patch, in the Appliance manager, go to the **Administration > Patches/Hotfixes > Patches** tab. The 7.8.1 upgrade patch should be listed in the table of **Available patches**.

9. If the patch is not listed in the table, click **Check for Patches**.

You may see security warnings as the system tries to run a Websense application related to uploading the patch. Click **Continue**. Mark the **I accept the risk ...** checkbox, and then click **Run**.

10. Next, click **Download**. The patch size is 6 gibibytes, so this will take some time.

    When the download is done, the patch status becomes **Ready to Install**.

    Once the patch is downloaded, it can be saved to a local network location. You can upload the patch to other appliances from the local location by clicking the **Upload Patch Manually** button. If you copy the patch from one appliance to a local server, for use with other appliances, select **both** the rpm file and the img file **at the same time** in the Upload Patch utility. If you try to upload one file, then the other, a warning message is displayed, and the upload cannot be completed successfully.

    As an **alternative** to steps 8, 9, and 10, the patch can be downloaded from websense.com and uploaded to the appliance.

    a. Go to MyWebsense.com, and select the **Downloads** tab. Click **Get Hotfixes & Patches**. Select your appliance model and version.

    b. Download the upgrade patch, which consists of a tarball containing two files: an rpm and an img file.

    c. Unpack the patch tarball into the two files.

    d. Log on to the Appliance Manager, and navigate to **Administration > Patches /Hotfixes** > **Patches** tab.

    e. Via the **Upload Patch Manually** button, browse for and select the patch to open. Click **Upload**. Both files in the patch must be uploaded simultaneously. After a few seconds, the patch is listed in the **Available patches** list.

    This is an efficient method when your deployment has many appliances because the download from Websense occurs only once. Other appliances can upload the patch from the local location.

11. Click **Install**.

12. A **system check** is launched to make sure you're set up correctly for the upgrade to succeed. This may take several minutes.

    a. If all pre-requisites are met, you can back up your appliance files to a remote machine by clicking **Back Up**. It is a best practice to back up your files at this point if you have not already done so.

    b. If you choose to back up your appliance, provide the connection information for the remote machine. You can click **Test Connection** to test the connection.

    c. To perform the backup, click **Run Backup Now**.

    d. When you see the backup has succeeded, click **Install Patch**.

13. Review the subscription agreement that you have with Websense. Check **I accept this agreement** and **Continue**.

14. A confirmation message tells you that during the upgrade, you are logged out of the Appliance manager and the appliance restarts twice. Click **OK** to begin the upgrade.

    While the upgrade is performed, services are **unavailable** to users.

15. After the appliance has automatically restarted twice, log on to the Appliance manager, and go to **Administration** > **Patches/Hotfixes** > **Patches** tab. Under **Patch History**, for version 7.8.1, it should say "Upgrade Succeeded" in the **Comments** section. In the Appliance manager, you can also check the appliance version number by going to the **Configuration > System** page and looking under **System Information**.

    On the **Configuration** > **System** page, you can also confirm and adjust, if necessary, the **Time and Date** settings, paying particular attention to the time zone setting.

16. If you have multiple appliances, after identifying the Policy Broker and Policy Database machine and upgrading that machine, you can move on to upgrading the next appliance and subsequent appliances. See *Upgrading multiple V-Series appliances*, page 22.

17. Upgrade all Websense components that you haven't already upgraded and which run off the appliance. These may include Web and Email Security Log Server, transparent identification agents, and the TRITON manager. If Policy Broker and Policy Server are on the same off-appliance server as the TRITON manager, you should have already upgraded all components on that box earlier.

    See Upgrading Websense Web Security Solutions and Upgrading Email Security Gateway to v7.8 for instructions.

If the upgrade fails, contact Technical Support.

Occasionally, you may need to upgrade or recover your appliance using a USB image. Complete instructions for downloading and creating the USB image can be found in this Knowledge Base article.

Upgrading multiple V-Series appliances

Appliance Upgrade Guide | Upgrades to v7.8.1

1. For multiple V-Series appliances, just like for a single appliance, you need to download the pre-upgrade hotfix from the Appliance manager, install it, and restart each appliance.

2. Then, you must download and install the v7.8.1 upgrade patch. (See *Upgrade instructions*, page 19.)

   Once the patch is downloaded, it can be saved to a local network location. You can upload the patch to other appliances from the local location by clicking the **Upload Patch Manually** button.

   When multiple V-Series appliances are deployed in the same network, it is very important that they be upgraded in the prescribed order.

If the appliance is an Email mode (only) appliance

Apply the 7.8.1 hotfix and upgrade patch before upgrading the off-appliance components.

If the appliance includes Web Security mode

It is a best practice to upgrade the *Full policy source* appliance first, then the *User directory and filtering*, then *Filtering only* appliances, and finally the off-appliance Websense components.

Best practice for upgrade sequence if Full policy source is on V-Series appliance

Follow this sequence whether the Full policy source is a Web mode (only) or Web and Email mode appliance.

Upgrade the **Full policy source** V-Series appliance. The appliance automatically restarts each time the upgrade is completed.

1. Sequentially apply the upgrade to all **User directory and filtering** appliances.
2. Sequentially apply the upgrade to all **Filtering only** appliances.
3. After all appliances have been upgraded, upgrade off-box components.

Best practice for upgrade sequence if Full policy source is not on V-Series appliance

If you have multiple V-Series appliances and the policy source (Policy Broker and Policy Server) is located off-appliance:

1. Make sure Policy Broker and Policy Server are upgraded to version 7.8.1 and are running. You should simultaneously upgrade all Websense services that are installed on the off-appliance server with Policy Broker and Policy Server. Use the version 7.8.1 Websense TRITON installer to upgrade the Policy Broker system. See Upgrading Websense Web Security Solutions for instructions.
2. Sequentially apply the upgrade to all **User directory and filtering** appliances. When the upgrade completes, the appliance automatically restarts.
3. Sequentially apply the upgrade to all **Filtering only** appliances.
4. Use the version 7.8.1 Websense installer to upgrade remaining off-appliance components. See Upgrading Websense Web Security Solutions for instructions.

If the Full policy source appliance is down or unavailable

Best practice is to upgrade the *Full policy source* appliance first, then the *User directory and filtering*, then *Filtering only* appliances, and finally the off-appliance Websense components.

However, if your site must upgrade a *User directory and filtering* or *Filtering only* appliance before the *Full policy source* appliance, or if your *Full policy source* appliance is unavailable, is being replaced, or is being re-imaged, then set a *User directory and filtering* or *Filtering only* appliance (temporarily) to be the Full policy source. To do this:

1. On that secondary appliance, in the V-Series console, navigate to **Configuration > Web Security Components**.
2. For **Policy Source**, select **Full policy source**. Save the setting.

3. Upgrade this appliance to version 7.8.1. The appliance automatically restarts when the upgrade is done.

After the original *Full policy source* appliance has been upgraded, replaced, or re-imaged, change the upgraded temporary *Full policy source* machine to point to the original *Full policy source* again for its policy information. To do this:

1. Upgrade the primary appliance.The appliance automatically restarts when the upgrade is done.

2. On the previously upgraded secondary appliance, in the V-Series console, navigate to **Configuration > Web Security Components**.

3. For **Policy Source**, select **User directory and filtering** or **Filtering only** and enter the IP address of the primary appliance. Save the setting.

4. Use the version 7.8.1 Websense installer to upgrade remaining off-appliance components. See Upgrading Websense Web Security Solutions for instructions.

To see all upgrade instructions go to *Upgrading the appliance from v7.7.x to 7.8.1*, page 14.

Post-upgrade activities

Appliance Upgrade Guide | Upgrades to 7.8.1

◆ If your appliance includes Email Security Gateway (Anywhere), perform the Email Security Gateway Post-upgrade activities.

◆ If your appliance hosts a Web Security Policy Server (is a user directory and filtering appliance), log onto the TRITON console, go to the Web Security manager **Settings > General > Policy Servers** page, and add the Policy Server instance. Next, go to the TRITON console **Appliances** tab and register the appliance.

◆ If your appliance includes Web Security Gateway (Anywhere), perform the Content Gateway Post-upgrade activities.

◆ If your appliance uses the Network Agent module, *Verify Network Agent settings*, page 25.

◆ Review the Release Notes for the Websense solutions on your appliances (links provided below). There are several new features that may require some configuration to put into effect.

Web Security users will be especially interested in the deployment visualization and management tools offered by the **Status** > **Deployment** page. Web Security Gateway Anywhere users will be interested in the option to enable Websense ThreatScope™ sandboxing of suspicious files.

Email Security users will be interested in the ThreatScope cloud-based message analysis function, which inspects email attachment file types for security threats.

■ Web Security Release Notes

■ Content Gateway Release Notes

■ Email Security Gateway Release Notes

Verify Network Agent settings

If you had to record your Network Agent settings prior to upgrade (*Network Agent settings*, page 17), restore them after the TRITON console has been upgraded.

1. Log on to the Web Security manager.

2. On the Settings tab, under Network Agent, place the mouse over **General**, then select the IP address of the Network Agent instance you want to configure.

3. Check and restore all values, paying particular attention to:

   ■ Filtering Service IP address

   ■ If Filtering Service is unavailable

   ■ Proxies and Caches

   ■ Port Monitoring

   ■ Ignore Port

   ■ Debug Setting

4. Check the **Settings > Network Agent > NIC Configuration** page for each NIC, especially the selections for:

   ■ Use this NIC to monitor traffic

   ■ Monitor List

   ■ Monitor List Exceptions

5. When your changes are complete, click **OK**.

6. Repeat steps 2 through 5 for additional Network Agent instances.

7. When you are finished updating your settings, click **Save and Deploy**.

Upgrading the appliance from v7.8.1 to 7.8.2 and from v7.8.1, v7.8.2 or 7.8.3 to 7.8.4

Appliance Upgrade Guide | Upgrades to v7.8.x

> Related topics:
>
> ◆ *Estimates of time to complete upgrade*, page 27
> ◆ *Preparing for the appliance upgrade*, page 28
> ◆ *Upgrade instructions*, page 31
> ◆ *Upgrading multiple V-Series appliances*, page 32
> ◆ *Post-upgrade activities*, page 34

This upgrade process applies to version 7.8.1, 7.8.2, and 7.8.3 for the following Websense solutions and platforms:

◆ Web Security, Web Security Gateway, and Web Security Gateway Anywhere

- ◆ Email Security Gateway and Email Security Gateway Anywhere
- ◆ V10000 G2 and G3 and V5000 G2 appliances

Here are the various upgrade paths to version 7.8.2, 7.8.3, or 7.8.4. The table also includes the path for upgrading from version 7.7.x to 7.8.1. You must upgrade to version 7.8.1 before you can upgrade to 7.8.2 or later:

To upgrade from	To this version	Step One	Step Two	Step Three
7.7.x	7.8.1	Apply HF 90	Upgrade to 7.8.1	
7.7.x	7.8.2	Apply HF 90	Upgrade to 7.8.1	Upgrade to 7.8.2
7.7.x	7.8.3	Apply HF 90	Upgrade to 7.8.1	Upgrade to 7.8.3
7.7.x	7.8.4	Apply HF 90	Upgrade to 7.8.1	Upgrade to 7.8.4
7.8.1	7.8.4	Upgrade to 7.8.4		
7.8.2	7.8.4	Upgrade to 7.8.4		
7.8.3	7.8.4	Upgrade to 7.8.4		

For an overview of the upgrade process, see the following flow diagrams:

- ◆ Web Security Gateway and Email Security Gateway on V-Series: Upgrade to 7.8.x
- ◆ Web Security and Web Security Gateway on V-Series Upgrade to 7.8.x
- ◆ Email Security Gateway on V-Series: Upgrade to 7.8.x.

The upgrade from v7.8.1 to 7.8.2 is:

- ◆ Applied to V-Series appliances via a software patch.

  Patches are installed via the Appliance console under the **Administration > Patches/Hotfixes > Patches** page.

- ◆ Similar to upgrading from 7.6.x to v7.7.x with the exception that you must use a 7.8.2 patch in place of the 7.7.x patch and a system check is performed during the upgrade.

The upgrade from v7.8.1, 7.8.2, or 7.8.3 to 7.8.4 is:

- ◆ Applied to V-Series appliances via a software patch.

  Patches are installed via the Appliance console under the **Administration > Patches/Hotfixes > Patches** page.

◆ Similar to upgrading from 7.6.x to v7.7.x with the exception that you must use a 7.8.3 patch in place of the 7.7.x patch and a system check is performed during the upgrade.

> **Important**
>
> After upgrading a filtering only appliance with an off-appliance policy source, Web Security manager lists two Filtering Service instances with the same IP address in **Settings > Network Agent > Global**.
>
> To avoid this problem, before upgrading a filtering only appliance from v7.8.1 to 7.8.2 or from v7.8.x to 7.8.4:
>
> 1. Switch filtering only mode to full policy source mode.
>
> 2. Run the upgrade process.
>
> 3. Switch back to filtering only mode.

Estimates of time to complete upgrade

Appliance Upgrade Guide | Upgrades to v7.8.x

The table below provides estimates of the time needed for the 7.8.2, 7.8.3, or 7.8.4 patch to be installed on an appliance. The amount of time varies, as indicated. Not all V-Series configurations are shown.

System	Configuration	Elapsed time
V10000 G2 V10000 G3	Web Security Gateway and Email Security Gateway User directory and filtering	90 - 110 minutes
V10000 G2	Web security only: Web Security Gateway Full policy source	70 - 90 minutes
V10000 G2 V10000 G3	Web Security and Email Security Gateway Full policy source	70-90 minutes
V10000 G2 V5000 G2	Web security only: Web Security Gateway User directory and filtering	90 - 110 minutes
V10000 G2	Dual mode: Web Security Gateway and Email Security Gateway	70 - 90 minutes
V10000 G2 V5000 G2	Email security only	20 - 30 minutes
V5000 G2	Web Security Gateway filtering only	30 minutes

The following provides a basic sample scenario:

Approximate total upgrade time, beginning to end, for all upgrade tasks:

◆ 1 Dual mode V10000 G2 appliance

◆ 2 Windows R2 2008 servers: 1 for the TRITON console, 1 for Web and Email Log Server

Approximately 3 to 4 hours

The download speed for each patch that you're going to apply depends on your network environment and can vary significantly.

Activity breakout:

◆ 1 hour to download the version 7.8.x appliance upgrade (patch) file (if the download speed is 512 kibibytes per second). This is the estimated time per patch. Depending on the upgrade path you take, your upgrade may involve more than one patch.

◆ 10 minutes to back up the V-Series appliance

◆ 70 to 90 minutes for the patch to perform the upgrade

◆ 10 minutes to restart the V-Series and verify that the upgrade was successful

◆ 20 minutes to download the version 7.8.x Websense TRITON Unified Installer

◆ 40 to 60 minutes to run the installer to upgrade the TRITON management server and the Log Server host

◆ 5 minutes to restart the Windows servers and verify that the upgrade was successful

Service disruption during upgrade

Appliance services are disrupted while the upgrade is applied and until the appliance completes restarting. See *Estimates of time to complete upgrade*, page 27.

> **✓ Note**
> Service is not disrupted while the off-box components are upgraded.

At completion of the V-Series upgrade, the appliance must be restarted.

Preparing for the appliance upgrade

Appliance Upgrade Guide | Upgrades to v7.8.2 and 7.8.3

Before applying the 7.8.2, 7.8.3, or 7.8.4 patch, perform these tasks and be aware of the following issues.

If you are not already familiar with the preparation required for upgrade of off-appliance components, review those requirements before upgrading your appliances.

◆ For Web Security solutions, see <u>Before upgrading Web Security to v7.8.x</u>.

◆ For Email Security Gateway (Anywhere), see <u>Preparing for the upgrade</u>.

Back up appliance configuration and settings

Perform a **full appliance configuration** backup:

1. Log on to Appliance Manager and go to the **Administration > Backup Utility** page.

2. Under Perform Backup, select **Full Appliance Configuration** as the backup type.

3. Click **Run Backup Now**.

4. When the backup file appears in the **Local Backup Files** list, click the backup file name. When prompted, save the backup file in another location off the appliance.

Content Gateway logs

If the appliance hosts Web Security Gateway (Anywhere), during the upgrade, depending on their size, older Content Gateway logs may be automatically removed by the upgrade procedure to make room for the new version.

To ensure that all Content Gateway logs are retained, you can download the Content Gateway logging directory.

1. In the Appliance Manager, go to **Administration >Logs**.

2. Select the **Websense Content Gateway** module and then **Download entire log file**.

3. Click **Submit** and specify a location to save the file.

Policy databases and Websense databases are not affected by the upgrade.

Content Gateway Integrated Windows Authentication (IWA) settings

IWA settings are not preserved in the upgrade.

If your deployment uses Content Gateway IWA user authentication, log onto Content Gateway and record the IWA settings, including the name of the domain to which IWA is joined. Keep this record where you can easily retrieve it after upgrade is complete.

Network Agent settings

In the majority of deployments, upgrade preserves all Network Agent settings.

However, when the following conditions are both true, the upgrade process does not preserve several Network Agent settings:

◆ There is a Filtering only appliance that is configured to get policy information from the Policy Broker machine (either the Full policy source appliance or an off-appliance software installation).

◆ There is an off-appliance Network Agent installation that uses the Filtering Service on the Filtering only appliance, and uses the Policy Server on the Policy Broker machine.

When the above conditions are both true and the upgrade is performed, the settings for the off-appliance Network Agent installation are not retained.

In this case, record your Network Agent settings (configured in TRITON - Web Security) before performing the upgrade. Go to the Local Settings page for each Network Agent instance (**Settings > Network Agent** > *agent_IP_address*) and record **all** of its settings.

The following local settings are not preserved.

◆ Filtering Service IP address
◆ If Filtering Service is unavailable
◆ Proxies and Caches
◆ Port Monitoring
◆ Ignore Port
◆ Debug Setting

NIC Configuration settings (from the **Settings > Network Agent > NIC Configuration** page for each NIC) are also not preserved:

◆ Use this NIC to monitor traffic
◆ Monitor List
◆ Monitor List Exceptions

Save your record where you can easily access it when the upgrade is complete.

Websense administrator accounts

Make sure Websense administrator accounts authenticated by a directory service have an email address specified in the directory service. In version 7.8.x, an email address is required for each administrator account (except group accounts).

Content Gateway changes

See the [Content Gateway Release Notes](#) for information about enhancements and changes in version 7.8.2.

See the [Content Gateway Release Notes](#) for information about enhancements and changes in version 7.8.3.

See the [Content Gateway Release Notes](#) for information about enhancements and changes in version 7.8.4.

Upgrade instructions

Appliance Upgrade Guide | Upgrades to v7.8.x

> **Important**
>
> V-Series appliance services are not available while the patch is being applied and until the appliance completes restarting. See *Estimates of time to complete upgrade*, page 27.
>
> It is best to perform the upgrade at a time when service demand is low.

1. If you have multiple V-Series appliances, read *Upgrading multiple V-Series appliances*, page 32, **before** following this procedure.

2. Take all precautions to ensure that power to the V-Series appliance is not interrupted during the upgrade. Power failure can result in operating system and software component corruption.

3. Back up appliance configuration and settings. See *Back up appliance configuration and settings*, page 29.

4. If Policy Broker and Policy Database are installed on an off-appliance server, make sure they're upgraded to the version you want (either 7.8.2. 7.8.3, or 7.8.4) and are running. You should simultaneously upgrade all Websense services that are installed on the off-box server with Policy Broker and Policy Database.

5. Restart the appliance (in Appliance Manager: **Status** > **General** > **Restart Appliance**).

6. To download the upgrade patch, in the Appliance Manager, go to the **Administration > Patches/Hotfixes > Patches** tab. The upgrade patch for the version you want (7.8.2, 7.8.3, or 7.8.4) should be listed in the **Table of available patches**. If it's not, click **Check for Patches**. The patch should be listed as available.

   Alternatively, the patch can be downloaded from websense.com and uploaded to the appliance.

   a. Go to MyWebsense.com, and select the **Downloads** tab. Click **Get Hotfixes & Patches**. Select your appliance model and version.

   b. Download the upgrade patch.

   c. Log on to the Appliance Manager, and navigate to **Administration > Patches /Hotfixes**.

   d. Click **Browse**, and select the upgrade file for the version you want (7.8.2, 7.8.3, or 7.8.4).

   e. Click **Upload**. After a few seconds, the upgrade is listed in the **Available patches** list.

This is an efficient method when your deployment has many appliances because the download from Websense occurs only once. Other appliances can upload the patch from the local location.

7. Click **Install** to apply the upgrade. Note that in v7.8.x, patch installation takes significantly longer than warned. See *Estimates of time to complete upgrade*, page 27.

8. A **system check** is launched to make sure you're set up correctly for the upgrade to succeed. This may take several minutes.

9. When you see that all patch pre-requisites have been met, you can continue to install the patch by clicking **Install Patch**.

10. Review the subscription agreement that you have with Websense. Check **I accept this agreement** and **Continue**.

11. A confirmation message tells you that during the upgrade, you are logged out of the Appliance manager and the appliance restarts. Click **OK** to begin the upgrade.

    While the upgrade is performed, services are **unavailable** to users.

12. After the appliance has automatically restarted, log on to the Appliance manager, and go to **Administration** > **Patches/Hotfixes** > **Patches** tab. Under **Patch History**, for version 7.8.2, 7.8.3, or 7.8.4, it should say "Patch has been installed succesfully" in the **Comments** section. In the Appliance manager, you can also check the appliance version number by going to the **Configuration > System** page and looking under **System Information**.

    On the **Configuration** > **System** page, you can also confirm and adjust, if necessary, the **Time and Date** settings, paying particular attention to the time zone setting.

13. If you have multiple appliances, after identifying the Policy Broker and Policy Database machine and upgrading that machine, you can move on to upgrading the next appliance and subsequent appliances. See *Upgrading multiple V-Series appliances*, page 32.

14. Upgrade all Websense components that you haven't already upgraded and which run off the appliance. These may include Web and Email Security Log Server, transparent identification agents, and the TRITON manager. If Policy Broker and Policy Server are on the same off-appliance server as the TRITON manager, you should have already upgraded all components on that box earlier.

    See Upgrading Websense Web Security Solutions and Upgrading Email Security Gateway to v7.8.x for instructions.

If the upgrade fails, contact Technical Support.

Upgrading multiple V-Series appliances

Appliance Upgrade Guide | Upgrades to v7.8.x

When multiple V-Series appliances are deployed in the same network, it is very important that they be upgraded in the prescribed order.

If the appliance is an Email mode (only) appliance

Apply the upgrade patch for the version you want before upgrading the off-appliance components.

If the appliance includes Web Security mode

It is a best practice to upgrade the *Full policy source* appliance first, then the *User directory and filtering*, then *Filtering only* appliances, and finally the off-appliance Websense components.

Best practice for upgrade sequence if Full policy source is on V-Series appliance

Follow this sequence whether the Full policy source is a Web mode (only) or Web and Email mode appliance.

Upgrade the **Full policy source** V-Series appliance. Each time the upgrade completes, the appliance automatically restarts.

1. Sequentially apply the upgrade to all **User directory and filtering** appliances.
2. Sequentially apply the upgrade to all **Filtering only** appliances.
3. After all appliances have been upgraded, upgrade off-box components.

Best practice for upgrade sequence if Full policy source is not on V-Series appliance

If you have multiple V-Series appliances and the policy source (Policy Broker and Policy Server) is located off-appliance:

1. Make sure Policy Broker and Policy Server are upgraded to the version you want and are running. You should simultaneously upgrade all Websense services that are installed on the off-appliance server with Policy Broker and Policy Server. Use the version 7.8.x Websense TRITON Unified Installer to upgrade the Policy Broker system. See [Upgrading Websense Web Security Solutions](#) for instructions.
2. Sequentially apply the upgrade to all **User directory and filtering** appliances. Each time the upgrade completes on an appliance, the appliance automatically restarts.
3. Sequentially apply the upgrade to all **Filtering only** appliances.
4. Use the version 7.8.x Websense TRITON installer to upgrade remaining off-appliance components. See [Upgrading Websense Web Security Solutions](#) for instructions.

If the Full policy source appliance is down or unavailable

Best practice is to upgrade the *Full policy source* appliance first, then the *User directory and filtering*, then *Filtering only* appliances, and finally the off-appliance Websense components.

However, if your site must upgrade a *User directory and filtering* or *Filtering only* appliance before the *Full policy source* appliance, or if your *Full policy source* appliance is unavailable, is being replaced, or is being re-imaged, then set a *User directory and filtering* or *Filtering only* appliance (temporarily) to be the Full policy source. To do this:

1. Back up the Full backup file of the User directory and filtering or Filtering only appliance in case changing the policy source fails.

2. On that secondary appliance, in the V-Series console, navigate to **Configuration > Web Security Components**.

3. For **Policy Source**, select **Full policy source**. Save the setting.

4. Upgrade this appliance to the version you want. The appliance automatically restarts when the upgrade finishes.

After the original *Full policy source* appliance has been upgraded, replaced, or re-imaged, change the upgraded temporary *Full policy source* machine to point to the original *Full policy source* again for its policy information. To do this:

1. Upgrade the primary appliance. When the upgrade is done, the appliance automatically restarts.

2. On the previously upgraded secondary appliance, in the V-Series console, navigate to **Configuration > Web Security Components**.

3. For **Policy Source**, select **User directory and filtering** or **Filtering only** and enter the IP address of the primary appliance. Save the setting.

4. Use the version 7.8.x Websense installer to upgrade remaining off-appliance components. See Upgrading Websense Web Security Solutions for instructions.

To see all upgrade instructions go to *Upgrading the appliance from v7.8.1 to 7.8.2 and from v7.8.1, v7.8.2 or 7.8.3 to 7.8.4*, page 25.

Post-upgrade activities

Appliance Upgrade Guide | Upgrades to v7.8.x

◆ If your appliance includes Email Security Gateway (Anywhere), perform the Email Security Gateway Post-upgrade activities.

◆ If your appliance hosts a Web Security Policy Server (is a user directory and filtering appliance), log onto the TRITON console, go to the Web Security manager **Settings > General > Policy Servers** page, and add the Policy Server instance. Next, go to the TRITON console **Appliances** tab and register the appliance.

◆ If your appliance includes Web Security Gateway (Anywhere), perform the Content Gateway Post-upgrade activities.

◆ If your appliance uses the Network Agent module, *Verify Network Agent settings*, page 35.

◆ Review the Release Notes for the Websense solutions on your appliances (links provided below). There are several new features that may require some configuration to put into effect.

For the 7.8.2 release, Web Security users may be especially interested in improvements made to Policy Broker replication, Filtering Service, User Service, Directory Agent, Log Server, LogonApp, the Installer, and the Web Security manager. For Web Security Gateway Anywhere users, emphasis was placed on stability and performance.

Email Security Gateway users may be interested in the on-premises secure message delivery feature, providing a secure portal in which an organization's customers may view, send, and manage email that contains sensitive information. Email Security Gateway Anywhere users will be interested in the phishing detection and education feature, part of the Websense ThreatScope add-on functionality.

- Web Security Release Notes
- Content Gateway Release Notes
- Email Security Gateway Release Notes

For the 7.8.3 release, Web Security Gateway Anywhere users can configure a delay for the download of data files used for Content Gateway analysis; use IP spoofing with explicit proxy; and configure rule-based authentication to use a new Captive Portal authentication method. Web Security now offers support for Mac OS X 10.9.2 and Windows 8.1 Update 1 for the logon application, and for Firefox 28 and Chrome 33 and 34.

Email Security Gateway users may be interested in how an email DLP policy action plan in Data Security may now include a filter action created in the Email Security manager. The on-premises secure messaging portal end-user registration process has also been enhanced.

- Web Security Release Notes
- Content Gateway Release Notes
- Email Security Gateway Release Notes

For the 7.8.4 release, please review the release notes below.

- Web Security Release Notes
- Content Gateway Release Notes
- Email Security Gateway Release Notes

Verify Network Agent settings

If you had to record your Network Agent settings prior to upgrade (*Network Agent settings*, page 29), restore them after the TRITON console has been upgraded.

Log on to TRITON - Web Security and go to **Settings > Network Agent > Local Settings**.

Select the IP address of the affected Network Agent installations and check and restore all values, paying particular attention to:

- Filtering Service IP address
- If Filtering Service is unavailable
- Proxies and Caches

- ◆ Port Monitoring
- ◆ Ignore Port
- ◆ Debug Setting

Also, check the **Settings > Network Agent > NIC Configuration** page for each NIC:

- ◆ Use this NIC to monitor traffic
- ◆ Monitor List
- ◆ Monitor List Exceptions

When your changes are complete, click **OK** and then **Save and Deploy**.