Upgrading to TRITON AP-DATA v8.0.x

WebSense Data Security must be at version 7.8.x in order to upgrade to TRITON AP-DATA v8.0.x. If you have an earlier version, there are interim steps to perform. These are shown in the table below.

<table>
<thead>
<tr>
<th>Your current version</th>
<th>Step 1</th>
<th>Step 2</th>
<th>Step 3</th>
<th>Step 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.1.x</td>
<td>Migrate to 7.6.0</td>
<td>Upgrade to 7.7.2</td>
<td>Upgrade to 7.8.4</td>
<td>Upgrade to 8.0</td>
</tr>
<tr>
<td>7.5.x</td>
<td>Migrate to 7.6.0</td>
<td>Upgrade to 7.7.2</td>
<td>Upgrade to 7.8.4</td>
<td>Upgrade to 8.0</td>
</tr>
<tr>
<td>7.6.x</td>
<td>Upgrade to 7.7.2</td>
<td>Upgrade to 7.8.4</td>
<td>Upgrade to 8.0</td>
<td></td>
</tr>
<tr>
<td>7.7.x</td>
<td>Upgrade to 7.8.4</td>
<td>Upgrade to 8.0</td>
<td>none</td>
<td></td>
</tr>
<tr>
<td>7.8.x</td>
<td>Upgrade directly to 8.0</td>
<td>none</td>
<td>none</td>
<td></td>
</tr>
</tbody>
</table>

Step-by-step guides to upgrading early Data Security installation can be found here:

- [Upgrading to TRITON AP-DATA from v7.7.x - 7.8.x](#)
- [Upgrading to TRITON AP-DATA from v7.6.x - 7.8.x](#)
- [Migrating to TRITON AP-DATA from v7.5.x - 7.8.x](#)

This guide describes how to upgrade stand-alone installations of Data Security v7.8.x to TRITON AP-DATA v8.0.x in 5 steps:

1. Upgrade the TRITON management server
2. Upgrade supplemental servers and standalone agents
3. Upgrade protectors and mobile agents
4. Deploy settings
5. Upgrade endpoints

Perform the upgrade in the order described. This sequence is critical, because if you upgrade supplemental servers or agents before the management server, they stop communicating. If you upgrade the management server first, it continues communicating with the components until they are upgraded.
For information on upgrading systems that include Websense Web Security and/or Email Security as well as Data Security, refer to the Deployment and Installation Center in the Websense Technical Library.

For high-level flow charts of the Data Security upgrade process, see:

- Manager upgrade
- Servers and agents upgrade
- Protector/mobile agent upgrade
- Endpoint upgrade

**Upgrade the TRITON management server**

You upgrade your TRITON management server—also known as the Data Security Management Server—using the TRITON installation package, WebsenseTRITON80xSetup.exe, where x is the version number. This is the same executable used for scratch installations.

The installation package detects that earlier versions of the product are installed, and automatically starts a series of upgrade wizards—one for each of the installed components.

The TRITON AP-DATA portion of the unified upgrade wizard upgrades all necessary components on the TRITON management server.

After upgrade, your system has the same configuration as before the upgrade. The upgrade process does not allow you to change your configuration or settings.

**Preparing for upgrade**

- Unless instructed otherwise by Websense Technical Support, ensure your system is functional prior to upgrade.
- Make sure your base version is 7.8.x.
- Perform a full backup of your system before upgrading.
  a. Use the TRITON backup utility to back up your TRITON Settings information (administrator accounts, for example).
     - On the TRITON management server machine, go to Start > Administrative Tools > Task Scheduler, then select Task Scheduler Library.
     - If the Triton Backup task is disabled, right-click the task and select Enable.
     - Right-click the Triton Backup task and select Run.
  b. Back up Data Security software as described in How do I back up and restore Data Security software?
- Stop all discovery and fingerprinting tasks.
- Route all traffic away from the system.
Upgrading to TRITON AP-DATA v8.0.x

- Ensure that your supplemental fingerprint repositories are fully synchronized with the primary repository.
- Make sure all settings are deployed successfully. Log onto the Data Security manager. If the **Deploy** button is highlighted, click it.
- If Websense supplied your organization with custom file types, change the name of 2 configuration files located in the 'policies_store\custom_policies\config_files' folder where Data Security is installed; otherwise they will be overwritten during upgrade.
  a. Change `extractor.config.xml` to `custom_extractor.config.xml`.
  b. Change `extractorlinux.config.xml` to `custom_extractorlinux.config.xml`.
  The filenames are case-sensitive.
- If you have custom policies provided by Websense, submit a request for updated versions before proceeding.

Note that the speed and success of your upgrade are affected by many factors, including:

- Number of online incidents.
- Size of the forensics folder.
- Number of policies or rules in use
- User directory import size
- Whether GPO restrictions are enforced on the server in domain membership scenarios

**Upgrade steps**

To upgrade TRITON management server components, use the v8.0 TRITON unified installer (Windows only): **WebsenseTRITON80xSetup.exe**, available from:

```
www.websense.com/MyWebsense/Downloads/
```

Select **TRITON AP-DATA, version** (8.0), and **operating system** (Windows), then click **download** next to the installer description.

When you launch the installer, it detects that earlier versions of the product are installed, and automatically starts a series of upgrade wizards—one for each of the modules included on the management server.

Log on as the service account.

---

**Note**

You may be prompted to restart the machine after each component is upgraded. This is optional. You may prefer to restart the machine once after all components are upgraded.
TRITON Infrastructure

The TRITON infrastructure provides basic framework for all of the components that make up TRITON management server. This framework includes a central settings database that stores shared configuration (like administrator directory and account information) for all management modules, as well as other internal shared services.

The infrastructure upgrade wizard contains the following screens.

<table>
<thead>
<tr>
<th>Wizard Screen</th>
<th>Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome</td>
<td>Welcomes you to the installation and upgrade wizard.</td>
</tr>
<tr>
<td></td>
<td>1. Click <strong>Next</strong> to begin the upgrade process. The system checks disk space requirements.</td>
</tr>
<tr>
<td></td>
<td>2. When prompted, click <strong>Next</strong> to launch the installation wizard.</td>
</tr>
<tr>
<td>Pre-Installation Summary</td>
<td>Shows:</td>
</tr>
<tr>
<td></td>
<td>• The destination folder for the installation files.</td>
</tr>
<tr>
<td></td>
<td>• The name of the SQL Server machine and the user name of an authorized database administrator.</td>
</tr>
<tr>
<td></td>
<td>• The IP address of the TRITON management server and administrator credentials.</td>
</tr>
<tr>
<td></td>
<td>Click <strong>Next</strong> to accept the properties.</td>
</tr>
<tr>
<td>Installation</td>
<td>Shows upgrade progress.</td>
</tr>
<tr>
<td></td>
<td>The system stops processes, copies new files, updates component registration, removes unused files, and more.</td>
</tr>
<tr>
<td></td>
<td>A popup message appears at this stage, warning that you must also upgrade all modules. This popup may be hidden behind the main installer window, so if your installation appears to freeze, locate the hidden popup by moving the main installer window, and click <strong>OK</strong> to proceed with the installation.</td>
</tr>
<tr>
<td>Summary</td>
<td>When module upgrade is complete, summarizes your system settings, including:</td>
</tr>
<tr>
<td></td>
<td>• The destination folder for the installation files.</td>
</tr>
<tr>
<td></td>
<td>• The name of the SQL Server machine and the user name of an authorized database administrator.</td>
</tr>
<tr>
<td></td>
<td>• The IP address of the TRITON management server and administrator credentials.</td>
</tr>
<tr>
<td></td>
<td>Click <strong>Finish</strong> to complete the upgrade for this module.</td>
</tr>
</tbody>
</table>
TRITON AP-DATA

The TRITON AP-DATA upgrade wizard contains the following screens.

<table>
<thead>
<tr>
<th>Wizard Screen</th>
<th>Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome</td>
<td>This screen welcomes you to the installation and upgrade wizard for TRITON AP-DATA. The system checks the disk space on the machine. When prompted, click Next to launch the installation wizard.</td>
</tr>
<tr>
<td>Installation Confirmation</td>
<td>Verify your system settings and click Install to continue the upgrade.</td>
</tr>
<tr>
<td>Installation</td>
<td>This screen shows the progress of the installation. The system stops processes, checks ports, copies new files, updates component registration, removes unused files, and more. In certain circumstances, you may receive an internal SQL error. If you do, do not click OK until you have resolved the issue with Websense Technical Support. If you continue prematurely, you can cause problems with your reporting database.</td>
</tr>
</tbody>
</table>
| Summary                           | When installation of this module is complete, this screen summarizes your system settings.  
1. Click Done and you’re prompted to update your predefined policies and content classifiers.  
2. Click OK to install the updates. You’re shown the status of the updates, the items being updated, and details such as how many policies are updated, deleted, or added.  
3. Click Close when the updates are complete. |

Once you are done, you must deploy changes to finish the upgrade. See Deploy settings, page 7 for instructions. For best practice, finish upgrading all other TRITON AP-DATA components, then you can deploy changes once.

Upgrade supplemental servers and standalone agents

Complete these steps to upgrade a supplemental Data Security server or stand-alone agents to v8.0.x.

**Important**

TRITON AP-DATA servers must be on 64-bit platforms. Supplemental Data Security servers running on Windows 2003 (32-bit) have their policy engines removed during the upgrade and only the agent is upgraded.
1. Launch the installer, WebsenseTRITONAP-DATAAgents80x-x64.msi, where \( x \) is the version number. The software is detected, and the upgrade wizard appears.

2. Click **Next** until you complete the wizard.
   Any v7.8.x Data Security components found on this machine are upgraded.

3. Once you are done, you must deploy changes to finish the upgrade. See *Deploy settings, page 7* for instructions. For best practice, finish upgrading all other TRITON AP-DATA components, then you can deploy changes once.

4. It is strongly recommended you wait 30 minutes before routing traffic through the upgraded system.

   When you upgrade a Data Security server it takes time for it to download the information necessary for resolving source and destination resources such as people, computers, and printers. Routing traffic through the system before this is complete may result in:
   - Potential false positives and negatives.
   - File-system discovery starts but immediately indicates "completed with errors".

### Upgrade protectors and mobile agents

Do the following to upgrade your protector or mobile agent from version to v8.0.x.

---

**Important**

If you are upgrading your protector to new hardware, be sure to keep the original IP address/host name if you want to retain settings and information from the original machine.

If you assign a new IP, the protector’s settings are cleared to default when it registers with the management server. In this case, you should manually delete the protector with the original IP address from the system modules page of the Data Security manager.

---

2. Copy the file, protector-update-8.0.x-yyyyy, into the directory `/tmp` where `x-yyyyy` is the latest version and build number, such as 8.0.0-3456.
3. Enter the command:
   ```bash
   chmod +x /tmp/protector-update-8.0.x-yyyyy
   ```
4. Run the following command:
   ```bash
   bash /tmp/protector-update-8.0.x-yyyyy
   ```
5. Answer **Y** on the “Are you sure?” question, and complete the wizard, accepting the defaults.
Upgrading to TRITON AP-DATA v8.0.x

6. Restart the protector or mobile agent machine when the wizard completes.
7. Once you are done, you must deploy changes to finish the upgrade. See Deploy settings, page 7 for instructions.
8. It is strongly recommended you wait 30 minutes before routing traffic through the upgraded system.

When you upgrade a protector, it takes time for it to download the information necessary for resolving source and destination resources such as people, computers, and printers. Routing traffic through the system before this is complete may result in false positives and negatives.

Deploy settings

Once you’ve upgraded all TRITON AP-DATA servers, agents, and appliances, you must deploy your changes in the TRITON Manager. Endpoints do not require a separate deploy step in the manager.

1. Log onto the TRITON console (https://<IP_address_or_hostname>:9443/triton/).
2. Select the Data tab.
3. You are prompted to update your policies. Follow the prompts. Websense research teams stay abreast of regulations across many industries and you should keep your policies and classifiers up-to-date. Depending on the number of policies you have, this can take up to an hour. During this time, do not restart the server or any of the services.
4. Click Deploy.

Upgrade endpoints

Management servers upgraded to TRITON AP-DATA v8.0.x fully support version 7.7.x and 7.8.x endpoints. These endpoints can take advantage of the new predefined policies, but to gain access to new endpoint features, you must upgrade your endpoints to v8.0.x.

Version 8.0 does not support v7.6.x endpoints or earlier. You must upgrade these endpoints to a supported version to use TRITON AP-DATA v8.0.x.

For best practice, upgrade a handful of endpoints and ensure that they’re working before upgrading all of the endpoints in your deployment.

Windows

After you have upgraded the TRITON management server and all supplemental TRITON AP-DATA servers:

1. Select Start > Programs > Websense > TRITON AP-DATA > Endpoint Package Builder on the management server to launch the endpoint client package builder.
2. Choose the deployment option, TRITON AP-ENDPOINT DLP. This is the new name for Data Endpoint.

3. Choose Windows 32- or 64-bit when prompted.

4. Deploy the v8.0.x package to each endpoint using GPO, SMS, or a similar deployment method. You can install v8.0.x on top of earlier versions without uninstalling and re-installing them.

5. Restart the endpoint after installation is complete.

For best practice, deploy an endpoint auto-update server. This can be used to push an endpoint installation package to client machines and silently install the package in the background.

**Linux**

After you have upgraded the TRITON management server and all supplemental TRITON AP-DATA servers:

1. Select **Start > Programs > Websense > TRITON AP-DATA > Endpoint Package Builder** on the management server to launch the endpoint client package builder.

2. Choose the deployment option, TRITON AP-ENDPOINT DLP. This is the new name for Data Endpoint.

3. Choose Linux when prompted.

4. When the wizard completes, copy the correct installer onto the Linux machine and run it as root from the console.

   - **LinuxEndpoint_SFX_installer_el5** - should be used with Red Hat Enterprise Linux version 5.x.

   No reboot is necessary. The endpoint software starts automatically. You can install v8.0.x on top of earlier versions without uninstalling and re-installing them.

**Mac**

After you have upgraded the TRITON management server and all supplemental TRITON AP-DATA servers:

1. Select **Start > Programs > Websense > TRITON AP-DATA > Endpoint Package Builder** on the management server to launch the endpoint client package builder.

2. Choose the deployment option, TRITON AP-ENDPOINT DLP. This is the new name for Data Endpoint.

3. Choose Mac when prompted.

4. When the wizard completes, unzip the WebsenseEndpoint.zip package onto your Mac systems.

5. Run the WebsenseEndpoint.pkg from the unzipped folder WebsenseEndpoint.

6. Follow the steps in the installation wizard.

7. End users may be prompted to log out and re-log on to their desktops.

See Installing and Deploying the TRITON AP-ENDPOINT or more information.