Upgrading Dual Mode (Web + Email) appliances from v7.8.x to v8.0.x on V-Series Appliances

Review the appropriate v8.0.x Release Notes prior to upgrade.

**START**

- My appliance is a V5000 G2 R2, V10000 G2 R2, or V10000 G3
  - **YES**
  - **NO**

  - Not sure
    - See the knowledge base article: [V-Series appliances supported with version 8.0](http://www.websense.com/content/7-8-upgrade-center.aspx)

- My appliance is a Web + Email mode appliance
  - **YES**
  - **NO**

  - See other flow charts: Web Only, Email Only

- This appliance is my policy source (Policy Broker), or my policy source is already upgraded
  - **YES**
  - **NO**

  - You need to upgrade your policy source first. Go to your policy source machine

- My appliance is on version 7.8.x (7.8.1, 7.8.2, 7.8.3, or 7.8.4).
  - **YES**
  - **NO**

  - You must upgrade to 7.8.1 before upgrading to 8.0.x

  - Visit the Upgrade Center for assistance:
    - [http://www.websense.com/content/7-8-upgrade-center.aspx](http://www.websense.com/content/7-8-upgrade-center.aspx)
    - Then, return here

- My policy source is on an appliance
  - **YES**
  - **NO**

  - My policy source is my policy source (Policy Broker), or my policy source is already upgraded

- My appliance is a V5000 G2 R2, V10000 G2 R2, or V10000 G3
  - **YES**
  - **NO**

  - See the knowledge base article: [V-Series appliances supported with version 8.0](http://www.websense.com/content/7-8-upgrade-center.aspx)

  - See other flow charts: Web Only, Email Only

**BEFORE UPGRADE**

- If you have not downloaded the patch previously, click the **download** button next to the 8.0.x patch you need

**UPGRADE PROCESS**

- Back up your appliance configuration and settings. See the Upgrade Center for guidance:
  - [http://www.websense.com/content/8-upgrade-center.aspx](http://www.websense.com/content/8-upgrade-center.aspx)

- Enable or permanently disable Network Agent

- If you have off-box Policy Broker or Policy Server services, ensure that they are running prior to upgrading

- If you are integrated with full Data Security, disable Data Security in the Content Gateway manager

- Ensure that the times set on all appliances are synchronized

- Redirect email traffic out of the system that is being upgraded

- Log onto the Appliance manager directly rather than through the TRITON console

- In the Appliance manager, go to Administration > Patches/Hotfixes > Patches tab. If the version 8.0.x patch you need is not shown, click Check for Patches, accepting all prompts

- Flow charts for upgrading the Policy Broker on Windows or Linux can be found in the Upgrade Center:
  - [http://www.websense.com/content/8-upgrade-center.aspx](http://www.websense.com/content/8-upgrade-center.aspx)
  - After your Policy Broker is upgraded, return here
When the patch finishes downloading, its status will show as "ready to install". You can now click Save to a network location if you need to upgrade multiple appliances.

Click the Install button. This will initiate a system check. If you receive errors, follow the instructions on-screen.

Re-initiate patch install if necessary. When system check completes successfully, click Install Patch.

Review and accept the subscription agreement by checking the "I accept" checkbox and clicking Continue, then click OK.

After the upgrade completes, you will be returned to the Appliance manager logon page.

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Click the Install button. This will initiate a system check. If you receive errors, follow the instructions on-screen.

Re-initiate patch install if necessary. When system check completes successfully, click Install Patch.

Review and accept the subscription agreement by checking the "I accept" checkbox and clicking Continue, then click OK.

After the upgrade completes, you will be returned to the Appliance manager logon page.

If you are integrated with full TRITON AP-DATA, re-register the Data module in the Content Gateway manager.

Upgrade all Websense components on non-appliance servers that you have not already upgraded. There is a list of flow charts for the other TRITON AP-WEB components in the Upgrade Center:

http://www.websense.com/content/8-upgrade-center.aspx

Upgrade any User Identification and Filtering appliances, then any Filtering Only appliances (in that order).

If the upgrade completed successfully, you should see Version 8.0.x under the patch history, with the comment Upgrade Succeeded!

Log on to the Appliance manager and navigate to the Administration > Patches/Hotfixes > Patches tab.

You may need to perform other post-upgrade activities, depending on your configuration or if you have any other Websense products. Please review the v8.0.x Release Notes or see the Upgrade Center for more information:

http://www.websense.com/content/8-upgrade-center.aspx

The upgrade process is now complete.

END.