

Upgrading X-Series Appliances to 8.1.0

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This article describes how to upgrade X-Series appliances from versions 7.8.x and 8.0.x to version 8.1.0.

Upgrade instructions cover all modules that can reside on the appliance, including the appliance module (APP) and product modules. The product modules are either:

- ◆ **Web module** (the core components of your web protection solution) plus **Proxy module** (Content Gateway)
- ◆ **Email module** (the core components of your email protection solution)

The upgrade procedure described in this guide uses a local filestore. By using a local filestore, the upgrade patches do not have to be downloaded multiple times from the patch download server.

Upgrade paths:

To upgrade from	To this version	Step One	Step Two
7.8.2, 7.8.3, 7.8.4	8.1.0	Upgrade the Appliance module (APP) to 8.0.0	Upgrade all modules to 8.1.0.
8.0.x	8.1.0	Upgrade all modules directly to 8.1.0. The <i>Express upgrade</i> option is recommended.	N/A



Important

If you are preparing to upgrade from v7.8.x and you have never enabled the “websense-ts” account on the blades, you must enable it one time (via the CLI). Then you may disable it. It need not be enabled during the upgrade process. In the CLI, use:

```
set account websense-ts --status <on|off>
```



Important

If you are upgrading version 7.8.4 **TRITON AP-EMAIL** to v8.1.0, the backup schedule (configured in the CLI) is lost during the upgrade.

Before upgrading, log on to the CLI and document the backup schedule. In the CLI, use: **show backup schedule**

After completing the upgrade, log on to the CLI and reconfigure the backup schedule. Use: **create backup schedule**



Important

If you are at version 7.8.4 and have already enabled VLAN support, no additional configuration is needed after upgrade to v8.1.x.

If you are at v7.8.2 or 7.8.3 and you want to enable VLAN support after upgrade, you must update the configuration of switches A1 and A2 on your X10G chassis. Please see the [Switch Configuration Guide](#) before you begin the upgrade process.



Important

If you are currently using **link aggregation** and plan to enable VLAN support after upgrade, you must disable link aggregation before enabling VLAN support on the blade or chassis.

Express upgrade

After the appliance module (APP) is upgraded to version 8.0.0, a new upgrade method, called **express upgrade**, is supported.

After the appliance module is upgraded to version 8.1.0, when a filestore is prepared with the upgrade patches, the CLI command **load patch --location <filestore_alias>** offers the express upgrade package.

Express upgrade is recommended because:

- It ensures that all patches are correct for the selected version and certified for production.
- It ensures that all needed patches are downloaded and, when the downloads are complete, the process automatically installs the patches in the correct order.

- It is the most efficient upgrade process, requiring the fewest steps and human interactions

Here's how it works:

1. In the CLI, when you enter **load patch** or **load patch --location** (if a local filestore has been prepared), a list of patches is displayed. The first package in the list is the **Express upgrade package**. It is clearly named.
2. When you select the express upgrade package the patches needed to upgrade to the version indicated in the package name are all downloaded and automatically installed without the need for a separate **install patch** command.

Individual patch files

You also have the option of upgrading each module individually.

When you select an individual patch file, the file is downloaded to the appliance, but not installed automatically. Once the download is complete, you can enter the **install patch** command when you are ready to apply the upgrade patch.

Upgrading from 7.8.x or 8.0.x to 8.1.0

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Upgrading includes these steps:

1. [Prepare the filestore, page 3](#)
2. [TRITON AP-WEB: Upgrade the policy source machine, page 5](#)
3. [Upgrade the Appliance module to 8.0.0, page 5](#)
4. [Upgrade the Appliance module to 8.1.0, page 6](#)
5. [Upgrade the product modules, page 7](#)
6. [Verify the blade upgrade and complete upgrade of off-appliance components, page 7](#)

Prepare the filestore

Staging upgrade patch files on a local filestore has many benefits:

- ◆ It greatly reduces the time needed to download upgrade patches to blade servers because the files are on the local network.
- ◆ Patch file downloads to blade servers are more reliable because Internet connectivity and Internet bandwidth are not a factor.
- ◆ The administrator has complete control over the software versions available for upgrade because the administrator controls what patch files are available in the filestore.

- ◆ For version 8.1.0 upgrades, when 8.1.0 patch files are staged in a local filestore and after the Appliance module (APP) is upgraded to version 8.1.0, **load patch --location <filestore_alias>** offers an express upgrade package to upgrade the product modules.

To prepare a filestore to support 8.1.0 upgrades:

1. If not already configured, identify the location of the filestore and define it on every X-Series blade with the CLI **set filestore** command.
2. Download the 8.1.0 upgrade patches to the filestore. (If you are upgrading from 7.8.x, an additional file is downloaded after this set. Stayed logged onto MyWebsense.)
 - a. Using a computer that has access to the Internet, go to www.websense.com and log in to your **MyWebsense** account.
 - b. In **MyWebsense**, go to the **Downloads** page and select the **Upgrades** tab.
 - c. From the **Product** drop down list, select **Websense X10G Base Configuration**. For **Version**, select 8.1.0.
 - d. Download the upgrade patch files for the modules installed on your blades.
 - *All blades need the upgrade patch for the security blade APP module.
 - The patch files are available under these headings:
 - X10G Security Blade upgrade patch for 8.1.0**
Patch file name: **Websense-Patch-App-8.1.0.rpm**
 - TRITON AP-WEB upgrade patch for 8.1.0**
Patch file name: **Websense-Patch-Web-8.1.0.tgz**
 - Content Gateway upgrade patch for 8.1.0**
Patch file name: **Websense-Patch-Proxy-8.1.0.tgz**
 - TRITON AP-EMAIL upgrade patch for 8.1.0**
Patch file name: **Websense-Patch-Email-8.1.0.tgz**
3. If you are upgrading from 7.8.x, download the 8.0.0 APP module patch.
 - a. From the **Product** drop down list, select **Websense X10G Base Configuration**. For **Version**, select 8.0.0.
 - b. Download the upgrade patch file for the APP module. The patch file is available under this heading:
 - Package 1 of a 4-part patch for v8.0 on the X10G**
Patch file name: **Websense-Patch-APP-8.0.0.rpm**
4. **IMPORTANT:** Verify that all patches are in the filestore and accessible from the blades.

Log onto the CLI of a blade to be upgraded and enter:

```
load patch --location <filestore_name>
```

Verify that all of the patches you downloaded are present. The list includes:

Websense-Patch-APP-8.0.0.rpm (if upgrading from v7.8.x)

Websense-Patch-App-8.1.0.rpm

For TRITON AP-WEB:

Websense-Patch-Web-8.1.0.tgz

Websense-Patch-Proxy-8.1.0.tgz

For TRITON AP-EMAIL:

Websense-Patch-Email-8.1.0.tgz

The filestore is now ready to support the upgrade.

TRITON AP-WEB: Upgrade the policy source machine

If your deployment includes TRITON AP-WEB, you must upgrade the policy source machine before upgrading web protection components on your security blades. See [Upgrade Instructions: TRITON AP-WEB](#) for information about getting the installers used to upgrade off-appliance components.

In all instances, you must upgrade web protection products in the following order:

- a. Full policy source
- b. User directory and filtering (policy lite) security blades, and non-appliance servers that host Policy Server
- c. Filtering only security blades, and non-appliance servers that host Filtering Service
- d. Off-appliance servers hosting other web protection components (like Log Server or Logon Agent)

Upgrade the Appliance module to 8.0.0

If you are upgrading from 7.8.x, you must upgrade the appliance module (APP) to version 8.0.0. No other modules have to be upgraded to 8.0.0.

If you are upgrading from 8.0.x, proceed to [Upgrade the Appliance module to 8.1.0](#), page 6.

1. Log on to the appliance CLI via the security blade iDRAC controller.
2. Enter **config** mode.
3. Use **load patch --location <filestore_alias>** to see a list of the available upgrade patches.
4. Select the 8.0.0 appliance module (APP) patch from the list to load the file. The patch file name is:

```
Websense-Patch-APP-8.0.0.rpm
```
5. After the patch is loaded, install the patch.

- **If you are upgrading from version 7.8.2**, use the **apply patch** command. You can enter the command with no parameters to select the patch file from a list, or use the following command to specify the filename:

```
apply patch --file Websense-Patch-APP-8.0.0.rpm
```

- **If you are upgrading from version 7.8.3 or 7.8.4**, use the **install patch** command. You can enter the command with no parameters to select the patch file from a list, or use the following command to specify the filename:

```
install patch --file Websense-Patch-APP-8.0.0.rpm
```

The upgrade process takes about 15 minutes. Do not restart or turn off the appliance while the upgrade is underway. The patch will automatically restart the appliance to complete the upgrade process.

Proceed to [Upgrade the Appliance module to 8.1.0](#), page 6.

Upgrade the Appliance module to 8.1.0

If the Appliance module (APP) is at 8.0.x, the next step is to upgrade the Appliance module to 8.1.0. This is true whether you plan to upgrade the remaining modules individually or use the express upgrade option, which the 8.1.0 software and your prepared filestore supports.

If the Appliance module is still at some version of 7.8.x, you must first [Upgrade the Appliance module to 8.0.0](#) and then return to this section.

To upgrade the Appliance module to 8.1.0:

1. Log on to the appliance CLI via the security blade iDRAC controller and enter **config** mode.
2. Use **load patch --location <filestore_alias>** to see a list of the available upgrade patches.
3. Select the 8.1.0 appliance module (APP) patch from the list to load the file. The name is:

```
Websense-Patch-App-8.1.0.rpm
```

4. After the patch is loaded, use the **install patch** command to install the patch. You can enter the command with no parameters to select the file from the list, or use the following command to specify the file name:

```
install patch --file Websense-Patch-App-8.1.0.rpm
```

The upgrade process takes about 15 minutes. Do not restart or turn off the appliance while the upgrade is underway. The patch will automatically restart the appliance to complete the upgrade process.

Proceed to [Upgrade the product modules](#), page 7.

Upgrade the product modules

To upgrade the product modules:

1. Log on to the appliance CLI via the security blade iDRAC controller and enter **config** mode.
2. Use the **load patch --location <filestore_alias>** command to see a list of available upgrade patches.
3. Select the **Express upgrade package** for 8.1.0 to load and install the product module patches needed to upgrade the appliance to 8.1.0.

If the appliance is **TRITON AP-WEB**, the patches include:

`Websense-Patch-Web-8.1.0.tgz`

`Websense-Patch-Proxy-8.1.0.tgz`

If the appliance is **TRITON AP-EMAIL**, the patch is:

`Websense-Patch-Email-8.1.0.tgz`

4. When the installation process launches, accept the subscription agreement.
5. After the upgrade has completed, *Verify the blade upgrade and complete upgrade of off-appliance components*.

Alternatively, you can upgrade each module individually.

Verify the blade upgrade and complete upgrade of off-appliance components

After the upgrade is complete, it's very important that you verify the version of every module on the appliance. They should all be at version 8.1.0.

1. Log on to the appliance CLI via the security blade iDRAC controller.
2. To verify the appliance controller version, use the command:
`show appliance`
3. To verify the Web module version (TRITON AP-WEB), use the command:
`show web`
4. To verify the proxy module version (Content Gateway), use the command:
`show proxy`
5. To verify the Email module version (TRITON AP-EMAIL), use the command:
`show email`

Lastly, complete the upgrade of off-appliance components.

For TRITON AP-WEB, see [Upgrade Instructions: TRITON AP-WEB](#).

For TRITON AP-EMAIL, see [Upgrade Instructions: TRITON AP-EMAIL](#).

For more information about CLI commands, see [Using the X-Series Command Line Interface \(CLI\)](#).