



## Upgrading from v7.6.x to v7.8.x

Websense<sup>®</sup> Data Security

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# 1

## Overview

If you are running Websense Data Security v7.6.x and you want to upgrade it to v7.8.x, you must first upgrade it to v7.7.2. You cannot upgrade directly to v7.8.x.

The required upgrade path is as follows:

**7.6.x > 7.7.2 > 7.8.x**

Perform the upgrade in the order described and make sure 1) you upgrade the entire system to v7.7.2 and 2) it is running, before upgrading to v7.8.

The sequence is critical, because if you upgrade components out of order, they stop communicating.

This guide describes how to upgrade stand-alone installations of Data Security v7.6.x to v7.8.x. 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.



# 1

## Upgrade Data Security from v7.6.x to v7.7.2

To upgrade your machine to v7.7.2, perform the following steps, in order:

1. [Upgrade the Data Security Management Server, page 1](#)
2. [Upgrade supplemental Data Security servers and standalone agents, page 5](#)
3. [Upgrade protectors and mobile agents, page 6](#)
4. [Upgrade endpoints, page 7](#)

### Upgrade the Data Security Management Server

You upgrade your management server using the TRITON installation package, **WebsenseTRITON772Setup.exe**. 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 Data Security portion of the unified upgrade wizard upgrades all necessary components on the Data Security 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 7.6.x system is functional prior to upgrade.
- ◆ Make sure your base version is 7.6.x.
- ◆ Perform a full backup of your 7.6.x 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.
- ◆ 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.
- ◆ If you use regulatory and compliance attributes in your quick policies, make a note of the laws that you enforce. You will need to re-configure these settings after upgrade.
  - a. Select **Main > Policy Management > DLP Policies**.
  - b. One by one, open your quick policies—Web DLP, email DLP, and mobile DLP.
  - c. Make note of the regulatory and compliance attributes. For Web and mobile DLP, this attribute is on the Attributes tab. For email DLP it is on the Outbound and Inbound tabs.

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 v7.7.2 TRITON unified installer (Windows only): **WebsenseTRITON772etup.exe**, available from:

[www.websense.com/MyWebsense/Downloads/](http://www.websense.com/MyWebsense/Downloads/)



Select **Data Security, version (7.7.2)**, and **operating system (Windows)**, then click **download** next to the installer description. Do not select version 7.7.3 even though it's newer.

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.



#### Note

If TRITON management components run on a virtual machine, restart the server after the upgrade is complete.

## TRITON Infrastructure

The TRITON infrastructure provides basic framework for all of the management components that make up TRITON Unified Security Center (TRITON console). 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.

Wizard Screen	Fields
Welcome	<p>Welcomes you to the installation and upgrade wizard.</p> <ol style="list-style-type: none"> <li>1. Click <b>Next</b> to begin the upgrade process. The system checks disk space requirements.</li> <li>2. When prompted, click <b>Next</b> to launch the installation wizard.</li> </ol>
Pre-Installation Summary	<p>Shows:</p> <ul style="list-style-type: none"> <li>• The destination folder for the installation files.</li> <li>• The name of the SQL Server machine and the user name of an authorized database administrator.</li> <li>• The IP address of the TRITON management server and administrator credentials.</li> </ul> <p>Click <b>Next</b> to accept the properties.</p>

Wizard Screen	Fields
Installation	<p>Shows upgrade progress.</p> <p>The system stops processes, copies new files, updates component registration, removes unused files, and more.</p> <p>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 <b>OK</b> to proceed with the installation.</p>
Summary	<p>When module upgrade is complete, summarizes your system settings, including:</p> <ul style="list-style-type: none"> <li>• The destination folder for the installation files.</li> <li>• The name of the SQL Server machine and the user name of an authorized database administrator.</li> <li>• The IP address of the TRITON management server and administrator credentials.</li> </ul> <p>Click <b>Finish</b> to complete the upgrade for this module.</p>

## Data Security

The Data Security upgrade wizard contains the following screens.

Wizard Screen	Fields
Welcome	<p>This screen welcomes you to the installation and upgrade wizard for Data Security.</p> <p>The system checks the disk space on the machine. When prompted, click <b>Next</b> to launch the installation wizard.</p>
Installation Confirmation	<p>Verify your system settings and click <b>Install</b> to continue the upgrade.</p>
Installation	<p>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.</p>
Summary	<p>When installation of this module is complete, this screen summarizes your system settings.</p> <ol style="list-style-type: none"> <li>1. Click <b>Done</b> and you're prompted to update your predefined policies and content classifiers.</li> <li>2. Click <b>OK</b> 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.</li> <li>3. Click <b>Close</b> when the updates are complete.</li> </ol>

## Wrapping up

1. Log onto the TRITON console ([https://<IP\\_address\\_or\\_hostname>:9443/triton/](https://<IP_address_or_hostname>:9443/triton/)).
2. Select the Data Security 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. If you have Web Security as well as Data Security:
  - a. Select **Settings > Deployment > System Modules**.
  - b. Listed are 2 instances of each Web Content Gateway module that is registered with the system. Delete the older instances. You can identify these by looking at the version number that is displayed.
5. If you use regulatory and compliance attributes in your quick policies, do the following to restore your settings.
  - a. Select **Main > Policy Management > DLP Policies**.
  - b. One by one, open your quick policies—Web DLP, email DLP, and mobile DLP.
  - c. Select the regulatory and compliance attribute. For Web and mobile DLP, this attribute is on the Attributes tab. For email DLP it is on the Outbound and Inbound tabs.
  - d. Select the laws to enforce. You wrote these down before starting the upgrade.
6. Click **Deploy**.

## Upgrade supplemental Data Security servers and standalone agents

---

Complete these steps to upgrade a supplemental Data Security server or stand-alone agent (e.g. SMTP, printer, crawler, or ISA/TMG) from v7.6.x to v7.7.2.

1. On the machine hosting the server or agent software, launch the installer, **WebsenseTRITON772Setup.exe**. The software is detected, and the upgrade wizard appears.
2. Click **Next** until you complete the wizard.

Any v7.6.x Data Security components found on this machine are upgraded.
3. After the upgrade has successfully completed, deploy the agents and supplemental servers by logging on to the TRITON console, selecting the Data Security tab, and clicking **Deploy**.
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 v7.6.x to v7.7.2.



### 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 TRITON - Data Security.

1. Download the protector update script from the v7.7.2 product area of [www.websense.com/MyWebsense/Downloads/](http://www.websense.com/MyWebsense/Downloads/).
2. Copy the update file, `protector-update-7.7.0-060`, into the directory `/tmp`.
3. Enter the command:  

```
chmod +x /tmp/protector-update-7.7.0-060
```
4. If you are upgrading from v7.6.8, log on as root and run the following command:  

```
rm -r /var/tmp/yum_update_cache
```
5. Run the following command:  

```
bash /tmp/protector-update-7.7.0-060
```
6. Answer **Y** on the "Are you sure?" question, and complete the wizard, accepting the defaults.
7. Restart the protector or mobile agent machine when the wizard completes.
8. If you have not already, log onto the machine as *root*. If you are using the appliance as a mobile agent and want to get root privileges by running "su", be sure to keep the same environment by running "su -" and not just "su".
9. Run the following command to re-register the protector or mobile agent with the management server, then follow the prompts in the wizard:  

```
wizard securecomm
```
10. If you are upgrading from v7.6.8, run the following command:  

```
rm -r /var/tmp/yum_update_cache
```
11. In TRITON - Data Security, click **Deploy**.
12. 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.

## Upgrade endpoints

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Before upgrading endpoint clients, do the following:

1. Disable all discovery tasks so that they don't run during the upgrade process.
2. Wait until there are no new endpoint discovery incidents appearing in the Data Security incidents report.

You can install endpoint packages on top of earlier versions without uninstalling and re-installing them.

## Windows

After you have upgraded the Data Security Management Server and all supplemental Data Security servers:

1. Select **Start > Programs > Websense > Data Security > Endpoint Package Builder** on the management server to launch the endpoint client package builder.
2. Choose Windows 32- or 64-bit when prompted.
3. Deploy the v7.7.2 package to each endpoint using GPO, SMS, or a similar deployment method. You can install v7.7.2 on top of earlier versions without uninstalling and re-installing them.
4. Restart the endpoint after installation is complete.

## Linux

After you have upgraded the Data Security Management Server and all supplemental Data Security servers:

1. Select **Start > Programs > Websense > Data Security > Endpoint Package Builder** on the management server to launch the endpoint client package builder.
2. Choose Linux when prompted.
3. To upgrade Data Endpoint software on a Linux computer, copy the correct installer to the machine and run it as root.
  - **LinuxEndpoint\_SFX\_installer\_e14** - should be used with Red Hat Enterprise Linux version 4.x.
  - **LinuxEndpoint\_SFX\_installer\_e15** - should be used with Red Hat Enterprise Linux version 5.x.

No reboot is necessary. The endpoint software starts automatically. You can install v7.7.2 on top of earlier versions without uninstalling and re-installing them.



# 3

## Upgrade Data Security from v7.7.2 to v7.8.x

To upgrade your machine from v7.7.2 to v7.8.x, perform the following steps, in order:

1. *Upgrade the Data Security Management Server*
2. *Upgrade supplemental Data Security servers and standalone agents*
3. *Upgrade protectors and mobile agents*
4. *Upgrade endpoints*

### Upgrade the Data Security Management Server

---

You upgrade your management server using the TRITON installation package, **WebsenseTRITON78xSetup.exe**, where *x* is the version number. As before, perform the upgrade in the order described. The sequence is critical.

#### Preparing for upgrade

- ◆ Unless instructed otherwise by Websense Technical Support, ensure your system is functional prior to upgrade.
- ◆ Make sure your base version is 7.7.2.
- ◆ Perform a full backup of your 7.7.2 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.
- ◆ 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 v7.8 TRITON unified installer (Windows only): **WebsenseTRITON78xSetup.exe**, available from:

[www.websense.com/MyWebsense/Downloads/](http://www.websense.com/MyWebsense/Downloads/)

Select **Data Security, version (7.8)**, and **operating system (Windows)**, then click **download** next to the installer description.



### Note

If TRITON management components run on a virtual machine, restart the server after the upgrade is complete.

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## TRITON Infrastructure

The infrastructure upgrade wizard contains the following screens.

Wizard Screen	Fields
Welcome	<p>Welcomes you to the installation and upgrade wizard.</p> <ol style="list-style-type: none"> <li>1. Click <b>Next</b> to begin the upgrade process. The system checks disk space requirements.</li> <li>2. When prompted, click <b>Next</b> to launch the installation wizard.</li> </ol>
Pre-Installation Summary	<p>Shows:</p> <ul style="list-style-type: none"> <li>• The destination folder for the installation files.</li> <li>• The name of the SQL Server machine and the user name of an authorized database administrator.</li> <li>• The IP address of the TRITON management server and administrator credentials.</li> </ul> <p>Click <b>Next</b> to accept the properties.</p>
Installation	<p>Shows upgrade progress.</p> <p>The system stops processes, copies new files, updates component registration, removes unused files, and more.</p> <p>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 <b>OK</b> to proceed with the installation.</p>
Summary	<p>When module upgrade is complete, summarizes your system settings, including:</p> <ul style="list-style-type: none"> <li>• The destination folder for the installation files.</li> <li>• The name of the SQL Server machine and the user name of an authorized database administrator.</li> <li>• The IP address of the TRITON management server and administrator credentials.</li> </ul> <p>Click <b>Finish</b> to complete the upgrade for this module.</p>

## Data Security

The Data Security upgrade wizard contains the following screens.

Wizard Screen	Fields
Welcome	<p>This screen welcomes you to the installation and upgrade wizard for Data Security.</p> <p>The system checks the disk space on the machine. When prompted, click <b>Next</b> to launch the installation wizard.</p>
Installation Confirmation	<p>Verify your system settings and click <b>Install</b> to continue the upgrade.</p>

Wizard Screen	Fields
Installation	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.
Summary	<p>When installation of this module is complete, this screen summarizes your system settings.</p> <ol style="list-style-type: none"><li>1. Click <b>Done</b> and you're prompted to update your predefined policies and content classifiers.</li><li>2. Click <b>OK</b> 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.</li><li>3. Click <b>Close</b> when the updates are complete.</li></ol>

## Wrapping up

1. Log onto the TRITON console ([https://<IP\\_address\\_or\\_hostname>:9443/triton/](https://<IP_address_or_hostname>:9443/triton/)).
2. Select the Data Security 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**.
5. If you are upgrading to v7.8.3 or 7.8.4, run the reporting upgrade tool attached to knowledge base article [7472](#) on the machine where SQL server is installed. This prevents issues that are sometimes encountered with Scheduled Tasks after upgrade.

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## Upgrade supplemental Data Security servers and standalone agents

---

Complete these steps to upgrade a supplemental Data Security server or stand-alone agent to v7.8.x.



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### Important

Starting with v7.8.2, supplemental Data Security servers must be on 64-bit platforms. Those running on Windows 2003 have their policy engines removed during the upgrade and only the agent is upgraded.

Starting with 7.8.3, all support for Windows 2003 has been dropped. As a result, the printer agent, SMTP agent, and ISA agent, which are dependent on Windows 2003, are no longer available.

Although you cannot upgrade these agents to the latest version, you can use existing 7.8.1 and 7.8.2 agents with the v7.8.x management server.

Websense does offer the TMG agent as a replacement for ISA.

---

1. If you are upgrading a Windows 2003 agent to v7.8.1 or 7.8.2, launch the installer, **WebsenseTRITON78ySetup.exe**, where *y* is the version number. The software is detected, and the upgrade wizard appears.  
If you are upgrading an agent to v7.8.1 or v7.8.2 on a 64-bit machine, launch **WebsenseDataSecurityAgents78y-x64.msi**.  
Use this same 64-bit installer to upgrade the TMG agent and supplemental servers to the latest 7.8.x version.
2. Click **Next** until you complete the wizard.  
Any v7.7.x Data Security components found on this machine are upgraded.
3. After the upgrade has successfully completed, deploy the agents and supplemental servers by logging on to the TRITON console, selecting the Data Security tab, and clicking **Deploy**.

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

## Upgrade protectors and mobile agents

---

Do the following to upgrade your protector or mobile agent from version to v7.8.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 TRITON - Data Security.

1. Download the protector update script from [www.websense.com/MyWebsense/Downloads/](http://www.websense.com/MyWebsense/Downloads/).
2. Copy the file, protector-update-7.8.x-yyyy, into the directory /tmp where x-yyyy is the latest version and build number.
3. Enter the command:  

```
chmod +x /tmp/protector-update-7.8.x-yyyy
```
4. Run the following command:  

```
bash /tmp/protector-update-7.8.x-yyyy
```
5. Answer **Y** on the “Are you sure?” question, and complete the wizard, accepting the defaults.
6. Restart the protector or mobile agent machine when the wizard completes.
7. If you have not already, log onto the machine as *root*. If you are using the appliance as a mobile agent and want to get root privileges by running “su”, be sure to keep the same environment by running “su -” and not just “su”.
8. Run the following command to re-register the protector or mobile agent with the management server, then follow the prompts in the wizard:  

```
wizard securecomm
```
9. In the Data Security manager, click **Deploy**.
10. It is strongly recommended you wait 30 minutes before routing traffic though 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.

## Upgrade endpoints

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Version 7.7.x endpoints are fully compatible with the v7.8 management server and can take advantage of the new predefined policies. To gain access to new endpoint features, however, you should upgrade your endpoints to v7.8.

### Windows

After you have upgraded the Data Security Management Server and all supplemental Data Security servers:

1. Select **Start > Programs > Websense > Data Security > Endpoint Package Builder** on the management server to launch the endpoint client package builder.
2. Choose Windows 32- or 64-bit when prompted.
3. Deploy the v7.8.x package to each endpoint using GPO, SMS, or a similar deployment method. You can install v7.8.x on top of earlier versions without uninstalling and re-installing them.
4. 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 Data Security Management Server and all supplemental Data Security servers:

1. Select **Start > Programs > Websense > Data Security > Endpoint Package Builder** on the management server to launch the endpoint client package builder.
2. Choose Linux when prompted.
3. To upgrade Data Endpoint software on a Linux computer, copy the correct installer to the machine and run it as root.
  - **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 v7.7.x on top of earlier versions without uninstalling and re-installing them.

See [Installing and Deploying the Data Endpoint](#) or more information.