

Upgrading from Websense Enterprise v6.3.x to v7.1.1

Topic 80008 / Updated: 13-October-2010

Applies To:	Websense Web Filter 7.1.1 Websense Web Security 7.1.1
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An upgrade from version 6.3.x of Websense Enterprise or Web Security Suite to v7.1.1 is a two-step process, described in this paper.

1. Upgrade to v7.1.0 (for v6.3.1 and v6.3.2) or v7.0 (for v6.3.3 only)
2. Then, upgrade immediately to v7.1.1

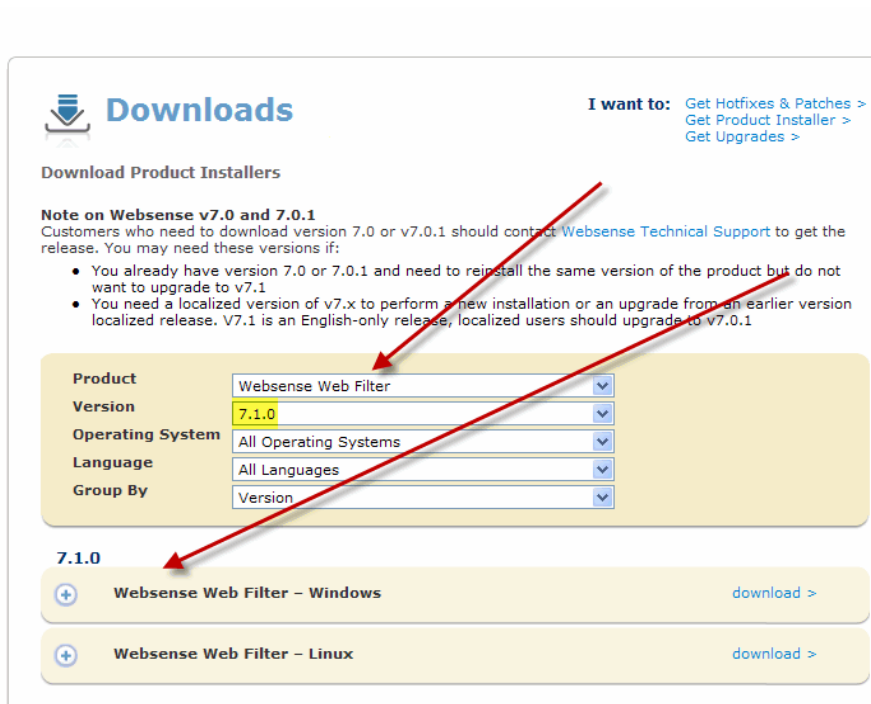
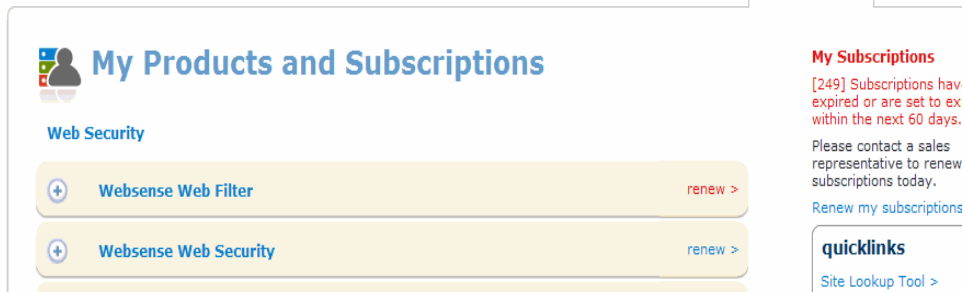
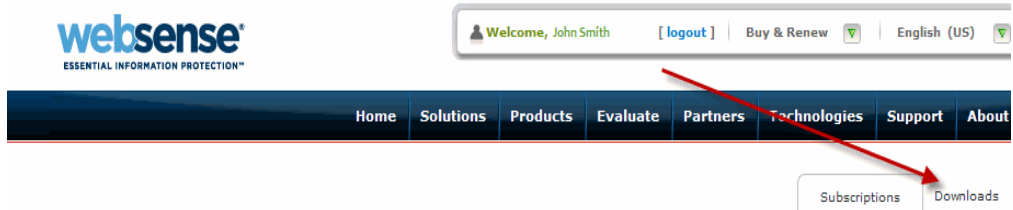
This document describes the upgrade path from v6.3.1 or v6.3.2 to v7.1.0. To upgrade from v6.3.3 to v7.0 see the [Upgrade Guide](#) for v7.0.


How do I get the software?

To download the software, go to **MyWebsense.com** and log in.

1. Select the **Downloads** tab, as shown below, and then select either **Websense Web Filter** or **Websense Web Security**, version **7.1.0**.

2. After version 7.1.0 has been downloaded, follow the same process to obtain version **7.1.1**.





Downloads

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Note on Websense v7.0 and 7.0.1
Customers who need to download version 7.0 or v7.0.1 should contact [Websense Technical Support](#) to get the release. You may need these versions if:

- You already have version 7.0 or 7.0.1 and need to reinstall the same version of the product but do not want to upgrade to v7.1
- You need a localized version of v7.x to perform a new installation or an upgrade from an earlier version localized release. V7.1 is an English-only release, localized users should upgrade to v7.0.1

Product	WebSense Web Filter
Version	7.1.1
Operating System	All Operating Systems
Language	All Languages
Group By	Version

7.1.1

+
WebSense Web Filter – Windows
download >

+
WebSense Web Filter – Linux
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New features for v7.1.0 and v7.1.1 are described in the *Release Notes* for each version. The user interface was enhanced in significant ways after version 6.3. After you log on to the new Websense Manager console, be sure to take a tour of the new features by selecting the tutorial called **Upgrading User Quick Start**. It is available from within Websense Manager.



Note

The technical papers and documents mentioned in this supplement are available in the Websense Technical Library: www.websense.com/library/.

This supplement provides an overview of the upgrade process, plus:

- ◆ *Versions supported for upgrade*
- ◆ *Changes to reporting*
- ◆ *Preparing for the upgrade*
- ◆ *Upgrade instructions*
- ◆ *Converting to Websense Web Security*
- ◆ *Changing IP addresses of installed components*

For information about upgrading Websense software in specific integrated configurations, refer to the *Installation Guide Supplement* for your integration product.



Note

If you plan to change your integration product, Websense, Inc., recommends that you make the change before upgrading Websense software.

Make sure that the installation machine meets the system recommendations in the *Deployment Guide*, including hardware specifications, operating system, browser, and database engine.

The Websense installer upgrades all Websense components detected on the installation machine, with the exception of the Remote Filtering Client and certain reporting components.

- ◆ If the optional Remote Filtering Client is installed on client computers in your network, see the *Remote Filtering* technical paper for upgrade instructions.
- ◆ Websense Reporter and Websense Explorer for Windows, available in v6.3.x, have been replaced by the reporting features embedded in Websense Manager. See [Changes to reporting](#).

Because Websense Manager now includes both administration and reporting features, you may need to move the component to a more robust machine.

The upgrade installs two new components: Websense Policy Database and Websense Policy Broker. If your network contains multiple Policy Servers, first run the upgrade on the machine running the central Policy Server. When you upgrade the other machines running Policy Server, point them to the existing Policy Broker. Do **not** install multiple Policy Brokers.

During the upgrade, the installer configures the new components to use the same Network Agent machines and the same network interface cards (NICs) used by the previous version. The installer assigns the same port numbers to the new components as used by the existing components.

The Websense Master Database is removed if you upgrade from v6.3.x. Websense Filtering Service downloads a new Master Database after the upgrade is completed.



Note

When scheduling an upgrade from v6.3.x, keep in mind that users will either have free, unfiltered Internet access, or be blocked completely from Internet access until the Websense services are restarted.

If Websense software is integrated with another product or device, all traffic is either unfiltered and permitted or completely blocked during the upgrade. The response depends on how your integration product is configured to respond when Websense filtering is unavailable.

When you upgrade the Stand-Alone Edition of Websense software, filtering stops when Websense services are stopped. Users have unfiltered access to the Internet until the Websense services are restarted.

Versions supported for upgrade



Note

The upgrade process is designed for properly functioning Websense systems. Upgrading does not repair a non-functional system.

Direct upgrades to v7.1.1 are supported from v7.0 or higher of Websense Web Filter or Websense Web Security.

Sites upgrading from Websense software at version 6.3.x must first upgrade to v7.1.0.

Upgrading versions prior to v6.3

Websense, Inc., recommends that you perform a fresh installation rather than an upgrade if you are running a version of Websense software earlier than v6.3, with or without an integration.

If you have a complicated policy configuration, contact Websense Technical Support for assistance.

Changes to reporting

In Windows environments, the reporting features of version 7.x are embedded in Websense Manager. As a result, Websense Manager now includes Web server functionality, and should be installed on a separate machine from the filtering components.

If you are upgrading from v6.3.x on Windows, and currently have Websense Reporter or Websense Explorer for Windows installed on the same machine as Log Server, do not change your configuration before upgrade. The upgrade removes Reporter and Websense Explorer, adds Websense Manager, and updates Log Server.

If Log Server is not installed on the same machine as Reporter or Explorer for Windows, then upgrading Log Server does not affect the reporting tools on the other machine.

- ◆ If the machine running the reporting tools from the previous version meets the system recommendations for running Websense Manager, manually remove Reporter and Explorer, and then install Websense Manager.
- ◆ As an alternative, you can install Websense Manager on the Log Server machine, or install it on a separate machine. Check the *Deployment Guide* to ensure that your machine's operating system and hardware are suitable.

To run reporting on Linux, you must install Websense Explorer for Linux. In this environment, reporting features are accessed through a separate, Web-based interface, not through Websense Manager. To upgrade from the earlier product, Websense Explorer for Unix, or for a new installation or upgrade of this product, refer to the *Explorer for Linux Administrator's Guide*.

Preparing for the upgrade

Before starting the upgrade:

- ◆ **Back up files**
Before upgrading to a new version of Websense Web security software, Websense, Inc., recommends performing a full system backup. This makes it possible to restore the current production system with minimum downtime, if necessary.

At minimum, back up the Websense configuration and initialization files, as follows:

1. Stop the Websense services. See *Stopping or starting Websense services*, in the *Installation Guide*.
2. Make a backup copy of the following files (located by default in the C:\Program Files\Websense\bin or /opt/Websense/bin directory).
 - config.xml
 - websense.ini
 - eimserver.ini
3. If you have created custom block messages, make a backup copy of the files in the **Websense\BlockPages\en\Custom** (Windows) or **Websense/BlockPages/en/Custom** (Linux) directory.
4. Save the backup copies to another location.
5. Start the Websense services. The Websense services must be running when you start the upgrade.

◆ **Audit Log**

To preserve your 6.3.x Audit Log, use Websense Manager to export the log to a tab-separated text file. Then, move the export file to a directory that will not be affected by the upgrade.

◆ **Check for host name on Linux**

If you are running an upgrade on Linux, make sure that the **hosts** file includes the host name for the machine on which you are running the upgrade. This file is located in the **/etc** directory, by default. Add a host name for the machine, if one is not included.

◆ **Do not transfer previous version configuration files to the new version**

Do not install Websense v7.x software on a separate machine and then copy the previous version configuration files to that machine.



Warning

Websense Web Security and Websense Web Filter v7.x cannot use configuration files, such as **config.xml**, from v6.3.x installations.

◆ **Non-English language versions**

This version is available in English only. The screens, alerts, messages, and other text associated with new features and functions have not been localized.

◆ **Upgrading distributed components**

To upgrade Websense software, run the Websense installer on each machine running a Websense component.

- If you are upgrading from v6.3.x, start with the machine running the central (or only) Policy Server.

See the order for upgrading components in *Upgrade instructions*.

◆ **Upgrading the integration plug-in**

The installer detects the integration-specific components, such as plug-ins and filters, and upgrades them. To upgrade the filtering plug-in, run the installer on the machine running the integration product.

If you are changing your integrated firewall, proxy server, caching application, or network appliance, modify that product before upgrading Websense software. See the *Installation Guide* or supplement for that integration product and your current version of Websense software.

◆ **Do not use remote control utilities**

Upgrading Websense software via a remote control utility such as Terminal Services is **not** supported.

◆ **Reporting**

- In Windows environments, reporting is now included with Websense Manager, which acts as a Web server to provide access to configuration and reporting pages. If a 6.3.x version of Websense Manager was installed on the machine running filtering components, and reporting was installed on a separate machine, uninstall Websense Manager from the filtering machine before the upgrade. See [Changes to reporting](#) for more information.

Check the *Deployment Guide* to ensure that the machine running the reporting components meets the hardware and software recommendations for the upgrade.



Important

Upgrade all filtering components **before** upgrading reporting components.

- In a Windows installation, if IIS or Apache HTTP Server was installed only to run Websense reporting tools, uninstall these Web servers. Websense versions of Apache Tomcat and Apache HTTP Server are installed with the reporting components.

Websense Explorer for Linux is not impacted by these Web server changes. You do not need to uninstall Apache on a Linux machine.

- In a Linux installation, refer to the *Websense Explorer for Linux Administrator's Guide* for information on upgrading reporting components.

◆ **Websense services**

Websense services must be running when the upgrade process begins. The installer stops and starts these services during the upgrade.

If these services have been running uninterrupted for several months, the installer may not be able to stop them before the upgrade process times out.

To ensure the success of the upgrade, manually stop and start all the Websense services before beginning the upgrade. See *Stopping or starting Websense services* in the *Installation Guide* for instructions.



Important

In the Windows Services dialog box, if you have set the **Recovery** properties of any of your Websense services to restart the service on failure, you must change this setting to **Take No Action** before upgrading.

◆ Matching locales

When upgrading a Filtering Service that is installed on a different machine from Websense Manager, you must upgrade Filtering Service in the same locale environment (language and character set) as Websense Manager.

- Before upgrading Filtering Service on Windows, open **Control Panel > Regional Options**, and change the locale to match that of the Websense Manager machine.
- When upgrading on Linux, log on to the Filtering Service machine with the locale appropriate to Websense Manager.

After the upgrade is complete, Websense services can be restarted with any locale setting.

Upgrade instructions

The standard Websense installation program is also used for upgrades. After it starts, the installer detects that an older version of the product is installed. The installer also detects which Websense components are installed and need to be upgraded, and checks the version of the database engine to ensure it is compatible with the new version of the Websense software.



Important

- ◆ Filtering and logging services are not available while you run the upgrade. To reduce the impact on network users, run the upgrade after hours, or during a quiet time on the network.
 - ◆ The *Installation Guide Supplement* for your integration product contains additional information needed to upgrade and configure Websense software to run with the integration product. Refer to the supplement before running the following procedures.
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Upgrade order

If Websense components are distributed across multiple machines, these components need to be upgraded in the following order, due to dependencies.

1. Policy Broker.
2. Policy Server.



Warning

When upgrading from a v6.3.x release, always run the installer on the **central Policy Server** machine first. (If you have only one Policy Server, upgrade that machine first.) Policy Broker must be installed and running, and the central or only Policy Server must be successfully upgraded and running, before other Websense components are upgraded or installed.

If you have multiple Policy Servers installed, first upgrade the central Policy Server machine, and then point the other Policy Servers to the new Policy Broker on that first machine.

Do **not** install multiple Policy Brokers.

3. User Service
4. Filtering Service
5. Network Agent
6. Transparent identification agents
7. Integration plug-ins
8. Log Server
9. Websense Manager

If multiple components are installed on a machine, the installer upgrades those components in the proper order.

Upgrade steps

Perform the following procedure on each machine running Websense components. Be sure to upgrade the components in the recommended sequence (see [Upgrade order](#)).

1. Close all instances of Websense Manager.
2. Uninstall any instances of Websense Manager that are running on Windows, but not installed on the Log Server machine. See the instructions for removing components in the *Installation Guide* for your current Websense software version.
 - If Log Server is running on the same Windows machine as Reporter or Websense Explorer for Windows, the installer upgrades Log Server and replaces the reporting application with Websense Manager.

- If Log Server is not running on the same Windows machine as Reporter or Websense Explorer for Windows, do not attempt to upgrade Reporter or Explorer.

Websense Manager must be installed with or after upgrading Log Server. It can be installed on the Log Server machine or on a separate machine pointing to Log Server.

You must uninstall Reporter and Websense Explorer for Windows if you want to install Websense Manager on that machine. Use Add or Remove Programs from the Windows Control Panel to uninstall these applications.

- If Websense Manager is running on a Linux machine, it does not need to be uninstalled.

3. Log on to the installation machine with administrative privileges:

- Linux—log on as **root**.
- Windows—log on with **domain** and **local** administrator privileges.

If you are upgrading User Service, DC Agent, or Logon Agent, this ensures that those components have administrator privileges on the domain.

If you are upgrading or installing Log Server (Windows only), and will use a Windows trusted connection to communicate with the database engine, your logon user account must also be a trusted account with local administration privileges on the database machine.



Important

If Websense components are installed on multiple machines, see [Upgrade order](#) for important information about the required upgrade sequence.

4. Perform a full system backup.

If a full backup is not feasible, make backup copies of the **websense.ini**, **eimserver.ini**, and **config.xml** files, and move them to a different location. These files are located in the Websense **bin** directory (C:\Program Files\Websense\bin or /opt/Websense/bin, by default).

5. Close all applications and stop any anti-virus software.



Warning

Be sure to close the Windows Event Viewer, or the upgrade may fail.

6. On Linux:

- a. Check the **etc/hosts** file. If there is no host name for the machine, add one.
- b. Create a setup directory for the installer files, such as **/root/Websense_setup**.



Important

If your Websense services have been running uninterrupted for several months, the installer may have difficulty stopping them.

To prevent the upgrade process from timing out and failing, stop the services manually and start them again before beginning the upgrade. For instructions, see *Stopping or starting Websense services* in the *Installation Guide*.

7. Download the installer package for Websense Web Security/Web Filter and start the installation program. See the *Installation Guide* for instructions.
8. Follow the onscreen prompts.
The installer detects the Websense components from an earlier version and asks how you want to proceed. You can upgrade the current system or exit the installer.
9. Select **Upgrade**, and then click **Next**.
10. Review the list of Websense services that the upgrade will stop, and then click **Next**.
11. When prompted to install the Policy Broker, select the appropriate option, and then click **Next**.
 - **Yes, install Policy Broker locally**—select this option if you are upgrading from v6.3.x on the only machine with Policy Server installed, or the machine running the central Policy Server.



Important

Do **not** install Policy Broker on multiple machines.

- **No, Policy Broker is installed elsewhere**—select this option if Policy Broker is already installed on another machine. then, enter the **Policy Broker IP address**. The default Configuration port is provided and should not be changed.
12. If prompted, enter and confirm a WebsenseAdministrator password for Websense Manager, and then click **Next**.
 13. Select a **Websense Filtering Feedback** option, and then click **Next**.
Selecting **Yes** allows Websense, Inc., to gather information about the use of Websense-defined protocols. This information is used to enhance protocol filtering.



Note

No information is sent to Websense, Inc., that would identify specific users, no matter which feedback option is selected.

The installer compares the system requirements for the upgrade with the machine's resources. These requirements are listed in the *Deployment Guide*.

- Insufficient disk space prompts an error message. The installer exits when you click **Next**.
- Insufficient RAM prompts a warning message. The upgrade continues when you click **Next**. To ensure optimal performance, increase the memory to the recommended amount after installation.

A summary shows the installation path and size, and the components to be upgraded.

14. Click **Next** to begin the upgrade.



Warning

When you upgrade from v6.3.x, the installer removes the existing Master Database. Filtering stops until the upgrade is complete. See the Websense Manager Help for details.



Important

When you upgrade from v6.3.x, the larger the Policy Server configuration file, **config.xml**, the longer the upgrade process takes. Please be patient. Do not interrupt the upgrade unless instructed to do so by Websense Technical Support.

15. In the Installation Complete message, click **Next** to exit the installer.

If Websense Manager was installed, a screen provides instructions for starting it.

16. If you stopped your anti-virus software, restart it.
17. If you have an integration product installed, check the *Installation Guide Supplement* for your integration to see if further upgrade steps are needed.
18. Repeat the upgrade procedure on each machine running Websense components, in the recommended order (see *Upgrade order*).

All components that interact must be upgraded to the same version.

If you have complete installations in separate locations that do not interact, they do not have to run the same Websense software version.

19. If Websense Manager is not installed, run the installation program to install it. See the *Installation Guide* for Custom installation instructions.
20. After all components have been upgraded, launch Websense Manager.

Websense Manager now runs with a Web server, and is accessed through a browser.

- On the Windows machines where Websense Manager is installed, double-click the Websense Manager desktop icon, or go to **Start > Programs > Websense > Websense Manager**.
- On any machine in your network, open a supported browser and enter the following:

`https://<IP address>:9443/mng`

Replace <IP address> with the IP address of the Websense Manager machine.

21. After you start Websense Manager, run the *Upgrading User Quick Start* tutorial for an overview of the new features and changes in the current version.
22. If a Master Database download does not start automatically, use Websense Manager to initiate a download. See the *Getting Started* topic in the Websense Manager Help for instructions.

Converting to Websense Web Security

To convert an installation of Websense Enterprise v6.3.x or later to Websense Web Security v7.x:

1. Upgrade to Websense Web Filter v7.x on each machine where a Websense component is installed. See *Upgrade instructions* for instructions.
2. Contact your Websense Authorized Reseller or Websense sales associate to update your subscription.
Websense, Inc., will update your subscription key to reflect the change, usually within 24 hours.
3. The next time the Master Database downloads after the key has been updated, Websense Web Security features will become available in Websense Manager. Refer to Websense Manager Help for details on using the new features.
4. Go to www.mywebsense.com to sign up for the BrandWatcher™, SiteWatcher™, and ThreatWatcher™ services that are included in the Websense Web Security subscription.

Changing IP addresses of installed components

If the IP address changes for a machine running Policy Server or Policy Broker after upgrade, certain configuration files must be updated. See the instructions for changing the Policy Server IP address under the *Websense Server Administration* topic in Websense Manager Help. Use the same procedure if you change the IP address of the Policy Broker (more instances of the IP address will be found in the files being updated).

Websense software handles IP address changes in the background for most other components, without any interruption to filtering.

In some cases, Websense services need to be restarted or configurations updated after changing an IP address.

Network Agent settings can be updated in Websense Manager. See the Websense Manager Help for more information.

Complete the upgrade with the version 7.1.1 installer

After you have upgraded to version 7.1.0, proceed to the [Upgrade Supplement](#) for version 7.1.1.