Upgrading Dual Mode (Web + Email) appliances from v7.7.x to v7.8.x on V-Series
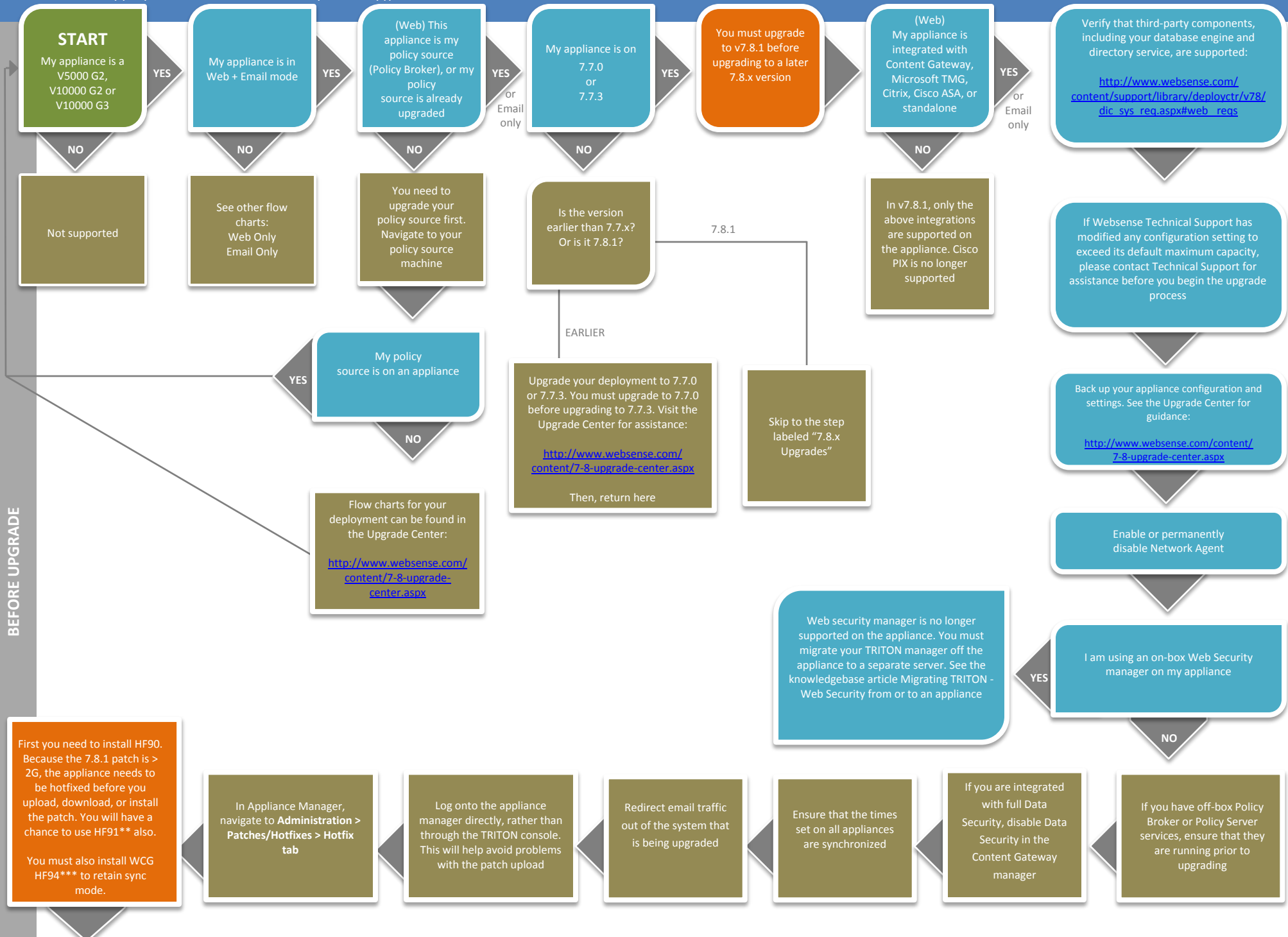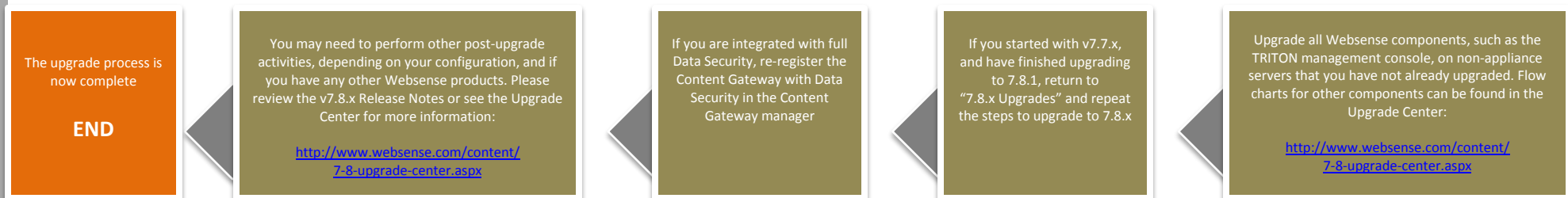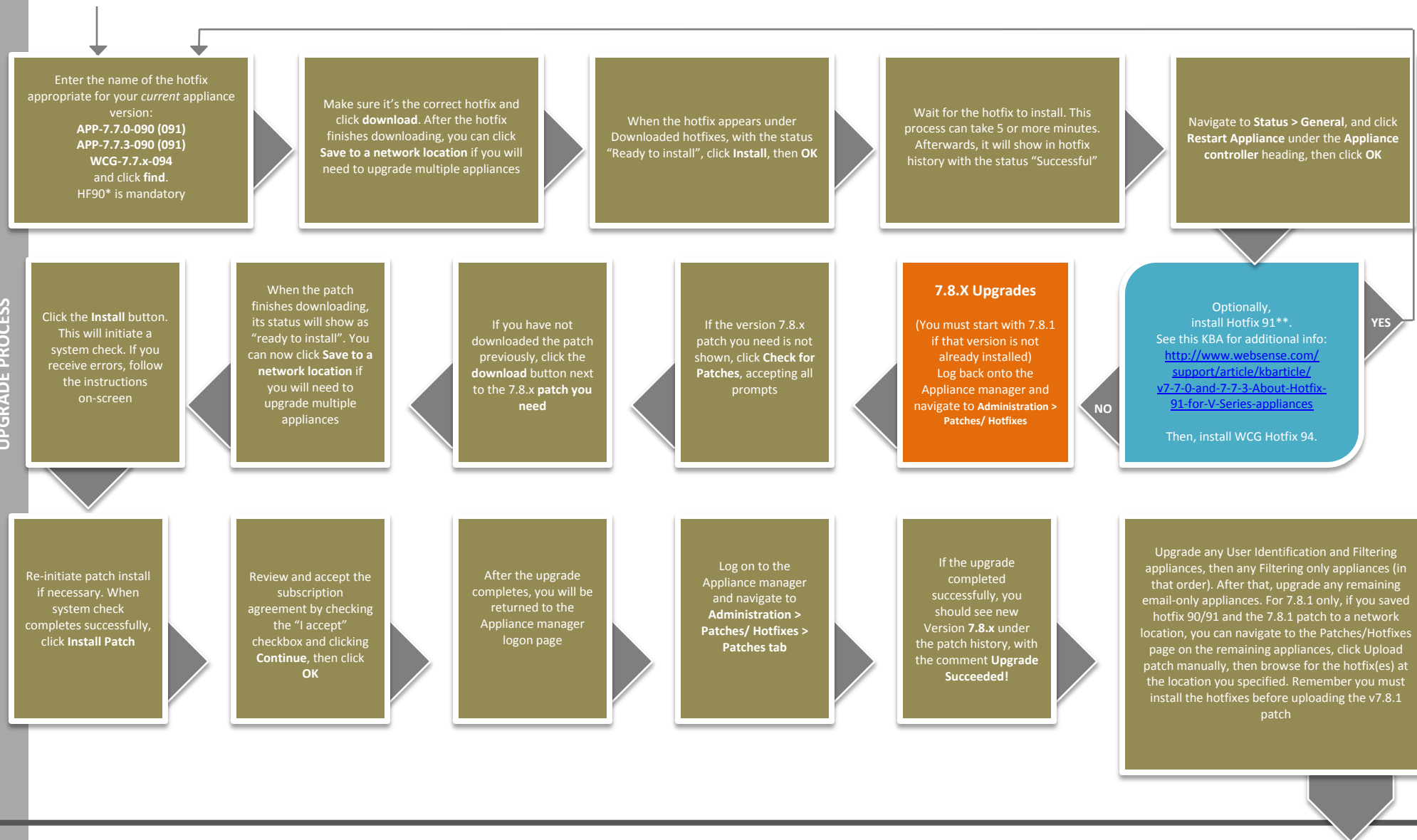
Review the appropriate v7.8.x Release Notes prior to upgrade

BEFORE UPGRADE

START
My appliance is a V5000 G2, V10000 G2 or V10000 G3

— YES →

My appliance is in Web + Email mode

— YES →

(Web) This appliance is my policy source (Policy Broker), or my policy source is already upgraded

— YES → *or Email only*

My appliance is on 7.7.0 or 7.7.3

— YES →

You must upgrade to v7.8.1 before upgrading to a later 7.8.x version

— →

(Web) My appliance is integrated with Content Gateway, Microsoft TMG, Citrix, Cisco ASA, or standalone

— YES → *or Email only*

Verify that third-party components, including your database engine and directory service, are supported:

http://www.websense.com/content/support/library/deployctr/v78/dic_sys_req.aspx#web_reqs

NO (START) → Not supported

NO (Web + Email mode) → See other flow charts:
Web Only
Email Only

NO (policy source) → You need to upgrade your policy source first. Navigate to your policy source machine

→ My policy source is on an appliance
  - **YES** → Flow charts for your deployment can be found in the Upgrade Center:
    http://www.websense.com/content/7-8-upgrade-center.aspx
  - **NO** →

NO (7.7.0 or 7.7.3) → Is the version earlier than 7.7.x? Or is it 7.8.1?
  - **EARLIER** → Upgrade your deployment to 7.7.0 or 7.7.3. You must upgrade to 7.7.0 before upgrading to 7.7.3. Visit the Upgrade Center for assistance:
    http://www.websense.com/content/7-8-upgrade-center.aspx
    Then, return here
  - **7.8.1** → Skip to the step labeled "7.8.x Upgrades"

NO (integrated) → In v7.8.1, only the above integrations are supported on the appliance. Cisco PIX is no longer supported

If Websense Technical Support has modified any configuration setting to exceed its default maximum capacity, please contact Technical Support for assistance before you begin the upgrade process

↓

Back up your appliance configuration and settings. See the Upgrade Center for guidance:

http://www.websense.com/content/7-8-upgrade-center.aspx

↓

Enable or permanently disable Network Agent

↓

I am using an on-box Web Security manager on my appliance
  - **YES** → Web security manager is no longer supported on the appliance. You must migrate your TRITON manager off the appliance to a separate server. See the knowledgebase article Migrating TRITON - Web Security from or to an appliance
  - **NO** →

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. This will help avoid problems with the patch upload

← In Appliance Manager, navigate to **Administration > Patches/Hotfixes > Hotfix tab**

← First you need to install HF90. Because the 7.8.1 patch is > 2G, the appliance needs to be hotfixed before you upload, download, or install the patch. You will have a chance to use HF91** also.

You must also install WCG HF94*** to retain sync mode.

Enter the name of the hotfix appropriate for your *current* appliance version:
APP-7.7.0-090 (091)
APP-7.7.3-090 (091)
WCG-7.7.x-094
and click **find**.
HF90* is mandatory

→

Make sure it's the correct hotfix and click **download**. After the hotfix finishes downloading, you can click **Save to a network location** if you will need to upgrade multiple appliances

→

When the hotfix appears under Downloaded hotfixes, with the status "Ready to install", click **Install**, then **OK**

→

Wait for the hotfix to install. This process can take 5 or more minutes. Afterwards, it will show in hotfix history with the status "Successful"

→

Navigate to **Status > General**, and click **Restart Appliance** under the **Appliance controller** heading, then click **OK**

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

←

When the patch finishes downloading, its status will show as "ready to install". You can now click **Save to a network location** if you will need to upgrade multiple appliances

←

If you have not downloaded the patch previously, click the **download** button next to the 7.8.x **patch you need**

←

If the version 7.8.x patch you need is not shown, click **Check for Patches**, accepting all prompts

←

7.8.X Upgrades

(You must start with 7.8.1 if that version is not already installed)
Log back onto the Appliance manager and navigate to **Administration > Patches/ Hotfixes**

← **NO**

Optionally, install Hotfix 91**. See this KBA for additional info: http://www.websense.com/ support/article/kbarticle/ v7-7-0-and-7-7-3-About-Hotfix-91-for-V-Series-appliances

Then, install WCG Hotfix 94.

YES ↑

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

→

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

→

If the upgrade completed successfully, you should see new Version **7.8.x** under the patch history, with the comment **Upgrade Succeeded!**

→

Upgrade any User Identification and Filtering appliances, then any Filtering only appliances (in that order). After that, upgrade any remaining email-only appliances. For 7.8.1 only, if you saved hotfix 90/91 and the 7.8.1 patch to a network location, you can navigate to the Patches/Hotfixes page on the remaining appliances, click Upload patch manually, then browse for the hotfix(es) at the location you specified. Remember you must install the hotfixes before uploading the v7.8.1 patch

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The upgrade process is now complete

END

←

You may need to perform other post-upgrade activities, depending on your configuration, and if you have any other Websense products. Please review the v7.8.x Release Notes or see the Upgrade Center for more information:

http://www.websense.com/content/ 7-8-upgrade-center.aspx

←

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

←

If you started with v7.7.x, and have finished upgrading to 7.8.1, return to "7.8.x Upgrades" and repeat the steps to upgrade to 7.8.x

←

Upgrade all Websense components, such as the TRITON management console, on non-appliance servers that you have not already upgraded. Flow charts for other components can be found in the Upgrade Center:

http://www.websense.com/content/ 7-8-upgrade-center.aspx

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*HF90 changes the patch system framework, to enable the appliance to download and upload patch files larger than 2G. It also adds some essential pre-check code
**HF91 expands the backup partition that stores snapshots and backups, for those requiring extra backup space prior to upgrading
***HF94 avoids possible latency issues sometimes caused by scanning using async mode.