

Upgrade Instructions: Web Security and Web Filter

Upgrade Instructions | Web Security and Web Filter | Version 7.8.x

These instructions describe how to upgrade Websense Web Security and Web Filter server components (Windows or Linux) from v7.6.x or v7.7.x to v7.8.x.

They also describe how to install Websense appliance-based components from v7.7.x to v7.8.x. If you have a v7.6.x Web Security or Web Filter deployment that includes appliance-based components, see [Instructions for upgrading to v7.7.x](#) for the steps to perform before upgrading to v7.8.x.

Note that the following operating systems are no longer supported in v7.8.x. If you are using one of these operating systems, you must migrate your operating system before upgrading to v7.8.x, as outlined below:

v7.6.x	Red Hat Enterprise Linux 4	<ol style="list-style-type: none">1. Migrate to Red Hat Enterprise Linux 5.2. Upgrade to v7.7.x on the new platform.3. Migrate to Red Hat Enterprise Linux 6.4. Upgrade to v7.8.x on the new platform.
v7.6.x	Windows 2003	<ol style="list-style-type: none">1. Migrate to Windows 2008 R2.2. Upgrade to v7.8.x.
v7.7.x	Red Hat Enterprise Linux 5	<ol style="list-style-type: none">1. Migrate to Red Hat Enterprise Linux 6.2. Upgrade to v7.8.x on the new platform.
v7.7.x	Windows 2008 (32-bit)	<ol style="list-style-type: none">1. Migrate to Windows 2008 R2.2. Upgrade to v7.8.x on the new platform.

To perform a migration and incremental upgrade, see:

- ◆ [Migration instructions for upgrading to v7.7.x](#) (Find links to detailed instructions at the bottom of the page, under the table.)
- ◆ [Instructions for upgrading to v7.7.x](#)
- ◆ [Migration instructions for upgrading to v7.8.x](#) (Find links to detailed instructions at the bottom of the page, under the table.)

The upgrade process is designed for a properly functioning Websense Web Security or Web Filter deployment. Upgrading does not repair a non-functional system.

Beginning with v7.8.4, you have the option to upgrade your Web Security deployment incrementally, rather than upgrading all machines and components at the same time. This allows you to upgrade individual Policy Server instances and their dependent components as separate "logical deployments." Policy Server instances that have not been upgraded and their dependent components continue to function normally at v7.8.3. Please see the new [Incremental Upgrade](#) guide for details.



Important

Before you start the upgrade process, the SQL Server Agent jobs associated with the Log Database must be stopped as described in [Step 1: Prepare for upgrade, page 2](#). Please coordinate with your database administrator, if needed, before beginning the upgrade process.

Note that this requirement does not apply to SQL Server Express.

- ◆ [Step 1: Prepare for upgrade, page 2](#)
- ◆ [Step 2: Prepare appliances for upgrade \(appliance-only\), page 4](#)
- ◆ [Step 3: Restart services before starting the upgrade, page 6](#)
- ◆ [Step 4: Upgrade the Policy Broker machine, page 7](#)
- ◆ [Step 5: Upgrade additional Policy Server machines, page 11](#)
- ◆ [Step 6: Upgrade additional Filtering Service, Network Agent, and User Service machines, page 15](#)
- ◆ [Step 7: Upgrade Websense Log Server, page 19](#)
- ◆ [Step 8: Upgrade the TRITON management server, page 21](#)
- ◆ [Step 9: Upgrade any additional components, page 22](#)

Step 1: Prepare for upgrade

Before upgrading Web Security or Web Filter:

1. Make sure the installation machine meets the hardware and operating system recommendations in [System requirements for this version](#).
2. If your Websense software is integrated with a third-party firewall, proxy server, or caching application, make sure that your integration product is supported in this version.

In v7.8.x, the supported third-party integration products are:

Product	Versions
Microsoft Forefront TMG	2008 or later
Cisco ASA	v8.0 or later

Product	Versions
Cisco Router	IOS v15 or later
Citrix Presentation Server	4.5
Citrix XenApp	5.0, 6.0, or 6.5

In addition, Blue Coat appliances can be integrated via the Websense ICAP Service.

3. Verify that third-party components that work with your Websense software, including your database engine and directory service, are supported. See [Requirements for Web Security solutions](#).
4. Back up all of your Websense components before starting the upgrade process. See the [Backup and Restore FAQ](#) for instructions.

The Backup and Restore FAQ includes instructions for backing up both the TRITON infrastructure and Web Security components.

On Websense appliances, be sure to perform a **full appliance configuration** backup.

5. Before upgrading Websense Filtering Service, make sure that the Filtering Service machine and the TRITON management server have the same locale settings (language and character set).

After the upgrade is complete, Filtering Service can be restarted with any locale settings.

6. Back up your current Log Database and stop Log Server.



Warning

If database operations are active during upgrade, the Websense Log Database may be left in an inconsistent state, rendering it unusable.

When this occurs, it can be difficult to fix.

Make **sure** to stop Log Server and the database jobs, as described below, before upgrading the database.

- a. Back up Web Security reporting databases.
Refer to Microsoft documentation for instructions on backing up databases. The Websense Web Security databases are named wslogdb70 (the catalog database), wslogdb70_n (standard logging partition databases), and wslogdb70_amt_1 (threats partition database).
 - b. On the Log Server machine, use the Windows Services tool to stop **Websense Log Server**.
7. Stop all database jobs associated with the Web Security Log Database:
If you have a **full version of Microsoft SQL Server** (not Express):
 - a. Log in to the Microsoft SQL Server Management Studio and expand **SQL Server Agent > Jobs** (in Object Explorer).

- b. To disable all currently active Websense SQL Server Agent jobs, right-click each of the following jobs and select **Disable**:

- Websense_ETL_Job_wslogdb70
- Websense_AMT_ETL_wslogdb70
- Websense_IBT_DRIVER_wslogdb70
- Websense_Trend_DRIVER_wslogdb70
- Websense_Maintenance_Job_wslogdb70

Disabling the jobs prevents them from executing at the next scheduled time, but does not stop them if a job is in process.

Make sure all jobs have completed any current operation before proceeding with upgrade.

- c. After upgrade, remember to enable the disabled jobs to resume normal database operations.

If you have **SQL Server Express**, use the Windows Services tool to restart the MSSQLSERVER service prior to upgrade, in order to ensure that the Service Broker jobs are not running.

8. If Websense Log Server uses a Windows trusted connection to access the Log Database, be sure to log on to the Log Server machine using the trusted account to perform the upgrade. To find out which account is used by Log Server:
 - a. Launch the Windows Services tool.
 - b. Scroll down to find **Websense Log Server**, then check the **Log On As** column to find the account to use.
9. If your deployment includes V-Series appliances, continue with the next section ([Step 2: Prepare appliances for upgrade \(appliance-only\)](#), page 4).
If you have a software-only deployment, skip to [Step 3: Restart services before starting the upgrade](#), page 6.

Step 2: Prepare appliances for upgrade (appliance-only)

Before applying the 7.8.x patch, perform the following tasks and be aware of the following issues.

Apply the v7.7 pre-upgrade hotfix

Before upgrading any Websense appliance to v7.8.x, a v7.7.x hotfix is required.

Until the hotfix is installed, it is not possible to download (or upload) the v7.8.x upgrade patch files to the appliance.

1. To get the hotfix, in the Appliance manager, go to the **Hotfixes** tab of the **Administration > Patches/ Hotfixes** page.
2. Enter the name of the hotfix to download and install on the appliance if it's not in the drop-down list. For example, if you are upgrading from:
 - v7.7.0, look for APP-7.7.0-090

- v7.7.3, look for APP-7.7.3-090
3. Click **Find** to locate the hotfix.
 4. Click **Download**.
When the download is done, the hotfix appears in the table of downloaded hotfixes with the status **Ready to install**.
 5. Click **Install** to apply the hotfix. The installation may temporarily interrupt some services.
 6. Click **OK** to continue. It may take more than 5 minutes to install the hotfix.

After the hotfix is installed, manually restart the appliance from the Appliance manager:

1. Navigate to the **Status > General** page.
2. Under Appliance Controller, click **Restart Appliance**.
Restarting the appliance takes from 5 to 8 minutes. The appliance has successfully restarted when you're returned to the Appliance manager logon page.

Repeat this process for each appliance that you intend to upgrade to v7.8.x.

Note that each appliance must be upgraded to v7.8.1 before upgrading to v7.8.2.

Network Agent settings

In the majority of deployments, upgrade preserves all Network Agent settings.

However, when the following conditions are true, the upgrade process does not preserve several Network Agent settings:

- ◆ There is a Filtering only appliance that is configured to get policy information from the Policy Broker machine (either the Full policy source appliance or an off-appliance software installation).
- ◆ There is an off-appliance Network Agent installation that uses the Filtering Service on the Filtering only appliance, and uses the Policy Server on the Policy Broker machine.

When the above conditions are true and the upgrade is performed, the settings for the off-appliance Network Agent installation are not retained.

In this case, record your Network Agent settings (configured in the Web Security manager) before performing the upgrade. Go to the Local Settings page for each Network Agent instance (**Settings > Network Agent > agent_IP_address**) and record **all** of its settings.

The following local settings are not preserved.

- ◆ Filtering Service IP address
- ◆ If Filtering Service is unavailable
- ◆ Proxies and Caches
- ◆ Port Monitoring

- ◆ Ignore Port
- ◆ Debug Setting

NIC Configuration settings (from the **Settings > Network Agent > NIC Configuration** page for each NIC) are also not preserved:

- ◆ Use this NIC to monitor traffic
- ◆ Monitor List
- ◆ Monitor List Exceptions

Save your record where you can easily access it when the upgrade is complete.

Disable on-appliance TRITON console

In version 7.8.x, the Web Security manager cannot reside on an appliance. Disable the on-appliance TRITON console and create a Windows-based TRITON management server before upgrading.

Complete instructions can be found in [Migrating the Web Security manager off of a Websense appliance](#).

Step 3: Restart services before starting the upgrade

Most Websense services must be running before the upgrade process begins. If any service (other than Log Server) is stopped, start it before initiating the upgrade.

The installer will stop and start Websense services as part of the upgrade process. If the 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 **except Log Server** before beginning the upgrade. (Log Server should remain stopped, as described in [Step 1: Prepare for upgrade, page 2](#).)
 - *Windows*: Navigate to the Websense **Web Security** directory (C:\Program Files (x86)\Websense\Web Security\, by default) and enter the following command:

```
WebsenseAdmin restart
```
 - *Linux*: Navigate to the **Websense** directory (/opt/Websense/, by default) and enter the following command:

```
./WebsenseAdmin restart
```
- ◆ On Windows machines, if you have configured the **Recovery** properties of any Websense service to restart the service on failure, use the Windows Services dialog box to change this setting to **Take No Action** before upgrading.

Internet access during the upgrade process

When you upgrade, policy enforcement stops when Websense services are stopped. Users have unrestricted access to the Internet until the Websense services are restarted.

The Websense Master Database is removed during the upgrade process. Websense Filtering Service downloads a new Master Database after the upgrade is completed.

Step 4: Upgrade the Policy Broker machine

You must upgrade the machine that hosts the primary (or standalone) **Websense Policy Broker** first, regardless of which other components are on the machine. Policy Broker may reside on:

- ◆ A Websense **full policy source** appliance
- ◆ A Windows Server 2008 R2 or R2 SP1, or 2012 (64-bit) machine
- ◆ A RHEL 6.x machine (64-bit)

Any other components on the Policy Broker machine are upgraded along with Policy Broker.

If your configuration includes a primary Policy Broker and one or more replica Policy Brokers, you must upgrade the primary Policy Broker first. An attempt to upgrade a replica Policy Broker without first upgrading the primary will result in an error message. You will be required to exit the upgrade for that machine and upgrade the primary Policy Broker before continuing.

Upgrade replica Policy Brokers after the primary has been upgraded and before attempting to upgrade any Policy Servers associated with them. If Policy Server is installed on the same machine, it will be upgraded at the same time.

Jump to the section with the upgrade instructions for the platform that hosts the primary (or standalone) Policy Broker:

- ◆ [Policy Broker: Appliance upgrade instructions, page 7](#)
- ◆ [Policy Broker: Windows upgrade instructions, page 9](#)
- ◆ [Policy Broker: Linux upgrade instructions, page 10](#)

Policy Broker: Appliance upgrade instructions

Before you begin:

- ◆ Make sure you have finished installing Hotfix 90, as described in the preparation steps at the start of the upgrade instructions.
- ◆ Log on to the Appliance manager directly, rather than using single sign-on from the TRITON console. This avoids potential timeout problems while the upgrade patch is being loaded onto the appliance.

- ◆ Take all precautions to ensure that power to the V-Series appliance is not interrupted during the upgrade. Power failure can result in operating system and software component corruption.
- 1. To download the upgrade patch, in the Appliance manager, go to the **Administration > Patches/Hotfixes > Patches** page.
If the 7.8.1 upgrade patch is not listed in the table of **Available patches**, click **Check for Patches**.
 - If a security warning appears, click **Continue**, mark the **I accept the risk...** check box, and then click **Run**.
 - The v7.8.1 upgrade patch includes 2 files: an **rpm** file and an **img** file.
If you copy the patch from one appliance to other appliances, select **both files** at the same time in the Upload Patch utility. If you try to upload one file, then the other, a warning message is displayed, and the upload cannot be completed successfully.
- 2. Click **Download**. The combined size of the patch files is over 6 GB, so the process may take some time.
When the download is done, the patch status becomes **Ready to Install**.
- 3. Click **Install** to apply the patch.
- 4. A **system check** is launched to verify that your system is ready for upgrade. This may take several minutes.
- 5. After the check succeeds, if you skipped the preparation step of backing up your files, click **Back Up**. If you are performing the backup now:
 - a. Provide the connection information for the remote machine where the backup files will reside, then click **Test Connection**.
 - b. Click **Run Backup Now**.
Wait for the backup process to complete.
- 6. Click **Install Patch**.
- 7. Review the subscription agreement, then mark the **I accept this agreement** check box and click **Continue**.
- 8. A confirmation message tells you that during the upgrade, you are logged out of the Appliance manager and the appliance restarts twice. Click **OK** to begin the upgrade.
The upgrade process may take up to 2 hours to complete.
- 9. After the appliance has automatically restarted twice, log on to the Appliance manager.
- 10. Navigate to the **Administration > Patches/Hotfixes > Patches** page.
- 11. Under **Patch History**, for version 7.8.1, verify that an **Upgrade Succeeded** status appears in the Comments section.
- 12. Navigate to the **Configuration > System** page and confirm the **Time and Date** settings, paying particular attention to the time zone setting. Make adjustments if needed.

When the appliance upgrade is complete, continue with [Step 5: Upgrade additional Policy Server machines](#).

Do not upgrade any other appliances or off-appliance components until the full policy source appliance has successfully completed the upgrade process.

Policy Broker: Windows upgrade instructions

1. Make sure that no administrators are logged on to the TRITON console.
2. Log on to the installation machine with an account having **domain** and **local** administrator privileges.



Important

If you are upgrading Log Server on this machine and it uses a Windows trusted connection to access the Log Database, you must log on to this machine using the same trusted account.

3. Close all applications and stop any antivirus software.



Warning

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

4. Go to the **Downloads** tab of mywebsense.com to download the TRITON Unified Installer.
 - The installer file is **WebsenseTRITON78xSetup.exe**.
 - Installer files occupy approximately 2 GB of disk space.
5. Right-click **WebsenseTRITON78xSetup.exe** and select **Run as administrator** to launch the installer. A progress dialog box appears, as files are extracted.
6. The installer detects Web Security components from an earlier version and asks whether you want to proceed.
Click **OK**.
7. On the installer **Introduction** screen, click **Next**.
Note the **Installer Dashboard** remains on-screen, behind the installer screens mentioned in the remaining steps.
8. On the **Websense Upgrade** screen, select **Start the upgrade**, then click **Next**.
9. When you click **Next**, a *Stopping All Services* progress message appears. Wait for Websense services to be stopped.

The **Pre-Upgrade Summary** screen appears when the services have been stopped.

In some cases, the installer may be unable to stop the Websense services. If the services have not been stopped after approximately 10 minutes, then stop them manually. You can leave the installer running when you do so. Use the C:\Program

Files (x86)\Websense\Web Security**WebsenseAdmin stop** command, or the Windows Services dialog box, to stop the services. Once you have manually stopped the services, return to the installer.

10. On the **Pre-Upgrade Summary** screen, review the list of Websense components that will be upgraded, and then click **Next**.

Critical files are backed up and install properties initialized. And then the **Installing Websense** screen appears.

If Policy Broker resides on the TRITON management server, or on the same machine as Log Server, the upgrade process checks for a required version of Microsoft SQL Server Native Client and related tools and installs them, if necessary.

11. Wait for the **Upgrade Complete** screen to appear. Click **Done** to exit the installer.
12. Reboot the machine.



Important

The machine must be rebooted to complete the upgrade process.

13. If you stopped your antivirus software, restart it.

Policy Broker: Linux upgrade instructions

1. Make sure no administrators are logged on to the TRITON console.
2. Log on the installation machine with administrator privileges (typically, as **root**).
3. Close all applications and stop any antivirus software.
4. Check the **etc/hosts** file. If there is no host name for the machine, add one.
5. Create a setup directory for the installer files, such as **/root/Websense_setup**.
6. Download the Web Security Linux installer from the Downloads page at mywebsense.com. The installer file is called **WebsenseWeb78xSetup_Lnx.tar.gz**.
7. Uncompress the installer file and use one of the following commands to launch it:
To launch the graphical installer (available only on English versions of Linux):

```
./install.sh -g
```


To launch the command-line installer, omit the -g switch:

```
./install.sh
```
8. On the Introduction screen, click **Next**.



Note

These instructions refer to the graphical installer screens. If you are using the command-line installer, the same prompts appear. Enter the menu-item number or character, corresponding to the button described in each step.

9. On the Subscription Agreement screen, click **I accept the terms of the Subscription Agreement** and click **Next**.
10. On the Websense Upgrade screen, select **Start the upgrade** and then click **Next**.
11. When you click **Next**, a “Stopping All Services” progress message appears. Wait for Websense services to be stopped.
The Pre-Upgrade Summary screen appears when the services have been stopped. In some cases, the installer may be unable to stop the Websense services. If the services have not been stopped after approximately 10 minutes, then stop them manually using the `/opt/Websense/WebsenseAdmin stop` command. You can leave the installer running when you do so. Once you have manually stopped the services, return to the installer.
12. On the Pre-Upgrade Summary screen, review the list of Websense components that will be upgraded, and then click **Next**.
Critical files are backed up and install properties initialized. And then the **Installing Websense** screen appears.
13. Wait for the **Upgrade Complete** screen to appear. Click **Done** to exit the installer.
14. Reboot the machine.

**Important**

The machine must be rebooted to complete the upgrade process.

15. If you stopped your antivirus software, restart it.

Step 5: Upgrade additional Policy Server machines

The central Policy Server resides on the same machine as Policy Broker, and was automatically upgraded in the previous section.

If you have additional Policy Server instances, upgrade them next, regardless of what other services reside on the machines. Policy Server may reside on:

- ◆ A Websense **user directory and filtering** appliance
- ◆ A Windows Server 2008 R2 or R2 SP1, or 2012 (64-bit) machine
- ◆ A RHEL 6.x machine

Jump to the section with the upgrade instructions for the platform that hosts Policy Server:

- ◆ [Policy Server: Appliance upgrade instructions, page 12](#)
- ◆ [Policy Server: Windows upgrade instructions, page 13](#)
- ◆ [Policy Server: Linux upgrade instructions, page 14](#)

Policy Server: Appliance upgrade instructions

Before you begin:

- ◆ Make sure you have finished installing Hotfix 90, as described in the preparation steps at the start of the upgrade instructions.
- ◆ Log on to the Appliance manager directly, rather than using single sign-on from the TRITON console. This avoids potential timeout problems while the upgrade patch is being loaded onto the appliance.
- ◆ Take all precautions to ensure that power to the V-Series appliance is not interrupted during the upgrade. Power failure can result in operating system and software component corruption.

1. To download the upgrade patch, in the Appliance manager, go to the **Administration > Patches/Hotfixes > Patches** page.

If the 7.8.1 upgrade patch is not listed in the table of **Available patches**, click **Check for Patches**.

- If a security warning appears, click **Continue**, mark the **I accept the risk...** check box, and then click **Run**.
- The v7.8.1 upgrade patch includes 2 files: an **rpm** file and an **img** file.
If you copy the patch from one appliance to other appliances, select **both files** at the same time in the Upload Patch utility. If you try to upload one file, then the other, a warning message is displayed, and the upload cannot be completed successfully.

2. Click **Download**. The combined size of the patch files is over 6 GB, so the process may take some time.

When the download is done, the patch status becomes **Ready to Install**.

3. Click **Install** to apply the patch.
4. A **system check** is launched to verify that your system is ready for upgrade. This may take several minutes.
5. After the check succeeds, if you skipped the preparation step of backing up your files, click **Back Up**. If you are performing the backup now:
 - a. Provide the connection information for the remote machine where the backup files will reside, then click **Test Connection**.
 - b. Click **Run Backup Now**.

Wait for the backup process to complete.

6. Click **Install Patch**.
7. Review the subscription agreement, then mark the **I accept this agreement** check box and click **Continue**.
8. A confirmation message tells you that during the upgrade, you are logged out of the Appliance manager and the appliance restarts twice. Click **OK** to begin the upgrade.

The upgrade process may take up to 2 hours to complete.

9. After the appliance has automatically restarted twice, log on to the Appliance manager.

10. Navigate to the **Administration > Patches/Hotfixes > Patches** page.
11. Under **Patch History**, for version 7.8.1, verify that an **Upgrade Succeeded** status appears in the Comments section.
12. Navigate to the **Configuration > System** page and confirm the **Time and Date** settings, paying particular attention to the time zone setting. Make adjustments if needed.

When the appliance upgrade is complete, continue with [Step 6: Upgrade additional Filtering Service, Network Agent, and User Service machines](#).

Do not upgrade any other appliances or off-appliance components until the full policy source appliance has successfully completed the upgrade process.

Policy Server: Windows upgrade instructions

1. Make sure that no administrators are logged on to the TRITON console.
2. Log on to the installation machine with an account having **domain** and **local** administrator privileges.



Important

If you are upgrading Log Server on this machine and it uses a Windows trusted connection to access the Log Database, you must log on to this machine using the same trusted account.

3. Close all applications and stop any antivirus software.



Warning

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

4. Go to the **Downloads** tab of mywebsense.com to download the TRITON Unified Installer.
 - The installer file is **WebsenseTRITON78xSetup.exe**.
 - Installer files occupy approximately 2 GB of disk space.
5. Right-click **WebsenseTRITON78xSetup.exe** and select **Run as administrator** to launch the installer. A progress dialog box appears, as files are extracted.
6. The installer detects Web Security components from an earlier version and asks how you want to proceed.
Click **OK**.
7. On the installer **Introduction** screen, click **Next**.
Note the **Installer Dashboard** remains on-screen, behind the installer screens mentioned in the remaining steps.
8. On the **Websense Upgrade** screen, select **Start the upgrade**, then click **Next**.

9. When you click **Next**, a *Stopping All Services* progress message appears. Wait for Websense services to be stopped.

The **Pre-Upgrade Summary** screen appears when the services have been stopped.

In some cases, the installer may be unable to stop the Websense services. If the services have not been stopped after approximately 10 minutes, then stop them manually. You can leave the installer running when you do so. Use the `C:\Program Files (x86)\Websense\Web Security\WebsenseAdmin stop` command, or the Windows Services dialog box, to stop the services. Once you have manually stopped the services, return to the installer.

10. On the **Pre-Upgrade Summary** screen, review the list of Websense components that will be upgraded, and then click **Next**.
Critical files are backed up and install properties initialized. And then the **Installing Websense** screen appears.
11. Wait for the **Upgrade Complete** screen to appear. Click **Done** to exit the installer.
12. Reboot the machine.



Important

The machine must be rebooted to complete the upgrade process.

13. If you stopped your antivirus software, restart it.

Policy Server: Linux upgrade instructions

1. Make sure no administrators are logged on to the TRITON console.
2. Log on the installation machine with administrator privileges (typically, as **root**).
3. Close all applications and stop any antivirus software.
4. Check the `etc/hosts` file. If there is no host name for the machine, add one.
5. Create a setup directory for the installer files, such as `/root/Websense_setup`.
6. Download the Web Security Linux installer from the Downloads page at mywebsense.com. The installer file is called **WebsenseWeb78xSetup_Lnx.tar.gz**.
7. Uncompress the installer file and use one of the following commands to launch it:
To launch the graphical installer (available only on English versions of Linux):

```
./install.sh -g
```

To launch the command-line installer, omit the `-g` switch:

```
./install.sh
```

- On the Introduction screen, click **Next**.

**Note**

These instructions refer to the graphical installer screens. If you are using the command-line installer, the same prompts appear. Enter the menu-item number or character, corresponding to the button described in each step.

- On the Subscription Agreement screen, click **I accept the terms of the Subscription Agreement** and click **Next**.
- On the Websense Upgrade screen, select **Start the upgrade** and then click **Next**.
- When you click **Next**, a “Stopping All Services” progress message appears. Wait for Websense services to be stopped.
The Pre-Upgrade Summary screen appears when the services have been stopped. In some cases, the installer may be unable to stop the Websense services. If the services have not been stopped after approximately 10 minutes, then stop them manually using the `/opt/Websense/WebsenseAdmin stop` command. You can leave the installer running when you do so. Once you have manually stopped the services, return to the installer.
- On the Pre-Upgrade Summary screen, review the list of Websense components that will be upgraded, and then click **Next**.
Critical files are backed up and install properties initialized. And then the **Installing Websense** screen appears.
- Wait for the **Upgrade Complete** screen to appear. Click **Done** to exit the installer.
- Reboot the machine.

**Important**

The machine must be rebooted to complete the upgrade process.

- If you stopped your antivirus software, restart it.

Step 6: Upgrade additional Filtering Service, Network Agent, and User Service machines

If you have additional Filtering Service, Network Agent, or User Service instances, upgrade them next, regardless of what other services reside on the machines. Filtering Service, Network Agent, and User Service may reside on:

- ◆ A Windows Server 2008 R2 or R2 SP1, or 2012 (64-bit) machine
- ◆ A RHEL 6.x machine (64-bit)

Filtering Service and Network Agent may also reside on Websense **filtering only** appliances.

Filtering Service and Network Agent: Appliance upgrade instructions

Before you begin:

- ◆ Make sure you have finished installing Hotfix 90, as described in the preparation steps at the start of the upgrade instructions.
- ◆ Log on to the Appliance manager directly, rather than using single sign-on from the TRITON console. This avoids potential timeout problems while the upgrade patch is being loaded onto the appliance.
- ◆ Take all precautions to ensure that power to the V-Series appliance is not interrupted during the upgrade. Power failure can result in operating system and software component corruption.

1. To download the upgrade patch, in the Appliance manager, go to the **Administration > Patches/Hotfixes > Patches** page.

If the 7.8.1 upgrade patch is not listed in the table of **Available patches**, click **Check for Patches**.

- If a security warning appears, click **Continue**, mark the **I accept the risk...** check box, and then click **Run**.

- The v7.8.1 upgrade patch includes 2 files: an **rpm** file and an **img** file.

If you copy the patch from one appliance to other appliances, select **both files** at the same time in the Upload Patch utility. If you try to upload one file, then the other, a warning message is displayed, and the upload cannot be completed successfully.

2. Click **Download**. The combined size of the patch files is over 6 GB, so the process may take some time.

When the download is done, the patch status becomes **Ready to Install**.

3. Click **Install** to apply the patch.
4. A **system check** is launched to verify that your system is ready for upgrade. This may take several minutes.
5. After the check succeeds, if you skipped the preparation step of backing up your files, click **Back Up**. If you are performing the backup now:
 - a. Provide the connection information for the remote machine where the backup files will reside, then click **Test Connection**.
 - b. Click **Run Backup Now**.Wait for the backup process to complete.
6. Click **Install Patch**.
7. Review the subscription agreement, then mark the **I accept this agreement** check box and click **Continue**.

8. A confirmation message tells you that during the upgrade, you are logged out of the Appliance manager and the appliance restarts twice. Click **OK** to begin the upgrade.
The upgrade process may take up to 2 hours to complete.
9. After the appliance has automatically restarted twice, log on to the Appliance manager.
10. Navigate to the **Administration > Patches/Hotfixes > Patches** page.
11. Under **Patch History**, for version 7.8.1, verify that an **Upgrade Succeeded** status appears in the Comments section.
12. Navigate to the **Configuration > System** page and confirm the **Time and Date** settings, paying particular attention to the time zone setting. Make adjustments if needed.

When the appliance upgrade is complete, continue with [Step 7: Upgrade Websense Log Server](#).

Do not upgrade any other appliances or off-appliance components until the full policy source appliance has successfully completed the upgrade process.

Filtering Service, Network Agent, or User Service: Windows upgrade instructions

1. Make sure that no administrators are logged on to the TRITON console.
2. Log on to the installation machine with an account having **domain** and **local** administrator privileges.



Important

If you are upgrading Log Server on this machine and it uses a Windows trusted connection to access the Log Database, you must log on to this machine using the same trusted account.

3. Close all applications and stop any antivirus software.



Warning

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

4. Go to the **Downloads** tab of mywebsense.com to download the TRITON Unified Installer.
 - The installer file is **WebsenseTRITON78xSetup.exe**.
 - Installer files occupy approximately 2 GB of disk space.
5. Right-click **WebsenseTRITON78xSetup.exe** and select **Run as administrator** to launch the installer. A progress dialog box appears, as files are extracted.

6. The installer detects Web Security components from an earlier version and asks how you want to proceed.
Click **OK**.
7. On the installer **Introduction** screen, click **Next**.
Note the **Installer Dashboard** remains on-screen, behind the installer screens mentioned in the remaining steps.
8. On the **Websense Upgrade** screen, select **Start the upgrade**, then click **Next**.
9. When you click **Next**, a *Stopping All Services* progress message appears. Wait for Websense services to be stopped.
The **Pre-Upgrade Summary** screen appears when the services have been stopped.
In some cases, the installer may be unable to stop the Websense services. If the services have not been stopped after approximately 10 minutes, then stop them manually. You can leave the installer running when you do so. Use the C:\Program Files (x86)\Websense\Web Security**WebsenseAdmin stop** command, or the Windows Services dialog box, to stop the services. Once you have manually stopped the services, return to the installer.
10. On the **Pre-Upgrade Summary** screen, review the list of Websense components that will be upgraded, and then click **Next**.
Critical files are backed up and install properties initialized. And then the **Installing Websense** screen appears.
11. Wait for the **Upgrade Complete** screen to appear. Click **Done** to exit the installer.
12. Reboot the machine.



Important

The machine must be rebooted to complete the upgrade process.

13. If you stopped your antivirus software, restart it.

Filtering Service, Network Agent, or User Service: Linux upgrade instructions

1. Make sure no administrators are logged on to the TRITON console.
2. Log on the installation machine with administrator privileges (typically, as **root**).
3. Close all applications and stop any antivirus software.
4. Check the **etc/hosts** file. If there is no host name for the machine, add one.
5. Create a setup directory for the installer files, such as **/root/Websense_setup**.
6. Download the Web Security Linux installer from the Downloads page at mywebsense.com. The installer file is called **WebsenseWeb78xSetup_Lnx.tar.gz**.
7. Uncompress the installer file and use one of the following commands to launch it:

To launch the graphical installer (available only on English versions of Linux):

```
./install.sh -g
```

To launch the command-line installer, omit the -g switch:

```
./install.sh
```

8. On the Introduction screen, click **Next**.

**Note**

These instructions refer to the graphical installer screens. If you are using the command-line installer, the same prompts appear. Enter the menu-item number or character, corresponding to the button described in each step.

9. On the Subscription Agreement screen, click **I accept the terms of the Subscription Agreement** and click **Next**.
10. On the Websense Upgrade screen, select **Start the upgrade** and then click **Next**.
11. When you click **Next**, a “Stopping All Services” progress message appears. Wait for Websense services to be stopped.
The Pre-Upgrade Summary screen appears when the services have been stopped. In some cases, the installer may be unable to stop the Websense services. If the services have not been stopped after approximately 10 minutes, then stop them manually using the `/opt/Websense/WebsenseAdmin stop` command. You can leave the installer running when you do so. Once you have manually stopped the services, return to the installer.
12. On the Pre-Upgrade Summary screen, review the list of Websense components that will be upgraded, and then click **Next**.
Critical files are backed up and install properties initialized. And then the **Installing Websense** screen appears.
13. Wait for the **Upgrade Complete** screen to appear. Click **Done** to exit the installer.
14. Reboot the machine.

**Important**

The machine must be rebooted to complete the upgrade process.

15. If you stopped your antivirus software, restart it.

Step 7: Upgrade Websense Log Server

Next, upgrade the Websense Log Server machine. Any other services on the machine are also upgraded.

Log Server runs on Windows Server 2008 R2 or R2 SP1, or 2012 (64-bit) machines.

To upgrade Log Server:

1. Make sure that no administrators are logged on to the TRITON console.
2. Log on to the installation machine with an account having **domain** and **local** administrator privileges.



Important

If Log Server uses a Windows trusted connection to access the Log Database, you must log on to this machine using the same trusted account.

3. Close all applications and stop any antivirus software.



Warning

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

4. Go to the **Downloads** tab of mywebsense.com to download the TRITON Unified Installer.
 - The installer file is **WebsenseTRITON78xSetup.exe**.
 - Installer files occupy approximately 2 GB of disk space.
5. Right-click **WebsenseTRITON78xSetup.exe** and select **Run as administrator** to launch the installer. A progress dialog box appears, as files are extracted.
6. The installer detects Web Security components from an earlier version and asks how you want to proceed.

Click **OK**.

7. On the installer **Introduction** screen, click **Next**.

Note the **Installer Dashboard** remains on-screen, behind the installer screens mentioned in the remaining steps.

8. On the **Websense Upgrade** screen, select **Start the upgrade**, then click **Next**.
9. When you click **Next**, a *Stopping All Services* progress message appears. Wait for Websense services to be stopped.

The **Pre-Upgrade Summary** screen appears when the services have been stopped.

In some cases, the installer may be unable to stop the Websense services. If the services have not been stopped after approximately 10 minutes, then stop them manually. You can leave the installer running when you do so. Use the C:\Program Files (x86)\Websense\Web Security**WebsenseAdmin stop** command, or the Windows Services dialog box, to stop the services. Once you have manually stopped the services, return to the installer.

10. On the **Pre-Upgrade Summary** screen, review the list of Websense components that will be upgraded, and then click **Next**.

Critical files are backed up and install properties initialized. And then the **Installing Websense** screen appears.

The upgrade process checks for a required version of Microsoft SQL Server Native Client and related tools and installs them, if necessary.

11. Wait for the **Upgrade Complete** screen to appear. Click **Done** to exit the installer.
During an upgrade to v7.8.4, a new logging partition is added to your Log Database to accommodate the new IPv6 feature.
12. Reboot the machine.

**Important**

The machine must be rebooted to complete the upgrade process.

13. If you stopped your antivirus software, restart it.
14. Enable the SQL Server Agent jobs that you disabled prior to upgrade.

Step 8: Upgrade the TRITON management server

If you have not already upgraded the TRITON management server in the course of upgrading another component, use the following steps to upgrade the management server machine.

1. Make sure that no administrators are logged on to the TRITON console.
2. Log on to the installation machine with an account having **domain** and **local** administrator privileges.
3. Close all applications and stop any antivirus software.

**Warning**

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

4. Go to the **Downloads** tab of mywebsense.com to download the TRITON Unified Installer.
 - The installer file is **WebsenseTRITON78xSetup.exe**.
 - Installer files occupy approximately 2 GB of disk space.
5. Right-click **WebsenseTRITON78xSetup.exe** and select **Run as administrator** to launch the installer. A progress dialog box appears, as files are extracted.
6. The installer detects Web Security components from an earlier version and asks how you want to proceed.
Click **OK**.
7. On the installer **Introduction** screen, click **Next**.
Note the **Installer Dashboard** remains on-screen, behind the installer screens mentioned in the remaining steps.
8. On the **Websense Upgrade** screen, select **Start the upgrade**, then click **Next**.

9. When you click **Next**, a *Stopping All Services* progress message appears. Wait for Websense services to be stopped.

The **Pre-Upgrade Summary** screen appears when the services have been stopped.

In some cases, the installer may be unable to stop the Websense services. If the services have not been stopped after approximately 10 minutes, then stop them manually. You can leave the installer running when you do so. Use the C:\Program Files (x86)\WebSense\Web Security**WebSenseAdmin stop** command, or the Windows Services dialog box, to stop the services. Once you have manually stopped the services, return to the installer.

10. On the **Pre-Upgrade Summary** screen, review the list of Websense components that will be upgraded, and then click **Next**.

Critical files are backed up and install properties initialized. And then the **Installing Websense** screen appears.

The upgrade process checks for a required version of Microsoft SQL Server Native Client and related tools and installs them, if necessary.

11. Wait for the **Upgrade Complete** screen to appear. Click **Done** to exit the installer.
12. Reboot the machine.



Important

The machine must be rebooted to complete the upgrade process.

13. If you stopped your antivirus software, restart it.

Step 9: Upgrade any additional components

Upgrade any additional server components, including transparent identification agents and Remote Filtering Server, that may be running on other machines.

See:

- ◆ [Additional components: Windows upgrade instructions, page 22](#)
- ◆ [Additional components: Linux upgrade instructions, page 24](#)

Additional components: Windows upgrade instructions

1. Log on to the installation machine with an account having **domain** and **local** administrator privileges.
2. Close all applications and stop any antivirus software.

**Warning**

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

3. Go to the **Downloads** tab of mywebsense.com to download the TRITON Unified Installer.
 - The installer file is **WebsenseTRITON78xSetup.exe**.
 - Installer files occupy approximately 2 GB of disk space.
4. Right-click **WebsenseTRITON78xSetup.exe** and select **Run as administrator** to launch the installer. A progress dialog box appears, as files are extracted.
5. The installer detects Web Security components from an earlier version and asks how you want to proceed.
Click **OK**.
6. On the installer **Introduction** screen, click **Next**.
Note the **Installer Dashboard** remains on-screen, behind the installer screens mentioned in the remaining steps.
7. On the **Websense Upgrade** screen, select **Start the upgrade**, then click **Next**.
8. When you click **Next**, a *Stopping All Services* progress message appears. Wait for Websense services to be stopped.
The **Pre-Upgrade Summary** screen appears when the services have been stopped.
In some cases, the installer may be unable to stop the Websense services. If the services have not been stopped after approximately 10 minutes, then stop them manually. You can leave the installer running when you do so. Use the C:\Program Files (x86)\Websense\Web Security**WebsenseAdmin stop** command, or the Windows Services dialog box, to stop the services. Once you have manually stopped the services, return to the installer.
9. On the **Pre-Upgrade Summary** screen, review the list of Websense components that will be upgraded, and then click **Next**.
Critical files are backed up and install properties initialized. And then the **Installing Websense** screen appears.
10. Wait for the **Upgrade Complete** screen to appear. Click **Done** to exit the installer.
11. Reboot the machine.

**Important**

The machine must be rebooted to complete the upgrade process.

12. If you stopped your antivirus software, restart it.

Additional components: Linux upgrade instructions

1. Log on the installation machine with administrator privileges (typically, as **root**).
2. Close all applications and stop any antivirus software.
3. Check the **etc/hosts** file. If there is no host name for the machine, add one.
4. Create a setup directory for the installer files, such as **/root/Websense_setup**.
5. Download the Web Security Linux installer from the Downloads page at mywebsense.com. The installer file is called **WebsenseWeb78xSetup_Lnx.tar.gz**.
6. Uncompress the installer file and use one of the following commands to launch it:
To launch the graphical installer (available only on English versions of Linux):

```
./install.sh -g
```


To launch the command-line installer, omit the -g switch:

```
./install.sh
```
7. On the Introduction screen, click **Next**.



Note

These instructions refer to the graphical installer screens. If you are using the command-line installer, the same prompts appear. Enter the menu-item number or character, corresponding to the button described in each step.

8. On the Subscription Agreement screen, click **I accept the terms of the Subscription Agreement** and click **Next**.
9. On the Websense Upgrade screen, select **Start the upgrade** and then click **Next**.
10. When you click **Next**, a “Stopping All Services” progress message appears. Wait for Websense services to be stopped.
The Pre-Upgrade Summary screen appears when the services have been stopped.
In some cases, the installer may be unable to stop the Websense services. If the services have not been stopped after approximately 10 minutes, then stop them manually using the **/opt/Websense/WebsenseAdmin stop** command. You can leave the installer running when you do so. Once you have manually stopped the services, return to the installer.
11. On the Pre-Upgrade Summary screen, review the list of Websense components that will be upgraded, and then click **Next**.
Critical files are backed up and install properties initialized. And then the **Installing Websense** screen appears.
12. Wait for the **Upgrade Complete** screen to appear. Click **Done** to exit the installer.

13. Reboot the machine.



Important

The machine must be rebooted to complete the upgrade process.

14. If you stopped your antivirus software, restart it.

