Upgrading Email Security Gateway v7.6.x to v7.7.0

These instructions cover the upgrade of an Email Security Gateway solution from version 7.6.x to version 7.7.0. If you are currently running a version 7.6.x deployment, and you want to upgrade to version 7.7.3 or 7.8.x you must upgrade to version 7.7.0 first. You cannot upgrade from version 7.6.x directly to version 7.7.3 or 7.8.x.

In addition, if you want to upgrade from version 7.6.x to TRITON AP-EMAIL version 8.x, you must upgrade to version 7.7.0 and then 7.8.0 first. See Upgrading Email Security Gateway Solutions for specific upgrade paths.

Any version 7.6.x Email Security component that is currently installed on Windows Server 2003 must be migrated to Windows Server 2008 R2 before the upgrade to version 7.7.0. Migration to Windows Server 2012 may be performed after an upgrade to version 7.8.x.

The upgrade process described in this article includes Websense V-Series appliance and TRITON Unified Security Center and Email Security Log Server Windows components. You should ensure that third-party components are upgraded as well, to work with your new Email Security Gateway version.

See Upgrading Email Security Gateway Solutions for important information about backing up your system before you upgrade and restoring your system to pre-upgrade state if necessary.

Upgrade preparation

Several issues should be considered before you begin an Email Security Gateway version 7.6.x product upgrade.

- **Verify current deployment.** Ensure that your current deployment is functioning properly, including any third-party integration components, before you begin the upgrade. The upgrade process does not repair a non-functioning system.
- **Verify the system requirements** for the version to which you are upgrading to ensure your network can accommodate the new features and functions. See System requirements for this version for a detailed description.
- **Prepare Windows components.** See All Websense TRITON solutions for an explanation of general preparations for upgrading Email Security Gateway Windows components.
- **Ensure that your firewall is configured correctly** so that the ports needed for proper Email Security Gateway operation are open. See Email Security Gateway

ports for information about all Email Security Gateway default ports, including appliance interface designations and communication direction.

- **Check configuration settings for maximum capacity.** If 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.

Upgrade instructions

Once you have completed the activities outlined in *Upgrade preparation*, you can perform the product upgrade. This section provides instructions for performing an upgrade of an Email Security Gateway only deployment.

> **Important**
> If your network includes Websense Web Security, you must upgrade the Policy Broker/Policy Server machine first, whether or not these components reside on an appliance. Other Websense services located on the Policy Broker/Policy Server machine should be upgraded at the same time. See Upgrade sequence for solutions that include Web, Email, and Data Security for more information.

Use the following procedure to perform the upgrade of Email Security Gateway to version 7.7.0:

1. Use the TRITON Enterprise upgrade installer from the MyWebsense downloads page to upgrade the Email Security Gateway Log Server if it is installed on a machine other than the one on which the TRITON console is installed. Follow the installation wizard instructions for Log Server.

   > **Important**
   > If you are upgrading multiple Log Servers, you should perform the upgrades one at a time to avoid possible upgrade process errors.

   - The installer does not allow you to change existing configuration settings. Changes must be made after the upgrade.
   - The upgrade installer stops the Email Security Gateway Log Server service, updates the Email Security Gateway Log Server, and then restarts the Email Security Gateway Log Server service.
2. Upgrade the TRITON console machine. Use the TRITON Enterprise upgrade installer from the MyWebsense downloads page. Ensure that Email Security Gateway is selected for upgrade. The upgrade process includes Data Security and the Email Security Log Server if it is installed on the TRITON console machine.

Follow the installation wizard instructions. The Data Security module upgrade occurs after the TRITON infrastructure upgrade. Email Security Gateway upgrade follows Data Security.

- The upgrade installer Configuration page shows the IP address of the database engine that manages the Email Security Log Database and logon type. If you have changed the database since your previous installation or upgrade, use this page to change these settings.
- The upgrade script stops the Email Security Gateway manager service, updates the Email Security Gateway SQL Server databases (and Log Server if found), and then restarts the Email Security Gateway manager service.

Note

The Email Security Gateway manager is not available until after the TRITON console upgrade completes.

3. Upgrade all your V-Series appliances. Email should not be directed through these machines during the upgrade process.

   Appliance upgrade is performed using the Appliance Manager patch facility to download the version 7.7.0 patch and apply it to the appliance. See the appliance upgrade guide for the appliance patch upgrade procedure for version 7.6.x to 7.7.0.

Note

V-Series appliance services are not available while the patch is being applied and until the appliance completes its restart.

   If your Email Security appliances are configured in a cluster, the primary box should be upgraded first, followed by all its secondary machines, 1 at a time. Reset the appliances to standalone mode before you perform the appliance upgrade process.

4. Continue with *Post-upgrade activities* to deploy the Email Security Gateway upgrade.

Post-upgrade activities

Your system should have the same configuration after the upgrade process as it did before the upgrade. Any configuration changes can be made after the upgrade process is finished.

After your upgrade is completed, redirect email traffic through your system to ensure that it performs as expected.

Email hybrid service registration information is retained during the upgrade process, so you do not need to complete the registration again.

You should perform the following tasks in the TRITON console:

Update Data Security policies and classifiers

1. Select the Data Security module.
2. Follow the prompts that appear for updating Data Security policies and classifiers.

   Depending on the number of policies you have, this operation can take up to an hour. During this time, do not restart the server or any of the services.
3. Click **Deploy**.

Repair Email Security Gateway registration with Data Security

1. In the Email Security Gateway module, navigate to **Settings > General > Data Security** and click **Unregister**.
2. In the Data Security module, navigate to **Settings > Deployment > System Modules**.
3. Click the Email Security Gateway entry.
4. Click **Delete** at the top of the **System Modules > Email Security Gateway** page to remove Email Security Gateway registration.
5. When prompted, click **Deploy** to apply the changed Data Security setting.
6. In the Email Security Gateway module, navigate to **Settings > General > Data Security**.
7. Register the Email Security appliance with Data Security.
8. Return to the Data Security module and click **Deploy** in the upper right area of the screen.