Upgrade Instructions: Web Filter & Security

Upgrade Instructions | Web Filter & Security | Version 8.2.x

Version 8.0.x introduced new product names and solution bundles for web protection solutions. Both Web Filter and Web Security are now Web Filter & Security. For more information about how these changes may affect you, contact your sales partner or Forcepoint Sales representative.

These instructions describe how to upgrade from **v7.8.4**, **v8.0.x**, or **v8.1.x** Web Filter or Web Security to **v8.2.x** Web Filter & Security. If you have an earlier version, there are interim steps you must take.

Your current version	Step 1	Step 2	Step 3	Step 4
v7.1.x	Upgrade to v7.6.x	Upgrade to 7.7.x	Upgrade to 8.0.x	Upgrade to 8.2.x
v7.5.x	Upgrade to v7.6.x	Upgrade to 7.7.x	Upgrade to 8.0.x	Upgrade to 8.2.x
v7.6.x	Upgrade to 7.7.x	Upgrade to 8.0.x	Upgrade to 8.2.x	none
v7.7.x	Upgrade to 8.0.x	Upgrade to 8.2.x	none	none
v7.8.1 v7.8.2 v7.8.3	Upgrade to 8.1.x	Upgrade to 8.2.x	none	none
v7.8.4	Upgrade to 8.2.x	none	none	none
v8.0.x	Upgrade to 8.2.x	none	none	none
v8.1.x	Upgrade to 8.2.x	none	none	none

These instructions also describe how to upgrade appliance-based components from **v7.8.4, v8.0.x, or v8.1.x** to **v8.2.x.**

> **Important**
>
> Direct upgrades from v7.7.x to v8.2.x are not supported on an appliance. You must first upgrade to v7.8.4.
>
> If you are currently running an appliance with v7.7.x, Appliance Hotfix 90 must be applied to v7.7.x prior to upgrading to v7.8.x. See the v7.8.x Upgrade Instructions.

> **Important**
>
> **V-Series appliance users:**
>
> Some older V10000 and V5000 appliances are not supported with this version.
>
> See V-Series appliances supported with version 8.x.

Note that the following operating systems are not supported as of v8.0.x. If you are using one of these operating systems, you must migrate your operating system before upgrading to v8.2.x, as outlined below:

v7.7.x	Red Hat Enterprise Linux 5	1. Migrate to Red Hat Enterprise Linux 6. 2. Upgrade to v8.0.x on the new platform. 3. Upgrade to v8.2.x on the new platform.
v7.7.x	Windows 2008 (32-bit)	1. Migrate to Windows 2008 R2. 2. Upgrade to v8.0.x on the new platform. 3. Upgrade to v8.2.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 v8.0.x (Find links to detailed instructions at the bottom of the page, under the table.)

For the versions covered in this document (v7.8.4 - v8.1.x), 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 the original version. Please see the new Incremental Upgrade guide for details.

When you are ready to begin, upgrade your deployment as follows:

- *Step 1: Prepare for upgrade*, page 3
- *Step 2: Prepare appliances for upgrade (appliance-only)*, page 6
- *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 16
- *Step 7: Upgrade Log Server*, page 20
- *Step 8: Upgrade the TRITON management server*, page 22
- *Step 9: Upgrade any additional components*, page 23

Step 1: Prepare for upgrade

> ⚠️ **Warning**
>
> The upgrade process is designed for a properly functioning Web Security, Web Filter, or Web Filter & Security deployment. Upgrading does not repair a non-functional system.

Before upgrading:

1. Make sure the installation machine meets the hardware and operating system recommendations in <u>System requirements for this version</u>.
2. If your web protection 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 v8.2.x, the supported third-party integration products are:

Product	Versions
Microsoft Forefront TMG	2008 or later
Cisco ASA	v8.0 or later
Cisco Router	IOS v15 or later
Citrix Presentation Server	4.5
Citrix XenApp	6.0 or 6.5

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

3. Verify that third-party components that work with your web protection software, including your database engine and directory service, are supported. See Requirements for web protection solutions.

4. Back up **all of your web protection components** before starting the upgrade process. See the Backup and Restore FAQ for instructions for backing up both software-based and appliance-based components.

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

5. Before upgrading 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 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 your reporting databases.

      Refer to Microsoft documentation for instructions on backing up databases. The 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. It is best to **stop all Log Latabase jobs** prior to starting the upgrade, but, before it upgrades the log database, the upgrade process will attempt to stop any Log Database jobs not already stopped. If the jobs cannot be stopped, you will need to stop them manually. However, you do not need to exit the installer to do that.

   Stop the Log Database jobs using these steps:

   a. If you have a **full version of Microsoft SQL Server** (not Express), stop **all database jobs** as follows. (See below for steps to stop SQL Express jobs.)

      ○ Log in to the Microsoft SQL Server Management Studio and expand **SQL Server Agent** > **Jobs** (in Object Explorer).

      ○ To disable all currently active 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.

○ After upgrade, verify that the jobs have been to enabled.

Enable any that were not automatically enabled by the upgrade process. Normal database operations will then resume.

○ Continue with step 9.

b. If you have **SQL Server Express, stop all database jobs** as follows:

○ Log in to the Microsoft SQL Server Management Studio.

○ Expand the **Databases** tree to locate the catalog database (wslogdb70, by default), then expand the catalog database node.

○ Expand **Service Broker > Queues**.

○ Right click **dbo.wse_scheduled_job_queue** and select **Disable Queue**.

○ The upgrade process will re-enable the job queue. After upgrade, verify that the Queue has been enabled.

Enable it, if necessary, by repeating the process, this time ultimately selecting **Enable Queue** to resume normal database operations.

selecting **Enable Queue** to resume normal database operations.

When Log Server is upgraded, the upgrade process first checks the Log Database version and updates the database, if necessary. If you have multiple Log Servers, the database update occurs with the first Log Server upgrade. The database update, including the need to stop the database jobs, is not repeated when additional Log Server instances are upgraded.

8. If 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 6.

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)

> **Important**
> **V-Series appliance users:**
>
> Some older V10000 and V5000 appliances are not supported with this version.
>
> See V-Series appliances supported with version 8.x.

Direct upgrades from v7.7.x to v8.2.x are not supported on an appliance. You must first upgrade to v7.8.4.

If you are currently running an appliance with v7.7.x, Appliance Hotfix 90 must be applied to v7.7.x prior to upgrading to v7.8.x. See the v7.8.x Upgrade Instructions.

Step 3: Restart services before starting the upgrade

1. To ensure the success of the upgrade, manually stop and start all the web protection services **except Log Server** before beginning the upgrade. (Log Server should remain stopped, as described in *Step 1: Prepare for upgrade*, page 3.)

   - *Windows*: Navigate to the **Web Security** directory (C:\Program Files *or* 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
     ```

   - *Appliance*: On the **Status > General** page in the Appliance manager, click **Restart Appliance** to restart all services.

2. Make sure that all web protection services (except Log Server) are running successfully before you begin the upgrade. If any service is stopped, use the Windows Services tool, opt/Websense//WebsenseDaemonControl command, or appliance Start Services button to start the affected service or services.

During the upgrade, when web protection services are stopped, policy enforcement stops. Users have unrestricted access to the Internet until the services are restarted.

The Master Database is removed during the upgrade process. 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 **Policy Broker** first, regardless of which other components on are on the machine. Policy Broker may reside on:

● A **full policy source** appliance

● A Windows Server 2008 R2, 2012, or 2012 R2 machine

● A RHEL 6.x or 7.x machine

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.

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 Policy Broker:

Policy Broker: Appliance upgrade instructions

Before you begin:

● 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.

You can either use an automated process to download the patch directly from Forcepoint servers to the appliance, or manually download the patch to a machine in your network, then upload it from that machine to the appliance.

1. To download the upgrade patch using the automated process:

   a. In the Appliance manager, go to the **Administration > Patches / Hotfixes > Patches** page.

   b. If the 8.2.x upgrade patch is not listed in the table of **Available patches**, click **Check for Patches**.

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

The upgrade patch file name has the following format:

```
V-Series-Patch-820.rpm
```

d. Click **Download**. The patch size is over 6 GB, so the process may take some time.

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

e. Continue with step 3.

2. To upload the upgrade patch manually:

> **!** **Important**
> If you are upgrading from 7.8.4, 8.0.0, or 8.0.1, you may get a Java version error when you initiate the upload. If you do, please see the knowledge base article <u>V-Series patch upload Java version error</u>.

a. Use a browser to connect to <u>forcepoint.com</u>.

b. Log in to My Account and click the **Downloads** tab.

c. On the Downloads page, select the **Upgrades** tab.

d. Select your appliance model from the **Product** drop-down list.

e. Under **V-Series upgrade patch for v8.2**, click **download**.

f. Log on to the Appliance manager directly (no single-sign on) and navigate to the **Administration > Patches / Hotfixes > Patches** page.

g. Click **Upload Patch Manually** and select the patch that you want to upload.

When the upload is complete, the patch is listed on the page with the status **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**.

If the subscription agreement is not displayed within 60 seconds, close and re-open the browser, return to the Patches / Hotfixes > Patches page, and initiate the patch installation again.

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.

   If your browser cannot connect to the Appliance manager immediately, the appliance may not have finished restarting all modules. Please be patient.

10. Navigate to the **Administration** > **Patches / Hotfixes** > **Patches** page.

11. Under **Patch History**, for version 8.2.x, 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. Use the Downloads tab of the My Account page at forcepoint.com to download the TRITON Unified Installer.

   ■ The installer file is **TRITON820Setup.exe**.

   ■ Installer files occupy approximately 5 GB of disk space.

5. Right-click **TRITON820Setup.exe** and select **Run as administrator** to launch the installer. A progress dialog box appears, as files are extracted.

   The file extraction process takes several minutes. Please be patient.

6. The installer detects software 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 **Upgrade** screen, select **Start the upgrade**, then click **Next**.

9. Accept the subscription agreement. When you click **Next**, a *Stopping All Services* progress message appears. Wait for web protection services to be stopped.

   In some cases, the installer may be unable to stop the web protection services. If this occurs, you are prompted to stop them manually (you do not need to exit the installer to do this). Use the Windows Services tool to stop the services, then return to the installer.

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

    Critical files are backed up and install properties initialized. And then the **Installing** 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. Use the Downloads tab of the My Account page at forcepoint.com to download the Linux installer. The installer file is called **Web820Setup_Lnx.tar.gz**.
7. Uncompress the installer file using:

   ```
   tar -xvzf <installer tar archive>
   ```
8. 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
```

9. 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.

10. On the Subscription Agreement screen, click **I accept the terms of the Subscription Agreement** and click **Next**.

11. On the Upgrade screen, select **Start the upgrade** and then click **Next**.

12. When you click **Next**, a "Stopping All Services" progress message appears. Wait for web protection services to be stopped.

    In some cases, the installer may be unable to stop the web protection services. If this occurs, stop them manually using the **/opt/Websense/WebsenseDaemonControl** command. Once you have manually stopped the services, return to the installer.

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

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

14. Wait for the **Upgrade Complete** screen to appear. Click **Done** to exit the installer.

15. Reboot the machine.

> **Important**
> The machine must be rebooted to complete the upgrade
> process.

16. 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:

- **User directory and filtering** appliances
- Windows Server 2008 R2, 2012, or 2012 R2 machines
- RHEL 6.x or 7.x machines

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 14
- *Policy Server: Linux upgrade instructions*, page 15

Policy Server: Appliance upgrade instructions

Before you begin:

- 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.

You can either use an automated process to download the patch directly from Forcepoint servers to the appliance, or manually download the patch to a machine in your network, then upload it from that machine to the appliance.

1. To download the upgrade patch using the automated process:

   a. In the Appliance manager, go to the **Administration > Patches / Hotfixes > Patches** page.

   b. If the 8.2.x upgrade patch is not listed in the table of **Available patches**, click **Check for Patches**.

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

      The upgrade patch file name has the following format:

      ```
      V-Series-Patch-820.rpm
      ```

   d. Click **Download**. The patch size is over 6 GB, so the process may take some time.

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

   e. Continue with step 3.

2. To upload the upgrade patch manually:

   > **Important**
   > If you are upgrading from 7.8.4, 8.0.0, or 8.0.1, you may get a Java version error when you initiate the upload. If you do, please see the knowledge base article V-Series patch upload Java version error.

    a.   Use a browser to connect to forcepoint.com.

    b.   Log in to My Account and click the **Downloads** tab.

    c.   On the Downloads page, select the **Upgrades** tab.

    d.   Select your appliance model from the **Product** drop-down list.

    e.   Under **V-Series upgrade patch for v8.2**, click **download**.

    f.   Log on to the Appliance manager directly (no single-sign on) and navigate to the **Administration > Patches / Hotfixes > Patches** page.

    g.   Click **Upload Patch Manually** and select the patch that you want to upload.

       When the upload is complete, the patch is listed on the page with the status **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**.

   If the subscription agreement is not displayed within 60 seconds, close and re-open the browser, return to the Patches / Hotfixes > Patches page, and initiate the patch installation again.

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.

   If your browser cannot connect to the Appliance manager immediately, the appliance may not have finished restarting all modules. Please be patient.

10. Navigate to the **Administration** > **Patches / Hotfixes** > **Patches** page.

11. Under **Patch History**, for version 8.2.x, 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*.

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. Use the Downloads tab of the My Account page at forcepoint.com to download the TRITON Unified Installer.

   ■ The installer file is **TRITON820Setup.exe**.

   ■ Installer files occupy approximately 5 GB of disk space.

5. Right-click **TRITON820Setup.exe** and select **Run as administrator** to launch the installer. A progress dialog box appears, as files are extracted.

   The file extraction process takes several minutes. Please be patient.

6. The installer detects software 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 **Upgrade** screen, select **Start the upgrade**, then click **Next**.

9. Accept the subscription agreement. When you click **Next**, a *Stopping All Services* progress message appears. Wait for web protection services to be stopped.

   In some cases, the installer may be unable to stop the web protection services. If this occurs, you are prompted to stop them manually (you do not need to exit the installer to do this). Use the Windows Services tool to stop the services, then return to the installer.

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

    Critical files are backed up and install properties initialized. And then the **Installing** 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. Use the Downloads tab of the [My Account](#) page at forcepoint.com to download the Linux installer. The installer file is called **Web820Setup_Lnx.tar.gz**.
7. Uncompress the installer file using:

   ```
   tar -xvzf <installer tar archive>
   ```

8. 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
   ```

9. 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.

10. On the Subscription Agreement screen, click **I accept the terms of the Subscription Agreement** and click **Next**.

11. On the Upgrade screen, select **Start the upgrade** and then click **Next**.

12. When you click **Next**, a "Stopping All Services" progress message appears. Wait for web protection services to be stopped.

    In some cases, the installer may be unable to stop the web protection services. If this occurs, stop them manually using the **/opt/Websense/ WebsenseDaemonControl** command. Once you have manually stopped the services, return to the installer.

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

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

14. Wait for the **Upgrade Complete** screen to appear. Click **Done** to exit the installer.

15. Reboot the machine.

> **❗ Important**
> The machine must be rebooted to complete the upgrade process.

16. 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:

● Windows Server 2008 R2, 2012, or 2012 R2 machines
● RHEL 6.x or 7 machines

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

Filtering Service and Network Agent: Appliance upgrade instructions

Before you begin:

● 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.

You can either use an automated process to download the patch directly from Forcepoint servers to the appliance, or manually download the patch to a machine in your network, then upload it from that machine to the appliance.

1. To download the upgrade patch using the automated process:

   a. In the Appliance manager, go to the **Administration > Patches / Hotfixes > Patches** page.

    b.   If the 8.2.x upgrade patch is not listed in the table of **Available patches**, click **Check for Patches**.

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

       The upgrade patch file name has the following format:

```
V-Series-Patch-820.rpm
```

    d.   Click **Download**. The patch size is over 6 GB, so the process may take some time.

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

    e.   Continue with step 3.

2.   To upload the upgrade patch manually:

> **Important**
>
> If you are upgrading from 7.8.4, 8.0.0, or 8.0.1, you may get a Java version error when you initiate the upload. If you do, please see the knowledge base article V-Series patch upload Java version error.

    a.   Use a browser to connect to forcepoint.com.

    b.   Log in to My Account and click the **Downloads** tab.

    c.   On the Downloads page, select the **Upgrades** tab.

    d.   Select your appliance model from the **Product** drop-down list.

    e.   Under **V-Series upgrade patch for v8.2**, click **download**.

    f.   Log on to the Appliance manager directly (no single-sign on) and navigate to the **Administration > Patches / Hotfixes > Patches** page.

    g.   Click **Upload Patch Manually** and select the patch that you want to upload.

       When the upload is complete, the patch is listed on the page with the status **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**.

   If the subscription agreement is not displayed within 60 seconds, close and re-open the browser, return to the Patches / Hotfixes > Patches page, and initiate the patch installation again.

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.

    If your browser cannot connect to the Appliance manager immediately, the appliance may not have finished restarting all modules. Please be patient.

10. Navigate to the **Administration** > **Patches / Hotfixes** > **Patches** page.

11. Under **Patch History**, for version 8.2.x, 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 Log Server*.

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. Use the Downloads tab of the My Account page at forcepoint.com to download the TRITON Unified Installer.

    ■ The installer file is **TRITON820Setup.exe**.

    ■ Installer files occupy approximately 5 GB of disk space.

5. Right-click **TRITON820Setup.exe** and select **Run as administrator** to launch the installer. A progress dialog box appears, as files are extracted.

The file extraction process takes several minutes. Please be patient.

6. The installer detects software 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 **Upgrade** screen, select **Start the upgrade**, then click **Next**.

9. Accept the subscription agreement. When you click **Next**, a *Stopping All Services* progress message appears. Wait for web protection services to be stopped.

   In some cases, the installer may be unable to stop the web protection services. If this occurs, you are prompted to stop them manually (you do not need to exit the installer to do this). Use the Windows Services tool to stop the services, then return to the installer.

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

    Critical files are backed up and install properties initialized. And then the **Installing** 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. Use the Downloads tab of the [My Account](#) page at forcepoint.com to download the Linux installer. The installer file is called **Web820Setup_Lnx.tar.gz**.

7. Uncompress the installer file using:

   ```
   tar -xvzf <installer tar archive>
   ```

8. 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
```

9. 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.

10. On the Subscription Agreement screen, click **I accept the terms of the Subscription Agreement** and click **Next**.

11. On the Upgrade screen, select **Start the upgrade** and then click **Next**.

12. When you click **Next**, a "Stopping All Services" progress message appears. Wait for web protection services to be stopped.

    In some cases, the installer may be unable to stop the web protection services. If this occurs, stop them manually using the **/opt/Websense/ WebsenseDaemonControl** command. Once you have manually stopped the services, return to the installer.

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

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

14. Wait for the **Upgrade Complete** screen to appear. Click **Done** to exit the installer.

15. Reboot the machine.

> **Important**
>
> The machine must be rebooted to complete the upgrade process.

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

Step 7: Upgrade Log Server

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

Log Server runs on Windows Server 2008 R2, 2012, or 2012 R2 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. Use the Downloads tab of the My Account page at forcepoint.com to download the TRITON Unified Installer.

   ■ The installer file is **TRITON820Setup.exe**.

   ■ Installer files occupy approximately 5 GB of disk space.

5. Right-click **TRITON820Setup.exe** and select **Run as administrator** to launch the installer. A progress dialog box appears, as files are extracted.

   The file extraction process takes several minutes. Please be patient.

6. The installer detects software 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 **Upgrade** screen, select **Start the upgrade**, then click **Next**.

9. Accept the subscription agreement. When you click **Next**, a *Stopping All Services* progress message appears. Wait for web protection services to be stopped.

   In some cases, the installer may be unable to stop the web protection services. If this occurs, you are prompted to stop them manually (you do not need to exit the installer to do this). Use the Windows Services tool to stop the services, then return to the installer.

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

    Critical files are backed up and install properties initialized. And then the **Installing** 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.
14. Enable the database 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. Use the Downloads tab of the [My Account](#) page at forcepoint.com to download the TRITON Unified Installer.

   ■ The installer file is **TRITON820Setup.exe**.
   ■ Installer files occupy approximately 5 GB of disk space.

5. Right-click **TRITON820Setup.exe** and select **Run as administrator** to launch the installer. A progress dialog box appears, as files are extracted.

   The file extraction process takes several minutes. Please be patient.

6. The installer detects software 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 **Upgrade** screen, select **Start the upgrade**, then click **Next**.

9. Accept the subscription agreement. When you click **Next**, a *Stopping All Services* progress message appears. Wait for web protection services to be stopped.

   In some cases, the installer may be unable to stop the web protection services. If this occurs, you are prompted to stop them manually (you do not need to exit the

installer to do this). Use the Windows Services tool to stop the services, then return to the installer.

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

    Critical files are backed up and install properties initialized. And then the **Installing** 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 23
- *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. Use the Downloads tab of the My Account page at forcepoint.com to download the TRITON Unified Installer.

    ■ The installer file is **TRITON820Setup.exe**.

    ■ Installer files occupy approximately 5 GB of disk space.

4. Right-click **TRITON820Setup.exe** and select **Run as administrator** to launch the installer. A progress dialog box appears, as files are extracted.

The file extraction process takes several minutes. Please be patient.

5. The installer detects software 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 **Upgrade** screen, select **Start the upgrade**, then click **Next**.

8. Accept the subscription agreement. When you click **Next**, a *Stopping All Services* progress message appears. Wait for web protection services to be stopped.

    In some cases, the installer may be unable to stop the web protection services. If this occurs, you are prompted to stop them manually (you do not need to exit the installer to do this). Use the Windows Services tool to stop the services, then return to the installer.

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

    Critical files are backed up and install properties initialized. And then the **Installing** 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. Use the Downloads tab of the [My Account](#) page at forcepoint.com to download the Linux installer. The installer file is called **Web820Setup_Lnx.tar.gz**.

6. Uncompress the installer file using:

    ```
    tar -xvzf <installer tar archive>
    ```

7. 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 Upgrade screen, select **Start the upgrade** and then click **Next**.

11. When you click **Next**, a "Stopping All Services" progress message appears. Wait for web protection services to be stopped.

    In some cases, the installer may be unable to stop the web protection services. If this occurs, stop them manually using the **/opt/Websense/ WebsenseDaemonControl** command. Once you have manually stopped the services, return to the installer.

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

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