



7.0 to 7.1 Upgrade Guide

Lumension Endpoint Management and Security Suite 7.1



Notices

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Chapter 1

Upgrading From Lumension EMSS 7.0

In this chapter:

- Pre-Upgrade Considerations
- Selecting an Upgrade Path
- Retaining Data with a Clean Install

This 7.0 to 7.1 Upgrade Guide is a resource to guide you through the upgrade from Lumension EMSS 7.0 to Lumension Endpoint Management and Security Suite 7.1.

Pre-Upgrade Considerations

Prior to upgrading to Lumension Endpoint Management and Security Suite 7.1 you must prepare your environment.

To prepare your environment for the Lumension Endpoint Management and Security Suite 7.0 to Lumension Endpoint Management and Security Suite (Lumension EMSS) 7.1 upgrade, you must consider and address the following:

Supported Operating Systems

Lumension EMSS 7.1 is supported on the following operating systems:

- Windows Server 2003, Web Edition with SP2 or later (x86)
- Windows Server 2003, Standard Edition with SP2 or later (x86)
- Windows Server 2003, Enterprise Edition with SP2 or later (x86)
- Windows Server 2003 R2, Standard Edition with SP2 or later (x86)
- Windows Server 2003 R2, Enterprise Edition with SP2 or later (x86)
- Windows Server 2008, Web Edition with SP2 or later (x86/x64)
- Windows Server 2008, Standard Edition with SP2 or later (x86/x64)
- Windows Server 2008, Enterprise Edition with SP2 or later (x86/x64)
- Windows Server 2008 R2, Standard Edition (with or without Hyper-V)
- Windows Server 2008 R2, Enterprise Edition (with or without Hyper-V)
- Windows Web Server 2008 R2



Supported Database Servers

Lumension EMSS 7.1 is supported on the following database servers:

- SQL Server 2005, Express Edition with SP3 (x86)
- SQL Server 2005, Standard Edition with SP3 (x86)
- SQL Server 2005, Enterprise Edition with SP3 (x86)
- SQL Server 2008, Express Edition with SP2 or later (x86/x64)
- SQL Server 2008, Standard Edition with SP2 or later (x86/x64)
- SQL Server 2008, Enterprise Edition with SP2 or later (x86/x64)
- SQL Server 2008 R2, Express Edition (x64)
- SQL Server 2008 R2, Standard Edition (x64)
- SQL Server 2008 R2, Enterprise Edition (x64)

Firewall Settings

To download Lumension EMSS module components and third-party vendor content, the Lumension EMSS server must be able to access the following URLs:

- <https://update.patchlinksecure.net>
- <http://cache.patchlinksecure.net>
- <http://cache.lumension.com>
- <http://gssnews.lumension.com>
- <http://download.windowsupdate.com>
- <http://www.download.windowsupdate.com> (For Microsoft content)
- <http://go.microsoft.com> (For Microsoft content)
- <http://ardownload.adobe.com> (For Adobe content)
- <http://swupdl.adobe.com> (For Adobe content)
- <http://armdl.adobe.com> (For Adobe content)
- <http://download.adobe.com> (For Adobe content)

Note: Refer to *Lumension KnowledgeBase Article 539* (<http://www.lumension.com/kb/539>) for additional URLs which may be required depending upon your configuration and content subscriptions.

Additional Prerequisites

During the installation of Lumension EMSS, 7.1 the installer will prompt you to install .NET Framework 3.5 SP1 and Windows Installer 4.5 if they are not already installed on your server.

Note: The installation of Windows Installer 4.5 will require a reboot to continue with the installation.



Database Backup

During the upgrade to Lumension EMSS 7.1, the installer will update your existing database. Therefore, it is strongly recommended that you create a backup of the following databases prior to performing the upgrade:

- PLUS
- PLUS_Staging
- PLUS_Reports (if exists)
- SCM
- STAT_Guardian
- UPCCommon

Note: Some databases may not be present on your system, as their presence is determined by your server configuration and licensed modules.

Storage Folder

Although the storage folder can grow quite large, if you have the available external drive space, it is recommended that you create a backup of the content storage folder (default location of <Installation Directory>\Lumension\EMSS\Content) prior to upgrading to Lumension EMSS 7.1.

Administrative Rights

Installation of Lumension EMSS 7.1 requires administrative rights on the target server. You must perform the installation with an account that is a member of the Local Administrators group and has full local Administrator rights to the target server.

Warning: When installing on a Windows 2008 server, the Domain Administrator account **does not** have full Local Administrator rights, even when the Domain Administrator has been added to the Local Administrators group. If you are logged in to the server as the Domain Administrator, you must run the installer as the Local Administrator by using the **Run as** function. (right-click on the Lumension EMSS installer and select **Run as ...**).

AntiVirus Products

To ensure a successful installation of Lumension EMSS 7.1 you must stop or disable any AntiVirus products (such as McAfee, Trend-micro, Symantec, and so on) prior to running the Lumension Endpoint Management and Security Suite installer.

Note: AntiVirus products can prevent the necessary installation processes from running correctly. Therefore, you should stop or disable all AntiVirus services prior to starting the installation.



SSL Communication

If you intend to upgrade an existing Lumension EMSS server that already utilizes SSL for agent communication, you must be sure to select SSL communication when running the Lumension EMSS upgrade.

If you are performing a Fresh or Clean installation you will be prompted to select and register your SSL certificate during the installation.

Note: It is also possible to setup SSL communication after installing (or upgrading to) Lumension EMSS 7.1, however you will need to contact [Lumension Support \(http://support.lumension.com\)](http://support.lumension.com) to do so.

PatchLink Distribution Point (PDP) Servers

If your organization utilizes PatchLink Distribution Point (PDP) 6.4 servers, you may need to upgrade these servers to the new Lumension Caching Proxy server after the upgrade. This can be done by deploying one of the following patches after your successful upgrade to Lumension EMSS 7.1:

- Lumension Caching Proxy 2.7 for Windows (Full Install)
- Lumension Caching Proxy 2.7 for Windows (Update) (Manual Install)

Note: Due to the differences in communication method and frequency, if you upgrade your agents to the new 7.1 agent, it is strongly recommended that you also upgrade your existing PatchLink Distribution Point servers to the Lumension Caching Proxy.

Selecting an Upgrade Path

When upgrading from Lumension Endpoint Management and Security Suite 7.0 (Lumension EMSS 7.0) to Lumension Endpoint Management and Security Suite (Lumension EMSS) 7.1, you have three different potential upgrade paths.

Before upgrading to Lumension EMSS, 7.1 you must decide which upgrade path you intend to follow. The potential options are as follows:

Upgrade over Existing

This option allows you to directly upgrade your existing Lumension Endpoint Management and Security Suite 7.0 server to Lumension EMSS 7.1. When performing the direct upgrade, all of your Agents, Groups, User Accounts, Policies, and Custom Packages will be retained and migrated.

If this is your desired upgrade path, refer to [Upgrading Over an Existing 7.0 Installation](#) on page 13 for additional details.



Clean Install

This option will install Lumension EMSS 7.1 on a new server (new hardware or image) that has never had an installation of Lumension Endpoint Management and Security Suite. If you are installing using a new serial number, this is the recommended upgrade path.

Tip: This upgrade method can also be used when you want to upgrade to a new physical or virtual server while retaining your existing data and using your existing agents. For additional details, refer to [Retaining Data with a Clean Install](#) on page 11 **prior** to performing the upgrade.

If this is your desired upgrade path, refer to [Clean Install](#) on page 17 for additional details.

Retaining Data with a Clean Install

If you are performing a Clean Install you may be able to import your existing 7.0 data into your Lumension Endpoint Management and Security Suite 7.1 server.

To retain your existing data when performing a Clean Install, you must:

1. Use your existing (Lumension Endpoint Management and Security Suite 7.0) serial number.

Warning: If you do not use your existing serial number, you will be unable to migrate any existing data and you will have to uninstall then reinstall all of your existing agents.

2. Create a backup of your current Lumension Endpoint Management and Security Suite 7.0 server.
3. Perform an upgrade of your existing Lumension Endpoint Management and Security Suite 7.0 server.
Refer to [Upgrading Over an Existing 7.0 Installation](#) on page 13 for additional details.
4. Create a backup of your database.
5. Create a backup of the `EndpointComponents` directory.
6. Power down your current Lumension Endpoint Management and Security Suite 7.0 server.

Note: At minimum, you must block all communication from the existing Lumension Endpoint Management and Security Suite 7.0 server.

7. Install Lumension Endpoint Management and Security Suite (Lumension EMSS) 7.1 on your new hardware using your existing serial number.
Refer to [Clean Install](#) on page 17 for additional details.

Warning: At this time, **do not** log in to the Lumension EMSS 7.1 server and complete the *Application Setup Manager*.

8. Stop the `EDS Lanportal` and `EDS Server` services on your new Lumension EMSS server.
9. Log in to the Lumension EMSS 7.1 server and complete the *Application Setup Manager*.
10. Restore the database backup over the newly installed Lumension EMSS server's database.
11. Restore the `EndpointComponents` directory over the `EndpointComponents` directory on the newly installed Lumension EMSS server.



12. Following system replication, restart the EDS Lanportal and EDS Server services.

Warning: Your newly installed server must have the same modules as the original server. If you intend to add additional modules following the upgrade, you must do so after all agents have been re-directed to, and contacted, the new server.

13. Modify your DNS to re-direct Agent traffic to your newly installed server.

Note: You must have powered down or blocked **all** network communication to your original server prior to re-directing the DNS.



Chapter 2

Upgrading Your Server

In this chapter:

- Upgrading Over an Existing 7.0 Installation
- Clean Install

Having selected an upgrade path, you can now upgrade your server from Lumension Endpoint Management and Security Suite 7.0 to Lumension Endpoint Management and Security Suite 7.1.

For assistance selecting an upgrade path, refer to *Selecting an Upgrade Path* on page 10.

Upgrading Over an Existing 7.0 Installation

Upgrading over an existing Lumension Endpoint Management and Security Suite 7.0 server allows you to retain and migrate all of your Agents, Groups, User Accounts, Polices, and Custom Packages.

Prerequisites:

- You have reviewed and addressed all of the considerations identified under *Pre-Upgrade Considerations* on page 7.
- Your server is Lumension Endpoint Management and Security Suite version 7.0.
- Download the Lumension Endpoint Management and Security Suite (Lumension EMSS) 7.1 installer from the *Lumension Customer Portal* (<https://portal.lumension.com>).

1. Log on to the Lumension Endpoint Management and Security Suite 7.0 server using an account with full local administrator privileges.

Important: Since this upgrade method uses the existing SQL Server instance, the account used to install Lumension EMSS must also have full `sysadmin` rights to the local SQL Server.

2. Stop or disable any AntiVirus products (such as McAfee, Trend-micro, Symantec, and so on) running on your server.

Note: An AntiVirus product can prevent processes from running correctly during the installation. Therefore, to ensure a successful installation, all AntiVirus services must be stopped or disabled prior to running the Lumension EMSS installer.



3. Double-click the Lumension EMSS installer at the location defined during download.

Step Result: The installer opens to the *Installation Method* page with the **Upgrade** option selected.

Note: During the installation, the installer will install Windows Installer 4.5, Silverlight 4, and .NET Framework 3.5 if they are not already installed on your server.

Additionally, if at any time during the installation you are prompted to reboot, you must allow the server to reboot. The installer will automatically reopen following the reboot.

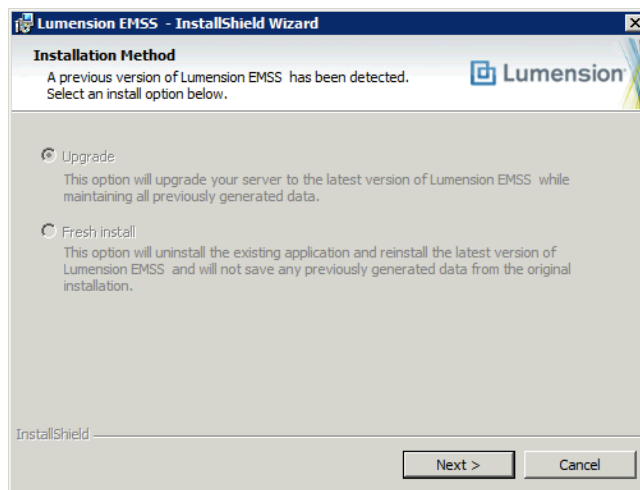


Figure 1: Installation Method Page

Note: When upgrading from Lumension EMSS 7.0 to Lumension EMSS 7.1, the **Fresh Install** option is disabled

4. Ensure the **Upgrade** option is selected.



5. Click **Next**.

Step Result: The *License Agreement* page opens.

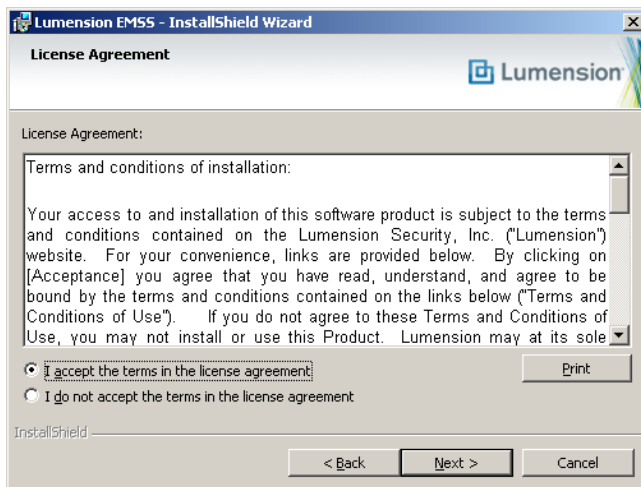


Figure 2: License Agreement Page

6. Review the **License Agreement** and select the **I accept the terms of the license agreement** option.

7. Click **Next**.

A new page or dialog opens.

Page/Dialog	Step
<p>If the <i>System Requirements</i> page opens:</p>	<p>Your server does not meet the minimum installation requirements.</p> <ul style="list-style-type: none"> If you receive only system requirement <i>warnings</i>, you may proceed with installation by clicking Next. Lumension recommends resolving warnings before proceeding with installation. <p>Note: When installing on a virtual platform you will likely receive a warning about the CPU requirements since the installer is unable to identify the processor in a virtual environment.</p> <ul style="list-style-type: none"> If you receive any system requirement <i>failures</i>, you must cancel the installation, resolve these failures, and then restart installation. <p>Tip: Click View all Failures/Warnings for detailed information about prerequisite status deficiencies.</p>



Page/Dialog	Step
If the <i>SQL Server Configuration Requirements</i> page opens:	<p>The pre-installed instance of SQL Server is not configured to work with Lumension EMSS.</p> <ul style="list-style-type: none"> If you only receive SQL Server configuration requirement <i>informationals</i> or <i>warnings</i>, click Next to continue (the Lumension EMSS installation will automatically reconfigure SQL Server). Proceed to the next step. If you receive any SQL Server configuration requirement <i>failures</i>, you must cancel the installation, resolve the failures, and then proceed with the installation. <hr/> <p>Tip: Click View Configuration Detail for detailed information about SQL Server configuration status requirements.</p>
If the <i>Installation Ready</i> page opens:	Proceed to the next step.

8. Click **Next**.

Step Result: The *Installation Ready* page opens.

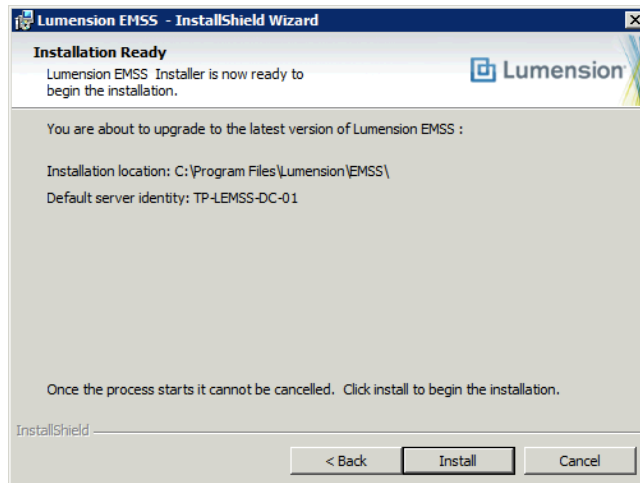


Figure 3: Installation Ready Page

9. Click **Install**.

Step Result: The upgrade procedure begins.



10. After installation completes, click **Finish**.

Step Result: Lumension EMSS is installed and can now be accessed.

Tip: Following installation, you can view and export installation details. For additional information, refer to the *Lumension Endpoint Management and Security Suite 7.1 User Guide* (<http://portal.lumension.com>).

11. Acknowledge the notification that appears by clicking **OK**.

After Completing This Task:

Having completed the upgrade to Lumension EMSS, 7.1 you can now log in to Lumension EMSS. You can log in using either the user account that was used to perform the upgrade or any of the previous defined (Lumension Endpoint Management and Security Suite) user accounts.

Clean Install

A Clean Install will install Lumension EMSS 7.1 on a new server (new hardware or image) that has never had an installation of Lumension Endpoint Management and Security Suite.

Required Windows Components

To successfully install the Lumension Endpoint Management and Security Suite server, your server must meet various software requirements.

Tip: For additional, more detailed, requirements and configuration guidance refer to the *Recommended Configuration* section of the *Lumension Endpoint Management and Security Suite 7.1 Server Installation Guide* (<http://portal.lumension.com>).

Lumension Endpoint Management and Security Suite (Lumension EMSS) must be installed on one of the following operating systems:

- Windows Server 2003, Web Edition with SP2 or later (x86)
- Windows Server 2003, Standard Edition with SP2 or later (x86)
- Windows Server 2003, Enterprise Edition with SP2 or later (x86)
- Windows Server 2003 R2, Standard Edition with SP2 or later (x86)
- Windows Server 2003 R2, Enterprise Edition with SP2 or later (x86)
- Windows Server 2008, Web Edition with SP2 or later (x86/x64)
- Windows Server 2008, Standard Edition with SP2 or later (x86/x64)
- Windows Server 2008, Enterprise Edition with SP2 or later (x86/x64)
- Windows Server 2008 R2, Standard Edition (with or without Hyper-V)
- Windows Server 2008 R2, Enterprise Edition (with or without Hyper-V)
- Windows Web Server 2008 R2

Depending upon your Operating System, you must ensure that the following Windows components are installed prior to installing Lumension EMSS:



Operating System	Windows Components
Windows 2003	<p>Add the necessary Windows 2003 components as follows:</p> <ol style="list-style-type: none">1. Open the <i>Add or Remove Programs</i> window by selecting Start > Control Panel > Add or Remove Programs.2. Select Add/Remove Windows Components. The <i>Windows Components Wizard</i> opens.3. Select Application Server and click Details. The <i>Application Server</i> window opens.4. Select ASP.NET and Enable network COM+ access.5. Select Internet Information Services (IIS) and click Details. The <i>Internet Information Services (IIS)</i> window opens.6. Select Common Files and Internet Information Services Manager.7. Select World Wide Web Service and click Details. The <i>World Wide Web Service</i> window opens.8. Select Active Server Pages and World Wide Web Service.9. Click OK saving your selections and closing the <i>World Wide Web Service</i> window.10. Click OK saving your selections and closing the <i>Internet Information Services (IIS)</i> window.11. Click OK saving your selections and closing the <i>Application Server</i> window.12. Click Next to install the Windows Components, closing the wizard when it completes the installation.



Operating System	Windows Components
Windows 2008 Windows 2008 R2	<p>Add the necessary Windows 2008 or Windows 2008 R2 components as follows:</p> <ol style="list-style-type: none"> 1. Open <i>Server Manager</i> by selecting Start > Administrative Tools > Server Manager. 2. Scroll down to the Roles Summary section, and click the Add Roles link. The <i>Add Roles Wizard</i> opens. 3. Click Next. The <i>Select Server Roles</i> page opens. 4. Select Web Server (IIS) and click Next. The <i>Web Server (IIS)</i> page opens. 5. Click Next. The <i>Select Role Services</i> page opens. 6. Select ASP.NET (under Application Development). A dialog will display indicating the need for additional role services with ASP.NET, click Add Required Role Services to add the additional role services. 7. Select the following: <ul style="list-style-type: none"> • ASP • Basic Authentication (under Security) • Windows Authentication (under Security) • Dynamic Content Compression (under Performance) 8. Click Next. The <i>Confirm Installation Selections</i> page opens. 9. Click Install to install the Windows components, closing the wizard when it completes the installation. <hr/> <p>Warning: If you have installed .NET Framework 4.0 components on this server they should be uninstalled and you must reboot the server prior to installing Lumension EMSS.</p> <p>If you are unable to remove .NET Framework 4.0, please refer to Lumension KnowledgeBase Article 759 (http://www.lumension.com/kb/759).</p>



Performing a Clean Install

A Clean Install will install Lumension Endpoint Management and Security Suite 7.1 on a new server (new hardware or image) that has never had a previous installation of Lumension Endpoint Management and Security Suite.

Prerequisites:

- You have reviewed and addressed all of the requirements and considerations identified under *Pre-Upgrade Considerations* on page 7.
- You have verified that your system contains the required Windows components as defined under *Required Windows Components* on page 17.
- Download the Lumension Endpoint Management and Security Suite (Lumension EMSS) 7.1 installer from the *Lumension Customer Portal* (<https://portal.lumension.com>).

Attention: This procedure assumes you are installing the default SQL Server instance that is installed as part of the Lumension EMSS 7.1 installer. If you wish to install to an existing (local or remote) SQL Server refer to the *Lumension Endpoint Management and Security Suite 7.1 Server Installation Guide* (<http://portal.lumension.com>) for additional details and instruction.

Warning: If you are upgrading to a new physical or virtual server but still want to retain your existing data and use your existing agents, refer to *Retaining Data with a Clean Install* on page 11 prior to performing the upgrade.

1. Log on to the server using an account with full local administrator privileges.
2. Stop or disable any AntiVirus products (such as McAfee, Trend-micro, Symantec, and so on) running on your server.

Note: An AntiVirus product can prevent processes from running correctly during the installation. Therefore, to ensure a successful installation, all AntiVirus services must be stopped or disabled prior to running the Lumension EMSS installer.

3. Double-click the Lumension EMSS installer at the location defined during the download.

Step Result: The Lumension EMSS *InstallShield Wizard* opens and begins extracting files. This process may take several minutes.

Note: During the installation, the installer will install Windows Installer 4.5, Silverlight 4, and .NET Framework 3.5 if they are not already installed on your server.

Additionally, if at any time during the installation you are prompted to reboot, you must allow the server to reboot. The installer will automatically reopen following the reboot.



4. Click **Next**.

Step Result: The *License Agreement* page opens.

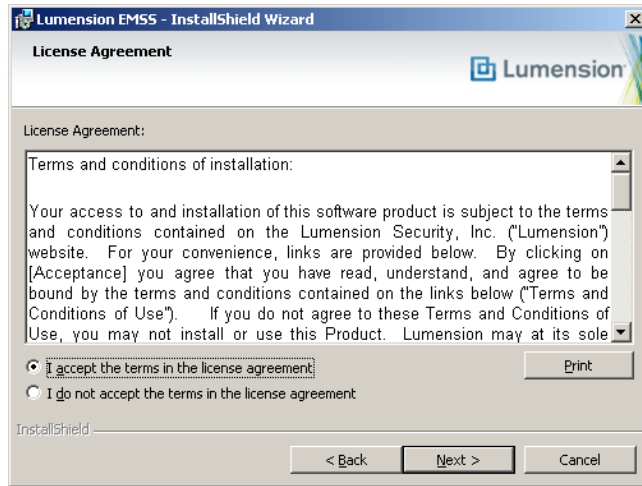


Figure 4: License Agreement Page

5. Review the **License Agreement** and select the **I accept the terms of the license agreement** option.

6. Click **Next**.

Step Result: The *Customer Information* page opens.

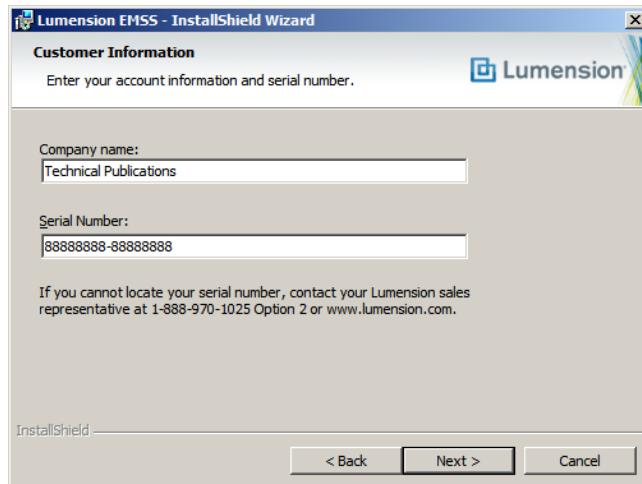


Figure 5: Customer Information Page



7. Type the applicable information in the following fields:

Field	Description
Company Name	Your company name.
Serial Number	Your Lumension EMSS serial number.

8. Click **Next**.

A new page or dialog opens.

Page/Dialog	Step
If the <i>Question</i> dialog opens:	Click Yes to start network discovery services. These services are necessary to use discovery features within Lumension EMSS.
If the <i>Required IIS Features</i> page opens:	Your server does not have the required IIS features installed. Click Install Features to install the features and proceed.
If the <i>System Requirements</i> page opens:	<p>Your server does not meet the minimum installation requirements.</p> <ul style="list-style-type: none"> If you receive only system requirement <i>warnings</i>, you may proceed with installation by clicking Next. Lumension recommends resolving warnings before proceeding with installation. <p>Note: When installing on a virtual platform you will likely receive a warning about the CPU requirements since the installer is unable to identify the processor in a virtual environment.</p> <ul style="list-style-type: none"> If you receive any system requirement <i>failures</i>, you must cancel the installation, resolve these failures, and then restart installation. <p>Tip: Click View all Failures/Warnings for detailed information about prerequisite status deficiencies.</p>
If the <i>Service Accounts</i> page opens:	Proceed to the next step.

9. Create the Web client and service accounts used by Lumension EMSS.

These accounts are used to operate components critical to Lumension EMSS.

Tip: Unless installing against a remote SQL Server, Lumension recommends that the Web client and service accounts be created as local accounts (which is the default). When installing against a remote SQL Server



refer to the *Lumension Endpoint Management and Security Suite 7.1 Server Installation Guide* (<http://portal.lumension.com>) for additional details.

- a) [Optional] Edit the **Web Client Account Username** field.

Note: Lumension recommends that you use the default user name.

- b) In the **Web Client Account Password** and **Web Client Account Confirm password** fields, type and retype the desired password.
- c) [Optional] Edit the **Service Account Username** field.

Note: Lumension recommends that you use the default user name.

- d) In the **Service Account Password** and **Service Account Confirm password** fields, type and retype the desired password.

10. Click **Next**.

If required, acknowledge the creation of new accounts by clicking **OK**.

Step Result: The *SQL Server Instance* page opens.

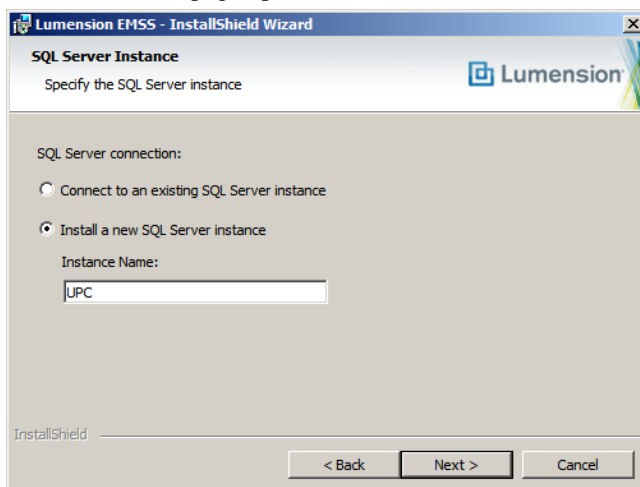


Figure 6: SQL Server Instance Page

11. Select the **Install a new SQL Server instance** option.

Note: When installing against a remote SQL Server you must refer to the *Lumension Endpoint Management and Security Suite 7.1 Server Installation Guide* (<http://portal.lumension.com>) for additional details.

12. [Optional] Type a new instance name in the **Instance Name** field.



13. Click Next.

Step Result: The *Destination Location* page opens.

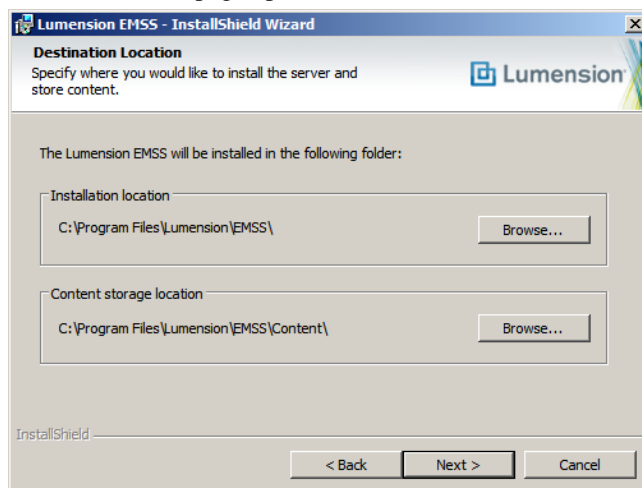


Figure 7: Destination Location Page

14. [Optional] Change the Lumension EMSS installation location.

- a) Click **Browse**.
- b) Define the desired file path using either the **Look in** lists or the **Folder name** field.
- c) Click **OK**.

Step Result: The **Installation Folder** field reflects your changes.

15. [Optional] Change the Lumension EMSS content storage location.

The content storage location is the location where patches and other content items are downloaded. Lumension recommends allocating at least 32 GB of storage space to content (plus an additional 10 GB if managing non-Windows endpoints).

- a) Click **Browse**.
- b) Define the desired file path using either the **Look in** lists or the **Folder name** field.
- c) Click **OK**.

Step Result: The **Content Storage Location** field reflects your changes.



16. Click **Next**.

Step Result: The *Proxy Settings* page opens.

Figure 8: Proxy Settings Page

Note: If one or both of the storage directories defined on the *Destination Location* page does not contain the recommended available disk space, the *Proxy Settings* page does not immediately open. Rather, a dialog that lets you redefine the storage directories will open. Then after redefining the storage directories, the *Proxy Settings* page will open.

17. If your network uses a proxy server to access the Internet, select the **A proxy server is required** check box and type the applicable information in the following fields.

Field	Type
Server Address	The IP address of the applicable proxy server.
Port	The port number used for communication.

Note: You can also configure Lumension EMSS to use a proxy following installation.

18. If your network uses a proxy server to access the Internet, and that proxy requires authentication, select the **Authentication required** check box and type the applicable information in the following fields.

Field	Type
Username	A user name that authenticates with the proxy.
Password	The password associated with the user name.
Confirm Password	The password retyped.



19. Click Next.

Step Result: The *Agent to Server Communication* page opens.

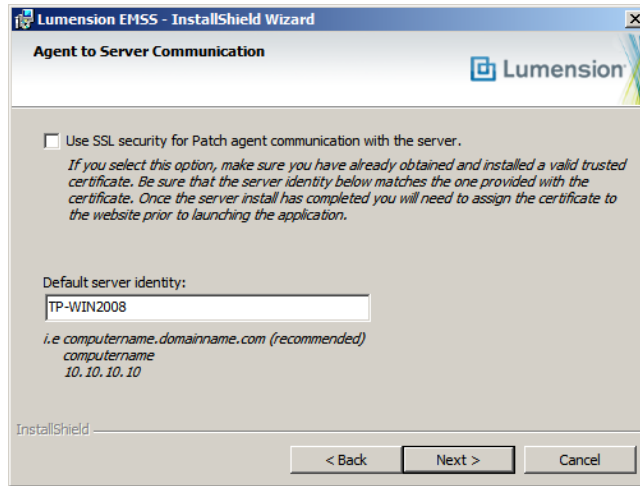


Figure 9: Agent to Server Communication Page

20. If you are using SSL for server and agent communication, select the **Use SSL security for Patch agent communication with the server** check box.

Note: You must possess an SSL certificate to implement SSL communication. Implementation of SSL communication during installation is optional. This feature can be implemented following installation.

21. In the **Default server identity** field, type the name of your server in one of the following formats:

- DNS name (*computername.domainname.com*)
- Computer name (*computername*)
- IP address (*10.10.10.10*)

During agent registration, the Lumension EMSS agents use this name to identify the server.

Note: If you are using SSL, the server name that you type in the field must match the server named on your certificate.



22. Click Next.

Step Result: The *Installation Ready* page opens.

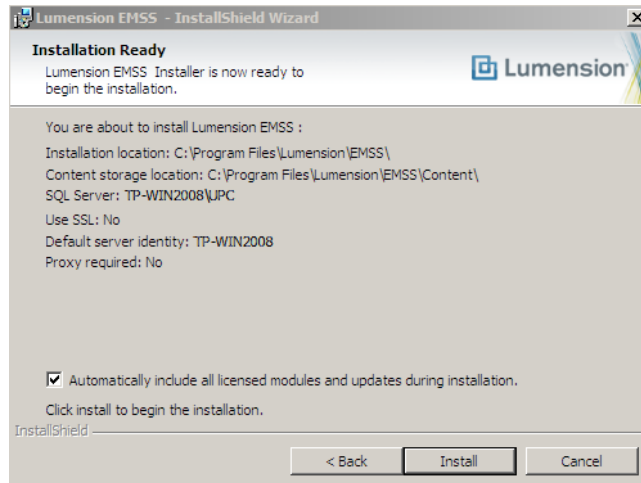


Figure 10: Installation Ready Page

23. [Optional] If you only want to install core components, clear the **Automatically include all licensed modules and updates during installation check box.**

Note: You may use the Lumension Installation Manager after the initial installation of Lumension EMSS to install additional components. For additional information, refer to *Using Lumension Installation Manager* in the *Lumension Endpoint Management and Security Suite 7.1 User Guide* (<http://portal.lumension.com>).

24. Review the installation information and click **Install to begin the installation of Lumension EMSS. This process may take several minutes.**

Important: During installation, do not attempt to access the Lumension EMSS Web site. Accessing the Web site during installation can cause installation errors.

25. After installation completes, click **Finish.**

26. Acknowledge the notification that appears by clicking **OK**.

After Completing This Task:

Having completed the Clean Install of Lumension EMSS, 7.1 you must now log in to Lumension EMSS to complete the installation. You can log in using the user account that was created with the same username and credentials as the account used to install Lumension EMSS.

When you log in to Lumension EMSS 7.1 for the first time, you will be presented with the **Application Setup Manager** window. From this window you can configure the following tabs (refer to the [Lumension Endpoint Management and Security Suite 7.1 Server Installation Guide \(http://portal.lumension.com\)](http://portal.lumension.com) for additional details):

- **Customer Info** - allows you to verify and add company information.
- **Languages** - allows you to change the default content language selections.
- **Uninstall Password** - allows you to define the default password that will be required to uninstall the Lumension EMSS agent from an endpoint.
- **Email Notifications** - allows you to set the administrator email address to receive email notifications.
- **Install an Agent** - allows you to deselect the default option of installing an agent on the Lumension EMSS server when the **Application Setup Manager** window is closed.

Note: Lumension Support recommends that you wait until after the first replication has completed before installing or upgrading the Lumension Content Wizard, the Lumension Enterprise Reporting Client, or the Lumension Caching Proxy.



Chapter

3

Upgrading Your Agents

In this chapter:

- Upgrading Patch and Remediation 6.4 Agents
- Upgrading Lumension EMSS 7.0 Agents

After upgrading the server to Lumension Endpoint Management and Security Suite 7.1, you must also upgrade the managed devices (agents).

Upgrading Patch and Remediation 6.4 Agents

Having upgraded to Lumension Endpoint Management and Security Suite 7.1, you should upgrade any existing Patch and Remediation 6.4 Agents.

Upgrading Agents Using the Deployment Wizard

Using the *Deployment Wizard* functionality of Lumension Endpoint Management and Security Suite 7.1, you can deploy the agent upgrade to existing Lumension Patch and Remediation 6.4 Agents.

When upgrading agents using the *Deployment Wizard*, you have the option between a minimal upgrade or full agent upgrade.

Tip: To ensure a smooth upgrade, Lumension recommends that you initially perform the *Minimal Upgrade*, so that all of your agents can patch using the Lumension Endpoint Management and Security Suite (Lumension EMSS) server's new architecture. Then, only after you have tested the new Lumension EMSS 7.1 Agent within your network environment, should you roll out the *Full Upgrade*.

Minimal Upgrade

The minimal upgrade allows you to deploy a patch to your existing agents that will allow those agents to continue patching content using the Lumension EMSS server's new architecture. This is the minimum action required to continue using the devices with Lumension EMSS.

Deploy the C - Lumension Patch Agent for Windows Native Scan Content Enhancement (May 2, 2011) (See Notes) patch to all of your registered agents.

Note: Use of this upgrade method will allow you to upgrade your agents without the need for any user interaction (pop-up dialogs) or a reboot.



Full Upgrade

This upgrade allows you to deploy a patch that will install the new Lumension EMSS 7.1 Agent on your existing agents. This is the preferred upgrade method as it provides for the full agent functionality of Lumension EMSS.

Deploy the C - Lumension EMSS Agent Upgrade for Windows (See Notes) patch to all of your registered agents.

Important: The new Lumension EMSS 7.1 Agent requires the ability to communicate with your Lumension EMSS server using port 443. If your legacy agents are not configured to use SSL then you must enable communication on both ports 80 and 443. However, if your legacy agents are using SSL, then all agent communication will use port 443.

Upgrading Lumension EMSS 7.0 Agents

Having upgraded to Lumension Endpoint Management and Security Suite 7.1, you should upgrade any existing Lumension EMSS 7.0 Agents.

Attention: When upgrading existing Lumension Endpoint Management and Security Suite 7.0 Agents Lumension recommends that you upgrade to the 7.0.0.60 Agent, and allow the agent to complete a DAU, before upgrading to the 7.1 Agent. This will help to ensure a smooth upgrade.

Upgrading Agents Using Manage Agent Versions Functionality

Using the Manage Agent Versions functionality of Lumension Endpoint Management and Security Suite 7.1 you can upgrade your existing 7.0 Agents.

Within Lumension Endpoint Management and Security Suite 7.1, select **Manage > Endpoints** (or **Manage > Groups > Endpoint Membership**) and select **Agent Versions...** to upgrade your agents. Refer to *Defining the Endpoint Agent Version* within the *Lumension Endpoint Management and Security Suite 7.1 User Guide* (<http://portal.lumension.com>) for additional details.



Appendix

A

Troubleshooting Your Upgrade

In this appendix:

- Top Upgrade Issues
- Frequently Asked Questions

The following topics will assist you in the unlikely event that you experience difficulty when upgrading to, or installing, Lumension Endpoint Management and Security Suite 7.1.

Top Upgrade Issues

The following list identifies the top reasons why your upgrade, or installation, may fail.

1. Your system does not have the minimum required Windows components, or does not meet the minimum system requirements.

Refer to *Required Windows Components* on page 17 for a complete list of the required Windows components and refer to the *Lumension Endpoint Management and Security Suite 7.1 Server Installation Guide* (<http://portal.lumension.com>) for a complete list of both required and recommended system requirements.

2. Failure to stop or disable an AntiVirus product (such as McAfee, Trend-micro, Symantec, and so on) prior to running the Lumension Endpoint Management and Security Suite installer.

Note: An AntiVirus product can prevent processes from running correctly during the installation. For best results, stop or disable all AntiVirus services prior to the installation. If you have an installation issue and you currently have an AntiVirus product running, Lumension Support will be unable to assist you until the AntiVirus product has been disabled.

3. The account used to install the Lumension Endpoint Management and Security Suite server is not a Local Administrator.

Warning: When installing on a Windows 2008 server, the Domain Administrator account **does not** have full Local Administrator rights, even when the Domain Administrator has been added to the Local Administrators group. If you are logged in to the server as the Domain Administrator, you must run the installer as the Local Administrator by using the **Run as** function. (right-click on the Lumension EMSS installer and select **Run as ...**).

4. You are attempting to install Lumension Endpoint Management and Security Suite with a remote SQL Database, but have not followed the *Installing Using a Remote SQL Server Instance* procedure exactly as it is documented within the *Lumension Endpoint Management and Security Suite 7.1 Server Installation Guide* (<http://portal.lumension.com>).



5. Your Lumension Endpoint Management and Security Suite 7.0 server does not meet the minimum system requirements. To upgrade an existing Lumension Endpoint Management and Security Suite 7.0 server, the server must meet the minimum SQL Server requirements as defined under [Supported Database Servers](#) on page 8.

Note: To upgrade your server to Lumension Endpoint Management and Security Suite 7.1, you must upgrade your SQL Server 2008 instance to SP2 or later. This is because 7.1 requires SP2 or later, whereas 7.0 did not.

6. There is a reboot pending.
If there is a reboot pending, Windows cannot install the Lumension Endpoint Management and Security Suite server. On occasion the server does not clear the reboot pending condition although the server was physically rebooted. To resolve this issue you must either rename or delete the `HKLM\System\CurrentControlSet\Control\Session Manager\PendingFileRenameOperations` registry key to complete the installation.

Frequently Asked Questions

When preparing for, or while performing an upgrade, users often ask the following questions.

1. Is there a cost for the upgrade?
No, as long as you are a current Lumension customer you can download and install the latest version without an additional charge.
2. If I want to install a new server, what operating systems are supported by Lumension Endpoint Management and Security Suite 7.1?
For a complete list of supported operating systems, refer to the [Lumension Endpoint Management and Security Suite 7.1 Server Installation Guide](#) (<http://portal.lumension.com>).
3. Can I retain my data if I want to perform a Clean Install to a new server?
Yes, it is possible to retain your existing data if you are using the same serial number and you coordinate with the [Lumension Customer Success Team](#) (CSTupgrade@lumension.com). Refer to [Retaining Data with a Clean Install](#) on page 11 for additional details.
4. I cannot remember my login and/or password to the [Lumension Customer Portal](#) (<http://portal.lumension.com>). What do I do?
Click the red **Lost your Password** link and follow the instructions. A new password will be sent to you. If you receive a message indicating that the email you entered is not recognized, try using a different email address or contact [Lumension Support](#) (<http://support.lumension.com>) for assistance.
5. If I upgrade my server now, do I have to immediately upgrade my agents?
No, it is not necessary for you to upgrade your agents at the same time that you upgrade your server. We do, however, encourage you to upgrade them at a later date to take advantage of the new content architecture and new features included with the Lumension Endpoint Management and Security Suite 7.1 Agents.
6. My upgrade was unsuccessful, and when the installer rolled-back the upgrade my installation of Lumension Endpoint Management and Security Suite 7.0 was also removed.
Depending upon where the upgrade procedure was, the installer may not be able to return to the previous Lumension Endpoint Management and Security Suite 7.0 installation. However, **the 7.0 database and content directories are still intact** and in their previous locations. Re-run the installer being sure to select



the existing content directory and SQL instance. The installer will recognize the presence of the 7.0 data and upgrade it accordingly.

Note: If you continue to have difficulties with the upgrade, please verify that you do not have a Domain policy (or any other security policy) that prevents access to the GAC (Global Assembly Cache). The Lumension Endpoint Management and Security Suite 7.1 installer requires access to the GAC. If you continue to have difficulty with your upgrade please call the Lumension Support Team, toll-free, at (888) 725-7828, option 2.

7. My upgrade or installation appeared to go smoothly, however my replication appears to be taking a long time. How long should this first replication take?

After the initial install or upgrade to Lumension Endpoint Management and Security Suite 7.1 it is not uncommon for the initial replication to take anywhere from 30 minutes to 2 hours to complete, depending upon your network speed and available bandwidth.

8. What should I do if I want to get a separate license to build and test my Lumension Endpoint Management and Security Suite server before I upgrade or move my agents?

Contact your Lumension Account Manager for additional details. If necessary, refer to <http://www.lumension.com/contact-us.aspx> for contact details.

9. Who do I contact if I have questions or would like assistance with the upgrade?

Contact the *Lumension Customer Success Team* (CSTUpgrade@lumension.com) or send an email to CSTUpgrade@lumension.com with any questions or requests for assistance.

10. Who do I contact if I have problems with the upgrade or the upgrade fails?

Please call the Lumension Support Team, toll-free, at (888) 725-7828, option 2.





Appendix

B

Upgrade Checklists

In this appendix:

- Checklist for Upgrading Over an Existing Installation
- Checklist for Performing a Clean Installation

The following checklists will assist you when upgrading your Lumension Endpoint Management and Security Suite 7.0 server.

Checklist for Upgrading Over an Existing Installation

The following checklist identifies the tasks necessary to upgrade an existing Lumension Endpoint Management and Security Suite 7.0 server to Lumension Endpoint Management and Security Suite (Lumension EMSS) 7.1 by installing Lumension EMSS 7.1 over Lumension Endpoint Management and Security Suite 7.0.

-
- You have configured your firewall to allow access to all necessary URLs.
Refer to *Firewall Settings* on page 8 for details.
-
- Download the Lumension Endpoint Management and Security Suite (Lumension EMSS) 7.1 installer from the *Lumension Customer Portal* (<https://portal.lumension.com>).
-
- Log on to the Lumension Endpoint Management and Security Suite 7.0 server using an account with full local administrator privileges.
Important: Since this upgrade method uses the existing SQL Server instance, the account used to install Lumension EMSS must also have full `sysadmin` rights to the local SQL Server.
-
- Stop or disable any AntiVirus products (such as McAfee, Trend-micro, Symantec, and so on) running on your server.
Note: An AntiVirus product can prevent processes from running correctly during the installation. Therefore, to ensure a successful installation, all AntiVirus services must be stopped or disabled prior to running the Lumension EMSS installer.
-



- Start the upgrade by launching the Lumension EMSS installer.
Refer to [Upgrading Over an Existing 7.0 Installation](#) on page 13 for step-by-step instructions.
-

- Upgrade your agents. Refer to [Upgrading Your Agents](#) on page 29 for additional details.
-

Checklist for Performing a Clean Installation

The following checklist identifies the tasks necessary to upgrade your existing Lumension Endpoint Management and Security Suite 7.0 server to Lumension Endpoint Management and Security Suite (Lumension EMSS) 7.1 by performing a Clean Install of Lumension EMSS 7.1 on a new server.

- You have configured your firewall to allow access to all necessary URLs.
Refer to [Firewall Settings](#) on page 8 for details.
-

- You are installing on a supported operating system.
Refer to [Supported Operating Systems](#) on page 7 for details.
-

- You have installed the necessary Windows components for your operating system.
Refer to [Required Windows Components](#) on page 17 for details.
-

- Download the Lumension Endpoint Management and Security Suite (Lumension EMSS) 7.1 installer from the [Lumension Customer Portal \(https://portal.lumension.com\)](https://portal.lumension.com).
-

Log on to the server using an account with full local administrator privileges.

- Warning:** When installing on a Windows 2008 server, the Domain Administrator account **does not** have full Local Administrator rights, even when the Domain Administrator has been added to the Local Administrators group. If you are logged in to the server as the Domain Administrator, you must run the installer as the Local Administrator by using the **Run as** function. (right-click on the Lumension EMSS installer and select **Run as ...**).
-

Stop or disable any AntiVirus products (such as McAfee, Trend-micro, Symantec, and so on) running on your server.

- Note:** An AntiVirus product can prevent processes from running correctly during the installation. Therefore, to ensure a successful installation, all AntiVirus services must be stopped or disabled prior to running the Lumension EMSS installer.
-



-
- Start the upgrade by launching the Lumension EMSS installer.
Refer to [Clean Install](#) on page 17 for step-by-step instructions.
-
- Log in to Lumension EMSS and complete the **Application Setup Manager** window.
-
- Upgrade your agents. Refer to [Upgrading Your Agents](#) on page 29 for additional details.
-



