



# 6.4 to 7.1 Server Upgrade Guide

Lumension Endpoint Management and Security Suite 7.1



---

# Notices

---

## Version Information

Lumension Endpoint Management and Security Suite 6.4 to 7.1 Server Upgrade Guide - Lumension Endpoint Management and Security Suite Version 7.1 - Published: August 2011  
Document Number: 02\_224\_7.1\_112141411

## Copyright Information

Lumension  
8660 East Hartford Drive, Suite 300  
Scottsdale, AZ 85255  
Phone: +1 888.725.7828  
Fax: +1 480.970.6323  
E-mail: [info@lumension.com](mailto:info@lumension.com)

**Copyright© 1999-2011 Lumension Security, Inc.; all rights reserved. Covered by one or more of U.S. Patent Nos. 6,990,660, 7,278,158, 7,487,495, 7,823,147, 7,870,606, and/or 7,894,514; other patents pending.** This manual, as well as the software described in it, is furnished under license. No part of this manual may be reproduced, stored in a retrieval system, or transmitted in any form – electronic, mechanical, recording, or otherwise – except as permitted by such license.

**LIMITATION OF LIABILITY/DISCLAIMER OF WARRANTY:** LUMENSION SECURITY, INC. (LUMENSION) MAKES NO REPRESENTATIONS OR WARRANTIES WITH REGARD TO THE ACCURACY OR COMPLETENESS OF THE INFORMATION PROVIDED IN THIS MANUAL. LUMENSION RESERVES THE RIGHT TO MAKE CHANGES TO THE INFORMATION DESCRIBED IN THIS MANUAL AT ANY TIME WITHOUT NOTICE AND WITHOUT OBLIGATION TO NOTIFY ANY PERSON OF SUCH CHANGES. THE INFORMATION PROVIDED IN THIS MANUAL IS PROVIDED “AS IS” AND WITHOUT WARRANTY OF ANY KIND, INCLUDING WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. THE INFORMATION PROVIDED IN THIS MANUAL IS NOT GUARANTEED OR WARRANTED TO PRODUCE ANY PARTICULAR RESULT, AND THE ADVICE AND STRATEGIES CONTAINED MAY NOT BE SUITABLE FOR EVERY ORGANIZATION. NO WARRANTY MAY BE CREATED OR EXTENDED WITH RESPECT TO THIS MANUAL BY SALES REPRESENTATIVES OR WRITTEN SALES MATERIALS. LUMENSION SHALL NOT BE LIABLE TO ANY PERSON WHATSOEVER FOR ANY LOSS OF PROFIT OR DATA OR ANY OTHER DAMAGES ARISING FROM THE USE OF THIS MANUAL, INCLUDING BUT NOT LIMITED TO DIRECT, INDIRECT, SPECIAL, INCIDENTAL, CONSEQUENTIAL, OR OTHER DAMAGES.



## Trademark Information

Lumension<sup>®</sup>, Lumension<sup>®</sup> Endpoint Management and Security Suite, Lumension<sup>®</sup> Endpoint Management Platform, Lumension<sup>®</sup> Patch and Remediation, Lumension<sup>®</sup> Enterprise Reporting, Lumension<sup>®</sup> Security Configuration Management, Lumension<sup>®</sup> Content Wizard, Lumension<sup>®</sup> Risk Manager, Lumension<sup>®</sup> AntiVirus, Lumension<sup>®</sup> Wake on LAN, Lumension<sup>®</sup> Power Management, Lumension<sup>®</sup> Remote Management, Lumension<sup>®</sup> Scan<sup>™</sup>, Lumension<sup>®</sup> Security Configuration Management, Lumension<sup>®</sup> Application Control, Lumension<sup>®</sup> Device Control, Lumension<sup>®</sup> Endpoint Security, Lumension<sup>®</sup> Intelligent Whitelisting, PatchLink<sup>®</sup>, PatchLink<sup>®</sup> Update<sup>™</sup>, their associated logos, and all other Lumension trademarks and trade names used here are the property of Lumension Security, Inc. or its affiliates in the U.S. and other countries.

RSA Secured<sup>®</sup> is a registered trademark of RSA Security Inc.

Apache is a trademark of the Apache Software Foundation.

In addition, any other companies' names, trade names, trademarks, and products mentioned in this document may be either registered trademarks or trademarks of their respective owners.

## Feedback

Your feedback lets us know if we are meeting your documentation needs. E-mail the Lumension Technical Publications department at [techpubs@lumension.com](mailto:techpubs@lumension.com) to tell us what you like best, what you like least, and to report any inaccuracies.



---

# Table of Contents

---

<b>Chapter 1: Upgrading From PatchLink Update 6.4 SP2.....</b>	<b>7</b>
Pre-Upgrade Considerations.....	7
Selecting an Upgrade Path.....	11
Retaining Data with a Fresh or Clean Install.....	12
<b>Chapter 2: Upgrading Your Server.....</b>	<b>13</b>
Upgrading Over an Existing 6.4 Installation.....	13
Performing a Fresh Install.....	21
Clean Install.....	31
Required Windows Components.....	31
Performing a Clean Install.....	34
<b>Chapter 3: Upgrading Your Agents.....</b>	<b>43</b>
Upgrading Agents Using the Deployment Wizard.....	43
Upgrading Agents Using Agent Management Jobs.....	44
Migrating Existing Agents.....	44
<b>Appendix A: Troubleshooting Your Upgrade.....</b>	<b>45</b>
Top Upgrade Issues.....	45
Frequently Asked Questions.....	46
<b>Appendix B: Upgrade Checklists.....</b>	<b>49</b>
Checklist for Upgrading Over an Existing Installation.....	49
Checklist for Performing a Fresh Installation.....	50
Checklist for Performing a Clean Installation.....	52





---

# Chapter 1

---

## Upgrading From PatchLink Update 6.4 SP2

---

### In this chapter:

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

This 6.4 to 7.1 Server Upgrade Guide is a resource to guide you through the upgrade from PatchLink Update 6.4 SP2 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 Patch and Remediation 6.4 SP2 (PatchLink Update 6.4 SP2) to Lumension Endpoint Management and Security Suite (Lumension EMSS) 7.1 upgrade, you must consider and address the following:

#### Firewall Settings

Lumension EMSS utilizes a new content architecture that provides for a wider variety of patch content. To download this 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> (Required for Microsoft content)
- <http://ardownload.adobe.com> (Required for Adobe content)
- <http://swupdl.adobe.com> (Required for Adobe content)
- Refer to *Lumension KnowledgeBase Article 539* (<http://www.lumension.com/kb/539>) for additional URLs which may be required depending upon your configuration.



---

<b>Supported Operating Systems</b>	<p>Lumension EMSS is supported on the following operating systems:</p> <ul style="list-style-type: none"><li>• Windows Server 2003, Web Edition with SP2 or later (x86)</li><li>• Windows Server 2003, Standard Edition with SP2 or later (x86)</li><li>• Windows Server 2003, Enterprise Edition with SP2 or later (x86)</li><li>• Windows Server 2003 R2, Standard Edition with SP2 or later (x86)</li><li>• Windows Server 2003 R2, Enterprise Edition with SP2 or later (x86)</li><li>• Windows Server 2008, Web Edition with SP2 or later (x86/x64)</li><li>• Windows Server 2008, Standard Edition with SP2 or later (x86/x64)</li><li>• Windows Server 2008, Enterprise Edition with SP2 or later (x86/x64)</li><li>• Windows Server 2008 R2, Standard Edition (with or without Hyper-V)</li><li>• Windows Server 2008 R2, Enterprise Edition (with or without Hyper-V)</li><li>• Windows Web Server 2008 R2</li></ul>
<b>Upgrade Prerequisites</b>	<p>If you intend to upgrade an existing Patch and Remediation 6.4 SP2 server, the server must meet the following requirements:</p> <ul style="list-style-type: none"><li>• Your server must be Lumension Patch and Remediation version 6.4 SP2 (6.4.0.1543) or higher.</li><li>• Your SQL Server is version 2005 SP3 (9.00.4035) or higher.</li></ul> <p><b>Tip:</b> You can see your server and SQL version by selecting <b>Options &gt; Support</b> within Lumension Patch and Remediation 6.4 SP2.</p> <ul style="list-style-type: none"><li>• All of your devices (Agents) have already been upgraded to version 6.3 or higher.</li></ul> <p><b>Tip:</b> You can see your Agent versions within Lumension Patch and Remediation 6.4 SP2, by browsing to the <b>Devices</b> page, setting the filter to show All (click <b>Update View</b> to apply the filter), and clicking on the version column heading to sort by version.</p> <p>If you have any 6.2 or older Agents, you must either upgrade them to version 6.4, or disable and then delete them <b>prior</b> to upgrading.</p>
<b>Additional Prerequisites</b>	<p>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.</p> <p><b>Note:</b> The installation of Windows Installer 4.5 will require a reboot to continue with the installation.</p>
<b>Database Backup</b>	<p>During the Lumension EMSS installation, the installer does not alter nor delete the original Patch and Remediation database. Therefore, you are not required to backup the database prior to installation.</p>

---



---

<b>Storage Folder</b>	During the Lumension EMSS installation, the installer does not modify nor delete the Patch and Remediation storage folder, regardless of whether you moved it to a new (non-default) location. Therefore, regardless of the storage folder's location, it will have no impact on the installation.
<b>Administrative Rights</b>	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.  <b>Warning:</b> When installing on a Windows 2008 server, the Domain Administrator account <b>does not</b> 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 <b>Run as</b> function. (right-click on the Lumension EMSS installer and select <b>Run as ...</b> ).
<b>AntiVirus Products</b>	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.  <b>Note:</b> 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.
<b>ClientAdmin and ServiceAdmin Accounts</b>	During the installation of Lumension EMSS 7.1 the following two new user accounts should be created: <ul style="list-style-type: none"><li>• <code>ClientAdmin</code> - this account is used to grant the Lumension EMSS services access to IIS.</li><li>• <code>ServiceAdmin</code> - this account is used to grant the Lumension EMSS services access to the SQL Server.</li></ul> During the installation you will be prompted to define the usernames and passwords for these accounts. Although it is possible to use the same account for both, it is strongly recommended (for security purposes) that you use two different accounts.  <b>Warning:</b> Both of these accounts must have a static password that does not change. If the password for either of these accounts were to change after installation you will be unable to use Lumension EMSS as critical services and functionality would be disabled.

---



---

**SSL Communication**

If you intend to upgrade an existing Patch and Remediation 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:** The existing PatchLink Distribution Point servers only support Lumension EMSS 7.1 when used with your existing 6.4 Agent with the Native Scan Content Enhancement (refer to [Upgrading Agents Using the Deployment Wizard](#) on page 43 for additional details regarding Agent upgrades). However, if you upgrade your agents to the new 7.1 agent, then you must also upgrade your existing PatchLink Distribution Point servers to the new Lumension Caching Proxy.

---

**PatchLink Developers Kit (PDK)**

If your organization utilizes the PatchLink Developers Kit (PDK), you will need to upgrade to the Lumension Content Wizard after your successful upgrade to Lumension EMSS 7.1.

---

**Tip:** The Lumension Content Wizard can be downloaded from the **Downloads** page of the [Lumension Customer Portal \(http://portal.lumension.com/\)](http://portal.lumension.com/).

---

**Lumension Scan (formerly PatchLink Scan)**

If you have Lumension Scan 6.4.7 or earlier installed on your Patch and Remediation server, you must upgrade to Lumension Scan 6.4.8 **prior** to upgrading to Lumension EMSS 7.1.

---

**Tip:** Lumension Scan 6.4.8 can be downloaded from the **Downloads** page of the [Lumension Customer Portal \(http://portal.lumension.com/\)](http://portal.lumension.com/).

---



---

**Lumension Enterprise Reporting (ERS)**

If you have Lumension Enterprise Reporting installed on your Patch and Remediation server, you must install the Lumension Enterprise Reporting Client after upgrading to Lumension EMSS 7.1.

**Tip:** The Lumension Enterprise Reporting Client can be installed using the Lumension Installation Manager. For additional information, refer to the *Lumension Endpoint Management and Security Suite 7.1: Enterprise Reporting Client User Guide* (<http://portal.lumension.com>).

---

## Selecting an Upgrade Path

---

When upgrading from Lumension Patch and Remediation 6.4 SP2 (PatchLink Update 6.4 SP2) 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 three potential options are as follows:

---

**Upgrade over Existing**

This option allows you to directly upgrade your existing Lumension Patch and Remediation 6.4 SP2 server to Lumension EMSS 7.1. When performing the direct upgrade, all of your Agents, Groups, User Accounts, Polices, and Custom Packages will be retained and migrated.

If this is your desired upgrade path, refer to *Upgrading Over an Existing 6.4 Installation* on page 13 for additional details.

---

**Fresh Install**

This option will install Lumension EMSS 7.1 over the existing Lumension Patch and Remediation 6.4 SP2 installation, removing the existing 6.4 SP2 installation without retaining or migrating any of your Agents, Groups, User Accounts, Polices, or Custom Packages.

**Warning:** When performing a Fresh Install, you must use the same serial number that was used for your Lumension Patch and Remediation 6.4 SP2 installation. If you are using a new serial number, it is strongly recommended that you perform the Clean Install on a different (and differently named) server.

If this is your desired upgrade path, refer to *Performing a Fresh Install* on page 21 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 Patch and Remediation. 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 Fresh or Clean Install](#) on page 12 **prior** to performing the upgrade.

If this is your desired upgrade path, refer to [Clean Install](#) on page 31 for additional details.

## Retaining Data with a Fresh or Clean Install

If you are performing a Fresh Install or Clean Install you may be able to retain your data.

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

1. Use your existing (Lumension Patch and Remediation 6.4 SP2) 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. Contact the [Lumension Customer Success Team \(CSTupgrade@lumension.com\)](mailto:CSTupgrade@lumension.com) for assistance prior to performing the upgrade.
3. Meet the following requirements:
  - Your server must be Lumension Patch and Remediation version 6.4 SP2 (6.4.0.1543) or higher.
  - Your SQL Server is version 2005 SP3 (9.00.4035) or higher.

**Tip:** You can see your server and SQL version by selecting **Options** > **Support** within Lumension Patch and Remediation 6.4 SP2.

- All of your devices (Agents) have already been upgraded to version 6.3 or higher.

**Tip:** You can see your Agent versions within Lumension Patch and Remediation 6.4 SP2, by browsing to the **Devices** page, setting the filter to show All (click **Update View** to apply the filter), and clicking on the version column heading to sort by version.

If you have any 6.2 or older Agents, you must either upgrade them to version 6.4, or disable and then delete them **prior** to upgrading.



---

# Chapter

# 2

---

## Upgrading Your Server

---

### In this chapter:

- Upgrading Over an Existing 6.4 Installation
- Performing a Fresh Install
- Clean Install

Having selected an upgrade path, you can now upgrade your server from Lumension Patch and Remediation 6.4 SP2 to Lumension Endpoint Management and Security Suite 7.1.

For assistance selecting an upgrade path, refer to *Selecting an Upgrade Path* on page 11.

### Upgrading Over an Existing 6.4 Installation

---

Upgrading over an existing Lumension Patch and Remediation 6.4 SP2 server allows you to retain and migrate all of your Agents, Groups, User Accounts, Policies, and Custom Packages.

#### Prerequisites:

- You have reviewed and addressed all of the considerations identified under *Pre-Upgrade Considerations* on page 7.
- Your server must be Lumension Patch and Remediation version 6.4 SP2 (6.4.0.1543) or higher.
- Your SQL Server is version 2005 SP3 (9.00.4035) or higher.

---

**Tip:** You can see your server and SQL version by selecting **Options** > **Support** within Lumension Patch and Remediation 6.4 SP2.

---

- All of your devices (Agents) have already been upgraded to version 6.3 or higher.

---

**Tip:** You can see your Agent versions within Lumension Patch and Remediation 6.4 SP2, by browsing to the *Devices* page, setting the filter to show All (click **Update View** to apply the filter), and clicking on the version column heading to sort by version.

---

If you have any 6.2 or older Agents, you must either upgrade them to version 6.4, or disable and then delete them **prior** to upgrading.

- 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 Patch and Remediation 6.4 SP2 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.

**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.

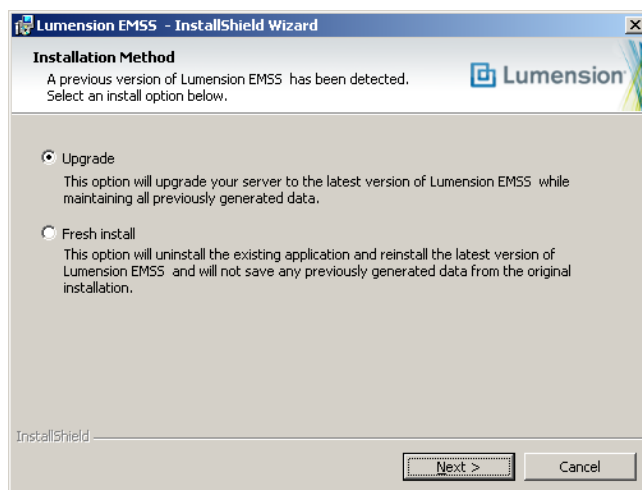


Figure 1: Installation Method Page

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



5. Click **Next**.

**Step Result:** The *License Agreement* page opens.

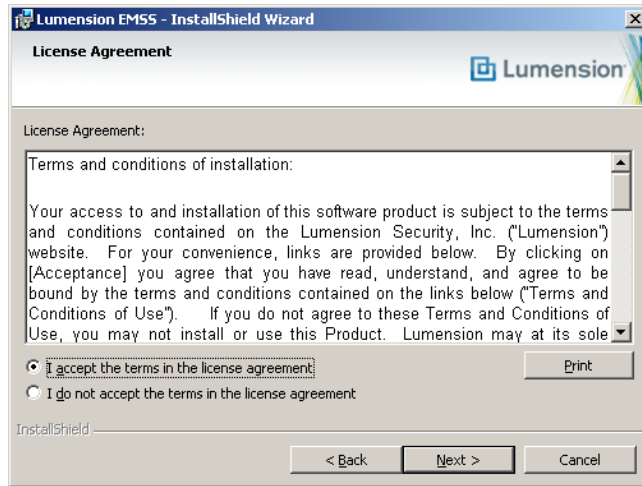


Figure 2: License Agreement Page

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
<b>If the <i>Required IIS Features</i> page opens:</b>	Your server does not have the required IIS features installed. Click <b>Install Features</b> to install the features and proceed.
<b>If the <i>System Requirements</i> page opens:</b>	<p>Your server does not meet the minimum installation requirements.</p> <ul style="list-style-type: none"> <li>If you receive only system requirement <i>warnings</i>, you may proceed with installation by clicking <b>Next</b>. Lumension recommends resolving warnings before proceeding with installation.</li> </ul> <p><b>Note:</b> 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"> <li>If you receive any system requirement <i>failures</i>, you must cancel the installation, resolve these failures, and then restart installation.</li> </ul> <p><b>Tip:</b> Click <b>View all Failures/Warnings</b> for detailed information about prerequisite status deficiencies.</p>



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

8. 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.



**9. Click Next.**

**Step Result:** The *Server Identity* page opens.

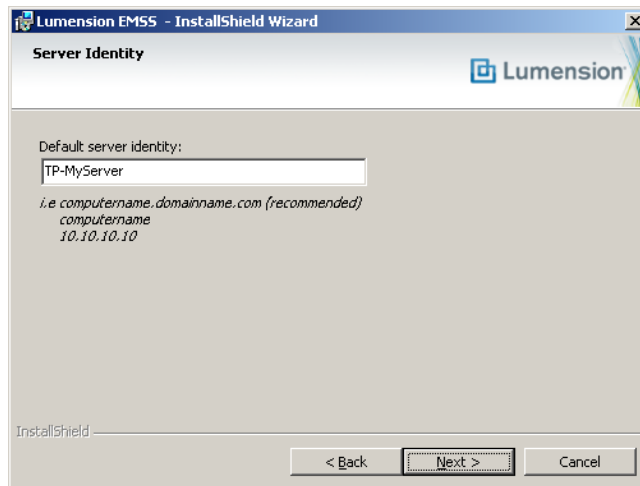


Figure 3: Server Identity Page

**10. 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.



## 11. Click **Next**.

**Step Result:** The *Destination Location* page opens.

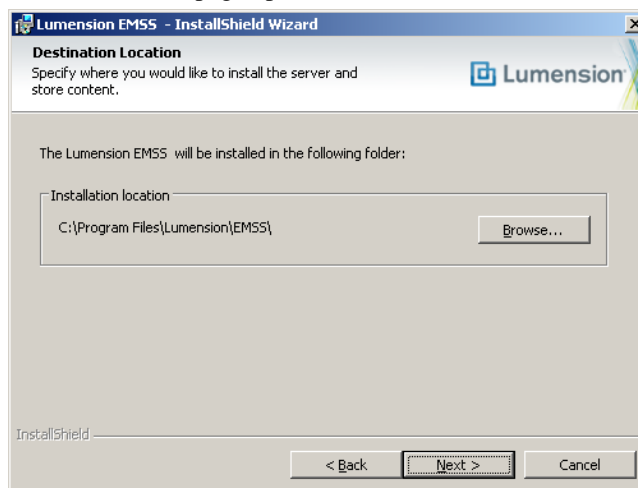


Figure 4: Destination Location Page

## 12. [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.

## 13. Click **Next**.

**Important:** Due to architectural changes from Patch and Remediation 6.4 SP2 to Lumension EMSS 7.1, certain data cannot be retained when upgrading. This data includes:

- Deployment history
- Mandatory Baselines
- Server logs
- System group settings
- Subscription history
- Content cache status

For your convenience, the installation procedure archives this 6.4 SP2 data at <Installation Directory>\Lumension\EMSS\Archive. This data is archived only for reference purposes.

**Step Result:** The *Data Accessibility* page opens. This page lists the data that will be retained during the upgrade.

**Note:** If the storage directory defined on the *Destination Location* page does not contain the recommended available disk space, the *Data Accessibility* page does not immediately open.



Rather, a dialog that lets you redefine the storage location will open. Then after redefining the storage location, the *Data Accessibility* page will open.

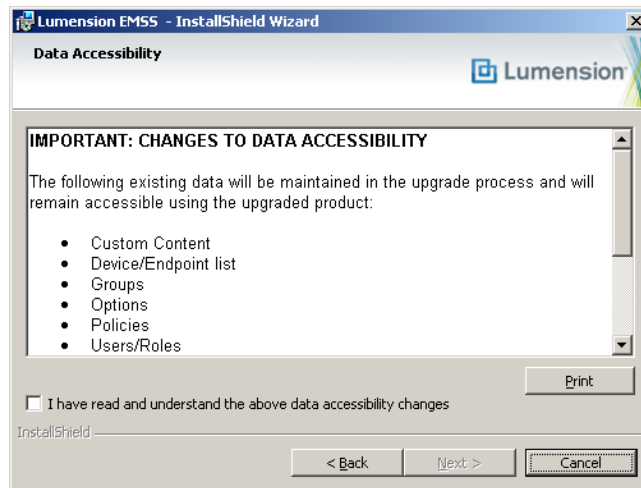


Figure 5: Data Accessibility Page

14. Review the notification and select the **I have read and understand the above data accessibility changes** check box.

15. Click **Next**.

**Step Result:** The *Installation Ready* page opens.

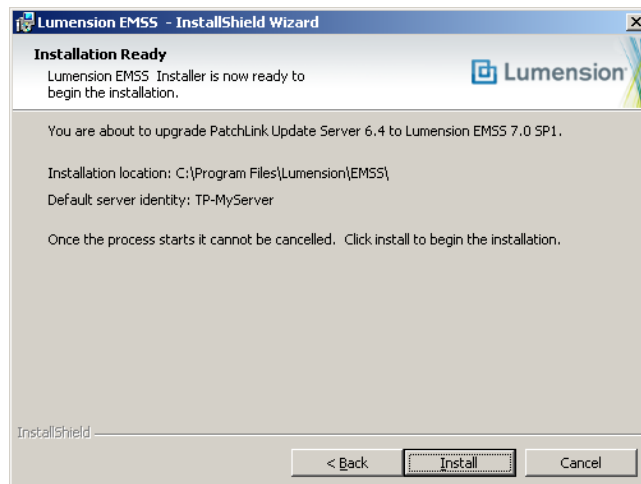


Figure 6: Installation Ready Page



**16. Click Install.**

**Step Result:** The upgrade procedure begins.

**Note:** During the upgrade procedure, agent hardening is turned off on the server so agents do not have to be uninstalled and reinstalled for the upgrade. Additionally, the upgrade procedure uses the same local SQL Server instance used for your previous installation.

**17. 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>).

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

---

**After Completing This Task:**

Having completed the upgrade from Lumension Patch and Remediation 6.4 SP2 to Lumension EMSS, 7.1 you must now log in to Lumension EMSS to complete the installation. You can log in using either the user account that was used to perform the upgrade or any of the previous defined (Lumension Patch and Remediation) user accounts.

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>) 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.

---



---

## Performing a Fresh Install

---

A Fresh Install will install Lumension EMSS 7.1 over the existing Lumension Patch and Remediation 6.4 SP2 installation, removing the existing 6.4 SP2 installation without retaining or migrating any of your Agents, Groups, User Accounts, Policies, or Custom Packages.

---

### Prerequisites:

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

**Warning:** When performing a Fresh Install, you must use the same serial number that was used for your Lumension Patch and Remediation 6.4 SP2 installation. If you are using a new serial number, it is strongly recommended that you perform the Clean Install on a different (and differently named) server.

---

1. Log on to the Lumension Patch and Remediation 6.4 SP2 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. From its download location, double-click the Lumension EMSS installer.

**Step Result:** The installer opens to the *Installation Method* page.

---

**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.

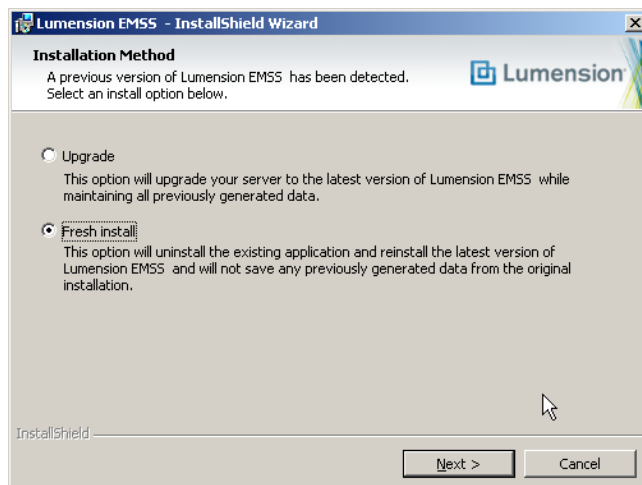


Figure 7: Installation Method Page

4. Ensure the **Fresh install** option is selected.
5. Click **Next**.

**Step Result:** The *License Agreement* page opens.

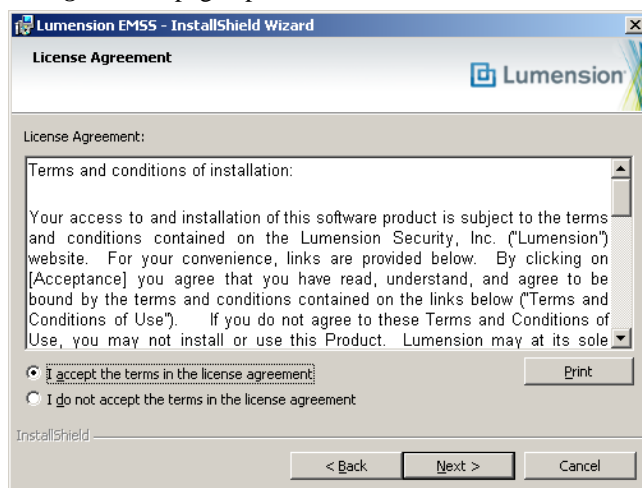


Figure 8: License Agreement Page

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



7. Click **Next**.

**Step Result:** The *Customer Information* page opens.

Figure 9: Customer Information Page

## 8. Type the applicable information in the following fields:

Field	Description
<b>Company Name</b>	Your company name.
<b>Serial Number</b>	Your Lumension EMSS serial number.

9. Click **Next**.

A new page or dialog opens.

Page/Dialog	Step
<b>If the <i>Question</i> dialog opens:</b>	Click <b>Yes</b> to start network discovery services. These services are necessary to use discovery features within Lumension EMSS.
<b>If the <i>Required IIS Features</i> page opens:</b>	Your server does not have the required IIS features installed. Click <b>Install Features</b> to install the features and proceed.



Page/Dialog	Step
<b>If the <i>System Requirements</i> page opens:</b>	<p>Your server does not meet the minimum installation requirements.</p> <ul style="list-style-type: none"> <li>If you receive only system requirement <i>warnings</i>, you may proceed with installation by clicking <b>Next</b>. Lumension recommends resolving warnings before proceeding with installation.</li> </ul> <p><b>Note:</b> 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"> <li>If you receive any system requirement <i>failures</i>, you must cancel the installation, resolve these failures, and then restart installation.</li> </ul> <p><b>Tip:</b> Click <b>View all Failures/Warnings</b> for detailed information about prerequisite status deficiencies.</p>
<b>If the <i>Service Accounts</i> page opens:</b>	Proceed to the next step.

#### 10. 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.



**11. Click Next.**

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

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

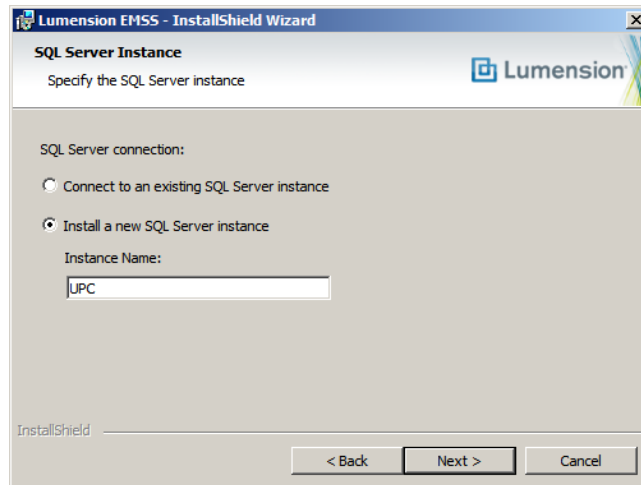


Figure 10: SQL Server Instance Page

**12. 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.

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

**14. Click Next.**

**Step Result:** The *Destination Location* page opens.

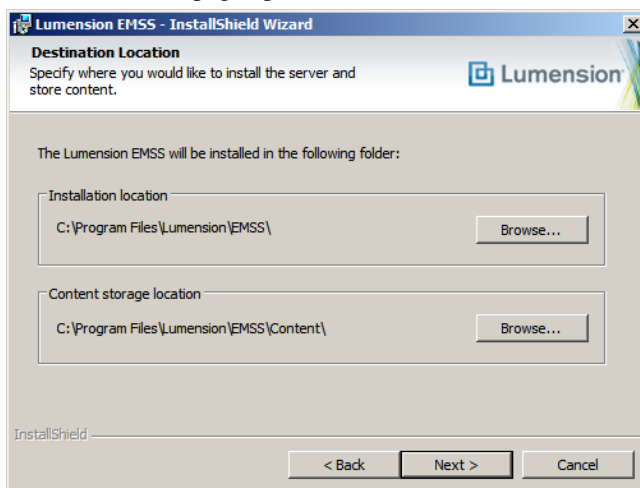


Figure 11: Destination Location Page

**15. [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.

**16. [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.



17. Click **Next**.

**Step Result:** The *Proxy Settings* page opens.

Figure 12: 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.

18. 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
<b>Server Address</b>	The IP address of the applicable proxy server.
<b>Port</b>	The port number used for communication.

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

19. 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
<b>Username</b>	A user name that authenticates with the proxy.
<b>Password</b>	The password associated with the user name.
<b>Confirm Password</b>	The password retyped.



**20. Click Next.**

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

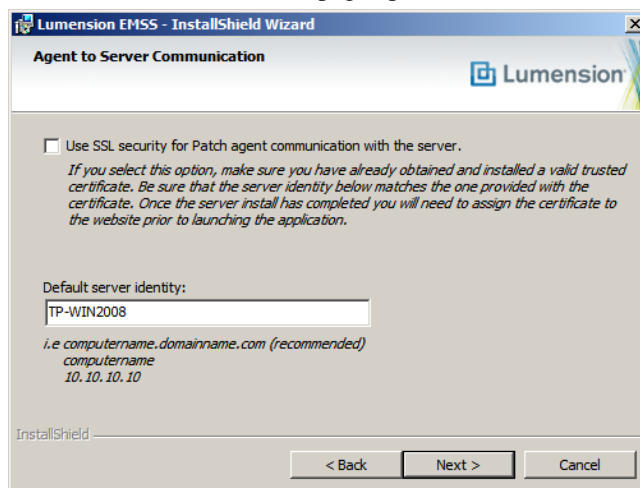


Figure 13: Agent to Server Communication Page

**21.** 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.

**22.** 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.



23. Click **Next**.

**Step Result:** The *Installation Ready* page opens.

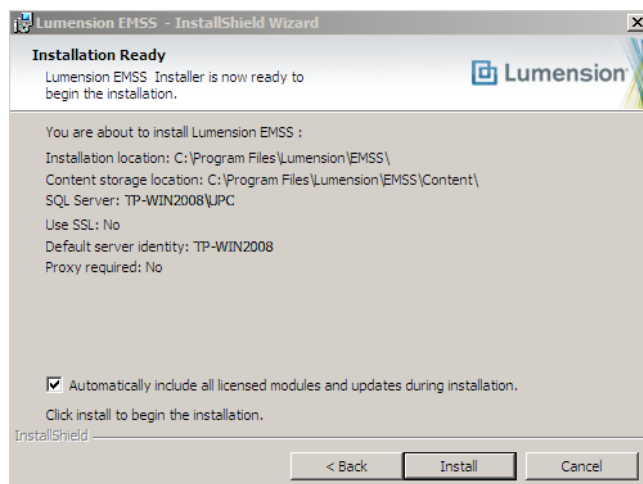


Figure 14: Installation Ready Page

24. [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>).

25. 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.

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



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

---

### After Completing This Task:

Having completed the Fresh 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.

---



## 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 Patch and Remediation.

### Required Windows Components

To successfully install the Lumension Endpoint Management and Security Suite server, your server must meet various software requirements. For additional, more detailed, requirements refer to 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"><li>1. Open the <i>Add or Remove Programs</i> window by selecting <b>Start &gt; Control Panel &gt; Add or Remove Programs</b>.</li><li>2. Select <b>Add/Remove Windows Components</b>. The <i>Windows Components Wizard</i> opens.</li><li>3. Select Application Server and click <b>Details</b>. The <i>Application Server</i> window opens.</li><li>4. Select ASP.NET and Enable network COM+ access.</li><li>5. Select Internet Information Services (IIS) and click <b>Details</b>. The <i>Internet Information Services (IIS)</i> window opens.</li><li>6. Select Common Files and Internet Information Services Manager.</li><li>7. Select World Wide Web Service and click <b>Details</b>. The <i>World Wide Web Service</i> window opens.</li><li>8. Select Active Server Pages and World Wide Web Service.</li><li>9. Click <b>OK</b> saving your selections and closing the <i>World Wide Web Service</i> window.</li><li>10. Click <b>OK</b> saving your selections and closing the <i>Internet Information Services (IIS)</i> window.</li><li>11. Click <b>OK</b> saving your selections and closing the <i>Application Server</i> window.</li><li>12. Click <b>Next</b> to install the Windows Components, closing the wizard when it completes the installation.</li></ol>



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"> <li>1. Open <i>Server Manager</i> by selecting <b>Start &gt; Administrative Tools &gt; Server Manager</b>.</li> <li>2. Scroll down to the <b>Roles Summary</b> section, and click the <b>Add Roles</b> link. The <i>Add Roles Wizard</i> opens.</li> <li>3. Click <b>Next</b>. The <i>Select Server Roles</i> page opens.</li> <li>4. Select <b>Web Server (IIS)</b> and click <b>Next</b>. The <i>Web Server (IIS)</i> page opens.</li> <li>5. Click <b>Next</b>. The <i>Select Role Services</i> page opens.</li> <li>6. Select <b>ASP.NET</b> (under <b>Application Development</b>). A dialog will display indicating the need for additional role services with ASP.NET, click <b>Add Required Role Services</b> to add the additional role services.</li> <li>7. Select the following:               <ul style="list-style-type: none"> <li>• ASP</li> <li>• Basic Authentication (under <b>Security</b>)</li> <li>• Windows Authentication (under <b>Security</b>)</li> <li>• Dynamic Content Compression (under <b>Performance</b>)</li> </ul> </li> <li>8. Click <b>Next</b>. The <i>Confirm Installation Selections</i> page opens.</li> <li>9. Click <b>Install</b> to install the Windows components, closing the wizard when it completes the installation.</li> </ol> <hr/> <p><b>Warning:</b> If you have installed .NET Framework 4.0 components on this server they should be uninstalled and you <b>must reboot</b> the server prior to installing Lumension EMSS.</p> <p>If you are unable to remove .NET Framework 4.0, please refer to <a href="http://www.lumension.com/kb/759">Lumension KnowledgeBase Article 759 (http://www.lumension.com/kb/759)</a>.</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 Patch and Remediation or 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 31.
- 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 Fresh or Clean Install* on page 12 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.

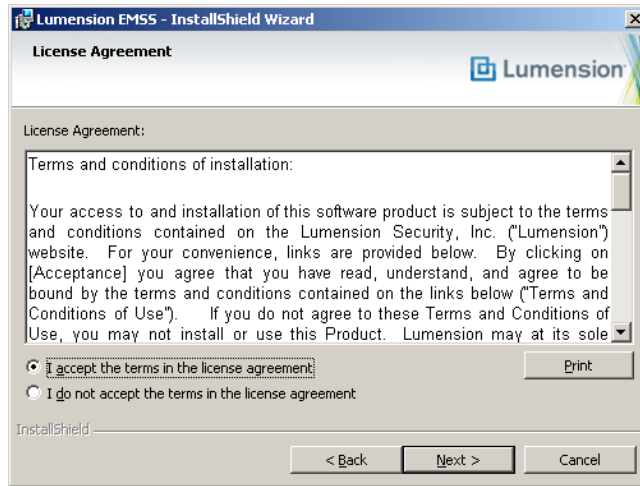


Figure 15: License Agreement Page

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.

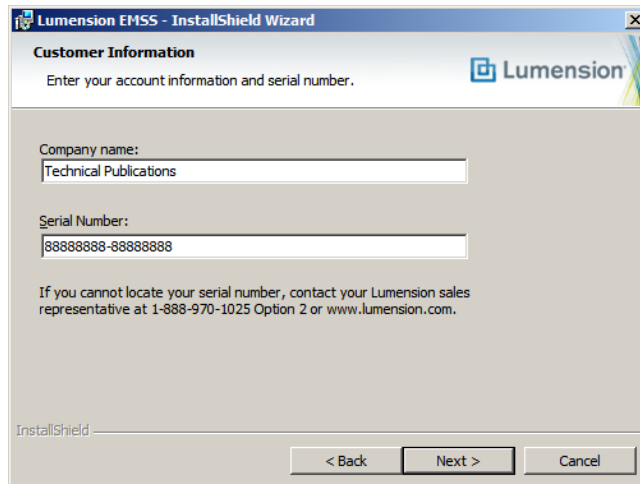


Figure 16: Customer Information Page



## 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
<b>If the <i>Question</i> dialog opens:</b>	Click <b>Yes</b> to start network discovery services. These services are necessary to use discovery features within Lumension EMSS.
<b>If the <i>Required IIS Features</i> page opens:</b>	Your server does not have the required IIS features installed. Click <b>Install Features</b> to install the features and proceed.
<b>If the <i>System Requirements</i> page opens:</b>	<p>Your server does not meet the minimum installation requirements.</p> <ul style="list-style-type: none"> <li>If you receive only system requirement <i>warnings</i>, you may proceed with installation by clicking <b>Next</b>. Lumension recommends resolving warnings before proceeding with installation.</li> </ul> <p><b>Note:</b> 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"> <li>If you receive any system requirement <i>failures</i>, you must cancel the installation, resolve these failures, and then restart installation.</li> </ul> <p><b>Tip:</b> Click <b>View all Failures/Warnings</b> for detailed information about prerequisite status deficiencies.</p>
<b>If the <i>Service Accounts</i> page opens:</b>	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.

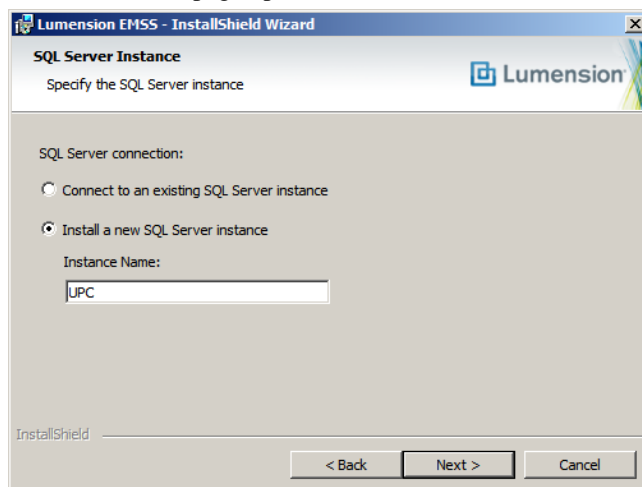


Figure 17: SQL Server Instance Page

## 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.

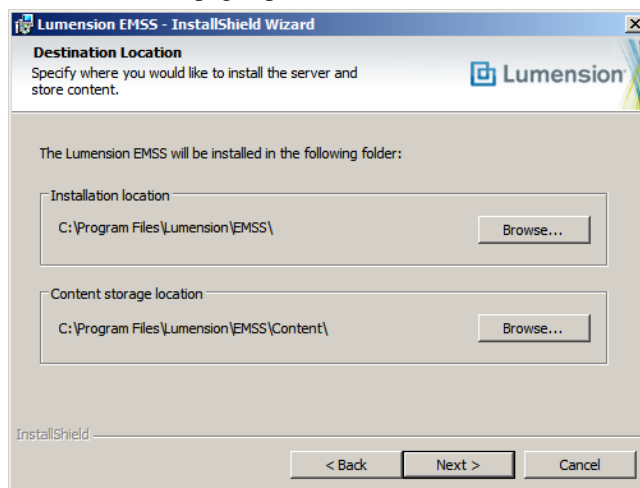


Figure 18: Destination Location Page

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

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

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

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



16. Click **Next**.

**Step Result:** The *Proxy Settings* page opens.

Figure 19: 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
<b>Server Address</b>	The IP address of the applicable proxy server.
<b>Port</b>	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
<b>Username</b>	A user name that authenticates with the proxy.
<b>Password</b>	The password associated with the user name.
<b>Confirm Password</b>	The password retyped.



**19. Click Next.**

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

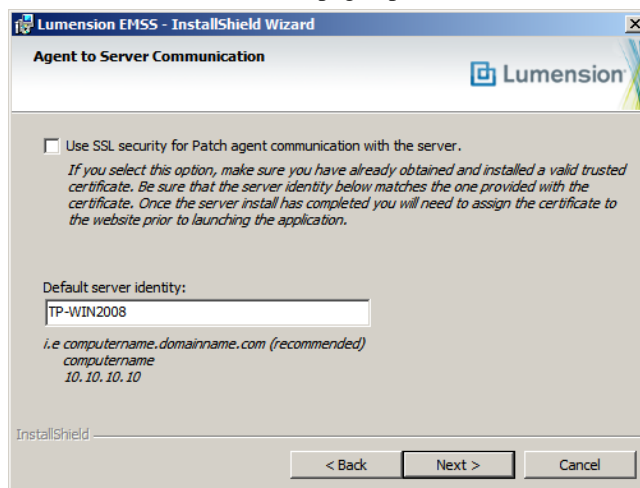


Figure 20: Agent to Server Communication Page

**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.

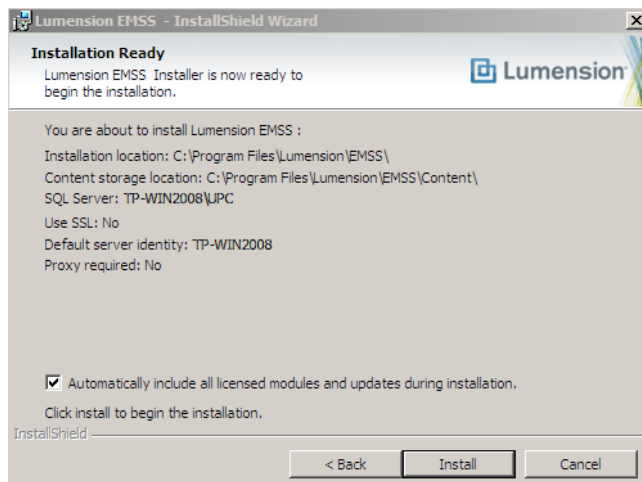


Figure 21: Installation Ready Page

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 Agents Using the Deployment Wizard
- Upgrading Agents Using Agent Management Jobs
- Migrating Existing Agents

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

When upgrading agents, you can choose from either of the following methods:

- [Upgrading Agents Using the Deployment Wizard](#) on page 43
- [Upgrading Agents Using Agent Management Jobs](#) on page 44

## 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 Agents Using Agent Management Jobs

Using the Agent Management Job functionality of Lumension Endpoint Management and Security Suite 7.1 you can upgrade all of your existing Lumension Patch and Remediation 6.4 Agents.

Within Lumension Endpoint Management and Security Suite select **Discover > Assets** and select **Install Agents** to launch an Agent Management Job that will identify the assets within your domain and remote upgrade (or install if no agent previously existed) the devices within your network. For additional details regarding how to use the Agent Management Job to install and upgrade agents, refer to the *Lumension Endpoint Management and Security Suite 7.1 User Guide* (<http://portal.lumension.com>).

## Migrating Existing Agents

If you selected to install your Lumension Endpoint Management and Security Suite server alongside your original Lumension Patch and Remediation 6.4 server you have the option of migrating your existing agents.

To migrate your existing Lumension Patch and Remediation 6.4 agents to your newly installed Lumension Endpoint Management and Security Suite (Lumension EMSS) server, select one of the following options:

- If you used the same serial number (from your existing Lumension Patch and Remediation 6.4 server) when installing Lumension EMSS you may add a DNS alias to your network that directs the agents to the new server. Do this by changing the IP Address of the DNS alias for your Lumension Patch and Remediation 6.4 server to the IP Address of your Lumension EMSS server.
- Use an Agent Management Job to overwrite the existing agents, pointing them to the new Lumension EMSS server.
- Use PSEXEC to reinstall your agents remotely using the new agent installer. Refer to *Lumension KnowledgeBase Article 737* (<http://www.lumension.com/kb/737>) for details regarding how to use PSEXEC for agent installation.
- Create a custom package on your existing Lumension Patch and Remediation 6.4 server to deliver the new agent installation file (LMagent.msi) to the currently managed endpoints. Use the following command (where <MyServer> is the name of your new Lumension EMSS server).

```
MSIEXEC /i "lmagent.msi" SERVERIPADDRESS="<MyServer>" /QN
```



---

# 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 31 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 Patch and Remediation server does not meet the minimum upgrade requirements. To upgrade an existing Patch and Remediation 6.4 SP2 server, the server must meet the following requirements:
  - Your server must be Lumension Patch and Remediation version 6.4 SP2 (6.4.0.1543) or higher.
  - Your SQL Server is version 2005 SP3 (9.00.4035) or higher.

**Tip:** You can see your server and SQL version by selecting **Options** > **Support** within Lumension Patch and Remediation 6.4 SP2.

- All of your devices (Agents) have already been upgraded to version 6.3 or higher.

**Tip:** You can see your Agent versions within Lumension Patch and Remediation 6.4 SP2, by browsing to the **Devices** page, setting the filter to show All (click **Update View** to apply the filter), and clicking on the version column heading to sort by version.

If you have any 6.2 or older Agents, you must either upgrade them to version 6.4, or disable and then delete them **prior** to upgrading.

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 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](mailto:CSTupgrade@lumension.com)). Refer to *Retaining Data with a Fresh or Clean Install* on page 12 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 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.

7. 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.

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

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

9. 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 Fresh Installation
- Checklist for Performing a Clean Installation

The following checklists will assist you when upgrading your Lumension Patch and Remediation 6.4 SP2 server.

#### Checklist for Upgrading Over an Existing Installation

---

The following checklist identifies the tasks necessary to upgrade an existing Lumension Patch and Remediation 6.4 SP2 server to Lumension Endpoint Management and Security Suite (Lumension EMSS) 7.1 by installing Lumension EMSS 7.1 over Lumension Patch and Remediation 6.4 SP2.

- 
- You have configured your firewall to allow access to all necessary URLs.  
Refer to *Firewall Settings* on page 7 for details.
- 
- Your server must be Lumension Patch and Remediation version 6.4 SP2 (6.4.0.1543) or higher.
- 
- Your SQL Server is version 2005 SP3 (9.00.4035) or higher.
- Tip:** You can see your server and SQL version by selecting **Options > Support** within Lumension Patch and Remediation 6.4 SP2.
- 



All of your devices (Agents) have already been upgraded to version 6.3 or higher.

**Tip:** You can see your Agent versions within Lumension Patch and Remediation 6.4 SP2, by browsing to the *Devices* page, setting the filter to show All (click **Update View** to apply the filter), and clicking on the version column heading to sort by version.



If you have any 6.2 or older Agents, you must either upgrade them to version 6.4, or disable and then delete them **prior** to upgrading.



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 Patch and Remediation 6.4 SP2 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 6.4 Installation* on page 13 for step-by-step instructions.



Log in to Lumension EMSS and complete the *Application Setup Manager* window.

---

## Checklist for Performing a Fresh Installation

---

The following checklist identifies the tasks necessary to upgrade an existing Lumension Patch and Remediation 6.4 SP2 server to Lumension Endpoint Management and Security Suite (Lumension EMSS) 7.1 by performing a Fresh Install of Lumension EMSS 7.1 on the same server as your Lumension Patch and Remediation 6.4 SP2 installation.



You have configured your firewall to allow access to all necessary URLs.

Refer to *Firewall Settings* on page 7 for details.



- 
- You are installing on a supported operating system.  
Refer to [Supported Operating Systems](#) on page 8 for details.
- 

- Your server must be Lumension Patch and Remediation version 6.4 SP2 (6.4.0.1543) or higher.
- 

Your SQL Server is version 2005 SP3 (9.00.4035) or higher.

- Tip:** You can see your server and SQL version by selecting **Options > Support** within Lumension Patch and Remediation 6.4 SP2.
- 

All of your devices (Agents) have already been upgraded to version 6.3 or higher.

- Tip:** You can see your Agent versions within Lumension Patch and Remediation 6.4 SP2, by browsing to the **Devices** page, setting the filter to show All (click **Update View** to apply the filter), and clicking on the version column heading to sort by version.
- 

If you have any 6.2 or older Agents, you must either upgrade them to version 6.4, or disable and then delete them **prior** to upgrading.

---

- 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 Lumension Patch and Remediation 6.4 SP2 server using an account with full local administrator privileges.
- 

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 [Performing a Fresh Install](#) on page 21 for step-by-step instructions.
- 

- Log in to Lumension EMSS and complete the **Application Setup Manager** window.
- 



## Checklist for Performing a Clean Installation

---

The following checklist identifies the tasks necessary to upgrade your existing Lumension Patch and Remediation 6.4 SP2 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 7 for details.
- 

- You are installing on a supported operating system.  
Refer to *Supported Operating Systems* on page 8 for details.
- 

- You have installed the necessary Windows components for your operating system.  
Refer to *Required Windows Components* on page 31 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 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 31 for step-by-step instructions.
- 

- Log in to Lumension EMSS and complete the *Application Setup Manager* window.
- 

