

Upgrading from a Previous Version of Pearl Echo

The instructions contained in this document are for major release upgrading only (e.g. **10.09.0009** to **12.25.0005**). For minor release patching (e.g. 12.**01.0001** to 12.**25.0005**), follow the patching instructions at pearlsoftware.com/echo12/updates.

Before you upgrade:

1. You must have a valid Version 12 serial number.
2. You must disable workstation anti-virus software.
3. You should backup your Pearl Echo Server installation directory.
4. You should manually test the upgrade before automatically deploying (see below).

Server Software Upgrade

Before installing and activating the Version 12 Server Software,

1. Login to the Administration Console of your previous version of Pearl Echo and turn Internet Management OFF from the Set Security Status menu.
2. Make note of your network settings in the Options->Network Settings menu.
3. Close the Pearl Echo Administration Console.
4. Make a backup copy of your Pearl Echo Server installation directory.

Server Software Upgrade from Version 8 and Later

Upgrading from Version 8 through Version 11 should be accomplished using the Pearl Echo 12 server installation software. A link to the full product download is emailed during trial registration and order confirmation. When run against your previous server software install, all settings and data will be maintained.

1. Run setup.exe from the downloaded Version 12 installation CD.
2. On the Startup screen, select the Server Setup Button.
3. The InstallShield Wizard will prompt you to confirm the default installation settings.
4. Once complete, login to the Administration Console and enter your Version 12 serial number in the Help->About Pearl Software menu.
5. Select "OK" and re-enable Internet Management when prompted.

Server Software Upgrade from Version 7 or Earlier

Install and run the full version of Pearl Echo Version 12 in a new program directory. A link to the full product download is emailed during trial registration and order confirmation. When prompted, use the same IP and Port settings as your previous installation. Your previous version's profiles, lists, active data and report settings will automatically be migrated to your new installation. After you confirm migration of your previous version's settings, uninstall the previous version Pearl Echo Server Software from Add/Remove Programs.

Testing the Workstation Software Upgrade

We have been notified that some antivirus programs may terminate the Pearl Echo Workstation upgrade mid-process. This may occur as the upgrade is altering secure system networking components leaving the system's network configuration in an unusable state.

To manually test:

1. Disable workstation anti-virus software.
2. Run setup.exe from the downloaded Version 12 installation CD.
3. On the Startup screen, select the Workstation Setup Button.
4. The InstallShield Wizard will prompt you to confirm the default installation settings.
5. Once complete, reboot, login to the workstation and browse the web.
6. Verify monitored activity in the Administration Console.

Automated Workstation Software Upgrade

It is recommended that you upgrade your Pearl Echo Workstation Software in order to take advantage of the added features and new filtering module changes available in this latest version. Before deploying, you should test the upgrade manually as described above and temporarily disable antivirus software.

Workstation Software Upgrade from Version 7 and Later

Previous versions of Pearl Echo Workstation must be patched to Version 10.099 or later to automatically upgrade your Pearl Echo Workstation agents to Version 12.

Part 1:

If Pearl Echo Workstation agents are at version 10.099 or later, skip to Part 2. If Pearl Echo Workstation agents are not at version 10.099 or later, download the Version 10.099 Workstation patch from the Pearl Software website, www.pearlsoftware.com/echo10/updates.

1. Place the Version 10.099 Workstation patch in the WS_Updates folder found in the directory where you installed the Pearl Echo Version 12 Server Software.
2. The Pearl Echo Administration Machine will automatically deliver the patch to Pearl Echo's workstation agent. After delivery, the self-updating agent will patch itself the next time the machine on which the workstation agent resides is restarted.

Part 2:

Verify all Workstations are at version 10.099 or later. To complete the Version 12 upgrade, place the Pearl Echo 12 Workstation upgrade file, Upgrade_122xx_WS.msi, in the WS_Updates folder found in the directory where you installed the Pearl Echo Version 12 Server Software. The upgrade file is found in the Workstation directory on the downloaded installation CD. Previous patches and this upgrade file can co-exist in the WS_Updates folder.

1. The Pearl Echo Administration Machine will automatically deliver the upgrade to Pearl Echo's workstation agent. After delivery, the self-updating agent will upgrade itself the next time the machine on which the workstation agent resides is restarted.

Version 6 or Earlier Workstation Upgrade

If you are upgrading your Version 6 or earlier workstations to Version 12, you will need to uninstall your previous version of the Pearl Echo Workstation Software before installing Pearl Echo 12 Workstation components. This can be accomplished by removing the software from the Workstation's Add/Remove Programs applet. **Because the Pearl Echo Workstation Software is a secure installation, it cannot be removed with a Group Policy Object.**