Upgrading from a Previous Version of Pearl Echo

The instructions contained in this document are for major release <u>upgrading</u> only (e.g. **10**.09.0009 to **11**.03.0003). For minor release <u>patching</u> (e.g. 11.**01.0001** to 11.**03.0003**), follow the patching instructions at www.pearlsw.com/echo11/updates.

Before you upgrade:

1. You <u>must</u> have a valid Version 11 serial number.
2. You <u>must</u> have a copy of the Pearl Echo Version 11 software:
    www.pearlsw.com/download/echo11/ec11downloadfull.html
3. You <u>should</u> backup your Pearl Echo Server installation directory.

Server Software Upgrade

Before installing and activating the Version 11 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.

Version 8, 9 and 10 Server Software Upgrade

Upgrading from Version 8, 9 or 10 should be accomplished using the Pearl Echo 11 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 11 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 11 serial number in the Help->About Pearl Software menu.
5. Select "OK" and re-enable Internet Management when prompted.

Version 7 or Earlier Server Software Upgrade

Install and run the full version of Pearl Echo Version 11 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 pervious 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.

Workstation Software Upgrade

Previous versions of the Pearl Echo Workstation Software are compatible with the new Pearl Echo 11 Server Software. It is recommended, however, 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.

Version 7, 8, 9 and 10 Workstation Upgrade

Previous versions of Pearl Echo Workstation must be patched to Version 10.099 to *automatically* upgrade your Pearl Echo Workstation agents to Version 11.

Part 1:

1. If Pearl Echo Workstation agents are not at version 10.099, download the Version 10.099 Workstation patch from the Pearl Software website, www.pearlsoftware.com/echo10/updates.
2. Place the Version 10.099 Workstation patch in the WS_Updates folder found in the directory where you installed the Pearl Echo Version 11 Server Software.

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:

1. To complete the Version 11 *upgrade*, place the Pearl Echo 11 Workstation upgrade file, Upgrade_110xx_WS.msi, in the WS_Updates folder found in the directory where you installed the Pearl Echo Version 11 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.

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 11, you will need to uninstall your previous version of the Pearl Echo Workstation Software before installing Pearl Echo 11 Workstation components. This can be accomplished by removing the software from the Workstation's Add/Remove Programs applet or automated with use of scripts provided by Pearl Software support. **Because the Pearl Echo Workstation Software is a secure installation, it cannot be removed with a Group Policy Object.**