

Shavlik Protect

Upgrade Guide



shavlik

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Document Information and Print History

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Date	Version	Description
June 2009	NetChk Protect 7.0	Initial release of the Shavlik NetChk Protect 7.x Upgrade Guide .
August 2009	NetChk Protect 7.1 Document Rev A	Add SQL Server 2000 and C++ prereq info for 7.1 users, and info about the asset management feature. Add data rollup functional difference.
November 2009	NetChk Protect 7.2 Document Rev B	Add Windows 7 info to system requirements section.
April 2010	NetChk Protect 7.5	Add info about Scan View, the new power management feature, improvements to software asset scan and virtual machine capabilities.
May 2010	NetChk Protect 7.5, Document Rev A	Clarify licensing information, some additional feature descriptions.
September 2010	NetChk Protect 7.6	Update product branding, add information about new 7.6 features and improvements.
March 2011	NetChk Protect 7.8	Add information about new 7.8 features and improvements.
October 2011	VMware vCenter Protect 8.0	Update product branding, add info about 8.0 upgrade tasks. Remove all info about versions prior to 7.5.
December 2011	VMware vCenter Protect 8.0, Document Rev A	Add step explaining how to compress the database before beginning the upgrade process.
September 2012	VMware vCenter Protect 8.0.1	Update product name and version, update cover graphics.
May 2013	Shavlik Protect 9.0	Update the system requirements. Add information about the new v9.0 features and improvements.
April 2014	Shavlik Protect 9.1	Update the system requirements. Add information about the new v9.1 features and improvements.

WELCOME

Purpose of this Guide

Welcome to Shavlik Protect 9.1. This document describes how to upgrade from VMware vCenter Protect 8.x or Shavlik Protect 9.0 to Shavlik Protect 9.1. If you are currently using a version that is older than Protect 8.x, you must first upgrade to 8.x before upgrading to 9.1.

In addition to describing the upgrade procedure, this document lists a number of functional differences you should be aware of when upgrading to Shavlik Protect 9.1. It also highlights the areas in the user interface that have changed significantly.

New System Requirements and Prerequisites

Please note the following new console requirements and prerequisites for Shavlik Protect 9.1.

- Microsoft .NET Framework 4.5.1 or later
- Windows Management Framework 4.0 (contains Windows PowerShell 4.0). This prerequisite does not apply to Windows 8.1 and Windows Server 2012 R2 as PowerShell 4.0 is already included with these operating systems.

All missing software prerequisites will be automatically installed during the upgrade process. See the *Shavlik Protect Installation Guide* for the complete list of system requirements.

Note: Windows XP Professional, Windows Vista, Windows Server 2003 Family, and Windows Server 2008 Family are no longer supported for use as a console operating system. X86 platforms are also no longer supported for use as a console.

User Account Requirements for Performing an Upgrade

In order to perform an upgrade your user account must meet the following requirements:

- The user performing the database upgrade must be a member of the db_owner role.
- If you have multiple consoles that share a database and are linking an additional console to a database that is already upgraded, the user account you use must be a member of the following database roles: db_datareader, db_datawriter, STExec, and STCatalogupdate. In addition, the service account used for background services must also be a member these roles. If your account is a member of the db_securityadmin and db_accessAdmin roles, the database upgrade tool will automatically attempt to map and configure the required roles for you.

UPGRADE PROCEDURE

Overview

This section describes how to upgrade from VMware vCenter Protect 8.x or Shavlik Protect 9.0 to Shavlik Protect 9.1. If you are taking this opportunity to move the console to a new machine and you want to perform the migration using the Migration Tool, see the *Shavlik Protect Migration Tool User's Guide* before performing the upgrade.

Before performing the upgrade, be sure to read the *Significant Changes and Enhancements* section on page 14 so you are aware of how the upgrade will affect your system.

Note: If you are currently using a version that is older than 8.x you must upgrade to version 8.x before upgrading to version 9.1. Use the following link to download version 8.0.2:

<http://www.shavlik.com/downloads/>

Performing the Upgrade

1. Compress the database used to store scan results, patch deployment results, and threat remediation results.

You can do this in SQL Server Management Studio by right-clicking the ShavlikScans database and selecting **Tasks > Shrink > Database**.

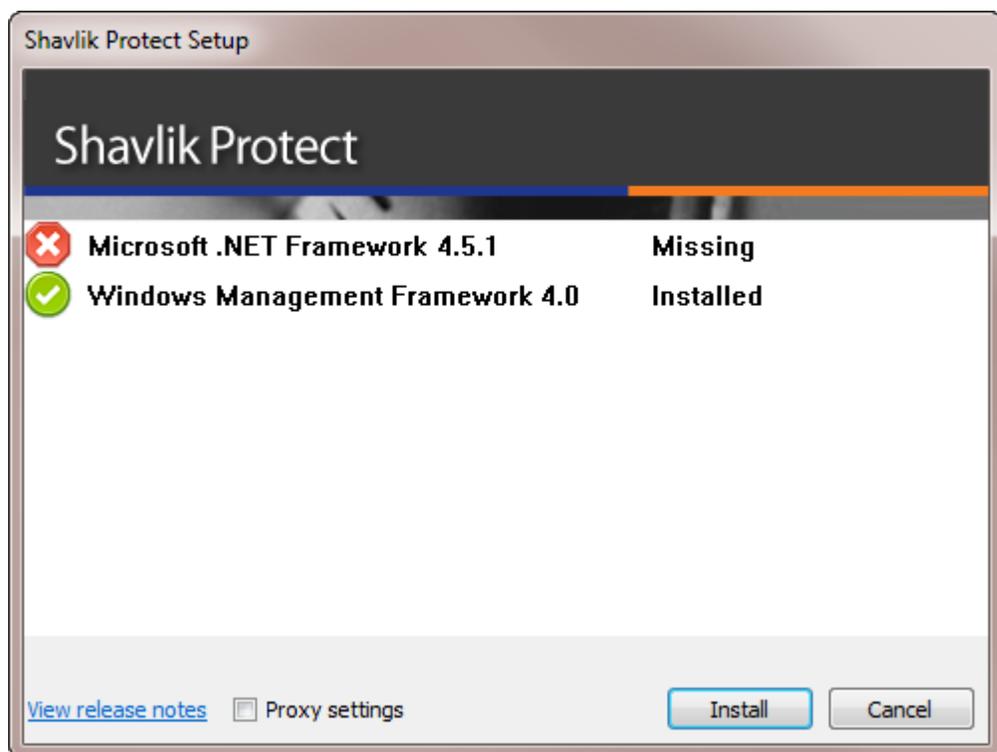
2. Create a backup of your current database using SQL Server Management Studio.
3. Close all programs running on the console machine, including Shavlik Protect or VMware vCenter Protect.
4. Download the Shavlik Protect 9.1 executable file to your console machine using the following link:

<http://www.shavlik.com/downloads/>

5. Begin the installation process using one of the following methods:
 - Double-click the file named **ShavlikProtect.exe**.
 - Type the file name at a command prompt. Doing so enables you to use one or more command-line options. You should consider this method if you are upgrading a very large database. The `DBCOMMANDTIMEOUT` option is used to specify the SQL command timeout value during installation. The default value is 15 minutes per GB. The minimum timeout value is the greater of 15 minutes per GB or 1800 seconds (30 minutes). If you have a 4 GB database you should increase the timeout value to 3600 seconds (60 minutes). For example:

```
ShavlikProtect /wi:"DBCOMMANDTIMEOUT =3600"
```

6. Respond to the dialog that asks if you want to continue with the upgrade. If you click **Yes** a dialog similar to the following is displayed.



7. Click **Install** to install any missing prerequisites.

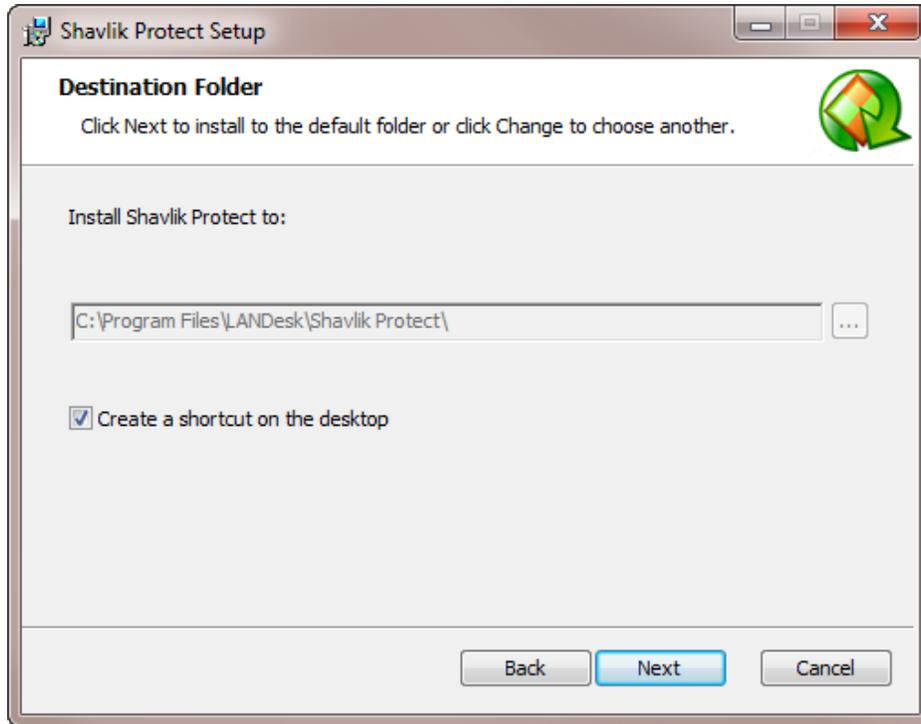
The Setup Wizard may need to perform a reboot during this portion of the installation process. If a reboot is required, when the machine is restarted the Setup dialog will reappear. Simply click **Install** again to proceed with the upgrade.

The **Welcome** dialog is displayed.
8. Read the information on the **Welcome** dialog and then click **Next**.

The license agreement is displayed. You must accept the terms of the license agreement in order to install the program.

9. To continue with the installation click **Next**.

The **Destination Folder** dialog is displayed.



10. If you want to change the default location of the program, click the browse button and choose a new location. You also have the option here to install a shortcut icon on your desktop. When you are done, click **Next**.

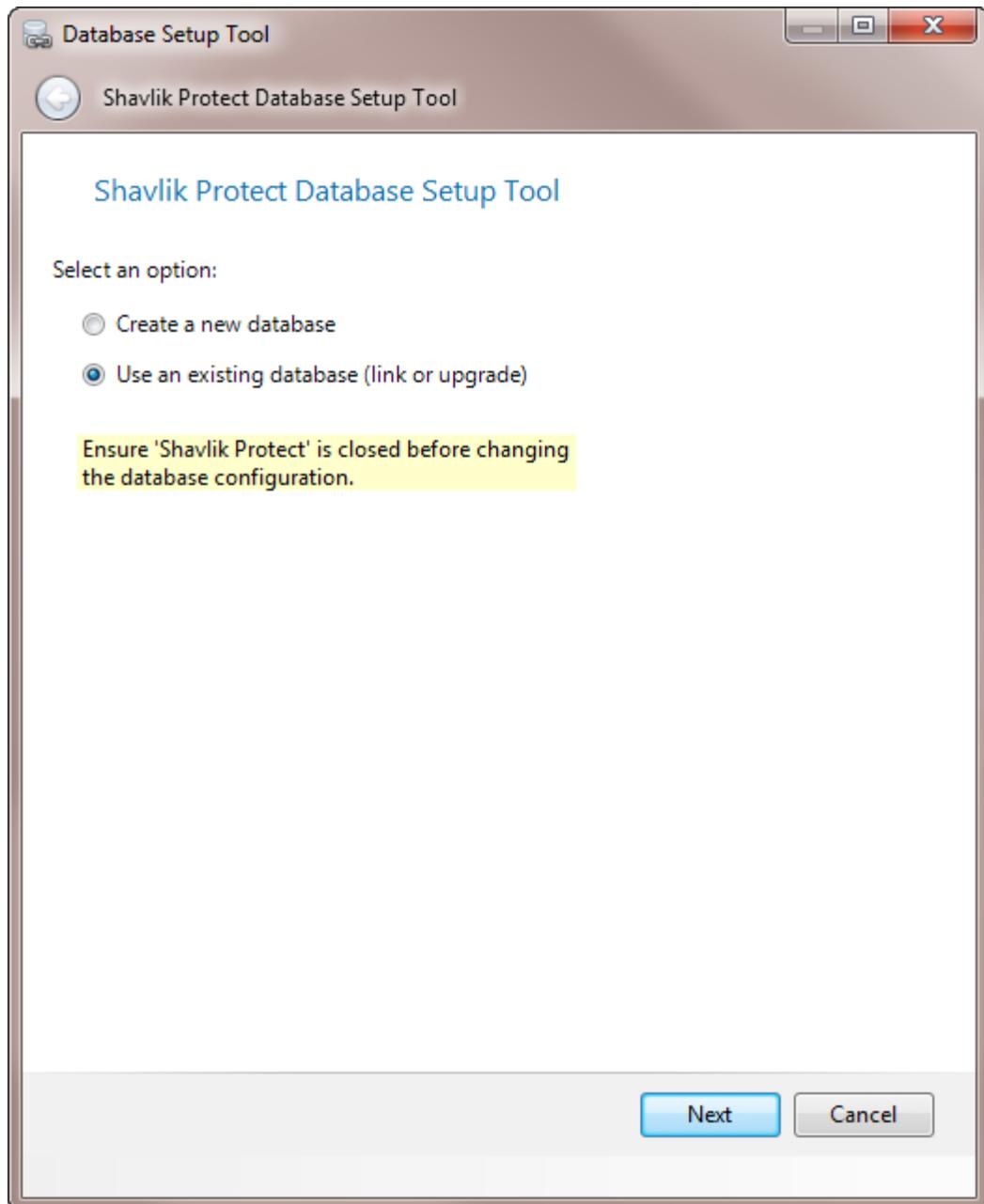
The **Product Improvement Program** dialog is displayed. Read the description and decide if you agree to participate in the program. The program enables Shavlik to collect product usage information that will help improve future versions of the product.

11. Click **Next**.

The **Ready to Install** dialog is displayed.

12. To begin the installation, click **Install**.

Near the end of the installation process the **Database Setup Tool** dialog is displayed.



Important! In the next step DO NOT select **Create a new database**. If you do a new database will be created and your existing data will not be used.

13. Make sure **Use an existing database** is selected and then click **Next**.

A dialog similar to the following is displayed:

The screenshot shows the 'Database Setup Tool' window with the following configuration options:

- Choose a database server and instance:**
 - Server name: JOE-DELLWIN7\SQLEXPRESS
 - Database name: Protect
- Choose how interactive users will connect to the database:**
 - Authentication method: Integrated Windows Authentication
 - User name: (empty text box)
 - Password: (empty text box)
 - Test server connection button
- Choose how services will connect to the database:**
 - Using Integrated Windows Authentication with remote databases requires Kerberos. (highlighted)
 - Use alternate credentials for console services
 - Authentication method: Integrated Windows Authentication
 - User name: (empty text box)
 - Password: (empty text box)

At the bottom right, there are 'Next' and 'Cancel' buttons.

14. Use the boxes provided to define how users and services will access the SQL Server database.

Choose a database server and instance

- **Server name:** You can specify a machine or you can specify a machine and the SQL Server instance running on that machine.
- **Database name:** Specify the database name you want to use. The default database name beginning in version 8.0 is **Protect**.

Choose how interactive users will connect to the database

Specify the credentials you want the program to use when a user performs an action that requires access to the database.

- **Integrated Windows Authentication:** This is the recommended and default option. Shavlik Protect will use the credentials of the currently logged on user to connect to the SQL Server database. The **User name** and **Password** boxes will be unavailable.
- **Specific Windows User:** Select this option only if the SQL Server database is on a remote machine. This option will have no effect if the database is on the local (console) machine. (See *Supplying Credentials* in the **Shavlik Protect Administration Guide** for more information about local machine credentials.) All Shavlik Protect users will use the supplied credentials when performing actions that require interaction with the remote SQL Server database.
- **SQL Authentication:** Select this option to enter a specific user name and password combination when logging on to the specified SQL Server.

Caution! If you supply SQL authentication credentials and have not implemented SSL encryption for SQL connections, the credentials will be passed over the network in clear text.

- **Test database connection:** To verify that the program can use the supplied interactive user credentials to connect to the database, click this button.

Choose how services will connect to the database

Specify the credentials you want the background services to use when making the connection to the database. These are the credentials that the results importer, various agent operations, and other services will use to log on to SQL Server and provide status.

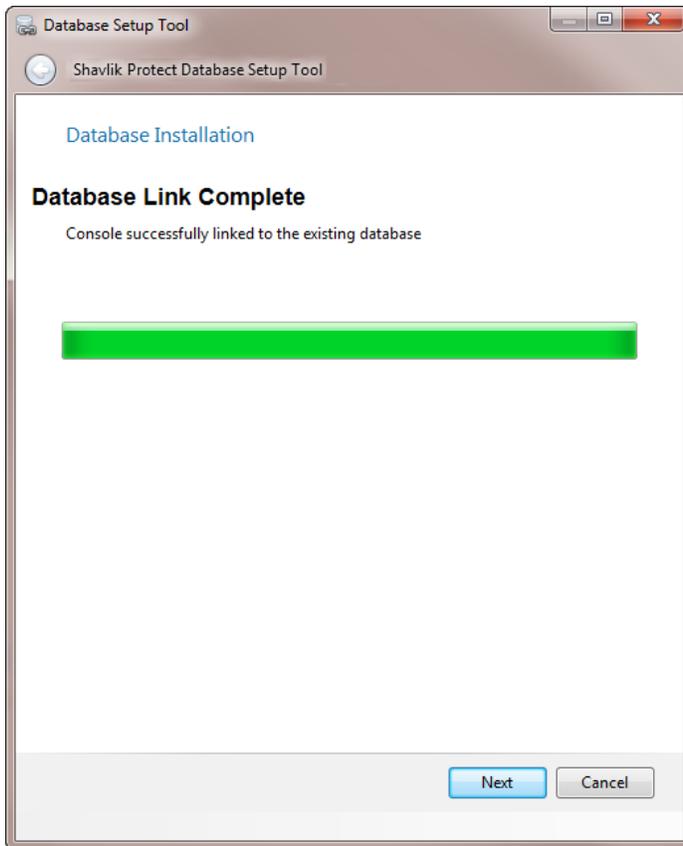
- **Use alternate credentials for console services:**
 - If the SQL Server database is installed on the local machine you will typically ignore this option by **not** enabling this check box. In this case the same credentials and mode of authentication that you specified above for interactive users will be used.
 - You will typically only enable this check box if the SQL Server database is on a remote machine. When the database is on a remote machine you need an account that can authenticate to the database on the remote database server.
- **Authentication method:** Available only if **Use alternate credentials for console services** is enabled.
 - **Integrated Windows Authentication:** Selecting this option means that the machine account will be used to connect to the remote SQL Server. The Kerberos network authentication protocol must be available in order to securely transmit the credentials. The **User name** and **Password** boxes will be unavailable.

Note: If you choose **Integrated Windows Authentication** the installation program will attempt to create a SQL Server login for the machine account. If the account creation process fails, see *SQL Server Post-Installation Notes* in the *Shavlik Protect 9.1 Installation Guide* for instructions on manually configuring a remote SQL Server to accept machine account credentials. Do this after you complete the Shavlik Protect upgrade process but before you start the program.

- **Specific Windows User:** Select this option to enter a specific user name and password combination. Shavlik Protect's background services will use these credentials to connect to the SQL Server database. This is a good fallback option if for some reason you have difficulties implementing integrated Windows authentication.
 - **SQL Authentication:** Select this option to provide a specific user name and password combination for the services to use when logging on to SQL Server.
15. After providing all the required information, click **Next**.

Note: If the installation program detects a problem with any of the specified credentials, an error message will be displayed. This typically indicates that a user account you specified does not exist. Make a correction and try again.

The console is linked to your existing database. When the link process is complete the following dialog is displayed:



16. Click **Next**.
17. On the **Installation Complete** dialog click **Finish**.
18. On the **Completed the Shavlik Protect Setup Wizard** dialog, enable the **Launch Shavlik Protect** check box and then click **Finish**.

UPGRADE TASKS PERFORMED ON THE CONSOLE

In order to complete the upgrade, the following tasks must be performed on the Shavlik Protect console.

Assign Aliases to the Console

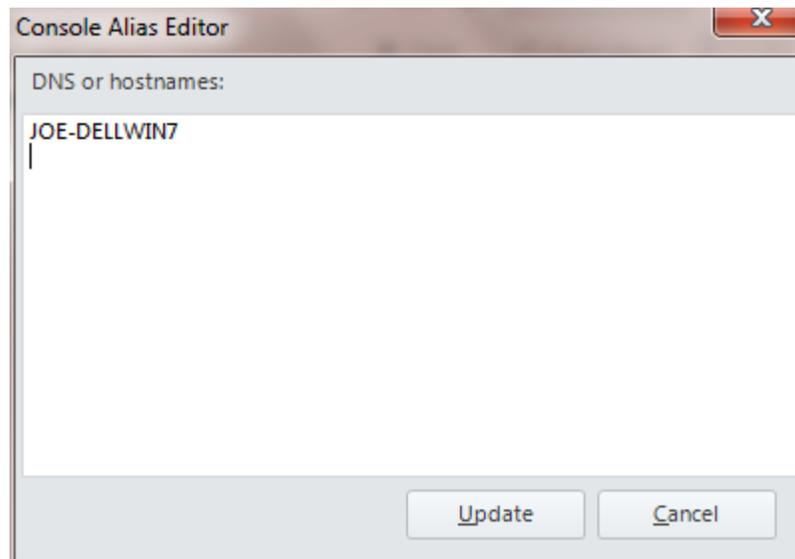
This task is necessary only if you use agents and if one of the following conditions exists:

- You have assigned the console machine to a new domain
- You have given the console a new common name or IP address
- You manually installed your agents and they use an IP address to communicate with the console

Under these conditions you must use the **Console Alias Editor** tool to identify the old console names or addresses as trusted aliases. If you don't, when an agent checks in with the Shavlik Protect console it will not be able to verify that the machine it contacted is a trusted machine.

1. Select **Tools > Console alias editor**.

The **Console Alias Editor** dialog is displayed. It will contain the names and IP addresses currently used to identify the console machine. For example:

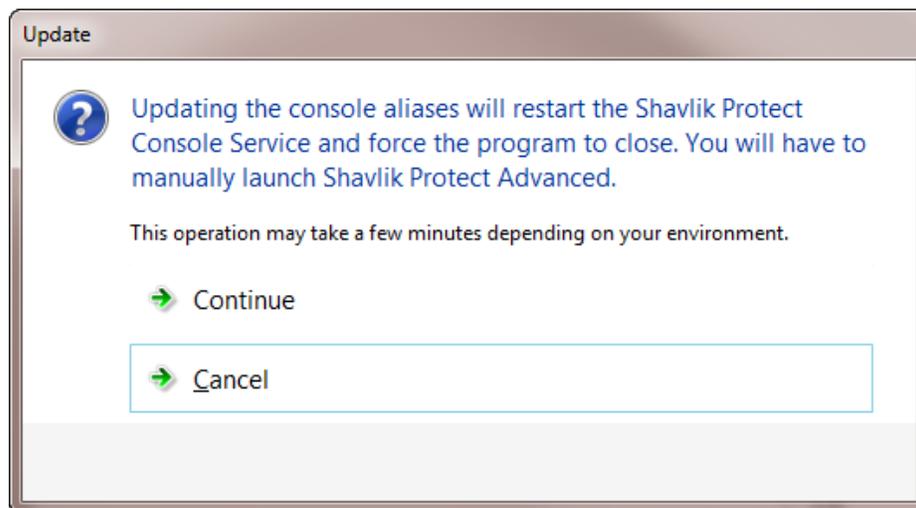


2. Type the names and/or IP addresses that you want to use as an alias for the console machine.

You can specify IP addresses using either an IPv4 or IPv6 format.

3. Click **Update**.

The following dialog is displayed:



In order to update the console aliases the console service must be restarted and Shavlik Protect must be closed and then manually restarted.

IMPORTANT! The agents will not recognize a new alias until after they check-in with the restarted console. The check-in must be initiated by an agent either manually using the agent client program or via a scheduled check-in; a check-in command issued from the console to an agent will not update the console certificate.

Synchronize Your Distribution Servers

You must update your distribution servers with the latest patches and/or scan engines and XML definition files contained on the console. This is particularly important if your agents use distribution servers to download these files. The distribution servers must be synchronized with the updated console files **prior** to the agents performing their check-in.

To synchronize your distribution servers:

1. Select **Help > Refresh files** to make sure the console contains all the latest files.
2. Select **Tools > Operations > Distribution Servers**.
3. In the **Add scheduled sync** box in the top pane, select the component you want to synchronize.
4. In the top pane, select which distribution server you want to synchronize with the console.
5. Click **Add scheduled sync**.
6. Specify when you want the synchronization to occur and then click **Save**.
7. In the **Schedule automatic synchronization** pane, select the scheduled synchronization entry.
8. Click **Run now**.

Don't worry if the agents happen to check in before you have finished synchronizing the distribution servers. The agents will be updated the next time a scheduled task is run or the agent updates its binaries.

Refresh Your License (Offline Consoles Only)

If your console is offline (it does not have an Internet connection), in order to view and use the new features in Shavlik Protect 9.1 you must manually refresh your license. For information on activating a disconnected console, in the Help system see **Installation and Setup > Getting Started > Activating the Program**.

If the console is online the license will be automatically refreshed during the upgrade process.

Re-establish Security Between Your Data Rollup Consoles

If you use multiple consoles and have a data rollup configuration in place, you must re-establish the security association between the central console and each remote console. This is because the certificates used beginning in v9.0 are different; they are stronger than in previous versions and provide enhanced security.

IMPORTANT! Once you begin the upgrade process, no data rollup activity will take place until both the central console and the remote console have been upgraded and the security association between the two consoles has been re-established. For this reason it is strongly recommended that you upgrade your consoles in tandem and at a time when you expect very little data rollup activity.

To re-establish the security association:

1. Upgrade the central console.
2. Export the central console's settings to a .drs file.
 - a. Select **Tools > Operations > Data Rollup**.
 - b. In the **Configure Data Rollup settings file** area, select the IP address of the central console.
 - c. Click **Export Settings** and save the file to a network share or to a removable media.
3. Upgrade each remote console.
4. At each remote console, import the central console's settings.
 - a. Select **Tools > Operations > Data Rollup**.
 - b. Click **Import Settings** and open the Data Rollup Settings (.drs) file that you exported from the central console.

For more information on data rollup, in the Help system see **Managing Multiple Consoles > Data Rollup Configuration**.

SIGNIFICANT CHANGES & ENHANCEMENTS IN SHAVLIK PROTECT

9.1

Localized Console Experience

Shavlik Protect is now localized for the following languages: Chinese (Standard), Chinese (Traditional), French, German, Italian, Japanese, Korean, Portuguese (Brazil), Russian, and Spanish.

Localized SafeReboot

The SafeReboot dialog has been localized to support the same language set as above. The language of the client machine's operating system will determine which language is displayed. The SafeReboot dialog will default to English if the operating system language is not supported.

Online Help

Localized versions of the Help system are now available on the Web. The help text will be localized according to the language specified on the **Display Options** dialog. An Internet connection is required in order to access localized help text from the console. For environments that do not have direct Internet access, an English-only version of the Help system is still shipped with the product and is available locally on the console.

IPv6 Support

Shavlik Protect now supports IPv6. IPv4 is still the preferred IP scheme that will be displayed in the UI, so for environments that happen to have IPv6 turned on but are not utilizing it yet, the IPv4 address will be the default address shown for machines.

Report Views

In conjunction with this release, Shavlik is providing a Report Views Guide that describes how to use database views within SQL Server database queries to generate custom reports for Shavlik Protect. This also allows for third-party tools such as SQL Reporting Services, Crystal Reports, Splunk, and others to be used to create reports for Shavlik Protect.

Migration Tool

In conjunction with this release, Shavlik is providing a Migration Tool that simplifies the process of migrating your existing Shavlik Protect console to a new machine. The Migration Tool captures core and user data from your existing console and rewrites it into a new Shavlik Protect installation.

Improved Machine Resolution in FQDN and IP-only Environments

For customers who have environments that require FQDN or IP to resolve machines, Shavlik has made significant improvements to our machine resolver so that Shavlik Protect will retain multiple resolution methods for each machine. FQDN, Hostname, and IP can all be attempted to ensure the machine is resolved correctly.

Scan by Vendor Severity

The patch scan templates and the assessment engine have been updated to include filters that enable you to scan by vendor severity. You can now scan specifically for Critical, Important, Moderate, Low, or Unassigned security or non-security patches.

Deployment Workflow Enhancements

The deployment workflow has been consolidated to reduce the many branches that existed in the deployment experience. When you perform a deployment now you will see the same level of detail as a scheduled deployment. The deployment results are also available for viewing after the deployment is complete.

Machine-level Status in Operation Monitor and in Deployment Tracker

A machine-level status has been added to the deployment flows. This gives you better visibility into the current state of your deployments.

Deployment Return Codes

Deployment return codes are now available within Deployment Tracker and within the deployment reports. Making the return codes available within the Shavlik Protect UI eliminates the need to comb through target machine logs for the return codes.

Active Directory (AD) Enhancements

Shavlik Protect is now able to discover any Active Directory Forests and Domains that are broadcasting themselves to the console machine's domain. In addition, you can now add additional Forests and Domains and save credentials for these items. This allows you to browse these items without having to reconnect each time.