Ivanti Endpoint Security 2022.2 (Version 8.6 Update 4)

Upgrade Guide

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Notices

Version Information

Ivanti Endpoint Security Upgrade Guide - Ivanti Endpoint Security Version 8.6 Update 4
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Chapter

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Upgrading to 8.6 Update 4

In this chapter:

• Upgrade Preparations

This upgrade guide is a resource to guide you through the upgrade to Ivanti Endpoint Security 8.6 Update 4.

Upgrade Preparations

Before upgrading your Ivanti Endpoint Security server to version 8.6 Update 4, you must prepare your environment.

IES Version Requirements	Only IES 8.6 and later can be updated to 8.6 Update 4. • Upgradable Server Versions on page 11 • Upgradable Agent Versions on page 11
Operating System Requirements	The server must be installed on one of the following operating systems to be eligable to upgrade: • Microsoft Windows Server 2022 (Standard and Datacenter editions) • Microsoft Windows Server 2019 (Standard and Datacenter editions) • Microsoft Windows Server 2016 (Standard and Datacenter editions) • Microsoft Windows Server 2012 R2 (Standard, Datacenter, and Foundation editions) • Microsoft Windows Server 2012 (Standard and Datacenter editions)
Microsoft SQL Server Requirements	The IES upgrade requires that your database instance for IES is SQL Server 2012 or a later SQL Server release.

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User Permissions	IES upgrades to 8.6 Update 4 are completed using IES Installation Manager, which uses the *serviceadmin* account to update the database. This means that the user completing the upgrade does not require administrative rights to complete the upgrade. However, this user does require access to Installation Manager.
Installation Manager Access	Users performing the upgrade require access to Installation Manager, so they must meet one of the following requirements: • The user must be assigned the administrator role within IES. • The user must be assigned a custom role with the Installation Manager access right. See Ivanti Endpoint Security User Guide for more information about users and roles.
Firewall Settings	IES 8.6 Update 4 requires access to the following Web sites: • https://cdn.securegss.net • http://cache.patchlinksecure.net • http://cache.lumension.com • http://gssnews.lumension.com • http://download.windowsupdate.com • http://www.download.windowsupdate.com (For Microsoft content) • http://go.microsoft.com (For Microsoft content) • http://ardownload.adobe.com (For Adobe content) • http://swupdl.adobe.com (For Adobe content) • http://armdl.adobe.com (For Adobe content) • http://download.adobe.com (For Adobe content) • **Important:** • Refer to Lumension's New Content Architecture and Lumension Global Subscription Server and GSS Repository Information for additional URLs and IP Addresses which may be required depending upon your configuration and content subscriptions. • The firewalls on your server may require modification to access these URLs. If your corporate policies do not allow you to make the necessary firewall modifications, please contact Ivanti Support for a recommended configuration.

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Additional Prerequisites	During upgrade, you are prompted to install software bundled in with the upgrade if they are not already installed on the server. You may be prompted to reboot your server.
AntiVirus Products	AntiVirus products can prevent the necessary installation processes from running correctly. To ensure a successful installation of IES 8.6 Update 4 you must stop or disable any third-party AntiVirus products (such as McAfee, Trend-micro, Symantec, and so on) before upgrade.
	If you use IES AntiVirus as your AntiVirus solution, you do not have to disable it.
Storage Folder Backup	Although the storage folder can grow quite large, creation of a backup content storage folder is recommended for Patch and Remediation users. By default, the storage folder is %Installation Directory%\HEAT Software\EMSS\Content.

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Database Backup

During upgrade, IES Installation Manager updates the existing IES databases. Therefore, creation of database backups before upgrade is recommended.

Note: Some of the databases listed may not be present on server. Their presence is conditional based on your server configuration and module licensing.

Table 1: Database Names

Database Name	Product
PLUS	Ivanti Endpoint Security
PLUS_Reports	IES Enterprise Reporting Client
STAT_Guardian	Ivanti Endpoint Security
UPCCommon	Ivanti Endpoint Security
UPCExtended	Ivanti Endpoint Security
ERS	IES Enterprise Reporting
ERS_Staging	IES Enterprise Reporting
ReportServer[1]	Microsoft SQL Server Reporting Services
ReportServerTempDB[1]	Microsoft SQL Server Reporting Services

1. Subscription features available in Microsoft SQL Server Reporting Services can be implemented in HEAT Enterprise Reporting. By default, the database names are ReportServer and ReportServerTempDB.
2. Data protection capabilities in is enhanced with a full disk encryption add-on from Sophos. The installation of results in a Safeguard database.

Note: Refer to *Creating a Database Backup* in the Ivanti Endpoint Security User Guide for additional information.

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Upgradable Server Versions

You can upgrade the following versions of the Ivanti Endpoint Security server to 8.6 Update 4.

You can view the version you have installed by opening the Web console and selecting **Help** > **Technical Support** and scrolling to **Suite Version Information**.

Release	Server Suite Version
IES 8.6 Update 3	8.6.0.40
IES 8.6 Update 2	8.6.0.30
IES 8.6 Update 1	8.6.0.20
IES 8.6	8.6.0.10

Note: Upgrading from any pre-8.6 server to 8.6 Update 4 is a two-step process. You must first upgrade your server to 8.6, and then upgrade to 8.6 Update 4.

Upgradable Agent Versions

You can upgrade the following versions of the Ivanti Endpoint Security Agent to 8.6 Update 4.

You can view the agent version installed on each endpoint by opening the Web console and selecting **Manage** > **Endpoints**.

Release	Agent Version
IES 8.6 Update 3	8.6.0.40
IES 8.6 Update 2	8.6.0.30
IES 8.6 Update 1	8.6.0.20
IES 8.6	8.6.0.10

Note: Upgrading from any pre-8.6 agent to 8.6 Update 4 is a two-step process. You must first upgrade your server to 8.6, and then upgrade to 8.6 Update 4.

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Chapter

2

Upgrading Your Server

In this chapter:

• Upgrading IES

After preparing for the upgrade, you can begin upgrading your Ivanti Endpoint Security server to version 8.6 Update 4.

Upgrading IES

You can use IES Installation Manager to download new or update existing components and install them automatically.

Prerequisites:

• Your server is running an upgradable version. See Upgradable Server Versions on page 11.
• Complete each item in the Upgrade Preparations on page 7.

Upgrade your old version of to 8.6 Update 4 using Installation Manager.

1. Within the IES Web console, select **Tools** > **Launch Installation Manager**.

   Step Result: Installation Manager opens.

2. If necessary, upgrade Installation Manager by clicking **Install**. Click **Close** when the upgrade finishes.

3. If necessary, click **Reboot Server**, and then log back into the Web console.

4. Select the latest **Suite Version** radio button.

5. [Optional] Select any new components you want to install.
   When updating the suite version, modules already installed are automatically selected for update and cannot be deselected.

6. Click **Install**.

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8. If the **_Prerequisites_** dialog opens, resolve the requirements before continuing. Complete the substeps below.

    If the **_Database backup recommended_** dialog opens, proceed to Step 9.

    a) Click **Install** to install the requirements.

    > **Tip:**
    > *   Click **Retry** to re-access the system for requirements.
    > *   Click **Print** to print the requirements.

    b) If necessary, **Reboot Server** and then log back in to IES.

9. If you haven't already, create a database backup before clicking **Next**.

    Step Result: The **_Ready to Install_** dialog opens.

10. Click the **terms and conditions** to review the user agreement.

11. Click **Install** to begin installation. If prompted, click **OK** to proceed.

    Installation takes several minutes.

12. After installation completes, review the **_Confirmation_** page. Click **Finish** when you are done.

    > **Tip:**
    > *   Click **View install log** to review the install log.
    > *   Clear the **Launch** checkbox to cancel relaunch of the Web console.

Result: Your server and modules are upgraded to version 8.6 Update 4.

After Completing This Task:
Begin upgrading your endpoints to IES Agent 8.6 Update 4.

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Chapter

3

Upgrading Your Agents

In this chapter:

• Upgrading Endpoints

After upgrading the server to 8.6 Update 4, you can upgrade your agents to version 8.6 Update 4 using the Web console.

Upgrading Endpoints

From the *Endpoints* page, you can upgrade your endpoints to the latest version of the Ivanti Endpoint Security Agent. You can update all the endpoints at once, but, as a test, you should upgrade just a few endpoints.

Upgrade your agents using the *Manage Agent Versions* dialog, which can be opened from any tab on the *Endpoints* page.

1. From the **Navigation Menu**, select **Manage** > **Endpoints**.

2. Select the endpoints you want to upgrade.

3. Click **Agent Versions**.

    Step Result: The *Manage Agent Versions* dialog opens.

4. Select the latest agent version from the **Select One** menu and click **Apply to All Agents**.

Tip:

*   You can also select an agent version for each endpoint by using the **Agent Version** column menu.
*   The agent versions available for upgrading can be selected from the *Agents* tab on the *Options* page.

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5. Click **OK**.

Result: Your endpoints begin upgrading.

- Endpoint upgrade progress displays on the **Manage** > **Endpoints** page.
- Endpoints in the process of upgrading display the ⚙ icon in the **Agent Version** column.
- When the icons stops displaying, and the agent version updates, the upgrade is complete.

After Completing This Task:
If you had pre-8.6 endpoints in your environment that could not upgrade directly to 8.6 Update 4, as they required upgrade to 8.6 first, perform this endpoint upgrade procedure once more.

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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 Ivanti Endpoint Security 8.6 Update 4.

Top Upgrade Issues

The following list identifies the top reasons why you cannot complete upgrade.

1. You do not have adequate permission to perform the upgrade. Only users assigned the *Administrator* role (or the *Installation Manager* access right) can access Installation Manager.
2. Your system does not have the minimum required Windows components, or does not meet the minimum system requirements.
   Refer to the Ivanti Endpoint Security Server Install Guide for a complete list of both required and recommended system requirements.
3. Failure to stop or disable an AntiVirus product (such as McAfee, Trend-micro, Symantec, and so on) prior to running the upgrade.

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 upgrade. If you have an upgrade issue and you currently have an AntiVirus product running, Ivanti Support will be unable to assist you until the AntiVirus product has been disabled.

Frequently Asked Questions

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

1. Is there a cost for the upgrade?

   No, as long as you are a current Ivanti Endpoint Security customer you can download and install the latest version without an additional charge.

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2. I cannot remember my login and/or password to the Ivanti Community. What do I do?
   Click the **Forgot my 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 Ivanti Support for assistance.

3. 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 to take advantage of the new IES Agents.

4. My upgrade appeared to go smoothly, however my replication appears to be taking a long time. How long should this first replication take?
   After the upgrade, 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.

5. What should I do if I want to get a separate license to build and test my IES server before I upgrade or move my agents?
   Contact your Ivanti Account Manager for additional details. If necessary, refer to Ivanti Support for contact details.

6. Who do I contact if I have questions or would like assistance with the upgrade?
   Please contact the Ivanti Support Team with any questions or requests for assistance.

7. Who do I contact if I have problems with the upgrade or the upgrade fails?
   Please contact the Ivanti Support Team with any questions or requests for assistance.

Appendix
B

Upgrade Checklists

In this appendix:

• Checklist to Upgrade to
  8.6 Update 4

The following checklists will assist you when upgrading to 8.6 Update 4.

Checklist to Upgrade to 8.6 Update 4

The following checklist identifies the tasks necessary to upgrade to Ivanti Endpoint Security (IES) 8.6 Update 4. By upgrading to IES 8.6 Update 4 you can take advantage of new features.

☐ Your firewall is configured to access required URLs.

Refer to *Firewall Settings* under Upgrade Preparations on page 7 for details.

☐ You are logged into the Web console as a user with access to Installation Manager.

☐ You have disabled any AntiVirus products running on your server before running Installation Manager. If you use HEAT AntiVirus as your AntiVirus, you can leave it running.

Note: An AntiVirus product can prevent the necessary installation processes from running correctly.

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You have created a backup of the databases listed below so that your IES server can roll back if upgrade fails.

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

Table 2: Database Names

Database Name	Product
PLUS	HEAT Endpoint Management and Security Suite
PLUS_Reports	HEAT Enterprise Reporting Client
STAT_Guardian	HEAT Endpoint Management and Security Suite
UPCCommon	HEAT Endpoint Management and Security Suite
UPCExtended	HEAT Endpoint Management and Security Suite
ERS	HEAT Enterprise Reporting
ERS_Staging	HEAT Enterprise Reporting
ReportServer[1]	Microsoft SQL Server Reporting Services
ReportServerTempDB[1]	Microsoft SQL Server Reporting Services
(1) Subscription features available in Microsoft SQL Server Reporting Services can be implemented in IES Enterprise Reporting. By default, the database names are ReportServer and ReportServerTempDB.	

You have used Installation Manager to upgrade the IES platform and components.

Refer to Upgrading IES on page 13 for step-by-step instructions.

You have upgraded your agents. Refer to Upgrading Your Agents on page 15 for additional details.

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