

SurfControl Report Central 2.6 Upgrade Instructions

WHY UPGRADE?

This release of SurfControl Report Central (SRC) includes new features and improvements and may resolve previous issues. SurfControl customers currently running earlier versions are encouraged to upgrade to version 2.6. New features in this release include:

Return on Investment (ROI) Report

The Report Manager now includes a new ROI report, which gives you visibility of the cost savings for your organization resulting from the implementation of SurfControl E-mail Filter.

Inbound Traffic Summary - Dashboard Chart

The Threat Dashboard now displays a summary pie chart which quickly and clearly shows the breakdown of your inbound e-mail traffic by type, such as spam, virus-infected, legitimate, and inappropriate.

SurfControl Reputation Service Reporting

With E-mail Filter 6.0, incoming e-mail connections can now be automatically checked against SurfControl's own DNS Blacklist to help determine whether the sender's IP address can be trusted. Report Central's connection-level reports will allow you to see the effectiveness of this additional protection.

BEFORE YOU UPGRADE

Before you upgrade to SurfControl Report Central version 2.6 you should consider the following:

Web Filter Specific

If you are running a version of SRC for Web Filter prior to version 2.0.3, you will need to upgrade to this version before upgrading to 2.6. You can download version 2.0.3 [here](#).

E-mail Filter Specific

- You must have upgraded E-mail Filter to either version 5.5 or 6.0 before upgrading SRC.
- If you are upgrading from a pre-2.5 version of SRC, you might want to run all your previous SRC reports because SRC 2.6 does not support old data. However, please be aware that this can be time-consuming.
- If you are upgrading from a pre-2.5 version of SRC, the Post Install Configuration wizard, which is opened the first time that you log in after upgrade, will enable you to create a Reporting database. This will be populated from your E-mail Filter 5.5/6.0 STEMLog database.
- If you are upgrading from a pre-2.5 version of SRC, Senders and Recipients will be renamed as Internal Addresses and External Addresses.

General Upgrade Considerations

- Ensure that your system meets SurfControl Report Central minimum hardware and software requirements. Check the system requirements page on our Web site.
- If you are running both components (SRC for E-mail Filter and SRC for Web Filter), and upgrade only one of the components, **do not** run a repair using Add/Remove.

AFTER YOU UPGRADE – SRC FOR WEB FILTER

When you have upgraded to SRC 2.6 for Web Filter, you will need to update your database to be able to see the data in Drill-Down Manager. To update the database information in SRC:

- 1 In the **Configuration** menu, select **Database Connection**.
- 2 Select the database, and then click **Edit Database Settings**.
- 3 Click the **Update Tasks** tab, and then select the option **Update information for Drill-Down Reports now**.
- 4 Select **OK**.

Depending on the size of your database, this update could take some time to complete.

AFTER YOU UPGRADE – SRC FOR E-MAIL FILTER (PRE-2.5 ONLY)

If you are upgrading from a pre-2.5 version of SRC 2.6 for E-mail Filter, you will need to update your database to be able to see the data in Drill-Down Manager. To update the database:

- 1 In the **Configuration** menu, select **Database Connection**.
- 2 Select the database, and then click **Edit Database Settings**.
- 3 Click the **Update Tasks** tab, and then click **Update Now**.
- 4 Click **OK**.

Depending on the size of your database, this update could take some time to complete.

UPGRADE INSTRUCTIONS

Web Filter

Run 'Setup' to open the Report Central installation wizard, which will walk you through the upgrade process.

E-mail Filter

Run 'Setup' to open the Report Central installation wizard, which will walk you through the upgrade process.

If you are upgrading from a pre-2.5 version, before using the product you will need to complete the Post Install Configuration wizard, which enables you to create links to your SRC for E-mail Filter database. This wizard is displayed once, and opens automatically when you first log in to SRC after you have upgraded.