

# Upgrading to SurfControl Web Filter Version 5.0

Please view the [README](#) and [Release Note](#) regarding v5.0

The release of SurfControl Web Filter version 5.0 includes new features and improvements and may resolve previous issues. SurfControl customers currently running earlier versions are encouraged to upgrade to the 5.0 version.

For complete installation and configuration information, please see the SurfControl Web Filter [Installation Guide](#). This is included in the product zip file as an Adobe Acrobat (PDF) document.

If you have a current SurfControl license, the 30 day evaluation version becomes a full version when installed over a previous version, or serialized with your SurfControl serial number.

**Note:** The Virtual Control Agent (VCA) product (which is an add-on utility) will run as an evaluation version until serialized, but categorization work performed during the evaluation period is not saved

## Before You Upgrade

Before you upgrade to SurfControl Web Filter version 5.0 there are a few issues you should be aware of:

- You cannot rollback the upgrade once it is completed. The upgrade process includes changing the database structure. Once your database has been upgraded, it cannot be converted back to the version of a previous release.
- If your existing version of SurfControl Web Filter is configured to write to flat files, it is VERY IMPORTANT that you perform any database updates before upgrading to SurfControl Web Filter v5.0. Access data may be lost if this is not done.
- Ensure that your system meets SurfControl Web Filter for Windows prerequisites. Check the SurfControl [System Requirements](#) page on our website.
- Before installing the software, please read the SurfControl Web Filter [README](#) file and [Installation Guide](#). SurfControl Web Filter [README](#) and Installation guides can be found in the downloaded unzipped installation directory, on the CD-ROM (under 'Which Solution' on the main menu page), or on the SurfControl web site where they can be read or easily downloaded.
- Microsoft MSDE has a 2 GB data size limit. During an upgrade it is possible that your database will go beyond this limit even if it below it before beginning the upgrade. It is recommended that you purge your existing database to less than 1 GB before upgrading.
- Before you upgrade:
  - Perform a full backup of your database. We strongly recommend archiving or purging the existing information so that you upgrade only relevant information. This will also shorten the time and disk space required for the upgrade.
  - The SurfControl system being upgraded should have between two to three times as much free disk space as the size of the database, this will ensure there are no problems creating temporary files required to perform the upgrade process.
  - Large databases may take several hours to restructure as part of the product upgrade. It is recommended that you start the upgrade process at the end of the day and let it run overnight. The upgrade procedure was created to allow you to enter the necessary

information (activation key, upgrade choices, and so on), then leave the upgrade running unattended, as the last step in the upgrade is the database work.

## Upgrading from SurfControl Web Filter Version 4.5

Simply run setup and the SurfControl installation wizard will walk you through the configuration windows.

During the upgrade process you can choose to 'Keep Existing Settings.' When you choose to keep existing settings, all your previous configuration settings will be kept, your selected SurfControl database will be automatically upgraded, and your users, Internet accesses, and rules data will be kept.

Ensure that you install the upgrade over any SurfControl Collectors (secondary SurfControl installations) or SurfControl Client installations you have installed as well.

## Upgrading from SurfControl Web Filter Version 4.2

To upgrade from v4.2 you have two choices:

- Uninstall version 4.2 and perform a full installation of v5.0. This will involve re-creating all rules, manually categorized sites, reports and other configuration options:
  - Archive our existing database.
  - Uninstall v4.2
  - Install v5.0 from either the CD or downloaded from this website.
- Upgrade to 4.5 and then to 5.0
  - **Download and install MSDE**
  - v4.5 can be downloaded from [here](#)

## Upgrading from SurfControl Web Filter versions earlier than 4.2

Completely uninstall your existing installation of SurfControl Web Filter. Please check your system meets the system requirements for 5.0, and then proceed to install SurfControl Web Filter 5.0.

### After you upgrade

- After the upgrade is complete, select the "Finish" button. If you have not yet read the ReadMe file, it is highly recommended that you keep the "Select to view **README** file" check box selected. It contains important information customers should be aware of. The **README** file can also be found on our web site or in the root SurfControl installation directory (C:\Program Files\SurfControl\SurfControl Web Filter\ReadMe.txt).
- Ensure the new upgrade installation is serialized, registered and updated with the latest SurfControl Category List update.
- SurfControl Web Filter version 5.0 will not work correctly with databases created in earlier versions unless they are upgraded to the newer database table schema. Only databases created in SurfControl versions 4.2 can be upgraded to a newer database format.

If you have any questions about upgrading your software, please don't hesitate to contact **Technical Support**.