Policy Patrol 10 Upgrade Guide

If you have Policy Patrol 7, 8, or 9 installed you can upgrade directly to version 10 and keep your existing configuration. If you are upgrading from Policy Patrol version 6 or earlier you must first upgrade to version 7 (for information on how to upgrade to Policy Patrol 7: http://www.policypatrol.com/assets/pp7-upgradeguide.pdf) and then upgrade to version 10.

Note: You require a new serial number for version 10. If you have a valid maintenance contract the serial number will be provided at no additional cost. If you do not have maintenance you will need to purchase an upgrade. For more information please contact sales at sales@redearthsoftware.com.

=> If you have a **32-bit clustered environment**, please refer to the Clustering guide for instructions on how to upgrade your installation (only applicable for 32-bit clusters):
http://www.policypatrol.com/assets/pp10-clustering.pdf

=> You must upgrade your server as well as any **remote administration** installations on separate machines.

=> If you are moving to **Exchange Server 2007/2010/2013** (and you will be installing Policy Patrol on the Exchange 2007/2010/2013 machine) you will need to download and install Policy Patrol for Exchange 2007/2010/2013 (64 bit). In this case the upgrade instructions will not apply since you will need to do a new installation. If you would like to keep your existing configuration, you must first upgrade your existing 32-bit installation to version 10 and then export the configuration from the 32-bit version 10 installation (select **Local** and go to **File** > **Export configuration**) and then import it on the 64-bit installation (select **Local server** and go to **File** > **Import configuration**). If you want to keep the contents of your monitoring folders, you must also copy the Policy Patrol monitoring folder (by default C:\Program Files\Red Earth Software\Policy Patrol Email\Monitoring) to the Exchange 2007/2010/2013 machine. Policy Patrol v.10 for Exchange 2007/2010/2013 (64-bit) can be downloaded from the following link: http://files.policypatrol.com/policypatrol64.exe.

New features in Policy Patrol 10:

- New Real-Time Phishing Black List
- New Anti-Spoofing Protection
- Metascan Online Multiple-AV Scanning (free edition)
- New Dashboard with Instant Overview of Threats Detected
- Audit Logs Now Accessible From Console
- New Test Email Feature for Email Signatures

- Improved User Interface
- Policy Patrol Mail Security 10 users free!

New: Advanced Threat Protection with Metascan

With the Metascan add-on, Policy Patrol Mail Security can scan email attachments with multiple (between 4 and 40) antimalware engines at once, significantly increasing the virus detection rate while maintaining fast scanning performance. Metascan can also perform file sanitization and file type checking, preventing zero-day and targeted attacks. Metascan is available as a server application that you install within your network (Metascan On-Premise), or as a cloud-based deployment that scans files in the cloud (Metascan Online). Download a trial version of Metascan On-Premise (http://www.policypatrol.com/policy-patrol-mail-security/download-metascan) or request your free Metascan Online subscription (http://www.policypatrol.com/request-free-metascan-online).

If you are upgrading from Policy Patrol version 7, 8 or 9

Note that the upgrade instructions are the same for each Policy Patrol edition: Policy Patrol Disclaimers, Policy Patrol Spam Filter, and Policy Patrol Mail Security.

Note: Before upgrading to Policy Patrol 10, please **make a backup** of your Policy Patrol 7/8/9 configuration by selecting **File** > **Export configuration** in the Policy Patrol Administration console. Note that this option is only available on the server itself (i.e. not through Remote Administration).

Follow the next instructions to upgrade to version 10:

1. Download Policy Patrol 10 from one of the following links:

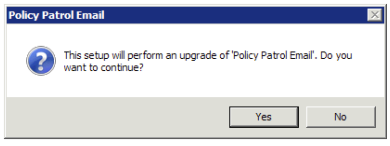
   Policy Patrol Email v.10 (for 64 bit systems):
   http://files.policypatrol.com/policypatrol64.exe

   Policy Patrol Email v.10 (for 32 bit systems):
   http://files.policypatrol.com/policypatrol.exe

2. Double-click on the executable. The Install Program will start up.

3. Click **Next** in the Welcome screen.

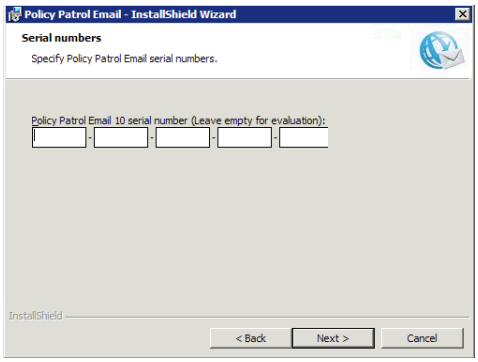
4. A notification message will appear asking you whether you wish to upgrade your existing Policy Patrol installation (your configuration will be kept). Click **Yes**.



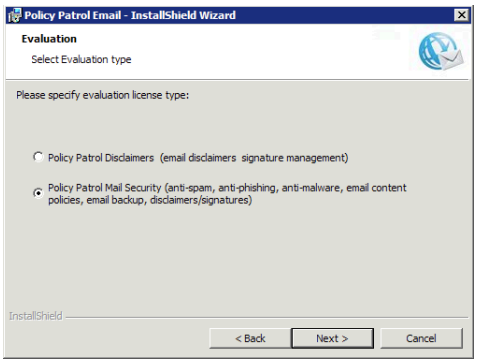
5. Read the License Agreement and select **I accept the terms in the license agreement** and click **Next**.

6. Select the installation type. Select **Complete** if you are upgrading Policy Patrol on the server. Select **Administration** if you are upgrading an installation that only includes the Administration console for remote management.

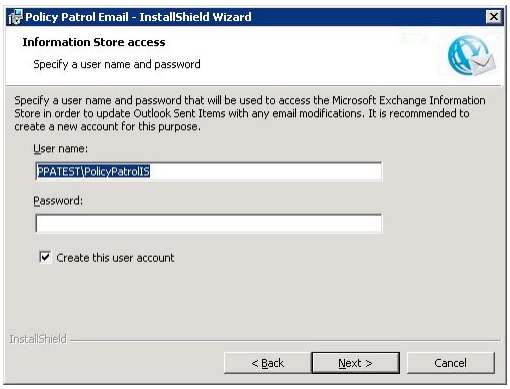
7. Enter your Policy Patrol serial number. If you are evaluating Policy Patrol, leave the serial number field empty. Click **Next**.



8. If you did not enter a serial number: A dialog will pop up asking you to select the evaluation license to be installed. Select the license you wish to install and click **Next**.



9. Only when upgrading from version 7: In order to gain access to the Exchange Information Store for updating Outlook Sent Items with email modifications, Policy Patrol needs a user account. Enter the user account and password for the account. Unless you are entering a new account to be used, uncheck the option **Create this user account**. When you are ready, click **Next**. Note that this dialog only appears if you are installing Policy Patrol on an Exchange Server machine.



10. Click **Install** to start copying files. (Make sure that you close any Exchange Management Console sessions since otherwise the installation will not be able to continue).

11. When the installation wizard has finished copying the files, click **Finish**. You have now successfully upgraded your Policy Patrol installation to version 10. The Administration console will start up and your existing configuration will be intact.

If you are upgrading from Policy Patrol 6 or earlier

If you are upgrading from Policy Patrol version 6 or earlier you must first upgrade to version 7 and then upgrade to version 10 following the instructions in the paragraph above. To upgrade to version 7, please consult the following document:

http://www.policypatrol.com/assets/pp7-upgradeguide.pdf

Policy Patrol version 7 can be downloaded from one of the following links:

Policy Patrol Email v.7 (for 64 bit systems):
http://files.policypatrol.com/policypatrol764.exe

Policy Patrol Email v.7 (for 32 bit systems):
http://files.policypatrol.com/policypatrol7.exe

More information

⇒ For more information on how to configure Policy Patrol, please consult the program help or download the product manual from: http://www.policypatrol.com/documentation.
⇒ If you still have questions after reading this document, please consult our online knowledge base at https://support.redearthsoftware.com/forums, or send an email to support@redearthsoftware.com.

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