



Ocularis 5

Upgrade Manual



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Ocularis 5.4

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US patent # 8390684 B2 for Ocularis Client

Patents Applied For in the U.S. and Abroad

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Read this document if you are upgrading to Ocularis 5.4. Some steps differ depending on which version of Ocularis you are upgrading from so read all instructions carefully. For new installations, see the *Ocularis Quick Start Guide* and the *Ocularis Installation and Licensing Guide*.

Version 5.4 Features

Features, bug fixes and known issues are identified in the *Release Notes for Ocularis 5.4*.

Upgrading to Ocularis Version 5.4

Upgrading from v5.x

To upgrade to Ocularis 5.4 from Ocularis 5.3 SP1, simply download the full installation package from the OnSSI website and reinstall all components on top of existing components (starting with Ocularis Base) except Ocularis Client and Ocularis Recorder components (i.e. Master Core, Device Manager, etc). Version 5.4 components are all 64-bit applications. Ocularis Client is available in 32-bit and may be downloaded from the OnSSI website if necessary. All Ocularis components that reside on the same computer must be of like version (i.e. all 32-bit or all 64-bit). The software installation will warn you during installation if this is not the case.

For Ocularis Client, you may reinstall the new version on top of the old version or let the operator do this at the next login using a new automatic update feature. See *Upgrading from 5.3 SP1* on page 11 for more information.

The recorder components have been updated in this release. We recommend that you upgrade all recorder components using the Update Service feature. The system can also do an automated upgrade of the recorder software from version R9 to R10. This upgrade is available free to all customers with a valid StayCURRENT plan.

To upgrade to Ocularis 5.4 from Ocularis 5.0/5.0 SP1/5.1/5.1 SP1/5.1 SP2, 5.2, 5.2.1 or 5.3, simply download the full installation package from the OnSSI website and reinstall all components on top of existing components (starting with Ocularis Base) except Ocularis Recorder components (i.e. Master Core, Device Manager, etc). Version 5.4 components are all 64-bit applications. Ocularis Client is available in 32-bit and may be downloaded from the OnSSI website if necessary. All Ocularis components that reside on the same computer must be of like version (i.e. all 32-bit or all 64-bit). The software installation will warn you during installation if this is not the case.

The recorder components have been updated in this release. We recommend that you upgrade all recorder components using the Update Service feature. The system can also do an automated upgrade of the recorder software from version R9 to R10. This upgrade is available free to all customers with a valid StayCURRENT plan.

Upgrading from v4.x or earlier

To upgrade to Ocularis 5.4 from v4.x or earlier, you must be up-to-date with your OnSSI [StayCURRENT](#) plan. The software will verify this during installation. If you have any questions or need to extend your StayCURRENT expiration date, please contact OnSSI Sales. Download the full installation package from the OnSSI website and reinstall components starting with Ocularis Base. See below for SLC requirements. The recorder components in v5.4 are different from those in 4.x. If you choose to install the 5.4 recorder it will be as a new installation, not an upgrade. Refer to the *Ocularis Installation and Licensing Guide* for instructions on installing a v5.4 recorder.

If you choose to update Ocularis Base and Client only while continuing to run your legacy recorders, you will still need a new Ocularis SLC. Request an SLC here: <http://onssi.com/base-and-client-upgrade-request/>.

Install a Brand New System

If you are installing Ocularis v5.4 on a brand new system, download the full installation package from the OnSSI website and follow the installation instructions found in the *Ocularis Installation and Licensing Guide*.

Ocularis 5.4 SLC Requirements

Do I need a new SLC for Ocularis 5.4?

If you have a New Installation

All new installations require a new Ocularis SLC. You will receive your SLC with the purchase of the product. SLCs are required for demo systems as well. Corresponding recorders have a separate SLC. This will also be provided to you upon product purchase.

If you have an Existing v5.x Installation

Your existing Ocularis Base SLC will work with v5.4 (with 905 prefix). The Ocularis Recorder SLC, however, will need to be refreshed. This can easily be done online in the software. See instructions on page 21 on how to update the recorder SLC.

If you have an Existing v4.x or Earlier Installation

All existing v4.x and earlier installations require a new Ocularis SLC to upgrade to v5.4. If you upgrade recorders to v5.4 you will also need a corresponding SLC for that component as well. You will receive these when your upgrade request has been submitted and approved. The Ocularis SLC for v5 contains the prefix '905' and the seven digit recorder SLC contains the prefix '500'.

How do I obtain a new SLC?

If you have a New Installation

You will receive your SLCs with the purchase of the product or for demo versions from OnSSI Sales.

If you have an Existing Installation

Obtain a new SLC upon request.

1. Go to <http://www.onssi.com/software-upgrade-request-form>.
2. Fill out the form and click **Submit**.
3. After validation, you will receive an email from OnSSI with the SLC(s) for Ocularis Base and Recorder.



It is important not to begin the Ocularis Base upgrade until you have your new SLC in hand in order to avoid service disruptions.

Performing the Upgrade

These steps are used when upgrading Ocularis from any prior version. Please note the following:

- The Ocularis installation file is downloaded and extracted to the Ocularis Base machine. Then, after Ocularis Base is installed, each satellite computer accesses a local webpage on the Ocularis Base machine to download and install each Ocularis component.

- Upgrade steps:
 - I. Refresh the Ocularis SLC
 - II. Download the Ocularis installation file from the OnSSI website
 - III. Extract the Ocularis installation file to the computer where Ocularis Base resides
 - IV. Install Ocularis Base over the existing Ocularis Base
 - V. Download and install Ocularis Clients, Administrator and Event Proxy from a webpage located on the Ocularis Base machine
 - VI. Perform Several Steps to allow the software to perform a self-upgrade on Recorder components
 - VII. Activate/Refresh Ocularis Base

Documents that should be referenced during upgrade/installation and located at <http://onssi.com/documentation/>

- *What You Need To Know To Migrate To Ocularis 5.x* This document explains things to consider prior to upgrading to 5.x
- *Ocularis 5 Upgrade Manual* This document reviews specifics on upgrading scenarios and options from v4.x or earlier.
- *Ocularis Quick Start Guide* This document is a short list of installation steps helpful for advanced users.
- *Ocularis Installation & Licensing Guide* This document explains the installation of Ocularis in detail. This is most useful for new installations.
- *Release Notes for Ocularis v5.4* This document identifies new features, bug fixes and known issues included in the v5.4 releases.

I. REFRESH THE OCULARIS SLC

If you are upgrading from v5.x, you may skip this step (unless you have recently purchased additional camera licenses or your license has otherwise changed).

If you are upgrading from v4.x or earlier, in order to validate your [StayCURRENT](#) plan expiration date and successfully upgrade the software, you need to refresh your Ocularis license. See <http://onssi.com/software-upgrade-plan/> for more information on StayCURRENT.

- [To Refresh an Ocularis license with Internet Connectivity](#) see page 24.
- [To Refresh an Ocularis license without Internet Connectivity](#) see page 25.

If you find that your StayCURRENT plan has expired, please contact [OnSSI Sales](#).

II. DOWNLOAD THE NEW OCULARIS INSTALLATION FILE

Obtain the Ocularis installation software package.

1. Open a browser and go to the 'Support → Download Software' page on the OnSSI website. (<http://onssi.com/software-downloads/>)
2. On the 'Download Software' page, click the link **Ocularis Full Release 5.4** under Ocularis Downloads.
3. A short web form appears. Fill out the form and click **Submit**.

You will receive an email containing the link to the download file and links to relevant documentation.

4. Click the link to download the Ocularis installation file.
5. You will be prompted to save the file. Select the desired file location and click **Save**.

The file downloads may take several minutes depending on your connection speed. Be sure to remember the path to the directory where the files were saved.

I. EXTRACT THE DOWNLOADED OCULARIS INSTALLATION FILE

These steps outline the extraction of the Ocularis installation files and may be used for all Ocularis feature sets.

1. Locate the Ocularis installation file. (**OcularisInstaller5.4.exe**)

WARNING: THIS PROCESS SHOULD BE PERFORMED ON THE SYSTEM WHERE OCULARIS BASE EXISTS (IF AN UPGRADE) OR WHERE IT WILL BE INSTALLED (NEW).

2. If it is not already there, copy the Ocularis installation file from step 1 above to the Ocularis Base machine.
3. Double-click the Ocularis installation file from step 1 above to launch and begin the file extraction. If prompted, click **Run**.

You'll see messages regarding the installation validation which may take several minutes. An *Installer Extraction Wizard* appears.

4. Click **Next**.

On the *Destination Folder* screen, you may modify the path for the installation files to be placed. The default location is: *c:\Ocularis Installer x64*. Click **Next**.

5. The *Ready to Extract* screen summarizes file extraction location and size. Click **Back** to make changes or click **Next** to proceed.

Files are extracted and copied to the location specified. This may take several minutes.

When all files are extracted, a *Setup Wizard Complete* screen appears. The installation files have been downloaded and unpacked. No applications or components have been installed.


6. If you choose to:
 - a. Upgrade Ocularis Base now: make sure the corresponding checkbox is selected and click **Finish**. Proceed to *Upgrade Ocularis Base* below.

- b. If you choose to upgrade Ocularis Base later: uncheck the *Install Ocularis Base* checkbox and click **Finish**. Proceed to *Upgrade Ocularis Base* below when you are ready to continue with the installation.

II. UPGRADE OCULARIS BASE

Ocularis Base must be upgraded/installed first as this installation will set up and configure the environment to install the other Ocularis components.



- (1) Your **StayCURRENT** program must be up-to-date if you are upgrading. Refresh your license in the Ocularis License Activation application if necessary.
 - (2) If you are upgrading from v4.x or earlier, before you begin the upgrade, make sure you have your **905** Ocularis SLC in hand as you need this for this upgrade (see *Do I need a new SLC for Ocularis 5.4?* on page 3).
 - (3) If you are not using the default SQL Server instance with Ocularis Base, be sure to have your SQL Server login credentials ready as you will need them during the upgrade.
 - (4) Also, be sure to have your IT database administrator backup the existing SQL database prior to starting the upgrade.
1. Launch the Ocularis Base installation either from the last page of the extraction wizard (see *Extract the Download File* above) or from the extracted location. The default location is: `c:\Ocularis Installer`. Double-click the shortcut **Install Ocularis Base**.
 2. When the Ocularis Base installation is first launched and you are upgrading, you should see a message that a previous installation has been detected and you are prompted if you want to continue as an upgrade. Click **Yes**.
 3. For upgrades from v5.x, skip to step 4. For upgrades from 4.x or earlier, if the installation process cannot find your StayCURRENT expiration date or it has expired, or it is still using the SLC starting with '901' you will see a message indicating the current SLC may not be used for this version.
 - a. If you still have the '901' Ocularis SLC entered and need to update to '905', click **OK** to launch the *Ocularis License Activation* application. You must deactivate the current SLC before you enter the new SLC.
 - i. If the machine has internet connectivity:
 1. Click the **Deactivate** button. 
 2. At the warning message, click **Yes** to confirm the deactivation. Click **OK** to close the 'License successfully deactivated' pop-up.
 3. Enter the new SLC (starting with '905') into the **Step 1: Enter SLC** box. (you may also paste it from the Windows clipboard to avoid typing errors). Click **Activate License**.
 4. Click **OK** at the 'License activation successful' pop-up.
 5. Click **Close** to continue with the installation of Ocularis Base.
 - ii. If the machine does not have internet connectivity, contact [OnSSI Tech Support](#) to deactivate the Ocularis SLC.
 - b. If StayCURRENT has expired or you are unable to update the license, contact [OnSSI Sales](#).
 4. The *Ocularis Base Setup Wizard* should appear. Click **Next**.
 5. The *License Agreement* appears. Please read, click the "I accept.." radio button and then click **Next**.
 6. Select the type of installation: **Typical** or **Custom**. *Typical* will update files using default settings for file locations and database instance. *Custom* allows you to change these settings. If you chose *Custom* when you installed Ocularis previously, you can choose it again and it will use the previously configured settings.
 - [Typical Upgrade](#) is found on page 8
 - [Custom Upgrade](#) is found on page 8.

Note: SQL Server Express 2008 is included with v5.1 and earlier. Ocularis v5.4 includes SQL Server Express 2014. However, during an upgrade, the existing SQL Server Express will be left in place and not be upgraded to SQL 2014.

Note: During an upgrade the software will be installed in the existing directory. In a new installation, it will default to an x64 directory.

7. **Completion Step:** After the Base files are installed and you are presented with the *Ocularis Base Setup Wizard Complete* screen, you can:
 - a. Click **Finish** to complete the installation of Ocularis Base and exit the wizard.
 - b. Click the link on the last page of the wizard to launch the 'Ocularis Component Downloads' website and proceed with the upgrade of other Ocularis components. You can always access this website later directly from a browser to continue with the upgrade. See *Upgrading Ocularis Components* on page 10.

Typical Upgrade

A typical upgrade encompasses the vast majority of the installations. Use these upgrade steps if you are using the database included with Ocularis (SQL Express) and wish to keep default settings for bookmark and file locations.

1. Select the *Typical* radio button and click **Next**. Ocularis Base is installed using all the existing settings for file locations and SQL Server parameters.

The Ocularis Base files are installed and may take several minutes. A new installer website is also created. When installation is completed, the *Setup Wizard Complete* for Ocularis Base screen appears.
2. Proceed to Step 7 **Completion Step** above.

Custom Upgrade

Upgrading Ocularis using the Custom option is used in the following scenarios:

- When you want to modify the location of the Ocularis Bookmarks or installation files (see [To Upgrade Ocularis with Modification to File Locations](#)).
- When you want to move the database from the default SQL Server instance into a corporate SQL Server instance during the upgrade (see [To Upgrade from the Default SQL Server Instance to a Corporate SQL Server Instance](#)).
- When you upgrade using a corporate SQL Server Instance (see [To Upgrade from SQL Server Corporate Instance or Express to SQL Server Corporate](#)).

To Upgrade Ocularis with Modification to File Locations

Use these steps only if you want to change the location of the Ocularis Bookmarks or installation files during the upgrade.

1. Select the *Custom* radio button and click **Next**.
2. On the *SQL Server instance* page, click **Next**.
3. You'll be presented with the location for **Bookmarks**. Select a new location. Note that by modifying the location of the Bookmarks, existing bookmarks will not be accessible. Copy the existing bookmarks to the new location after the installation is complete in order to gain access to them. Click **Next** when done.
4. The location for the Ocularis Base installation files is presented next. Make necessary changes and click **Next** when ready.
5. Current settings are displayed for a final review. Click **Back** to make changes or click **Next** to continue.

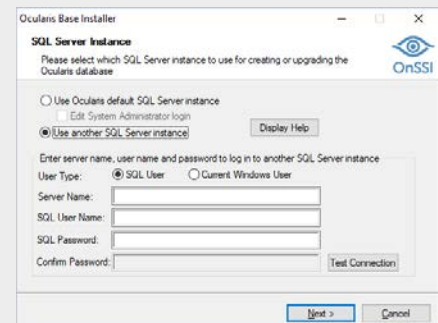


Figure 1 SQL Server Instance

6. The Ocularis Base files are installed to the specified directory and may take several minutes. A new installer website is also created. When installation is completed, the *Setup Wizard Complete for Ocularis Base* screen appears.
7. Proceed to Step 7 **Completion Step** above.

To Upgrade from the Default SQL Server Instance to a Corporate SQL Server Instance

Use these steps only if you need to relocate the existing Ocularis SQL database to a Corporate SQL Server Instance during the upgrade.

1. If necessary, use the provided SQL Server Express installer or other tools to create a new SQL instance in the desired location.
2. Using SQL tools, export the database from the old location and import the existing data to the new location.
3. Select the *Custom* radio button and click **Next**.
4. On the *SQL Server instance* page (see Figure 2), select: **Use another SQL Server instance** - Enter the login credentials for the new SQL Server instance created in step 1. When ready, click **Next**.

5. You'll be presented with the location for Bookmarks. Select a new location if desired. (Note that if you modify the location of the Bookmarks, existing bookmarks will not be accessible. Copy the existing bookmarks to the new location after the installation is complete in order to gain access to them.) Click **Next** when done.

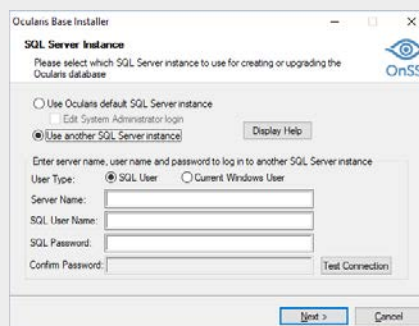


Figure 2 SQL Server Instance

6. The location for the Ocularis Base installation files is presented next. Make necessary changes and click **Next** when ready.
7. Current settings are displayed for a final review. Click **Back** to make changes or click **Next** to continue.
8. The Ocularis Base files are installed and may take several minutes. A new installer website is also created.

When installation is completed, the *Setup Wizard Complete for Ocularis Base* screen appears.

9. Proceed to Step 7 on page 8.

To Upgrade from SQL Server Corporate Instance or Express to SQL Server Corporate

This advanced option is used by organizations that use a corporate version of SQL Server for their Ocularis database. This database must be updated during the upgrade to v5.

1. Make a backup of the existing SQL database.
2. Select the *Custom* radio button and click **Next**.
3. On the *SQL Server instance* page, select: **Use another SQL Server 2008 instance** - Enter the login credentials for the SQL Server instance that contains the Ocularis database. When ready, click **Next**.
4. You'll be presented with the location for Bookmarks. Select a new location if desired. (Note that if you modify the location of the Bookmarks, existing bookmarks will not be accessible. Copy the existing bookmarks to the new location after the installation is complete in order to gain access to them.) Click **Next** when done.
5. The location for the Ocularis Base installation files is shown next. Make desired changes and click **Next**.
6. Current settings are displayed for a final review. Click **Back** to make changes or click **Next** to continue.
7. The Ocularis Base files are installed to the specified directory and may take several minutes. A new installer website is also created.

When installation is completed, the *Setup Wizard Complete for Ocularis Base* screen appears.

8. Proceed to Step 7 Completion Step on page 8.

III. UPGRADING OCULARIS COMPONENTS

Once Ocularis Base has been installed and licensed, we recommend the following order for installation/upgrading: Ocularis Administrator, Ocularis Clients and Ocularis Event Proxy. For the recorder components see *Upgrading Ocularis Components* on page 10.

Note: it is recommended to upgrade the Base, Client, Administrator and Event Proxy prior to upgrading the Recorder components.

For upgrades, all components are downloaded from a webpage installed on the Ocularis Base machine. Ocularis components include:

- Ocularis Administrator
- Ocularis Client
- Ocularis Recorder Event Proxy
- Ocularis Recorder
- Ocularis Recorder Manager
- Ocularis Media Server

Note: Be sure to turn off any Firewalls running on the Ocularis Base machine.

1. From the local machine on which you want to install the Ocularis component, access the download webpage located on the Ocularis Base machine through a browser using the following URL:

`http://[BASE_IP]:[port]/OcularisService`

where **[BASE_IP]** is either the IP Address or computer name of the Ocularis Base machine and port is the IIS port number. In most cases, the default port 80 is used and it is not necessary to enter it here. This URL will redirect to a longer one, which may also be used:

`http://[BASE_IP]:[port]/OcularisService/InstallerWebsite/install.html`

The following web page appears:

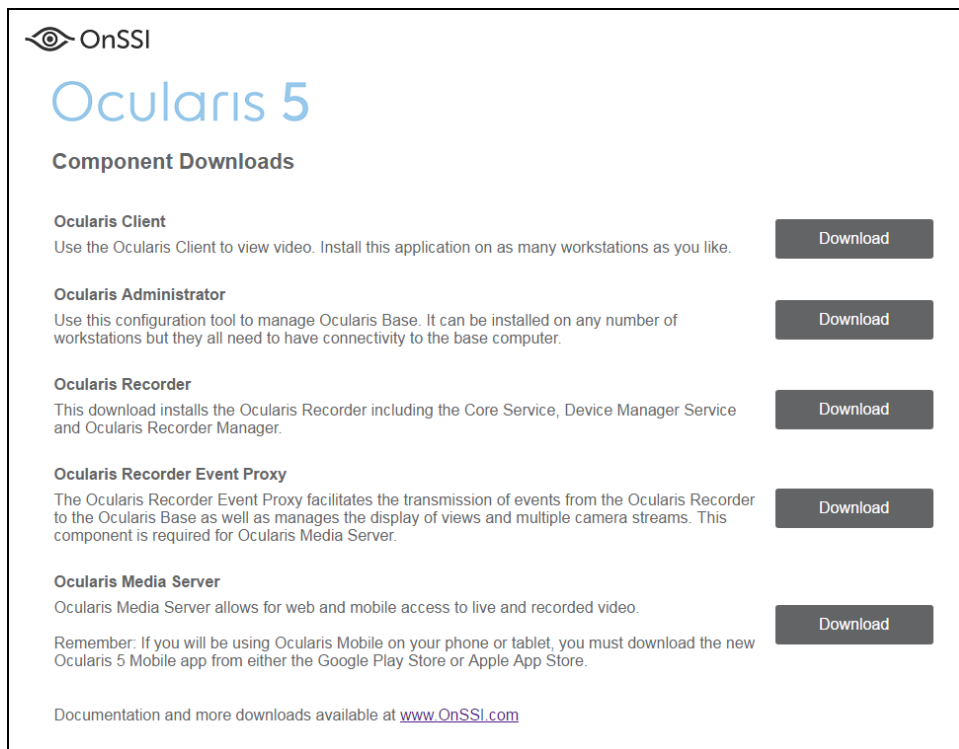


Figure 3 Ocularis Component Downloads Web Page

2. Click 'Download' adjacent to the component you wish to download and install. The executable file is downloaded in the browser.
3. Click the downloaded file. Follow the on-screen prompts.

Upgrading the Ocularis Administrator

1. From the 'Ocularis Component Downloads' web page, click the **Download** button next to Ocularis Administrator.
2. You may be prompted to run or save the file; you may choose to either run it now or save it and run the installation later.
3. Follow the prompts to extract the files and then you'll see the *Welcome to Ocularis Administrator Setup Wizard* screen.
4. Click **Next**.
5. Run the installation and follow the wizard prompts. When run, the system will detect existing installations and want you to confirm the uninstallation of the existing component. Click **Yes**.
6. When done, click **Finish**.

Note: *Ocularis Administrator* v5.4 has some new features in it that you may want to address. In the Users / Privileges Tab, Triggers are now a privileged function. If you use triggers, you will need to assign privileges in this tab as they are unprivileged by default. Also, there is a new tab called 'Settings'. In this tab, administrators can configure the Audit Log as well as enable or disable update settings for *Ocularis Client*. See [Upgrading from 5.3 SP1](#) below or refer to the *Ocularis Administrator User Manual*.

Upgrading the Ocularis Client

With Ocularis 5.4, there are two ways to update the Ocularis Client software depending on which version you are upgrading from.

Upgrading from 5.3 or earlier

This method must be used when upgrading from v5.3 or earlier.

1. From the 'Ocularis Component Downloads' web page, click the **Download** button next to Ocularis Client.
2. You may be prompted to run or save the file, you may choose to either run it now or save it and run the installation later. When run, the system will detect existing installations and want you to confirm the uninstallation of the existing component. You will also be prompted whether you want to see the settings of the Client from the installed version. Follow the prompts to extract the files and then you'll see the *Welcome to Ocularis Client Setup Wizard* screen.
3. Once Run has been selected, if a previous version of the Ocularis Client is detected, a notice will appear asking for your confirmation to uninstall the older version and install the new version. Click **Yes**.
 - a. An "Are you sure you want to remove Ocularis Client...?" screen appears. Click **Yes**.
 - b. When the uninstall is complete, click **OK**.
 - c. The *Welcome to Ocularis Client Setup Wizard* appears. Click **Next**.
4. Run the installation and follow the wizard prompts. The process will ask whether you would like to retain your existing settings.
5. When done, click **Finish**.

Upgrading from 5.3 SP1

To upgrade Ocularis Client from version 5.3 SP1 you may use the method mentioned above or use a new automatic update method. Whenever Ocularis Client's login process is performed, the software checks Ocularis Base for the most current version of the software. If the version of Ocularis Client on the Base is newer than the one being used by the Operator, a prompt appears asking if the operator would like to download and install the new version.

Note: The logged in Windows user must have administrator rights to the PC in order for this method to work. If the Operator does not have administrator rights, the prompt will not appear. You can right-click and run as administrator to force this.

When an Ocularis Client login attempt is made after upgrading Ocularis Base, the following message appears:

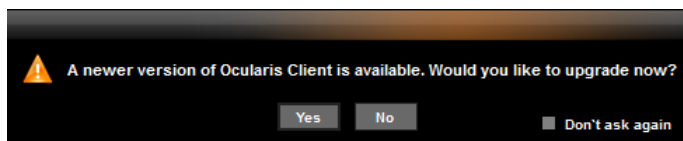


Figure 4 Version Check for Ocularis Client

Click **No** to delay the upgrade at this time. The next time you login to Ocularis Client, you'll get this message again. It will keep appearing until you upgrade or click the 'Don't ask again' checkbox.

Click **Yes** to download the installation files from Ocularis Base. Ocularis Client will launch and the files are downloaded in the background. This may take several minutes based on your network bandwidth. When the download is complete, you'll see the message:

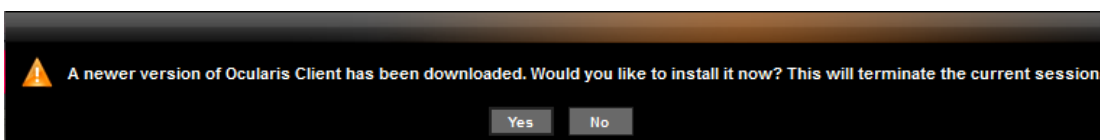


Figure 5 Upgrade Downloaded Message

Click **No** to avoid software installation at this time. The software may be manually installed at a later time by launching Ocularis Client x64.exe from `c:\Program Data\OnSSI\OcularisClient`.

Click **Yes** to close Ocularis Client and start the upgrade process. Follow the system prompts to install the new software.

Note: If you are using the 32-bit Ocularis Client there is an additional step required. Download the 32-bit version of the Client from the onssi.com website and place the file on the Base Server in the following location: `c:\Program Files\OnSSI\Ocularis Base\Installer Website\files`. Then, when the 32-bit Client logs into the Base the version will be checked and this file will be used to in the update.

Upgrading the Recording Component Event Proxy

If you are Upgrading from v5.x

1. From the 'Ocularis Component Downloads' web page, click the **Download** button next to Ocularis Recorder Event Proxy.
2. You may be prompted to run or save the file; you may choose to either run it now or save it and run the installation later. When run, the system will detect existing installations and want you to confirm the uninstallation of the existing component. Click **Yes**.
3. Follow the prompts to extract the files and then you'll see the *Welcome to Ocularis Event Proxy Setup Wizard* screen. Click **Next**.
4. Run the installation and follow the wizard prompts. When done, click **Finish**.

Note: The 'Auto Update Recorder' checkbox has been removed. It has been replaced with an 'Auto Add Recorder' checkbox. This checkbox will add a brand new recorder to the Base upon the next restart of the Event Proxy Service. It works the first time only. If you need to update the recorder, do so from the Servers/Events Tab of *Ocularis Administrator*.

If you are Upgrading from v4.x or earlier

The event proxy for the recorder in Ocularis 5 is specific to v5. This component simply needs to be installed from scratch when you use a v5 recorder. To install a v5 event proxy, refer to the document *Ocularis Installation & Licensing Guide*.

If you continue to use a 4.x legacy recorder in your 5.x system, you need to install the 64-bit version of the corresponding legacy 4.x recorder's event proxy if the component resides on a computer with other Ocularis components. This is

available on the onssi.com website. If you updated your legacy event proxy in v5.3, you will need to update it again to the 5.4 version.

IV. UPGRADING THE RECORDING COMPONENT

If you are Upgrading from v5.0/5.0 SP1

The recorder version for v5.0/5.0 SP1 was R6. Please contact OnSSI Technical Support for upgrade instructions from this version.

If you are Upgrading from 5.1/5.1 SP1/5.1 SP2/5.2/5.2.1/5.3/5.3 SP1

Important:
**Make sure that each machine running any Recorder component
has at least 15 GB of free disk space.
If there is not sufficient disk space, the upgrade will not be successful.**

The recorder for v5.4 has been updated. Therefore, we highly recommend upgrading your v5x recorder to the recorder included with v5.4 (which is version R10). The Update Service, which can automatically download and install recorder patches, also allows for the upgrade of software from one major version to another. We recommend using this service to upgrade your software since each and every component (i.e. Core, DM, Ocularis Recorder Manager, etc.) must be upgraded. Use of the Update Service minimizes downtime in the system and is a very efficient way to upgrade. By default, however, this feature is not enabled automatically so you must manually enable it.

Unlike other Ocularis components, **do not install new recorder software over old recorder software**. This is problematic. We recommend using the Update Service. For those not using the Update Service, please contact OnSSI Technical Support for further upgrade instructions.

Note: For demo versions, the Update Service will not work automatically. If all recorder components (Core, DM, Ocularis Recorder Manager) are installed on one PC as is typically the case with demo systems, you can manually uninstall and then reinstall the recorder software components.

If the demo system resides on multiple PCs, you will need to do a manual Update Service upgrade. Obtain the software upgrade files from OnSSI Tech Support and follow the instructions found in *Manually Apply Ocularis Recorder Upgrade Files* on page 20.

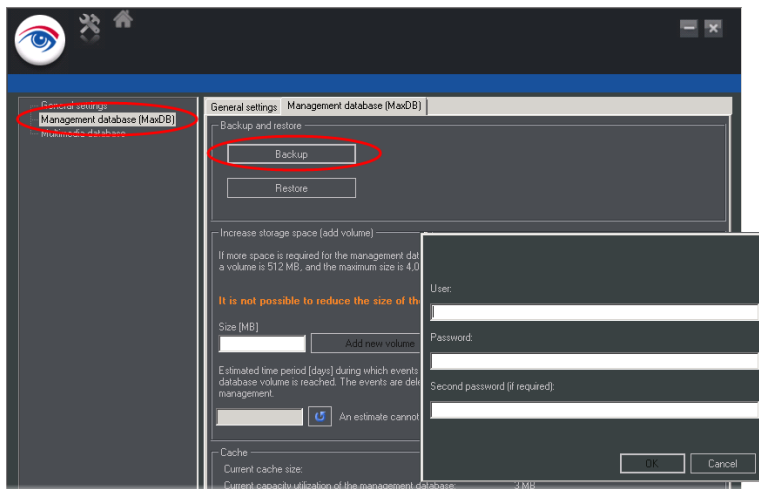
In either case a new demo SLC is required for R10. Contact OnSSI Sales to obtain one.

Make a Manual Backup

Whenever starting a software upgrade, it is always good to have a backup - just in case. Use these steps to perform a manual backup.

Note: this should be done for each Master Core. If you are using Ocularis ULT or ENT, this typically need only be done once. If you are using Ocularis PRO, this must be done for each Master Core instance. Backup can be done from the *Ocularis Recorder Administration Tool* or from *Ocularis Recorder Manager*.

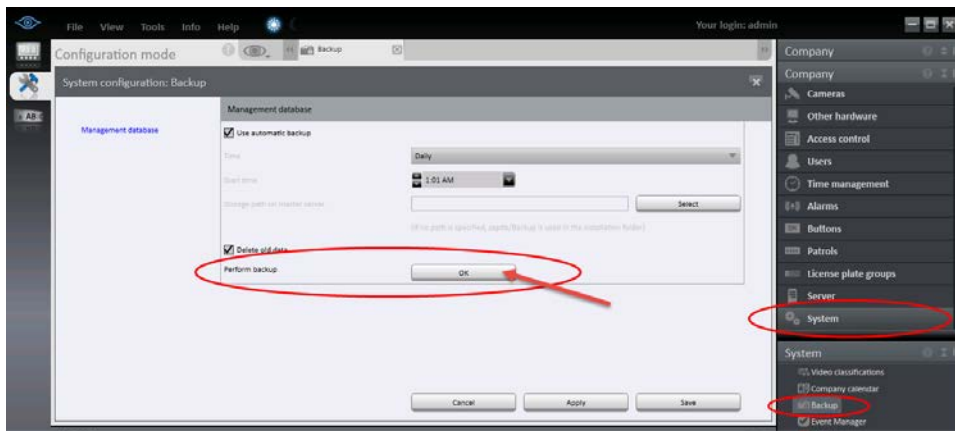
1. From the *Ocularis Recorder Administration Tool*:



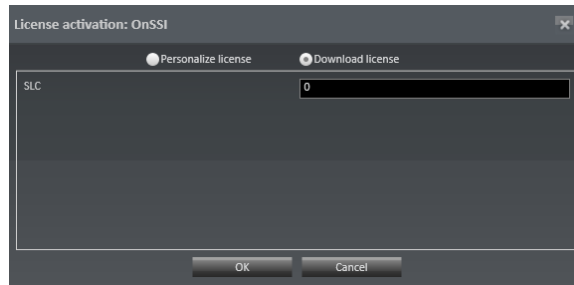
- a. Select 'Management Database (MaxDB)'
- b. Click **Backup**
- c. Enter credentials for an administrator account on the Master Core.
- d. Click **OK**.
- e. A warning pop-up appears indicating that the backup may take several minutes. Click **OK**.
- f. On the backup successfully created pop-up, click **OK**.
- g. Close the *Ocularis Recorder Administration Tool*.

2. From the *Ocularis Recorder Manager*:

- a. Select 'System' from the Control Bar.
- b. Select 'Backup'.
- c. Click **OK** adjacent to 'Perform backup'



- d. Click **OK** when on the 'Export Successful' pop-up.
 - e. Close *Ocularis Recorder Manager*.
3. Copy the backup file to a safe location.
 4. Also, make a copy of the folder: **c:\Program Files\OnSSI\Ocularis Recorder\conf** and store in a safe location.
- These saved files may be used in the event a manual restoration becomes necessary.



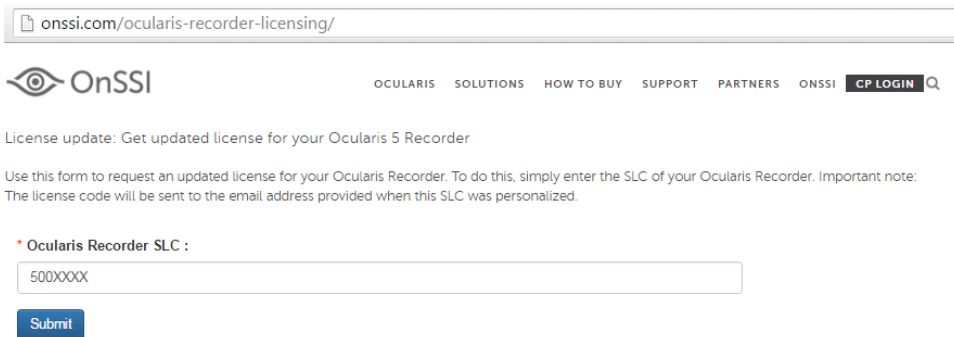
4. Enter your seven digit SLC and click **OK**.

The software license will be updated in the background and updated key installed on your computer.

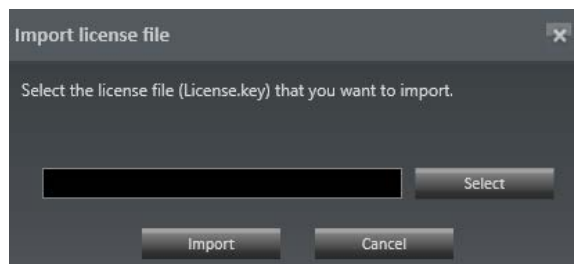
Manually Refresh the Recorder SLC - Offline Method

Use the following steps to refresh a recorder SLC with no internet connectivity:

1. Go to any PC that does have internet connectivity and open the webpage:
<http://onssi.com/ocularis-recorder-licensing/>
2. Scroll to the bottom of the page and enter your recorder SLC in the field under License update



3. The system will update your license and email it to the address used when the software was initially personalized.
4. Detach the license.zip or license.key file that is sent to the email address and bring it to the computer without internet connectivity.
5. From the *Ocularis Recorder Manager*, select the **Info > Activate product > offline** menu.
6. Click the **Import license file** tab.



7. Click the **Select** button, navigate to the file attachment you just received and click **Open**.
8. Then, click the **Import** button.

The license is now updated.

The Recorder software must be updated to the most current patch

If you've installed the Update Service using default values, it will automatically download and install the latest update patch at the next scheduled update (if it hasn't already done so).

Manually Check for Patches using the Update Service

1. On the Core server, open the *Ocularis Recorder Update Server configuration tool* in the **Windows > Start > All Programs > OnSSI > Ocularis Recorder** folder.
2. Click the **Server configuration** tab.

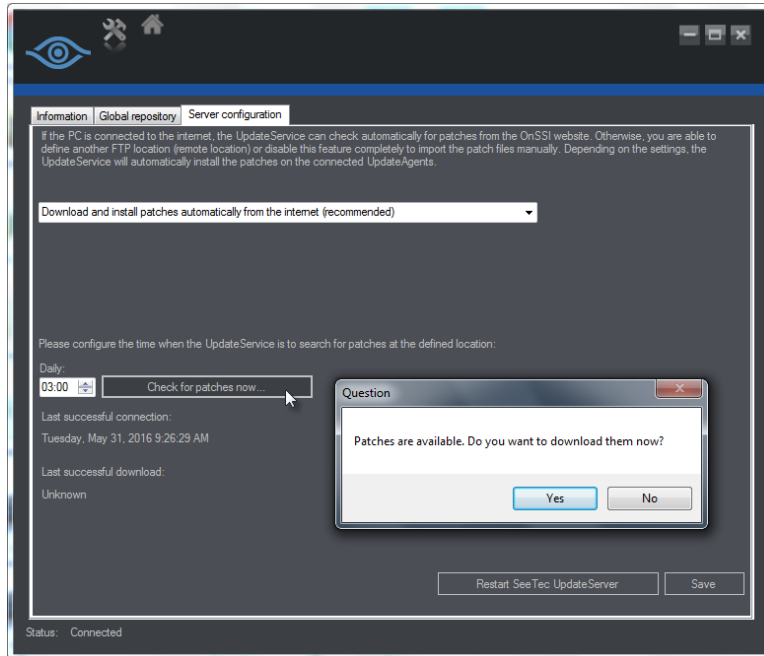


Figure 7 Server configuration tab of the Ocularis Recorder Update Server configuration tool

3. Verify that 'Download and install patches automatically from the internet (recommended)' is selected.
4. Click 'Check for patches now...'

The system will be updated with the this patch:

- a. For clients in the Default group: immediately
- b. For clients in a custom group: upon the next scheduled patch time as configured

The 'Also download full upgrade packages' checkbox must be checked

With the most up-to-date patch installed, the *Ocularis Recorder Update Server Configuration Tool* will have some new settings available.

1. On the Core server, open the *Ocularis Recorder Update Server configuration tool* in the **Windows > Start > All Programs > OnSSI > Ocularis Recorder** folder.
2. Click the **Server configuration** tab.

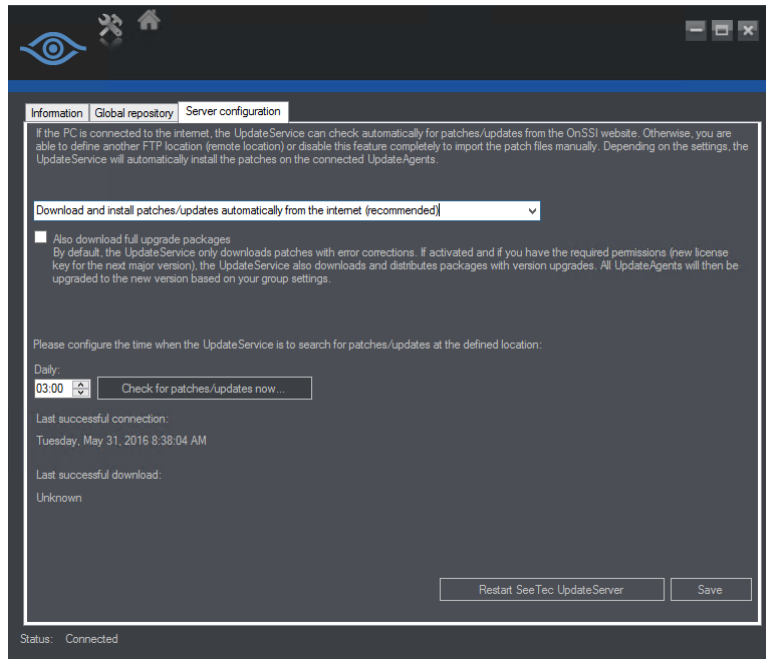


Figure 8 Updated Ocularis Recorder Update Server Configuration Tool

3. Now, underneath the drop-down menu, you'll see a new checkbox:
 - Also download full upgrade packages
By default, the UpdateService only downloads patches with error corrections. If activated and if you have the required permissions (new license key for the next major version), the UpdateService also downloads and distributes packages with version upgrades. All UpdateAgents will then be upgraded to the new version based on your group settings.

This checkbox is unchecked by default. The download of software function works in conjunction with the download options above it. So, for instance, if you've selected **Download patches from the internet, but do not install them automatically**, the software installation components will also be downloaded but not automatically installed.

4. Check the *Also download full upgrade packages* checkbox.
5. Click **Save**.

The software will be upgraded to the next version at the next scheduled **Update time**. You can check this by clicking the **Information** tab, click a group and then click **Configure Group**. (see Figure 9 Update time).

6. If you want to check for updates now without waiting for the next schedule Update time, click the **Check for patches/updates now** button.

Note: It may take a few minutes after clicking Save to recognize updates so we recommend waiting a few minutes after clicking Save before you click Check for patches/updates now.

To check the Update Time

A field is available for setting the time for software upgrades with the **Update time** fields. In the *Ocularis Recorder Update Server Configuration Tool*, click the **Information** tab, click a group and then click **Configure Group**.

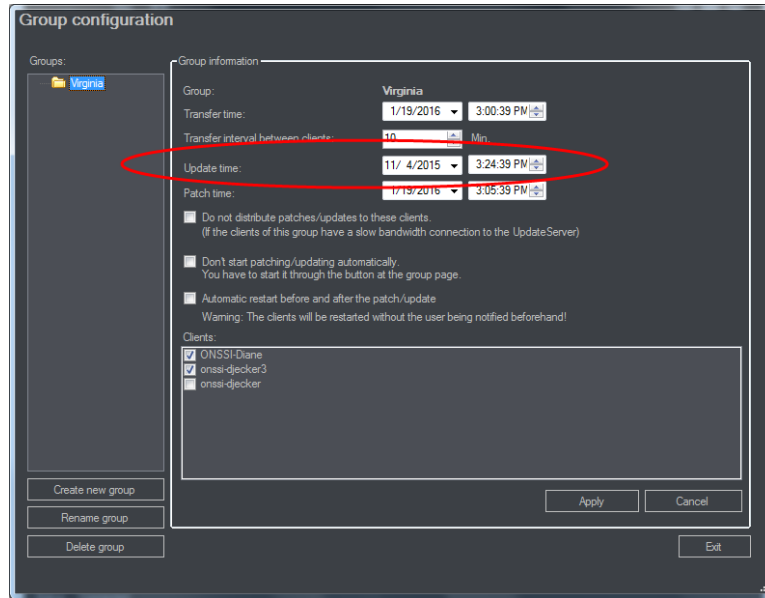


Figure 9 Update time

Notice how now you can have different times for recorder patches/fixes and software upgrades. For more information on software upgrades, contact OnSSI Technical Support.

Manually Apply Ocularis Recorder Upgrade Files

Use this procedure when the system with the Update Service on it does not have connectivity to the internet or for demo systems that are distributed across multiple computers. This procedure will apply the software upgrade files to the Update Service, allowing it to then distribute the upgrade throughout the system based on configured settings. Using the Update Service to upgrade the software is the most efficient way to update the system with the minimal amount of downtime. Use this to upgrade from R8 (found in v5.2) or R9 (found in v5.3) to R10 (found in 5.4).

Note: When manually uploading the software upgrade files, the Automatic Update service will start the upgrade process immediately for all clients/agents listed in the Default group. This will cause recorder components to stop and start as they are upgraded. Clients/agents in a configured group will be upgraded based on the configured schedule.

Note: Contact OnSSI Tech Support to obtain the software upgrade files. Once downloaded, transfer the files to the server that has the 'Ocularis Recorder UpdateServer configuration' application installed. By default, this is on the Master Core.

Note: 15 GB of free space is required on the C: drive of all machines that contain an Ocularis Recorder component.

1. Open the 'Ocularis Recorder UpdateServer configuration' application and select the 'Server configuration' tab.
2. If not already selected, choose 'Do not search for patches/updates on the internet or any remote location (not recommended)' from the drop-down list.

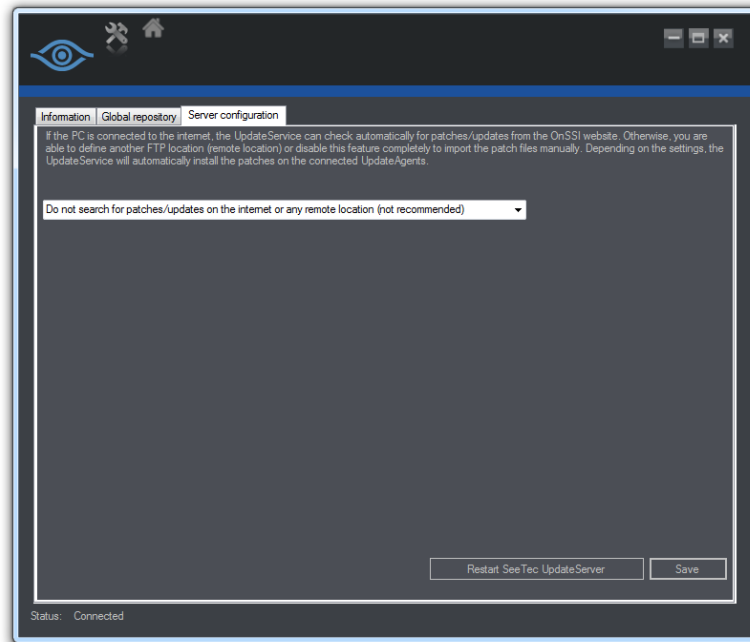


Figure 10 Server configuration tab

3. Click **Save**.
4. Select the 'Global repository' tab.

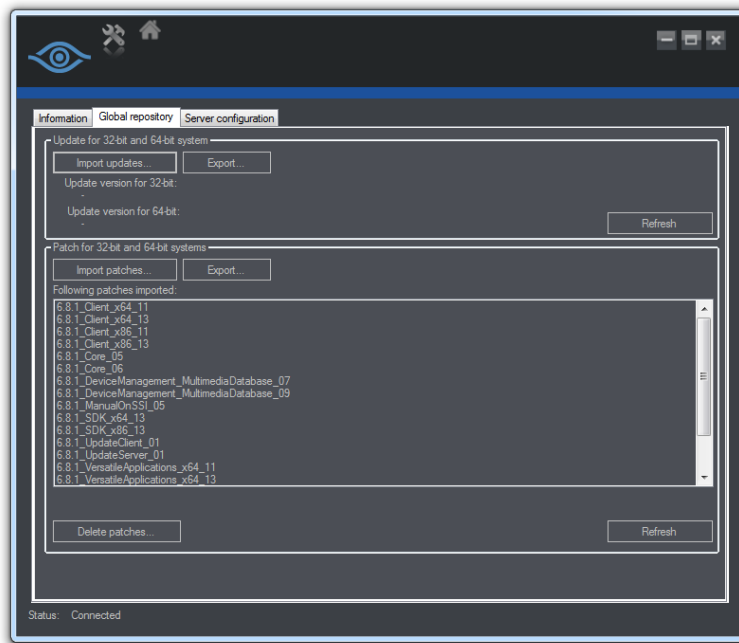


Figure 11 Global repository tab

5. In the section 'Update for 32-bit and 64-bit systems', click **Import updates...** and select the files downloaded from OnSSI Tech Support.
6. Once the files are imported, the version number will be listed.

The clients/agents in the 'Default' group will begin to update immediately and those in a configured group will do so based on the configured update date and time.

Uninstallation of Ocularis Recorder v5.4

In rare instances, it may be necessary to downgrade an Ocularis Recorder v5.4 version back to an older version Ocularis Recorder. This can easily be done by following these steps:

1. Using Windows *Control Panel*, uninstall Ocularis Recorder 5.x for all recorder components (Core, DM, etc.). Follow the on-screen wizard prompts.
2. Re-install the older version Ocularis Recorder (for all components: Core, DM, etc.)
3. Use the *Ocularis Recorder Administration Tool* to restore the last backup.

There is no known data corruption when downgrading from Ocularis Recorder 5.4 to a prior version.

If you are Upgrading from v4.x or earlier

The recording components included with Ocularis are new in generation 5 of Ocularis. Therefore, there is no direct upgrade path to go from an Ocularis 4.x recorder to an Ocularis 5 recorder. However, with the Ocularis Mix & Match feature, you may continue to use your 4.x recorder with v5 until such time you transition your system to a v5 recorder. Both 4.x and 5.x recorders may reside within a 5.x Base installation.

Note: In a mix and match environment, you will need to upgrade the v4.x event proxy to a 64-bit version if it resides on a computer with a version 5 Ocularis component. Download the 64-bit proxy for RC-C/RC-I or RC-L/RC-E from the OnSSI website and install it over the old event proxy. It will recognize the existing software and upgrade it to the new version.

To install a new v5 recorder, refer to the document *Ocularis Installation & Licensing Guide*. Also reference the *Ocularis 5 Upgrade Manual* both of which can be found at: <http://onssi.com/documentation/>.

V. UPGRADE OCULARIS MEDIA SERVER

If you are upgrading from v5.3, simply install the new Ocularis Media Server software over the existing. The installation process should recognize the older version and uninstall it during this process.

You may also keep your v5.2 Ocularis Media Server in place and run it with v5.4 recorders. You can even run both OMS v5.2 and OMS v5.4 in the same v5.4 environment provided that they are installed on different servers.

If you are running a mix & match environment with v4.x recorders, you must install a 64-bit event proxy in order to see video from a v4.x legacy recorder via Ocularis Web or Ocularis Mobile. Download this event proxy from the OnSSI website.

For more information on OMS installation and configuration, refer to the document, *Ocularis Media Server Installation and Administration Guide*.

VI. ACTIVATE/REFRESH OCULARIS BASE

Activating the Ocularis license is necessary when upgrading from version 4.x or prior of Ocularis (demo, trial or retail) or if you make a change to the license (e.g. add more cameras).

The activation steps differ slightly depending on whether the computer where Ocularis Base resides has internet connectivity.

The actions related to Ocularis licenses include:

- **Activating the Ocularis SLC**– Use when licensing Ocularis for the first time.
- **Refreshing the Ocularis SLC**– Use when the license status of Ocularis changes.
- **Deactivating the Ocularis SLC**– Use when you need to move Ocularis Base from one computer to another.

Note: To use the license activation application, you must be logged into the computer using an account with Windows Administrator privileges.

Activating the Ocularis SLC

Activating an Ocularis SLC is done the first time Ocularis is installed.

The steps to activate are different based on whether the Ocularis Base computer is connected to the internet or not.

- To Activate Ocularis Base with Internet Connectivity
- To Activate Ocularis Base without Internet Connectivity

To Activate an Ocularis license with Internet Connectivity

1. Launch the *Ocularis License Activation* application.



Figure 12 Licensing

2. Enter the Ocularis SLC.
3. Click **Activate License**. The licensing application will collect relevant data including the SLC and send this over the internet to OnSSI's licensing server. OnSSI's licensing server validates the information and sends back the activation required to license the software. This process is nearly instantaneous.
4. Once activation is complete, a confirmation pop-up appears. Click **OK**.

You are done! The **License Status** area of the *Ocularis License Activation* screen displays updated camera counts and other information based on your SLC.

To Activate an Ocularis license without Internet Connectivity

1. Launch the *Ocularis License Activation* application.
2. The first time you license Ocularis, you need to enter your new SLC in the field labeled: **Step 1: Enter SLC**.
3. Click the **Activate License** button. You will receive a pop-up with a message reminding you that there is no internet connectivity and you should use offline activation. Click **OK** to close this dialog. The screen updates with additional steps:

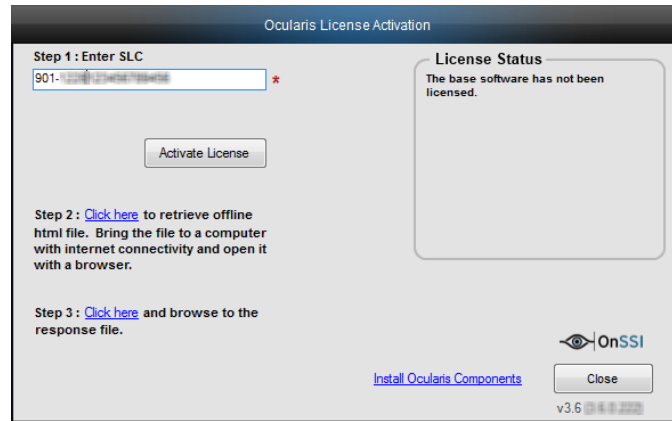


Figure 13 Additional Steps for Offline Licensing

4. Click the link in *Step 2: Click here to retrieve offline html file.*

An html file is created named `OcularisActivationRequest.html` and stored in:

```
c:\Program Files (x86)\OnSSI\Ocularis Licensing Activation\OfflineActivation
```

5. Copy this file to portable media and bring to a computer that has internet connectivity.
6. Launch the `OcularisActivationRequest.html` file (double-click it).
7. The default web browser should launch and load a page with a Download button. Click the **Download** button.
8. The browser may ask you if you want to save a file called `response.xml` from `licensing.onssi.com`. Choose **Save As** and save it to portable media.
9. Bring the `response.xml` file back to the Ocularis Base computer.
10. On the Ocularis License Activation screen (see Figure 13), click the link in *Step 3: Click here and browse to the response file.*
11. In the resulting Windows' Open dialog, browse to the `response.xml` file you just brought from the internet connected machine. Select the file and click **Open**.
12. You should see a 'License Activation Successful' pop-up. Click **OK**.

You are done! The **License Status** area of the *Ocularis License Activation* screen displays updated camera counts and other information based on your SLC. The 'Activate License' changes to 'Refresh' to accommodate future updates.

Refreshing the Ocularis SLC

Refreshing your Ocularis SLC is done when a change is made to your Ocularis License. For instance, you add additional camera licenses to Ocularis or you upgrade from a demo version to a retail version. Refreshing is simple but the process differs whether the Ocularis Base computer has internet connectivity.

To Refresh an Ocularis license with Internet Connectivity

1. Launch the *Ocularis License Activation* application.
2. Click the **Refresh** button. The licensing application will collect relevant data including the SLC and send this over the internet to OnSSI's licensing server. OnSSI's licensing server validates the information and sends back the activation required to license the software. This process is nearly instantaneous.

Once activation is complete, a confirmation pop-up appears. Click **OK**.

You are done! The **License Status** area of the *Ocularis License Activation* screen displays updated license information based on your SLC.

To Refresh an Ocularis license without Internet Connectivity

1. Launch the *Ocularis License Activation* application.
2. Click the **Refresh** button. You will receive a pop-up with the message reminding you to check internet connectivity or refresh offline. Click **OK** to close this dialog. The screen updates with additional steps.
3. Click the link in *Step 2: Click here to retrieve offline html file*.

An html file is created named `OcularisActivationRequest.html` and stored in:

```
c:\Program Files (x86)\OnSSI\Ocularis Licensing Activation\OfflineActivation
```


4. Copy this file to portable media and bring to a computer that has internet connectivity.
5. Launch the `OcularisActivationRequest.html` file (double-click it).
6. The default web browser should launch and load a page with a Download button. Click the **Download** button.
7. The browser may ask you if you want to save a file called `response.xml` from `licensing.onssi.com`. Choose **Save As** and save it to portable media. For subsequent licensing, the file may have the format 'response(x).xml' where the 'x' is 1, 2, etc. based on the number of response files created.
8. Bring the `response.xml` file back to the Ocularis Base computer.
9. On the Ocularis License Activation screen, click the link in *Step 3: Click here and browse to the response file*.
10. In the resulting Windows' Open dialog, browse to the `response.xml` file you just brought from the internet connected machine. Select the file and click **Open**.
11. You should see a 'License Successfully Refreshed' pop-up. Click **OK**.

You are done! The **License Status** area of the *Ocularis License Activation* screen displays updated information based on your SLC.

Deactivating the Ocularis SLC

Deactivating your Ocularis SLC is done when you want to move the Ocularis Base software from one computer to another computer. Before you begin, consider that when you move Ocularis Base from one computer to another, the database which stores Ocularis settings, as well as existing Bookmarks, must be moved manually from the source computer to the destination computer. There is also a limit to the number of deactivations for each license. Typically, you may deactivate an Ocularis SLC up to five times. Beyond that, you need to contact OnSSI Technical Support for further assistance.

To Deactivate an Ocularis License

1. Launch the *Ocularis License Activation* application.
2. Notice the *Deactivate License* icon. 

Click the *Deactivate License* icon. You will receive a pop-up with a warning message reminding you that license deactivation stopped the Base from functioning. If the computer does not have internet connectivity contact [OnSSI Tech Support](#) for deactivation instructions.

3. If you are sure you want to proceed, click **Yes** to deactivate the Ocularis SLC.

On the destination computer, install Ocularis Base (see *Upgrade Ocularis Base* on page 7) and activate the same SLC on this computer (see *Activate/Refresh Ocularis Base* on page 23). Restore the Ocularis SQL Database and bookmarks (refer to the document *Ocularis Database Backup*). If you had events configured on the original Ocularis Base computer, the event proxies will need to be updated to direct events to this new Ocularis Base IP address.