Ocularis 5

Upgrade Manual:
Technical Instructions

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Ocularis 5.1 SP2

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Table of Contents

Read this document if you are upgrading to Ocularis 5.1 SP2. 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 5.1 SP2 Features

Features, bug fixes and known issues are identified in the *Release Notes for Ocularis 5.1, Release Notes for Ocularis 5.1 SP1* and *Release Notes for Ocularis 5.1 SP2.*

Upgrading to Ocularis Version 5.1 SP2

Upgrading from v5.1

To upgrade to Ocularis 5.1 SP2 from Ocularis 5.1 or Ocularis 5.1 SP1, simply download the full installation package from the OnSSI website and reinstall all components on top of existing components except Ocularis Recorder components (i.e. Master Core, Device Manager, etc).

For the recorder components, **it is not necessary to re-install the recorders** (assuming that you updated them when you installed v5.1). Be sure, however, to install the update patches. Refer to the Technical Notes for Ocularis 5.1 for more information on the update service. This upgrade is available free to all v5.1 customers with or without a valid StayCURRENT plan.

Upgrading from v5.0/5.0 SP1

To upgrade to Ocularis 5.1 SP2 from Ocularis 5.0/5.0 SP1, simply download the full installation package from the OnSSI website and reinstall all components on top of existing components except Ocularis Recorder components (i.e. Master Core, Device Manager, etc).

For the recorder components, you must first use Windows Control Panel to uninstall the component and then you may reinstall the component from the website located on the Base. This must be done on all computers that contain any recorder components. You must also Update the v5.1 License on the Recorder's Master Core Server. This is done from within the software. This upgrade is available free to all v5.0/5.0 SP1 customers with or without a valid StayCURRENT plan.

Upgrading from v4.x or earlier

To upgrade to Ocularis 5.1 SP2 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. See below for SLC requirements.

If you choose to update Ocularis Base and Client only while running 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 v5.1 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 5.1 SLC Requirements

Do I need a new SLC for Ocularis 5.1?

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 v5.1 Installation

Your existing v5.1 SLCs for both Ocularis Base and Recorder will work with v5.1 SP2.

If you have an Existing v5.0/5.0 SP1 Installation

Your existing <u>Ocularis Base</u> v5.0/5.0 SP1 SLC will work with v5.1. The Ocularis Recorder v5.1 SLC, however, will need to be updated. This can easily be done online in the software. See instructions <u>Update the v5.1 License on the Recorder's Master Core Server</u> on page 15 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 v5.1. If you upgrade recorders to v5.1 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 <u>not</u> 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 for the model of your choice
    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 components from a webpage located on the Ocularis Base machine
    VI. 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 v5.1* and *Release Notes for Ocularis v5.1 SP1* and *Release Notes for Ocularis v5.1 SP2.*	These documents identify new features, bug fixes and known issues included in the v5.1 releases.

I. REFRESH THE OCULARIS SLC

If you are upgrading from v5.0, v5.0 SP1, v5.1 or v5.1 SP1, you may skip this step (unless you have recently purchased additional camera licenses).

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://www.onssi.com/sales/current-program for more information on StayCURRENT.

- To Refresh an Ocularis license with Internet Connectivity see page 18.
- To Refresh an Ocularis license without Internet Connectivity see page 19.

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 for the Ocularis model you wish to download (e.g. **Ocularis Enterprise 5.1 SP2**)

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, any relevant recorder patch updates 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.

III. 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. (for example, **Ocularis_Installer 5.1 SP2.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*. 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.

IV. 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. Along with Ocularis Base, its corresponding SQL database also needs up be upgraded.

(1) **Your StayCURRENT program must be up-to-date if you are upgrading from v4.x or earlier**. 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 5.1?* 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 v5.0/5.0 SP1/5.1/5.1 SP1, 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.

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.

Figure 1 SQL Server Instance

5. Current settings are displayed for a final review. Click **Back** to make changes or click **Next** to continue.

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 <u>only</u> 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 2008 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.

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 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.

Figure 2 SQL Server Instance

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 presented next. Make necessary changes and click **Next** when ready.

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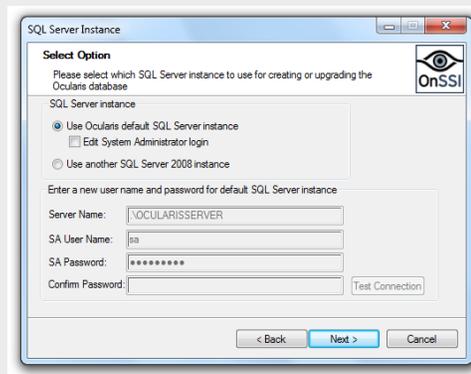
    When installation is completed, the *Setup Wizard Complete for Ocularis Base* screen appears.

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

V.   UPGRADING OCULARIS COMPONENTS

Once Ocularis Base has been installed and licensed, we recommend the following order for installation/upgrading: Ocularis Administrator, Ocularis Clients, Ocularis Recording Components and Ocularis Event Proxy.

Note: it is important to upgrade Ocularis Client(s) prior to upgrading the recorder from v5.0 to v5.1

All components are downloaded from a webpage installed on the Ocularis Base machine. Ocularis components include:

- Ocularis Administrator
- Ocularis Client
- Ocularis Recording Component
- Ocularis Recorder Event Proxy

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`
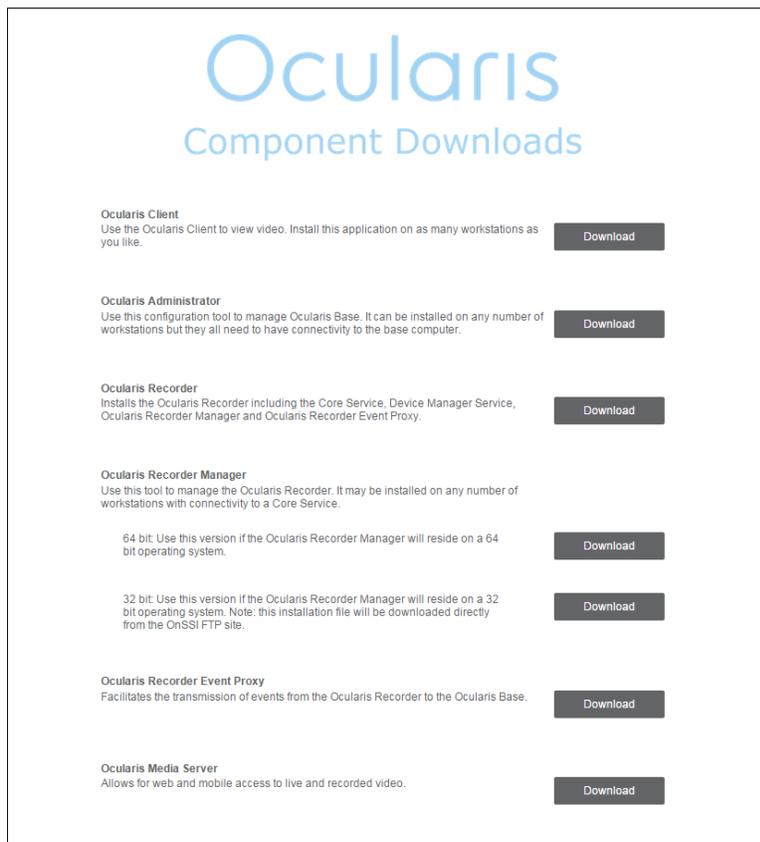
The following web page appears:

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.

4. 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**.

Upgrading the Ocularis Client

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 the Recording Component

If you are Upgrading from v5.1 or 5.1 SP1

If you are upgrading from v5.1/5.1 SP1, it is **not necessary to re-install the recorders for v5.1 SP2**. However, you should be sure that all recorder patches are installed and up to date. See the section on the Update Service in the Technical Notes for Ocularis 5.1 on the OnSSI website. (http://onssi.com/documentation/)

If you are Upgrading from v5.0/5.0 SP1

The recorder for v5.1 has been updated. Therefore, we highly recommend upgrading your v5.0/5.0 SP1 recorder to v5.1. These steps must be done on every PC that contains a recorder component (e.g. Master Core, Slave, Core, Device Manager, Ocularis Recorder Manager, etc.) Also, each Master Core's license must be updated. (See *Update the v5.1 License on the Recorder's Master Core Server* on page *15*).

1. First, make a manual backup of the Management Database. If you are using Ocularis ULT or ENT, this need only be done once. If you are using Ocularis PRO, this must be done for each Master Core instance. Backup can be done either:

    a. From the *Ocularis Recorder Administration Tool:*
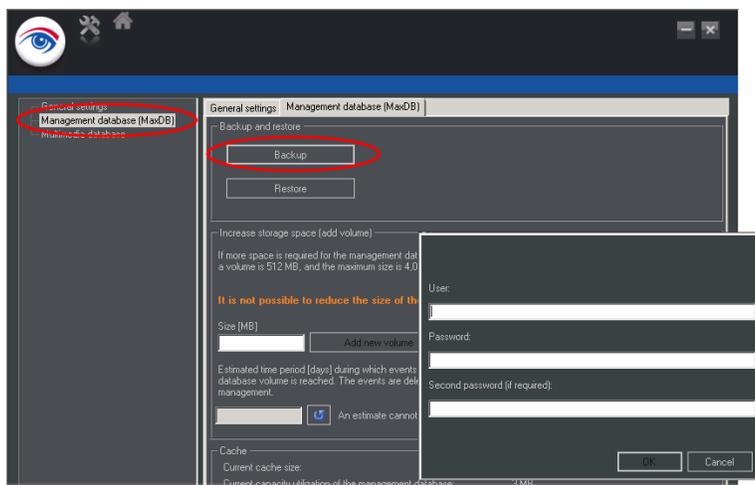
    i.   Select 'Management Database (MaxDB)'
    ii.   Click **Backup**
    iii. Enter credentials for an administrator account on the Master Core.
    iv.   Click **OK**.
    v.   A warning pop-up appears indicating that the backup may take several minutes. Click **OK**.
    vi.   On the backup successfully created pop-up, click **OK**.
    vii. Close the *Ocularis Recorder Administration Tool.*

    b. From the *Ocularis Recorder Manager:*

    i.   Select 'System' from the Control Bar.
    ii.   Select 'Backup'.
    iii. Click **OK** adjacent to 'Perform backup'
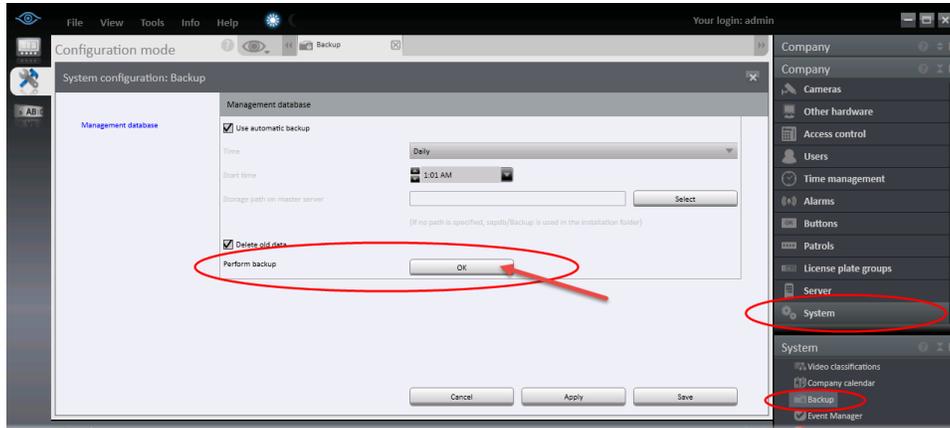
      iv.   Click **OK** when on the 'Export Successful' pop-up.

      v.   Close *Ocularis Recorder Manager*.

2. Uninstall the old version (v5.0/5.0 SP1) using Windows Control Panel <u>on each PC</u> with a recorder component (Core, DM, Ocularis Recorder Manager, etc). Ocularis 5 recorder components are listed as 'Ocularis Recorder 5.0' regardless of whether the installed component is a Master Core, Slave Core, Device Manager or any combination. Use the Install Shield Wizard to uninstall the component(s). At the end of the wizard, click **Finish**.

3. Now, reinstall the new version Ocularis Recorder. From the 'Ocularis Component Downloads' web page, click the **Download** button next to Ocularis Recorder. You should reinstall the Master Core first.

4. 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 after the download. When run, you are first prompted for the language to use for the installation. Select it and click **OK**.

5. At the *Welcome* wizard screen, click **Next**.

6. Read the *End User License Agreement*, click the 'I accept...' radio button, and click **Next**.

7. The next screen prompts you for the destination folder for the installation files. It will default to the path used previously. It is recommended to use this path. Click **Next**.

8. Next, you are prompted for the type of setup you prefer. Choices are: **Manager & Server**, **Manager**, **Device Manager**, **Custom**. Choose the option corresponding to the component you are upgrading. (i.e. if you are only upgrading a Device Manager, choose that option or choose **Custom**). By default, a new service, 'UpdateService', will be installed for v5.1.

Update Service

The Update Service with v5.1 is a service that will automatically check online for updates to recording system components and download the update if it is available. Recorder updates are typically made available once per month. By default the system will check for the update nightly at 3:00 a.m. and if found, will download and install the update patch. These settings may be modified.

There are two components to the Update Service: the Update Service SVR (Server module) and Update Service Agents (Client module). By default, the SVR service will be installed on the Master Core (unless unchecked using the 'Custom' install option). You may also install this service on a separate server, however there should be only one instance of the server module in an ENT or ULT system. For PRO, the Update Service SVR service should be installed on each Master Core Server (and it will be installed by default). Components installed on remote/satellite PCs will have an Update Service Agent installed by default. This allows the Update Service SVR to communicate and push any updates out to Agents on the remote machines.

Therefore, if you decide to include the Update Service SVR (Server) on the Master Core server, use either the 'Manager & Server' installation option or 'Custom' installation option. With the 'Custom' installation option, be sure that 'UpdateService' is among the checkboxes selected.

If you choose to install the Update Service SVR (Server) on a server other than the Master Core, be sure to use the 'Custom' option and that 'UpdateService' is among the checkboxes selected when installing the Update Service.

Once the UpdateService SVR option is installed, if you decide to use the 'Custom' installation option to install other components, the 'UpdateService' should be unchecked (since it is already installed on another computer).

The UpdateService uses port 63000 and 63001. It is advised to keep these default values. If you need to change these port numbers, please contact OnSSI Technical Support prior to doing so.

Click **Next**.

9. Verify the IP addresses listed in the 'Server services' screen. It should retain prior settings and include a new section for 'Update service'.
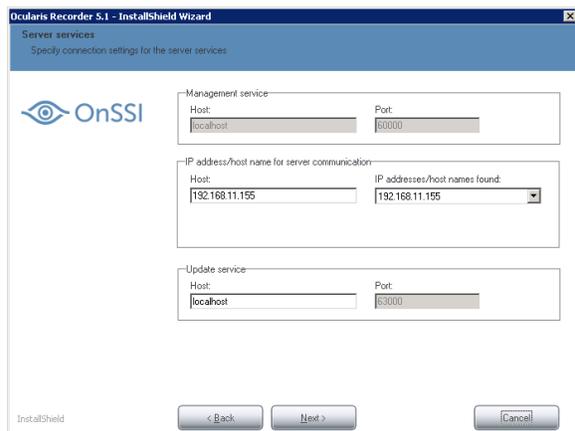
10. In the 'Host' field of the 'Update Service' section,

    a. If you are updating the Master Core and are installing the UpdateService SVR on the same computer (the default setting), the 'Host' field should contain 'localhost'. Click **Next**.

    b. If you are updating the Master Core and the UpdateService SVR is on another computer, enter the IP address of the server where the UpdateService SVR is installed. Click **Next**.

    c. If you are on a remote PC and updating any other recording component (e.g. Device Manager, Slave Core, etc.), enter the IP address of the server where the UpdateService SVR is installed. In most cases, this will be the IP address of the Master Core Server. Click **Next**.

11. If applicable, on the next screen, review and/or modify storage zones. Click **Next**.

12. An informational message appears as a result of the new UpdateService:
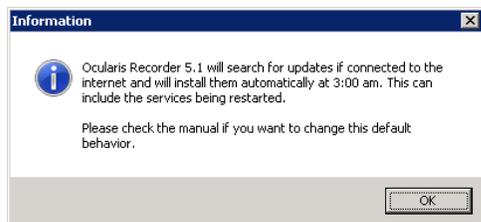
13. Click **OK**.

14. Click **Install** to begin the installation. All prior configuration settings of the component will be retained. In the unlikely event where this is not the case, you can use the backup you made at the beginning of this section to restore the configuration.

15. If DirectX is installed, click **Yes** to accept its EULA.

16. When the wizard is complete, click **Finish**.

17. Repeat steps 2 - 16 on all PCs with a recorder component.

18. Update the license for the recorder on each Master Core Server. See *Update the v5.1 License on the Recorder's Master Core Server* below.

Update the v5.1 License on the Recorder's Master Core Server

You only need to do this step if you are upgrading from v5.0 or v5.0 SP1. If you are upgrading from v5.1/v5.1 SP1, this step is **not** necessary.

Ocularis v5.0/5.0 SP1 users will need an updated Ocularis Recorder license. When you launch *Ocularis Recorder Manager*, you will get a message indicating this with a note that the software will work for only 30 days as it has reverted back to trial mode.

Master Core has Internet Connectivity

If the Master Core Server has internet connectivity, follow these steps to update the license:

1. From the *Ocularis Recorder Manager*, select the **Info** menu.
2. Choose **Activate License**.
3. Click **OK** to acknowledge that an internet connection is required.
4. In the form, select 'Download license' radio button.
5. Enter your Ocularis Recorder SLC and click **OK**.

A new license for v5.1 will be downloaded to the Master Core and the software is licensed. Repeat these steps for each Master Core instance for an Ocularis Professional installation.

Master Core does not have Internet Connectivity

If the Master Core Server does not have internet connectivity, follow these steps to update the license:

1. On another computer that does have internet connectivity, go to the Ocularis 5 Recorder Licensing page on the OnSSI website: http://onssi.com/ocularis-recorder-licensing/.
2. Scroll the page to the bottom to the section: 'License update: Get updated license for your Ocularis 5 Recorder'
3. Enter your Ocularis Recorder SLC in the corresponding field. Click **Submit**.
4. A new SLC (in the form of a license.zip file) will be emailed to the email address that was used then the software was initially registered.
5. Detach the license.zip file from the email and store on portable media (USB drive, etc.)
6. From the *Ocularis Recorder Manager*, select the **Info** menu.
7. Choose **Import license file**.
8. Use the **Select** button to browse to the license.zip file detached from the email. Select the file and click **Open**.
9. Click **Import**.

Repeat these steps for each Master Core instance for an Ocularis Professional installation.

Uninstallation of Ocularis Recorder v5.1

In rare instances, it may be necessary to downgrade an Ocularis Recorder v5.1 version back to Ocularis Recorder v5.0. This can easily be done by following these steps:

1. Using Windows Control Panel, uninstall Ocularis Recorder 5.1 for all recorder components (Core, DM, etc.). Follow the on-screen wizard prompts.
2. Re-install Ocularis Recorder v5.0 SP1 (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 5.1 to Ocularis Recorder 5.0/5.0 SP1.

If you are Upgrading from v4.x or earlier

The recording components included with Ocularis v5 are new in this generation 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.

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/.

Upgrading the Recording Component Event Proxy

If you are Upgrading from v5.1 or v5.1 SP1

If you are upgrading from v5.1/5.1 SP1, it is not necessary to re-install the Ocularis Recorder Event Proxy for v5.1 SP2.

If you are Upgrading from v5.0/5.0 SP1

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**.

If you are Upgrading from v4.x or earlier

The event proxy for the recorder in Ocularis v5 is new. 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, use the existing event proxy for the corresponding legacy 4.x recorder(s).
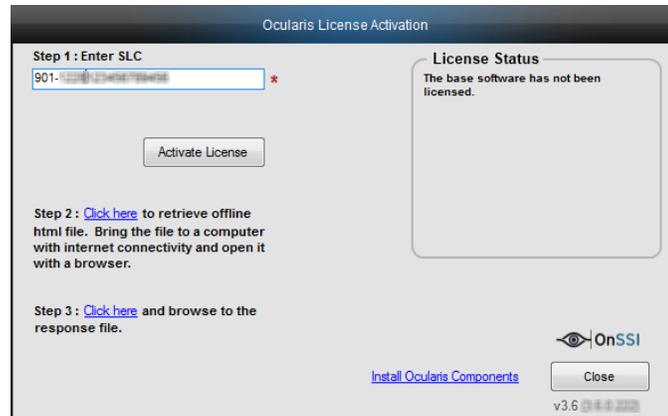
VI. ACTIVATE/REFRESH OCULARIS BASE

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 4 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 5 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 5), 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 17). 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.