Read this document if you are upgrading to Ocularis 4.2. For new installations, see the *Ocularis Quick Start Guide* and the *Ocularis Installation and Licensing Guide*.

Version 4.2 Features

Features, bug fixes and known issues are identified in the *Release Notes for Ocularis 4.2*.

Upgrading to Ocularis Version 4.2

To upgrade to Ocularis 4.2, you must be up-to-date with your OnSSI StayCURRENT program. The software will verify this during installation. If you have any questions or need to extend your StayCURRENT expiration date, please contact OnSSI Sales.

If you are upgrading from any Ocularis version, you need to download the full installation package from the OnSSI website and reinstall all components. See below for SLC requirements.

If you are upgrading from an older version recorder (specifically RC-P 1.0, RC-I 7.0, RC-C 7.0, NetDVMS 6.5 or earlier, NetDVR 6.5 or earlier or ProSight), you must first upgrade to the 2.5/8.5 generation recorder and then upgrade to the 2.6/8.6 version. This is a two step process. When you request your new SLC you will receive instructions on how to perform this upgrade.

Install a Brand New System

If you are installing Ocularis v4.2 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 4.2 SLC Requirements

Do I need a new SLC for Ocularis 4.2?

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 from OnSSI Sales. SLCs are required for demo systems as well. Corresponding recorders have a separate SLC and associated license file. This will be provided to you upon product purchase.

If you have an Existing Installation

Ocularis SLC

If you currently have Ocularis version 3.5 or earlier, you **will** need a new Ocularis SLC. If you have Ocularis version 3.6 or later, you do not need a new Ocularis SLC to upgrade to Ocularis v4.2.
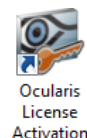
Recording Component SLC

Recorders have not been upgraded in this version.

- You <u>will</u> need a new SLC to upgrade to these recorders if you are upgrading from a v4.0 or earlier recorder.

- You will <u>not</u> need a new SLC to upgrade to these recorders if you are upgrading from a v4.1 recorder.

- The recorder versions included in v4.2 are (respectively): RC-P 2.6b, RC-I 8.6b, RC-C 8.6b, RC-L 7.0c and RC-E 7.0c. *These recorders may only be installed on a 64-bit operating system.* Note: Neither Windows XP nor Windows Server 2003 are supported. Please see http://www.onssi.com/hardware-recommendations for an up-to-date listing of supported operating systems.

How can I tell what Ocularis version I am using?

The easiest way is to launch the *Ocularis License Activation* application located on the Ocularis Base machine. The version number is located in the lower right corner of the screen.

Ocularis
License
Activation

How can I tell what version recording component I am using?

1. For Ocularis PS, Ocularis IS and Ocularis CS open the *Management Application*. For Ocularis LS and ES, open the *Management Client*.

2. From the *Help* menu, select *About*.

The pop-up identifies the version number.

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. You will receive an email from OnSSI with the SLC(s) and recorder license file.

> *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 feature set file
    III. Extract any Ocularis feature set file to the computer where Ocularis Base should reside
    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.   Re-register existing camera licenses on any upgraded recorders
    VII. Activate / Refresh Ocularis Base License if changes to license are made

---

Documents that should be referenced during upgrade/installation:

*   *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 v4.2* — This document identifies new features, bug fixes and known issues included in the v4.2 release.

I. REFRESH THE OCULARIS SLC

In order to validate your StayCURRENT program 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 20.
- To Refresh an Ocularis license without Internet Connectivity see page 21.

If you find that your StayCURRENT program has expired, please contact OnSSI Sales.

II. DOWNLOAD THE NEW OCULARIS FEATURE SET FILE

Obtain the Ocularis installation software package.

1. Open a browser and go to the 'Downloads' page at: http://www.onssi.com/support/downloads.

2. Review the SLC requirements and other instructions found on http://www.onssi.com/download-notes.

3. On the 'Downloads' page, click the link for the Ocularis feature set you wish to download (e.g. **Ocularis CS v4.2 Download**)

4. A short web form appears. Fill out the form and click **Submit**.

   You will receive an email containing the link to the download file as well as links to other documentation.

5. Click the link to download the Ocularis 4.2 file. In some cases, you may be directed to perform a two step update for older LS/ES recorders.

6. You will be prompted to save the file. Select the desired file location and click **Save**.

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

III. EXTRACT THE DOWNLOADED 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_PS-IS-CS_4.2.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 installation file(s) from step 1 above to the Ocularis Base machine.

3. Double-click the 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 _S Installer* (where '_S' corresponds to the Ocularis Feature Set.) 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. Install Ocularis Base now: make sure the corresponding checkbox is selected and click **Finish**. Proceed to *Install Ocularis Base* below.

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

You have completed the extraction of the Ocularis installation files.

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**. Refresh your license in the Ocularis License Activation application if necessary.

(2) Before you begin the upgrade, make sure you have your Ocularis SLC in hand if you need this for this upgrade (see Do I need a new SLC for Ocularis 4.2? on page 1).

(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. This most likely in the default location. For example: `c:\Ocularis CS IS PS 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. If the installation process cannot find your StayCURRENT expiration date or it has expired, you will see a message indicating this.

   a. Click **OK** to launch the *Ocularis License Activation* application.

      i. If the machine has internet connectivity, click **Refresh** to update the License Status.

      ii. If the machine does not have internet connectivity, follow the steps in *To Refresh an Ocularis license without Internet Connectivity* on page 21.

   b. If StayCURRENT has expired or you are unable to update the license, contact OnSSI Sales.

   c. If StayCURRENT is up-to-date, click **OK** to close the '*License successfully refreshed*' message. Then click **Close** to close the *Ocularis License Activation* application.

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. The vast majority of installations should choose *Typical*. 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 5

   • Custom Upgrade is found on page 5.

7. 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 screen to launch the 'Install Ocularis Components' website and proceed with the upgrade of other Ocularis components. You can always access the 'Install Ocularis Components' website later directly from a browser to continue with the upgrade. See *Upgrading Ocularis Components* on page 7.

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 on page 4.

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.
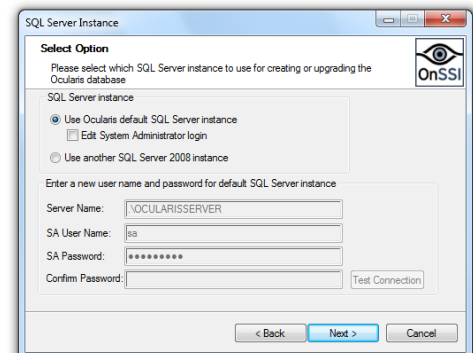
7. Proceed to Step 7 on page 4.

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 2008 instance** - Enter the login credentials for the new SQL Server instance created in step 1. When ready, click **Next**.

On-Net Surveillance Systems Inc. | One Blue Hill Plaza, PO Box 1555, Pearl River NY 10965 | T 845-732-7900 | www.onssi.com | page 5

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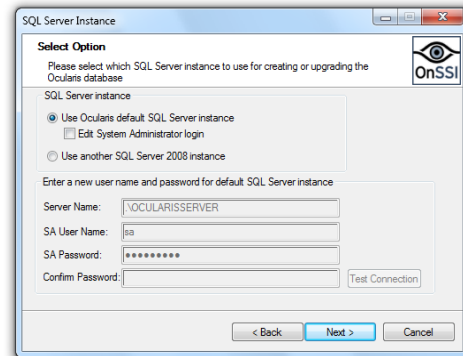
    When installation is completed, the *Setup Wizard Complete for Ocularis Base* screen appears.

9. Proceed to Step 7 on page 4.

Figure 2 SQL Server Instance

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 v4.2.

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 on page 4.

V. UPGRADING OCULARIS COMPONENTS

Once Ocularis Base has been installed and licensed, the order of installing the remaining components does not matter. All components are downloaded from a webpage installed on the Ocularis Base machine. Ocularis Components include:

- Ocularis Administrator

- Ocularis Client

- Ocularis Recording Component & 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://[NAME]:[port]/OcularisService
```

where **[NAME]** 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://[NAME]:[port]/OcularisService/InstallerWebsite/index.html
```
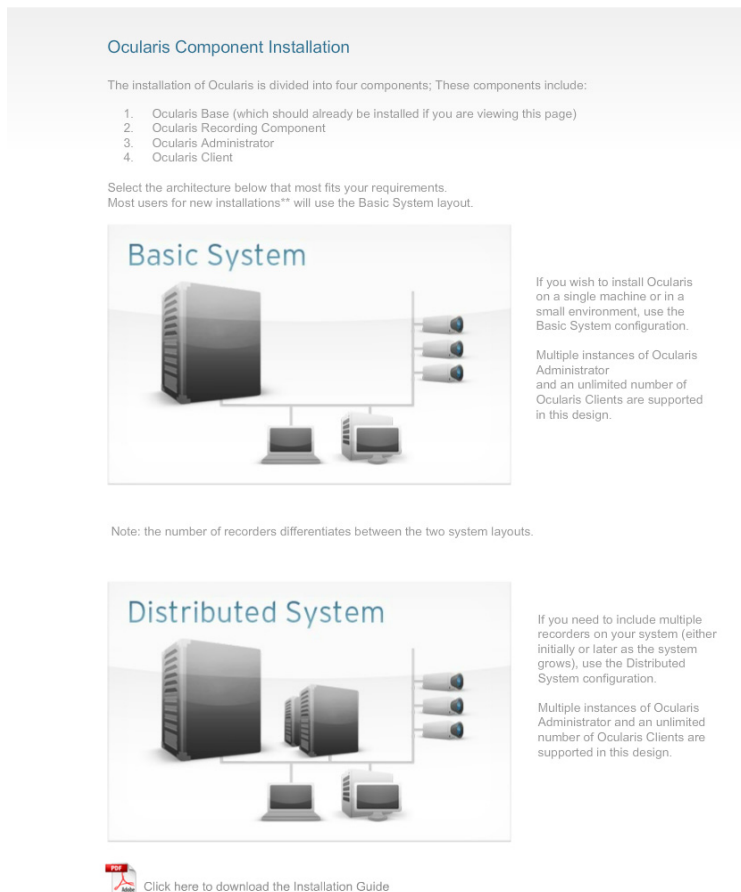
The following web page appears:

Figure 3 Install Ocularis Components Web Page

2. Click on 'Basic System'. This option should be used by most Ocularis PS, IS and CS installations.

3. Select the component you wish to download and install.

4. Select the '*Click here to download component'* link when you are ready to download the corresponding component to the local machine.

5. Follow the on-screen prompts.

Upgrading the Ocularis Administrator

1. Follow the steps above in Upgrading Ocularis Components. Be sure to be located at the pc on which you wish to install *Ocularis Administrator*.

2. From the Basic Installation page, click the *Ocularis Administrator* component.

3. Select the '*Click here to download component'* link when you are ready to download the *Ocularis Administrator* component to the local machine.

4. Run the installation and follow the wizard prompts. The process will detect existing versions of *Ocularis Administrator* and prompt you to delete the old version and install the new version.

Upgrading the Ocularis Client

1. Follow the steps above in Upgrading Ocularis Components. Be sure to be located at the pc on which you wish to install *Ocularis Client*.

2. From the Basic Installation page, click the *Ocularis Client* component.

3. Select the '*Click here to download component'* link when you are ready to download the *Ocularis Client* component to the local machine.

4. Run the installation and follow the wizard prompts. The process will detect existing versions of *Ocularis Client* and prompt you to delete the old version and install the new version.

Upgrading the Recording Component-General

The recording component versions for Ocularis v4.2 are as follows:

Ocularis PS	RC-P v2.6
Ocularis IS	RC-I v8.6
Ocularis CS	RC-C v8.6
Ocularis LS	RC-L v7.0
Ocularis ES	RC-E v7.0

If you do not have the recorder versions listed above, we highly recommend that you upgrade with v4.2 in order to take full advantage of all new features. You may upgrade at any time. Keep in mind, however, that when you decide to upgrade to these version recorders, you will need a new recorder SLC (.lic file) from OnSSI. As always, when upgrading recorder software always upgrade its corresponding event proxy (not applicable for Ocularis PS).

Note:
All recorders included in the v4.2 release are 64-bit applications and *require* a 64-bit operating system for installation. If you have a 32-bit operating system, do not attempt to install these new recorders as the installation will fail. See page 10 for 32-bit upgrade instructions. Also: neither Windows XP nor Windows Server 2003 are supported. Please see http://www.onssi.com/hardware-recommendations for an up-to-date listing of supported operating systems.

Upgrade instructions:

Upgrading Ocularis PS, IS or CS

The upgrade process varies slightly depending on which version you are upgrading from and whether the existing recorder is installed on a 32-bit or 64-bit operating system.

- On systems with 64-bit operating systems (see below)
- On systems with 32-bit operating systems (see page 10)

On systems with 64-bit operating systems

Note: Neither Windows XP nor Windows Server 2003 are supported. Please see http://www.onssi.com/hardware-recommendations for an up-to-date listing of supported operating systems.

Summary Steps

See below for detailed steps.

1. Obtain the recording component SLC/License file (file with a '.lic' filename extension).
2. Backup existing configuration data.
3. Install the Recording Component software using the appropriate .lic file on the same PC as the existing software.
4. Update the Camera Licenses on the upgraded recorders.
5. Refresh the recording server in *Ocularis Administrator*.
6. Adjust Motion Detection Sensitivity Settings.

Detailed How To

1. Obtain the Recording Component SLC / license file (Ocularis PS, Ocularis IS and Ocularis CS) from OnSSI or your Ocularis dealer. For all Ocularis feature sets, the Ocularis recording component requires its own license file (with .lic filename extension). This file is provided to you when you receive your Ocularis SLC.

   It is unnecessary to manually uninstall the existing software.

   Once the recorder SLC has been upgraded, the old SLC is disabled.
   The existing system will not be affected but you will not be able to add or remove cameras.

2. Backup existing recorder configuration data (Ocularis PS, Ocularis IS and Ocularis CS)

   Make a backup of the recording component configuration data for insurance reasons or if you need to replace the hardware on which the component is installed. The procedure below is only for RC-P, RC-I and RC-C.

   1. From the *Management Application*, select the **File** menu.

   2. Select ***Export Configuration – Backup…*** A Windows *Save As* dialog appears.

   3. Provide a location and name for the backup file. (i.e: configuration08162014). The file will be stored in .xml format.

   4. Click the **Save** button.

   The *Management Application* gathers all necessary data regarding cameras, configuration and application settings and stores this in a single .xml file. It is recommended to store this file in a safe place away from the actual server (e.g. on a thumb drive or network drive) in case of catastrophic server failure.

   For more details on backing up or restoring recorder configuration data, refer to the document *Ocularis Recording Component Configuration Backup*.

3. Install the Recording Component software using the appropriate .lic file (SLC file) on the same PC as the existing software. The installation will recognize the earlier version, prompt you to uninstall the older version and install the new version on top.[1]

4. Update the Camera Licenses on the upgraded recorders. In most cases, this is automatic.

   - For systems with internet connectivity:

     o During the upgrade, device licenses will be re-registered automatically. Camera and encoder licenses are updated and potentially freed up during this process.

     o If, for some reason, camera licenses were not updated during the upgrade, simply re-register them by selecting *File…Activate License Online* from the *Management Application*.

   - For systems without internet connectivity:

     o Once the software installation is complete, in the *Management Application*, select *File…Activate License Offline*.

       (1) Click the Export button to generate a license request file (.lrq). Save this file to a convenient location.

       (2) Email this file to support@onssi.com with the request to perform offline licensing.

       (3) OnSSI will process the file and return to you an email with a new license file (.lic) as an attachment.

       (4) Detach this file to portable media and bring to the recorder computer.

       (5) Click **Browse** (from *File…Activate License Offline*); select the .lic file and click **Open**.

       (6) Click **Activate**.

> **A Note About Licenses in Ocularis 4.2:**
> Devices are now licensed based on their IP address rather than their video stream. For devices with multiple channels (such as an encoder or multi-lens camera), this can significantly reduce the number of licenses required in your system. After an upgrade to v4.2, you may find that you have extra licenses. For example:
> If you have:
> > 1 encoder with 4 channels on the same IP address
> > 2 four headed cameras
> With Ocularis 4.0, you would need 12 device licenses: 6 licenses for the v2.5/8.5 recorder and 12 for Ocularis Base.
> With Ocularis 4.1 or 4.2, you need 3 device licenses for both the v2.6/8.6 recorder and Ocularis Base.
> If you no longer need any extra licenses, contact OnSSI Sales to discuss.

5. Adjust Motion Detection Sensitivity Settings.

   A new enhancement has been included in the v2.6/8.6 version recorders that significantly improves the algorithm for the sensitivity level for background noise in the video stream. When you upgrade, this feature is not enabled; therefore, you must enable it manually if you want it to take effect.

   1. From the *Management Application,* open the Camera Properties pop-up for a camera.

   2. In the Motion Detection tab, uncheck the **Manual sensitivity** checkbox.

   3. Click **OK**.

   4. Repeat for each camera. Be sure to save all changes.

6. Refresh the recording server in *Ocularis Administrator*.

   Ocularis must be updated with changes to the recorder licenses.

   1. From the *Ocularis Administrator's* **Servers/Events Tab**, right-click the updated recording server.

   2. Select **Refresh server**. Ocularis will retrieve updated settings. The license distribution to your cameras may be adjusted if the upgraded system included any encoders. Verify license count in the **About Tab**.

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[1] *If you are upgrading from RC-P 1.0, RC-I 7.0, RC-C 7.0, NetDVMS 6.5 or earlier, NetDVR 6.5 or earlier or ProSight, you must first upgrade to the 2.5/8.5 generation recorder and then upgrade to the 2.6/8.6 version. This is a two step process.*

3. In most cases, licenses should be correctly applied during the upgrade. Verify this by expanding the recording component to see the device list. Check any devices that should be licensed.

4. Repeat for all upgraded recording servers.

On systems with 32-bit operating systems

The recorders for Ocularis PS, Ocularis IS and Ocularis CS are supported only on 64-bit operating systems. Follow these steps to migrate an earlier version recorder on a 32-bit system to a new 64-bit operating system. Note: Neither Windows XP nor Windows Server 2003 are supported. Please see http://www.onssi.com/hardware-recommendations for an up-to-date listing of supported operating systems.

1. On the new 64-bit server, create a new folder under `C:\ProgramData` called `OnSSI`.

2. Then create another folder under `C:\ProgramData\OnSSI` called `RC-C` (or `RC-I` or `RC-P`)

3. From the 32-bit system, copy the contents of `C:\ProgramData\OnSSI\RC-C` (or `RC-I` or `RC-P`) to the corresponding location on the new 64-bit system.

4. On the 64-bit system, install the new recorder using the new SLC/.lic file. The copied files will be used during the upgrade and configuration should be maintained.

   If you do not see your hardware devices after the upgrade, please contact support@onssi.com for further assistance.

5. Proceed to step 4 on page 10 and continue with the upgrade steps listed.

Upgrading Ocularis LS or ES

If you are upgrading the Ocularis LS or ES recording component, each component within the recording system, will need to be upgraded (Management Server, Failover Server(s), Recording Server(s), etc.).

We recommend using these instructions in addition to those found in the *Ocularis Installation and Licensing Guide* when upgrading a complex platform such as Ocularis LS or ES.

⚠️ **Important Upgrade Notes:**

- Upgrading to v7.0 of RC-L or RC-E does not require manually uninstalling any component. Simply install the new components over the old components and the software will handle any uninstalling required.

- We **strongly recommend** backing up all configuration and databases prior to upgrading. For detailed instructions on how to perform a backup, see the *Ocularis Recording Component Configuration Backup* document.

- After the upgrade of the Management Server, if you are requested to reboot, do not do so until several steps are performed. See Steps Prior to Reboot on page 13.

- After upgrading an RC-L or RC-E recording component, camera licenses need to be reregistered immediately. See Re-register Camera Licenses on page 15.

- Version 7.0 of RC-L or RC-E requires a 64-bit operating system. If your current system is 32-bit, contact OnSSI Tech Support for options on migrating system data.

Upgrade Instructions

Note:
Upgrading any recording servers or failover servers requires use of an account with local administrator rights. You may use a Domain Service account or, if using workgroups, you can use a local administrator account (create one if necessary). Each computer that houses the component you upgrade must have such an account. This will enable this upgrade to be successful.

1. Backup all configuration and databases prior to the upgrade. For detailed instructions on how to perform a backup, see the *Ocularis Recording Component Configuration Backup* document.

2. On each recording server (RC-L or RC-E) or failover server (RC-E) machine log in with the account mentioned above:

    (1) In the Windows Server Manager, right-click the *RC-L_RC-ERecordingServerService* Service and select **Properties**.

    (2) In the **Log On** tab, select 'This account' and specify the account addressed above and its corresponding password.

    (3) Click **OK** through all messages.

    (4) Restart the system. Now you are prepared to continue with the upgrade.

3. Upgrade Ocularis Base, Ocularis Administrator and Ocularis Client using the steps outlined earlier in this document. Upgrade the Management Server and Event Proxy from the Ocularis component webpage. This webpage is installed on the Ocularis Base machine:

    `http://`**[NAME]:[port]/**`OcularisService/InstallerWebsite/sysadmin.html`

    where **[NAME]** 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.

4. Launch the link: *RC-E RC-L Event Proxy and Management Server Bundle.* Follow the wizard to install the Management Server and Event Proxy.

    🛑 **If you are asked to reboot the computer during the installation, perform the** Steps Prior to Reboot **below!**

Steps Prior to Reboot

If requested to reboot during an LS/ES upgrade (to 7.0c) you first need to do the following in order to ensure system configuration and data integrity:

1. Close the installer when requested to reboot.

2. Go to the registry and delete:

    `HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\RunOnce`

    Note: The path can vary if you are running as a different user:

    `HKEY_USERS\<SID of the user>\Software\Microsoft\Windows\CurrentVersion\RunOnce`

3. Delete the InstallerFramework entry in this registry location.

4. Reboot the machine.

5. Run the installation again.

Contact OnSSI Technical Support if you have any questions.

5. During the installation of the Management Server, be sure to have your .SLC handy. You'll also be presented with an Installation option screen. The options are:

Single Server	This is the easiest installation option and will install all component software on the current computer.
Distributed	This option installs all management server components on the current computer. You must install the Recording Server on a separate computer using the Recorder Downloads page.
Custom	This option allows you to select which components to install on the current computer. You will need to use the Recorder Downloads page to install components on remote systems.

Choose your desired option by clicking its corresponding button. Continue with the installation wizard.

6. At the completion of the wizard, click **Close**.

7. If you chose the *Single Server* option, installation is complete. If you chose the *Distributed* or *Custom* installation option, you need to proceed to the remote computers to install components.

Installing Remote Components

1. If you chose the *Distributed* or *Custom* installation option, or if you simply need to install a recording component on a machine other than the Management Server machine, use the Recorder Downloads page to download and install these components. This page can be accessed from any web browser.

    Type in the following URL:

    `http://[Management Server address]:[port]/installation/admin`

    For instance:
    `http://192.168.60.74/installation/admin`

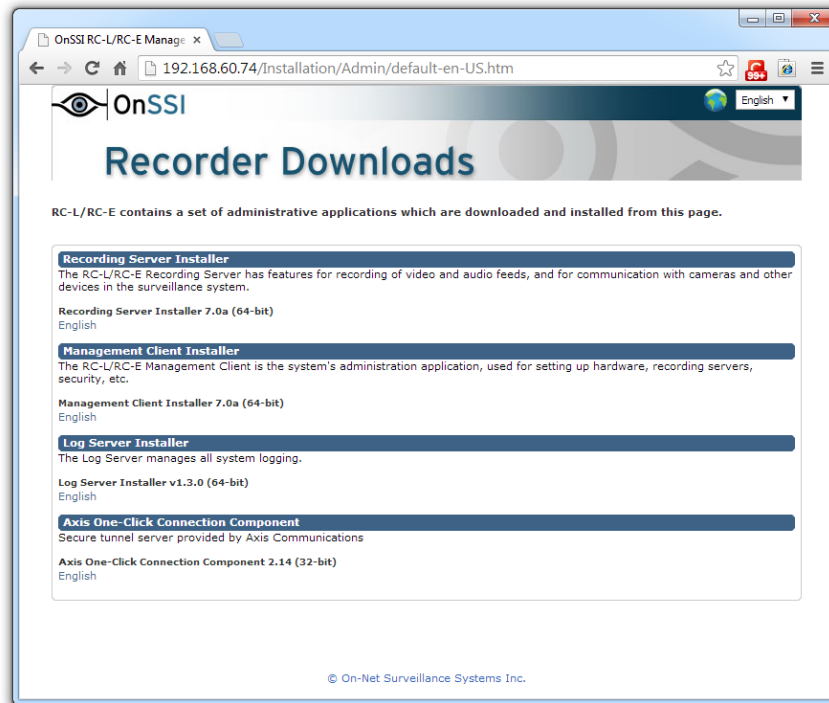This page can be accessed from any pc with network connectivity to the Management Server machine.

Figure 4 RC-L/RC-E Recorder Downloads webpage

2. From the Recorder Downloads installation webpage:

   a. Install the Ocularis Recording Server software by using the link under Recording Server Installer. This component may be installed on multiple servers to support multitudes of cameras. When you install this component, you will need to identify the location (IP Address) of the Management Server. **For upgrades, be sure to create a local Windows administrator account and follow step 1 in** *Upgrade Instructions* **on page 12.** This component must be installed on a 64-bit operating system.

   b. Install the Management Client. This component must be installed on a 64-bit operating system with connectivity to the Management Server.

   c. Install the Log Server. This component must be installed on a 64-bit operating system.

   d. Update to the latest video device driver pack (if necessary). Check the OnSSI website at http://www.onssi.com/support/downloads for the most up-to-date driver pack.

   e. Install additional Recording Servers or Failover servers (optional). **For upgrades, be sure to create a local Windows administrator account and follow step 1 in** *Upgrade Instructions* **on page 12.**

   f. Install the Axis One-Click Connection Component (optional).

   g. Install the RC-L/RC-E Event Proxy software (if not already updated).

Re-register Camera Licenses

After upgrading an RC-L or RC-E recorder, the camera license status changes to 'Missing'. Camera licenses need to be reactivated manually.

1. From the *Management Client,* select **Basics -> License Information**.

   Camera license counts appear in the *Missing* column in the last column of the bottom table.

2. Activate the licenses by selecting the *Activate License* drop-down menu and choosing **Activate License**.

   You then have the option to **Activate License Online** or **Activate License Offline**.

3. Select either option based on whether the *Management Client* has internet connectivity.

4. Follow the standard camera registration instructions as found in *Ocularis Camera License Registration.*

Adjust Motion Detection Sensitivity Settings

An enhancement was included in the v4.1/4.2 version recorders (RC-L 7.0 and RC-E 7.0) that significantly improves the algorithm for the sensitivity level for background noise in the video stream. When you upgrade, this feature is not enabled; therefore, you must enable it manually if you want it to take effect.

1. From the *Management Client,* open the camera properties for a camera.

2. In the *Motion* tab, uncheck the **Manual sensitivity** checkbox.

3. Save changes.

4. Repeat for each camera. Be sure to save all changes.

Refresh Updated Component Data in Ocularis

Ocularis must be updated with any changes to the recording components.

1. From the *Ocularis Administrator's* **Servers/Events Tab**, right-click the updated Management Server.

2. Click **Refresh server**. Ocularis will retrieve updated settings. The license distribution to your cameras may be adjusted if the upgraded system included any encoders. Verify license count in the **About Tab**.

Upgrading Only the Recording Component Event Proxy

Use this procedure to upgrade only the recording component event proxy, if necessary.

To Update the RC-C / RC-I Event Proxy

These instructions assume that you have updated Ocularis Base and are located at the system on which you wish to install the RC-C / RC-I Event Proxy. This process should be done on each recorder.

1. Access the alternate download webpage located on the Ocularis Base machine through a browser using the following URL:

   `http://[NAME]:[port]/OcularisService/InstallerWebsite/sysadmin.html`

   where **[NAME]** 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.

2. From the component download Basic Installation page, click the *Recording Component* icon.

3. Select the '*Click here to download component'* link when you are ready. The component downloaded will be both the event proxy and the recorder software.

4. Run the executable file and follow the wizard prompts. Once the wrapper is extracted you will see an *Extraction Complete* page. There are two checkboxes: one to Install the Event Proxy and one for the Recorder.

5. Uncheck the 'Install Recorder' checkbox, leaving only the 'Install Event Proxy' box checked.

6. Click **Finish**.

7. The previous version of the event proxy should be 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 the RC-C / RC-I Event Proxy*…?" screen appears. Click **Yes**.
   b. When the uninstallation is complete, click **OK**.

8. The *Welcome to the RC-C RC-I Event Proxy Setup Wizard* appears. Click **Next**.

9. The *Select Destination Folder* screen appears. You may leave the default directory path or change it if necessary according to your organization. If installing the *Demo* version, keeping the default path is recommended. Click **Next**.

10. The next screen will confirm the file path and disk space requirements. Click **Next** if OK. Click **Back** to make changes to the directory path or the folder. The *RC-C / RC-I Event Proxy* software is installed.

11. When the *Event Proxy* Setup is completed, the *Setup Wizard Complete* screen appears. Click **Finish**. Using an account with Windows Administrator privileges, launch the Event proxy to configure settings and view the corresponding Ocularis version number.

Note:
A required field, *Recorder IP*, has been included in this version of the event proxy. This field identifies where the events are coming from. Since prior versions of the event proxy required that it be installed on the recorder computer, this field will have a default value of 127.0.0.1. As long as the event proxy remains on the recorder computer, you may leave this value as is or you may modify it to the actual IP Address. If you install the event proxy software on a computer that does not house the event proxy, you must change the IP address.

Note:
Multiple IP addresses (separated by a comma) may be added to the *Server IPs* field if you wish to forward events to more than one recipient. For more details, refer to the *Ocularis Installation and Licensing Guide*.

To Update the RC-L/RC-E Event Proxy

These instructions assume that you have updated Ocularis Base and are located at the system on which you wish to install the RC-L/RC-E Event Proxy.

1. Access an alternate webpage on the Ocularis Base machine:

   `http://`**`[NAME]:[port]/`**`OcularisService/InstallerWebsite/sysadmin.html`

   where **[NAME]** 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.

2. From the webpage, click the link for *RC-L/RC-E Event Proxy* in the Plugins section. When prompted to run or save the file, you may choose to either run it now or save it and run the installation.

3. The previous version of the event proxy should be 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 the RC-E Event Proxy*…?" screen appears. Click **Yes**.
   b. When the uninstall process is complete, click **OK**.

4. The *Welcome to the RC-L/RC-E Event Proxy Setup Wizard* appears. Click **Next**.

5. The *Select Destination Folder* screen appears. You may leave the default directory path or change it if necessary according to your organization. Click **Next**.

6. The next screen will confirm the file path and disk space requirements. Click **Next** if OK. Click **Back** to make any changes. The *RC-L/RC-E Event Proxy* software is installed.

7. When the *Event Proxy* Setup is completed, the *Setup Wizard Complete* screen appears. Click **Finish**. Using an account with Windows Administrator privileges, launch the event proxy to verify or configure settings.

Note:
Multiple IP addresses (separated by a comma) may be added to the *Server IPs* field if you wish to forward events to more than one recipient. For more details, refer to the *Ocularis Installation and Licensing Guide*.

VI. RE-REGISTER EXISTING CAMERA LICENSES ON UPGRADED RECORDERS

For Ocularis 3.6 and above recorders, all cameras have a 30 day grace period from the time of camera installation or upgrade until their licenses must be registered. This means that cameras are fully functional after you install them. You do not have to wait in the field for a .DLK file from OnSSI in order to use a camera with the newest recorders. The camera is immediately operational. The timestamp of the installation is noted in the recorder and a countdown begins, giving you 30 days to register the camera license.

Licensing cameras must be done when installing new cameras or to existing cameras after upgrading to an Ocularis 4.2 recorder from Ocularis 3.5 or earlier.

Ocularis PS, IS and CS

When upgrading to v4.2, camera licenses should automatically be updated provided that the recording server has internet connectivity.

Ocularis LS and ES

When upgrading to v4.2, camera licenses will <u>not</u> automatically be updated. Therefore, you must manually update camera licenses online or offline.

For further instructions on how to register camera licenses, refer to the document *Ocularis Camera License Registration*.

VII.   ACTIVATE/REFRESH OCULARIS BASE

Activating the Ocularis license is necessary when upgrading from versions of Ocularis (demo, trial or retail) prior to v3.5. **If you upgrade from v3.6, you do not need to activate the Ocularis license unless changes were made to the license** (e.g. camera licenses were added).

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 v4.2 for the first time or when upgrading from v3.5 or earlier.

- **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 v4.2 is installed. This applies when the installation is on a brand new system or if you are upgrading from a much earlier (v3.5 or earlier) Ocularis version.

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 5 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.

Proceed with Upgrading Ocularis Components below.

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:
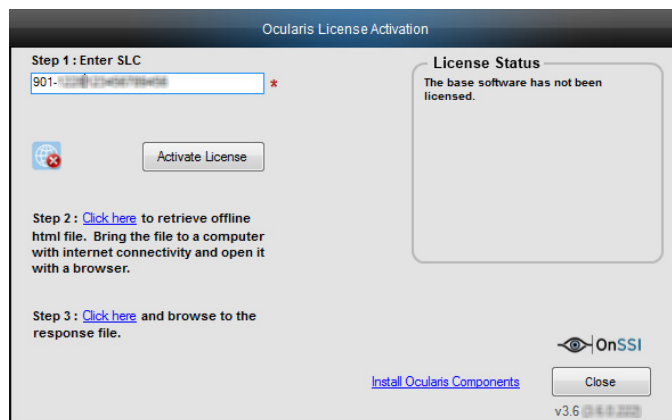

Figure 6 Additional Steps for Offline Licensing

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 6), 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.

   Proceed with <u>Upgrading Ocularis Components</u> on page 7 to upgrade any Ocularis components.

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. Notice the offline icon. 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.

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 4) and activate the same SLC on this computer (see *Activate/Refresh Ocularis Base* on page 19). 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.

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