



Upgrading to Ocularis

Version 6.1

August, 2021

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Revision History

| Revision | Purpose for Change | Date |
|----------|--------------------|-------------|
| 00 | GA | August 2021 |
| | | |

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1 About This Guide

This document describes how to upgrade to Ocularis v6.1.

1.1 Related Documentation

Related documents are listed below.

Table 1-1: Related Documents

| Document Name | Version | File Type | Date |
|---|---------|-----------|-------------|
| Ocularis Installation & Licensing Guide | 6.1 | PDF | August 2021 |
| Ocularis Quick Start Guide | 6.1 | PDF | August 2021 |
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| Add-on Documentation | | | |
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2 Introduction

Read this document if you are upgrading to Ocularis 6.1. 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*.

2.1 Version 6.1 Features

Features, bug fixes and known issues are identified in the *Release Notes for Ocularis 6.1*.

2.2 Upgrading to Ocularis Version 6.1

In order to upgrade your system to Ocularis 6.1, your operating system must be capable of supporting Microsoft .NET 4.6.2 Framework, which provides improved performance and security. Check the [Ocularis Hardware Recommendations](#) page to make sure you are running a supported operating system prior to upgrading to Ocularis 6.1 regardless of which version you may be upgrading from.

2.2.1 Upgrading from v5.x

Important: if upgrading from Ocularis 5.3 or older, contact Ocularis Technical Support for assistance before starting the upgrade.

To upgrade to Ocularis 6.1 from Ocularis 5.x, simply download the full installation package from the Qognify website and reinstall all components on top of existing components (starting with Ocularis Base) except Ocularis Client and Ocularis Recorder components (i.e. Main Core, Device Manager, Slave Core, Ocularis Recorder Manager).

For Ocularis Client, if you are upgrading from Ocularis v5.3 or prior v5, you must reinstall the new version on top of the old version. When upgrading from v5.3 SP1 or later, let the operator upgrade at the next login using an automatic update feature.

Ocularis Administrator will be upgraded or installed on the Base computer automatically. If you want to upgrade Ocularis Administrator on other PCs, you may do so via the Ocularis Component Download web page.

The recorder components have been updated in this release. You should check the hardware recommendations page on the website for supported systems (<https://www.qognify.com/support-training/hardware-recommendations/>)

We recommend letting the Update Service feature perform an automated upgrade of the recorder software to R16. Refer to the document *Ocularis Installation and Licensing Guide* for more details on the Update Service.

It is strongly recommended to upgrade Ocularis Base, Administrator and Client(s) before upgrading the recorder.

2.2.2 Upgrading from v4.x or earlier

To upgrade to Ocularis 6.1 from v4.x or earlier, you must be up-to-date with your Qognify Software Maintenance Agreement (SMA). The software will verify this during installation. If you have any questions or need to extend your SMA expiration date, please contact Qognify Inside Sales. Download the full installation package from the Qognify website and reinstall components starting with Ocularis Base. See below for SLC requirements. The recorder components in v6.1 are different from those in 4.x. If you choose to install the

6.1 recorder it will be as a new installation, not an upgrade. Refer to the *Ocularis Installation and Licensing Guide* for instructions on installing a v6.1 recorder.

2.3 Install a Brand New System

If you are installing Ocularis v6.1 on a brand new system, download the full installation package from the Qognify website and follow the installation instructions found in the *Ocularis Installation and Licensing Guide*.

2.4 Ocularis 6.1 SLC Requirements

2.4.1 Do I need a new SLC for Ocularis 6.1?

2.4.1.1 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.

2.4.1.2 If you have an Existing v5.x Installation

Your existing Ocularis Base SLC will work with v6.1. The Ocularis Recorder SLC, however, will need to be refreshed.

2.4.1.3 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 v6.1. If you upgrade recorders to v6.1 (R16) 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 contains the prefix '905' and the seven digit recorder SLC contains the prefix '500' or '501'.

1.



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

3 Performing the Upgrade

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

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

- Upgrade steps:
 - I. Refresh the Ocularis SLC
 - II. Download the Ocularis installation file from the Qognify website
 - III. Extract the Ocularis installation file to the computer where Ocularis Base resides
 - IV. Install Ocularis Base over the existing Ocularis Base
 - V. Download and install Ocularis Clients, Administrator and Recorder Proxy from a webpage located on the Ocularis Base machine
 - VI. Perform Several Steps to allow the software to perform a self-upgrade on Recorder components (**Important: Make sure to upgrade all Ocularis Components before upgrading the Recorder**)
 - VII. Upgrade Ocularis Media Server (OMS)
 - VIII. Activate/Refresh Ocularis Base

3.1 Refresh the Ocularis SLC

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

If you are upgrading from v4.x or earlier, to validate your SMA expiration date and successfully upgrade the software, you need to refresh your Ocularis license.

- [To Refresh an Ocularis license with Internet Connectivity](#) see page 28.
- [To Refresh an Ocularis license without Internet Connectivity](#) see page 28.

If you find that your SMA plan has expired, please contact Qognify Inside Sales.

3.2 Download the new Ocularis Installation File

Obtain the Ocularis installation software package.

1. Open a browser and go to the 'Support → Download Software' page from this link on the website. (<https://www.qognify.com/support-training/software-downloads/>)
2. On the 'Download Software' page, click the link **Ocularis Full Release 6.1** under Ocularis Downloads.
3. Click the link to download the Ocularis installation file.
4. 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.

3.3 Extract the Downloaded Ocularis Installation File

These steps outline the extraction of the Ocularis installation files and may be used for all Ocularis models. You may install Ocularis Base, Administrator, Client and Proxy before receiving an updated SLC for the recorder(s).

1. Locate the Ocularis installation file. (**OcularisInstaller6.1.exe**)

WARNING: THIS PROCESS SHOULD BE PERFORMED ON THE SYSTEM WHERE 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**.

An *Installer Extraction Wizard* appears.

4. Click **Next**.

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

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

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


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

6. If you choose to:
 - a. Upgrade Ocularis Base now: make sure the corresponding checkbox is selected and click **Finish**. Proceed to *Upgrade Ocularis Base* below.
 - b. If you choose to upgrade Ocularis Base later: uncheck the *Install Ocularis Base* checkbox and click **Finish**. Proceed to *Upgrade Ocularis Base* below when you are ready to continue with the installation.

3.4 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. Base upgrades since v5.6 will also include either upgrading or installing Ocularis Administrator on the Base computer.



- (1) **Your SMA must be up-to-date if you are upgrading.** Refresh your license in the Ocularis License Activation application if necessary.
 - (2) If you are upgrading from v4.x or earlier, before you begin the upgrade, make sure you have your **905** Ocularis SLC in hand as you need this for this upgrade (see *Do I need a new SLC for Ocularis 6.1?* 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 before starting the upgrade.
 - (5) To save time, install Microsoft .NET v4.6.2 (or later) before upgrading Ocularis Base. The installation, however, will install it automatically if necessary. A reboot may be required after installation of Microsoft .NET 4.6.2.
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 x64**. Double-click the shortcut **Install Ocularis Base**.
 2. When the Ocularis Base installation is first launched and you are upgrading, you should see a message that a previous installation has been detected and you are prompted if you want to continue as an upgrade. Click **Yes**.
 3. For upgrades from v5.x, skip to step 4. For upgrades from 4.x or earlier, if the installation process cannot find your SMA 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 a '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 Tech Support to deactivate the Ocularis SLC.
 - b. If your SMA has expired or you are unable to update the license, contact Qognify Inside 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 the 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 7
- [Custom Upgrade](#) is found on page 7.

Note: *SQL Server Express 2008 is included with v5.1 and earlier. Ocularis v6.1 include SQL Server Express 2019. However, during an upgrade from an earlier version, the existing SQL Server Express will be left in place and not necessarily upgraded to SQL 2019.*

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

Note: *If you have implemented **TLS 1.2 security** and are using SQL Server Express 2008 as the Ocularis Base database, SQL must be upgraded manually to a version that supports TLS 1.2. SQL Server Express 2008 was included with Ocularis version 5.2 and prior but may also be present if you have upgraded to version v5.3-5.6 from an older Ocularis version. If you are unsure of your version of SQL Server, check with your IT department or contact Tech Support.*

7. After the Base files are installed, Ocularis Administrator will be upgraded or installed on the same computer.
8. At the end of the wizard, you can:
 - a. Click **Finish** to complete the installation.
 - 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 9.

3.4.1 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.

3.4.2 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](#)).

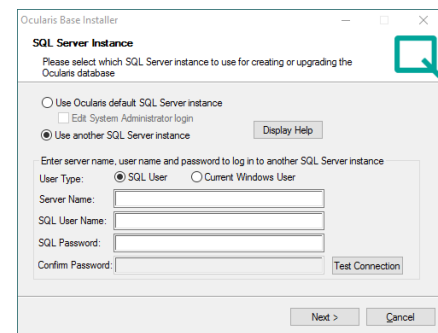
- When you want to move the database from the default SQL Server instance into a corporate SQL Server instance during the upgrade (see [To Upgrade from the Default SQL Server Instance to a Corporate SQL Server Instance](#)).
- When you upgrade using a corporate SQL Server Instance (see [To Upgrade from SQL Server Corporate Instance or Express to SQL Server Corporate](#)).

3.4.2.1 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.
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.

Figure 1 SQL Server Instance



3.4.2.2 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 1), select: **Use another SQL Server instance** - Enter the login credentials for the new SQL Server instance created in step 1. When ready, click **Next**.
5. You'll be presented with the location for Bookmarks. Select a new location if desired. (Note that if you modify the location of the Bookmarks, existing bookmarks will not be accessible. Copy the existing bookmarks to the new location after the installation is complete in order to gain access to them.) Click **Next** when done.
6. The location for the Ocularis Base installation files is presented next. Make necessary changes and click **Next** when ready.

7. Current settings are displayed for a final review. Click **Back** to make changes or click **Next** to continue.
8. The Ocularis Base files are installed and may take several minutes. A new installer website is also created.

When installation is completed, the *Setup Wizard Complete for Ocularis Base* screen appears.
9. Proceed to Step 7 on page 7.

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

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

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

When installation is completed, the *Setup Wizard Complete for Ocularis Base* screen appears.
8. Proceed to Step 7 Completion Step on page 7.

3.5 Upgrading Ocularis Components

Once Ocularis Base has been installed and licensed, we recommend the following order for installation/upgrading: Ocularis Administrator, Ocularis Clients and Ocularis Recorder Proxy. For the recorder components see *Upgrading the Recording Component* on page 16.

Note: *Microsoft.NET 4.6.2 or later is required on machines running Ocularis components. You may install this in advance to save time or the automated installer will install it for you if necessary. Upon completion, the system may require a reboot after installing Microsoft .NET 4.6.2.*

Note: *It is very important to upgrade the Base, Client, Administrator and Recorder Proxy before upgrading the Recorder components.*

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

- Ocularis Client
- Ocularis Administrator

- Ocularis Recorder
- Ocularis Recorder Proxy
- Ocularis Media Server – link to website
- Ocularis Client Dewarping Plug-Ins – link to website

Note: *Be sure to open any necessary ports in the 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
```

Figure 2 Ocularis Component Downloads Web Page

OCULARIS

Component Downloads - v5.9.0.374

Ocularis Client
Use the Ocularis Client to view video. Install this application on as many workstations as you like. [Download](#)

Xvid Codec (3rd Party Module)
This codec is required in order to export AVI video, and should be installed on any system with Ocularis Client or Ocularis Media Server. [Download](#)

Ocularis Administrator
Use this configuration tool to manage Ocularis Base. It can be installed on any number of workstations but they all need to have connectivity to the base computer. [Download](#)

Ocularis Recorder
This download installs the Ocularis Recorder including the Core Service, Device Manager Service and Ocularis Recorder Manager. [Download](#)

Ocularis Recorder Proxy
The Ocularis Recorder Proxy facilitates communication of configuration changes and transmission of events from the Ocularis Recorder to the Ocularis Base as well as manages the display of views and multiple camera streams. This is required on all systems. [Download](#)

Ocularis Media Server
Ocularis Media Server allows for web and mobile access to live and recorded video.
Remember: If you will be using Ocularis Mobile on your phone or tablet, you must download the new Ocularis 5 Mobile app from either the Google Play Store or Apple App Store. [Link to Qognify](#)

The installer can also be downloaded directly at <https://www.qognify.com/support-training/software-downloads/>

Ocularis Client Dewarping Plug-ins
Ocularis Dewarping Plug-ins allow Ocularis Client users to dewarp, pan, tilt and zoom supported cameras with 360-degree lenses.
Plug-ins for the corresponding manufacturer or lens must be downloaded from the Qognify website and installed on the Ocularis Base machine only. Use the Ocularis Administrator to configure the dewarping properties of each camera after installing the plug-in. [Link to Qognify](#)

Plug-ins can also be downloaded directly at <https://www.qognify.com/support-training/software-downloads/>

Documentation and more downloads available at www.Qognify.com

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

3.5.1 Upgrading the Ocularis Administrator

On the Base computer, Ocularis Administrator will automatically be upgraded to the same version as the Base. Use this process to upgrade all satellite installations of 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; choose to either run it now.
3. Follow the prompts to extract the files which results in the *Welcome to Ocularis Administrator Setup Wizard* screen.
4. Click **Next**.

5. Continue with the installation and follow the wizard prompts. The system will detect existing installations and want you to confirm the uninstallation of the existing component if present. Click **Yes**.
6. When prompted enter in the IP Address for the Update Server.
7. When done, click **Finish**.

Note: *If you have not changed the default password for the user account 'admin' you will be prompted to do so the first time you log in after upgrading.*

3.5.1.1 Ocularis ENT & ULT Only

If upgrading from v5.6 or prior, manually refresh the servers in Ocularis Administrator in order to automatically assign a root level Sub Core to the Master Core. If found, the Sub Core will be assigned as a backup in the database. Then, in an instance where an Ocularis Client user logs in and the Master Core is unavailable, the user will still be able to access video via the Sub Core.

1. Open **Ocularis Administrator**
2. Right-click the server in the **Servers / Events** tab.
3. Select **Refresh Server**
4. Repeat for all servers listed

3.6 Upgrading the Ocularis Client

With Ocularis 6.1, there are two ways to update the Ocularis Client software depending on which version you are upgrading from.

3.6.1 Upgrading from 5.3 or earlier

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

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

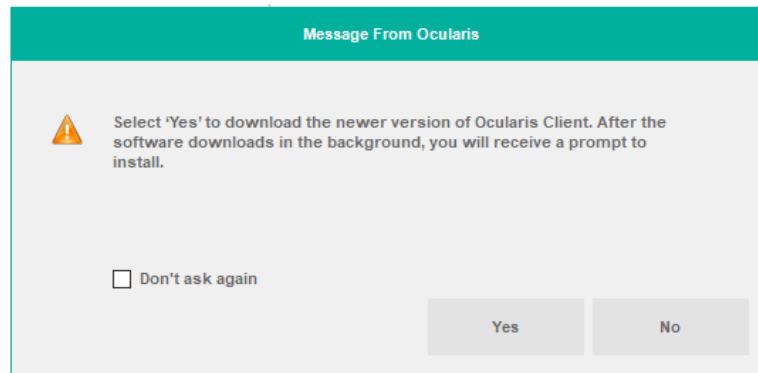
3.6.2 Upgrading from 5.3 SP1 or later

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

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

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

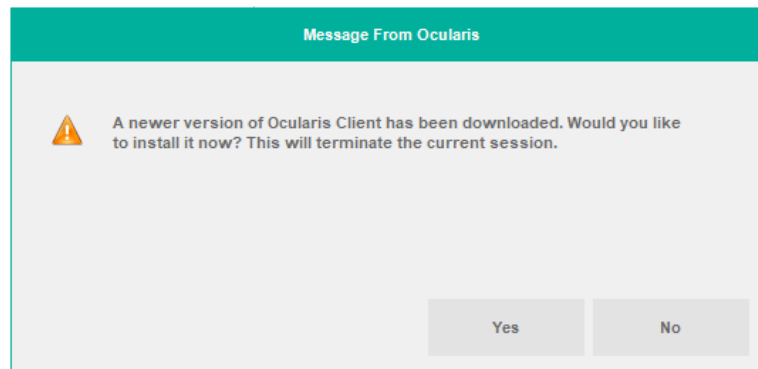
Figure 3 Version Check for Ocularis Client



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

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

Figure 4 Upgrade Downloaded Message



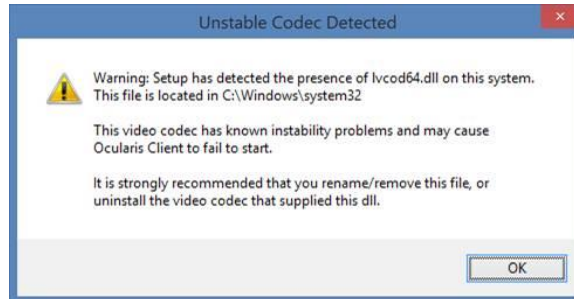
Click **No** to avoid software installation at this time. The software may be manually installed at a later time by launching Ocularis Client x64.exe from `c:\Program Data\OnSSI\OcularisClient`.

Click **Yes** to close Ocularis Client and start the upgrade process.

3.6.2.1 Troubleshooting the Ocularis Client Installation

As part of the software installation/upgrade, the installer now looks in **c:\Windows\System32** for problematic .dlls related to certain video codecs. If it locates these you will see the following message:

Figure 5 Sample .DLL Error Message



If you receive this message, rename or remove the listed .dll file(s) in order for Ocularis Client to properly run. This affects both manual upgrades and those operators using the automated update included in v5.3 or later.

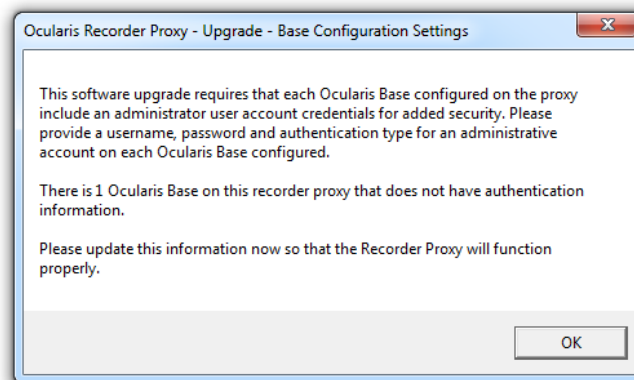
3.7 Upgrading the Ocularis Recorder Proxy

The Ocularis Recorder Proxy was formerly named 'Ocularis Event Proxy'. The name was changed to provide a better product description. If you have an Ocularis Event Proxy installed, simply install the Ocularis Recorder Proxy on top when you perform an upgrade.

3.7.1.1.1 If you are Upgrading from v5.x

1. From the 'Ocularis Component Downloads' web page, click the **Download** button next to Ocularis Recorder Proxy.
2. You may be prompted to run or save the file; choose to run it now. When you click **Run**, you may see the following pop-up message depending on which version you are upgrading from:

Figure 6 Upgrading the Proxy Requires Base Credentials



With Ocularis version 5.5 and later, when you specify a Base to forward events to, you will also need to provide an administrative username and password to authenticate the Base. This is for security purposes. If you have already specified this when you upgraded to v5.5, skip to step 9.

3. Click **OK**.
4. You will then see an authentication screen that allows you to enter the username and password of an administrative account on that Base. Enter these two fields as well as the 'Authentication' type.

Figure 7 Enter Credentials for an administrator account on the Base

Click **Test Authentication**.

5. Once the test is complete, you'll see a pop-up with the message 'Test connection is successful.' Click **OK**.
6. Click **Save**.
7. When authentication is complete, a pop-up with the message '<IP Address> Ocularis Base has been successfully authentication.' Click **OK**.

Note: *Providing Base authentication is required during the upgrade. If you cancel out of providing account credentials, the installation will be aborted. You will see a message stating this. The existing software remains intact.*

8. Repeat this for each Base listed in the Proxy.
9. The installation continues. The system will detect existing software installations and want you to confirm the uninstallation of the existing component. Click **Yes**.
10. Follow the prompts to extract the files and then you'll see the *Welcome to Ocularis Event Proxy Setup Wizard* screen. Click **Next**.
11. When prompted enter in the IP Address for the Update Server.
12. Run the installation and follow the wizard prompts. When done, click **Finish**.

Note: *The 'Auto Add Recorder' checkbox has been removed and replaced with a 'Auto Update Recorder on Ocularis Base' checkbox. If checked, the proxy will notify Ocularis Base if there is a change made in the Ocularis Recorder. For more details, refer to the Ocularis Recorder Proxy Configuration Guide.*

3.7.1.2 If you are Upgrading from v4.x or earlier

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

3.8 Upgrading the Recording Component

(This only applies if not already running Ocularis Recorder R16) Important: Make sure to upgrade all Ocularis components before upgrading the Recorder(s).

3.8.1 If you are Upgrading from 5.1 or Later

Important:

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

The recorder for v6.1 has been updated. Therefore, we highly recommend upgrading your v5x recorder to the new recorder included with v6.1 (which is version R16). The Update Service, which can automatically download and install recorder patches, also allows for the upgrade of software from one major version to another. We recommend using this service to upgrade your software since each and every component (i.e. Core, DM, Ocularis Recorder Manager, etc.) must be upgraded. Use of the Update Service minimizes downtime in the system and is a very efficient way to upgrade. By default, however, this feature is not enabled automatically so you must manually enable it.

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

All Ocularis components including all recorder components require Microsoft .NET 4.6.2 Framework which is included in the installation package. You can save time by installing .NET 4.6.2 or later in advance of installing Ocularis. Upon successful installation, the PC may need to be rebooted.

As a result of the Microsoft .NET framework version 4.6.2 implementation, the system has improved performance and security. Microsoft does not support .NET 4.6.2 on Windows Server 2008 (2008 Server R2 SP1 is supported). As a result, Windows Server 2008 is no longer supported. Ocularis systems should always be kept current with the latest Microsoft operating system updates. Check the hardware recommendations page to make sure your operating system is using the minimum required service pack or update. <https://www.qognify.com/support-training/hardware-recommendations/>

Once you receive the updated SLC, you should import the license.zip file from the *Ocularis Recorder Manager* (Info→Activate product→Offline. Then select the 'Import license file' tab, browse to the license.zip file, select 'Open' and then 'Import'). Then let the Update Service feature perform an automated upgrade of the recorder software from version R14 to R16. Refer to the document *Ocularis Installation and Licensing Guide* for more details on the Update Service.

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

If the demo system resides on multiple PCs, you will need to do a manual Update Service upgrade. Obtain the software upgrade files from Tech Support and follow the instructions found in Manually Apply Ocularis Recorder Upgrade Files on page 22.

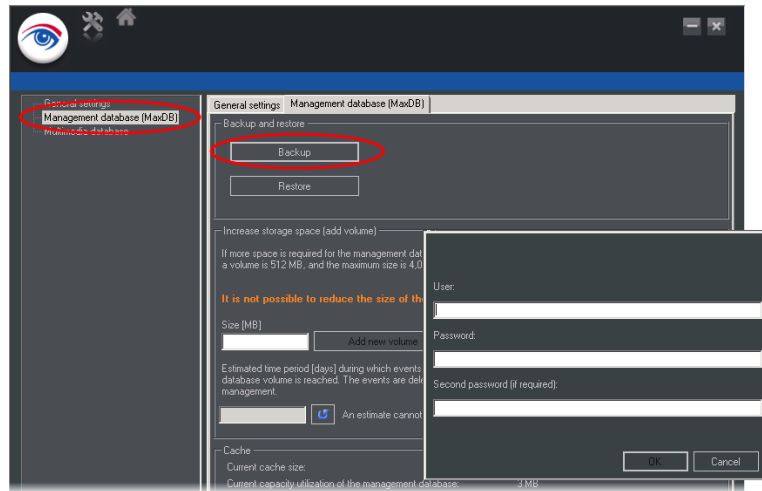
In either case a new demo SLC is not necessary as long as it has not expired.

3.8.1.1 Make a Manual Backup

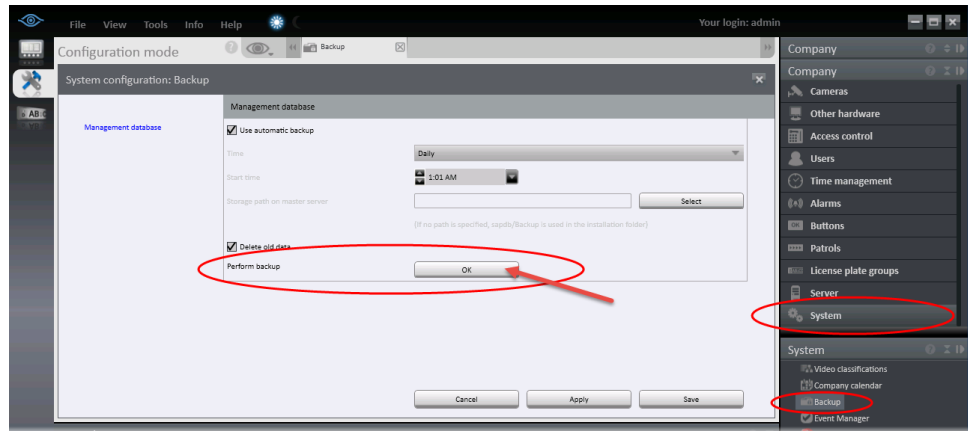
Whenever starting a software upgrade, it is always good to have a backup - just in case. Use these steps to perform a manual backup.

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

1. From the *Ocularis Recorder Administration Tool*:



- a. Select 'Management Database (MaxDB)'
 - b. Click **Backup**
 - c. Enter credentials for an administrator account on the Main Core.
 - d. Click **OK**.
 - e. A warning pop-up appears indicating that the backup may take several minutes. Click **OK**.
 - f. On the backup successfully created pop-up, click **OK**.
 - g. Close the *Ocularis Recorder Administration Tool*.
2. From the *Ocularis Recorder Manager*:
 - a. Select 'System' from the Control Bar.
 - b. Select 'Backup'.
 - c. Click **OK** adjacent to 'Perform backup'



- d. Click **OK** when on the 'Export Successful' pop-up.
 - e. Close *Ocularis Recorder Manager*.
3. Copy the backup file to a safe location.
 4. Also, make a copy of the folder: **c:\Program Files\Qognify\Ocularis Recorder\conf** and store in a safe location.

These saved files may be used in the event a manual restoration becomes necessary.

3.8.1.2 Four Conditions for an Automatic Software Upgrade

The four conditions for an automated software upgrade to work are:

- Your SMA plan is up-to-date.
- You have manually refreshed your recorder SLC.
- The Recorder software must be updated to the most current patch.
- The 'Also download full upgrade packages' checkbox must be checked in the Server Configuration tab of the Ocularis Recorder Update Server Configuration Tool.

(For the update of patches only, an up-to-date SMA is also required.)

Once these conditions are fulfilled, the software will update itself automatically at the next scheduled update time.

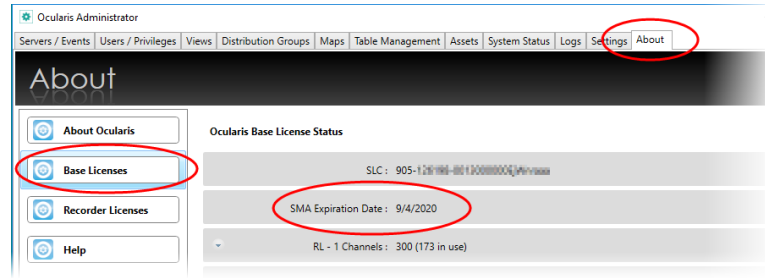
Note: We recommend scheduling the upgrade during normal business hours so that the system administrator can confirm that it completed successfully.

Note: Make sure that each server/computer contains at least 15 GB free space on the installation hard drive.

3.8.1.3 Valid SMA

During software upgrade, your Software Maintenance Agreement (SMA) is validated by the system. It will not proceed if the SMA plan has expired. You can verify the expiration date of your SMA plan by launching *Ocularis Administrator*, opening the **About** Tab and selecting **License Information**.

Figure 8 SMA Expiration Date



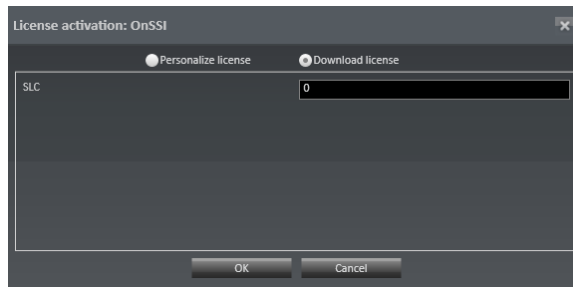
The expiration date is shown underneath the SLC. If the plan is still active, the upgrade will proceed. Contact Qognify Inside Sales for more information on SMA.

3.8.1.4 Manually Refreshing the Recorder SLC

Manually Refresh the Recorder SLC - Online Method

Use the following steps to refresh a recorder SLC with internet connectivity:

1. From the *Ocularis Recorder Manager*, select the **Info > Activate product > online** menu.
2. Click **OK** to clear the notice that this feature requires a connection to the Internet.
3. Click the radio button for **Download license**.



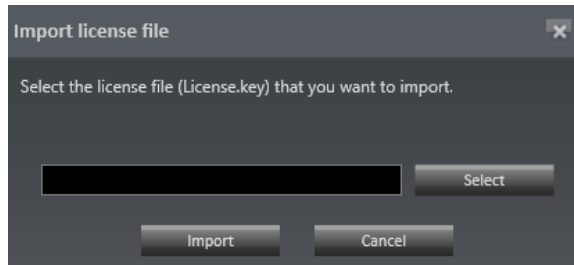
4. Enter your seven digit SLC and click **OK**.

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

Manually Refresh the Recorder SLC - Offline Method

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

1. Go to any PC that does have internet connectivity and open the webpage:
 2. <https://www.qognify.com/support-training/licensing/> Scroll to the bottom of the page and enter your recorder SLC in the field under License update
3. The system will update your license and email it to the address used when the software was initially personalized.
4. Detach the license.zip or license.key file that is sent to the email address and bring it to the computer without internet connectivity.
5. From the *Ocularis Recorder Manager*, select the **Info > Activate product > offline** menu.
6. Click the **Import license file** tab.



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

The license is now updated.

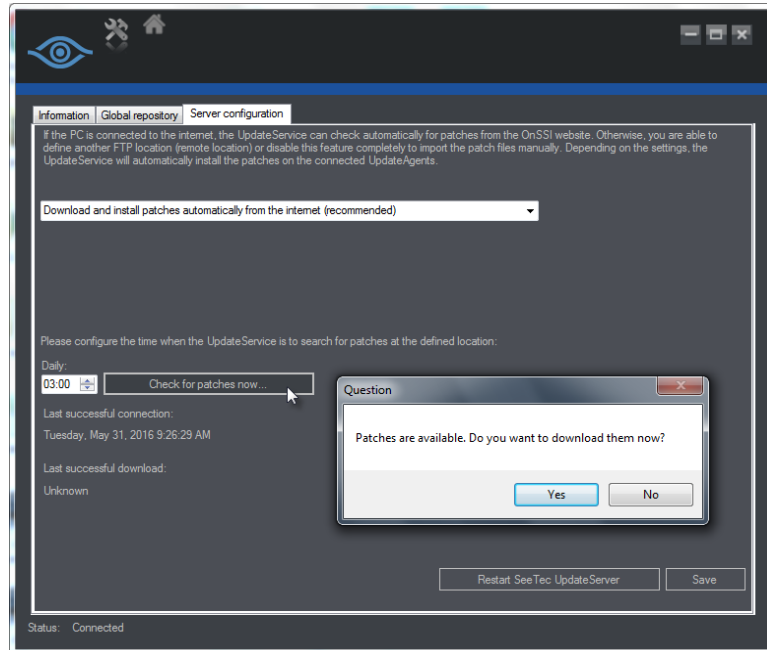
3.8.1.5 The Recorder software must be updated to the most current patch

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

Manually Check for Patches using the Update Service

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

Figure 9 Server Configuration Tab



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

The system will be updated with this patch:

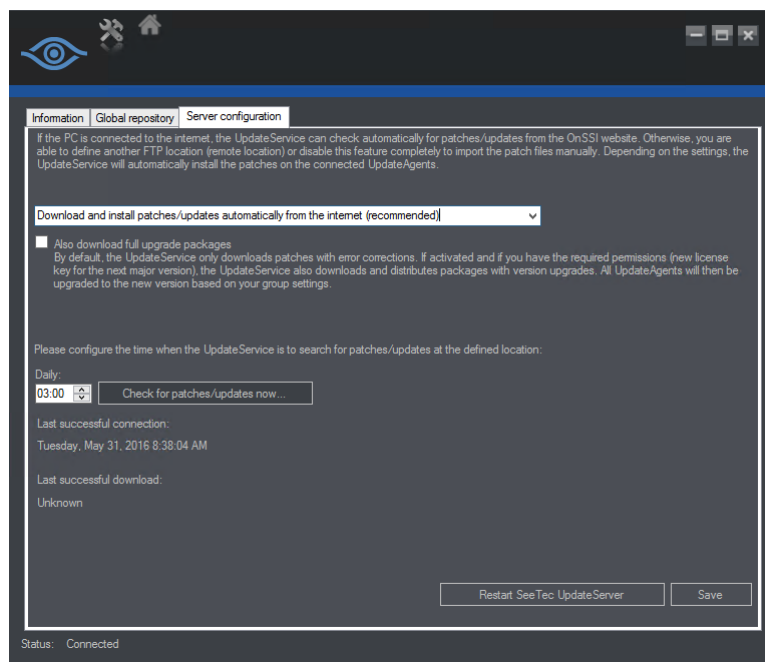
- a. For clients in the Default group: immediately
- b. For clients in a custom group: upon the next scheduled patch time as configured

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

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

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

Figure 10 Updated Ocularis Recorder Update Server Configuration Tool



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

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

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

The software will be upgraded to the next version at the next scheduled **Update time**. You can check this by clicking the **Information** tab, click a group and then click **Configure Group**. (see Figure 11 Update time).

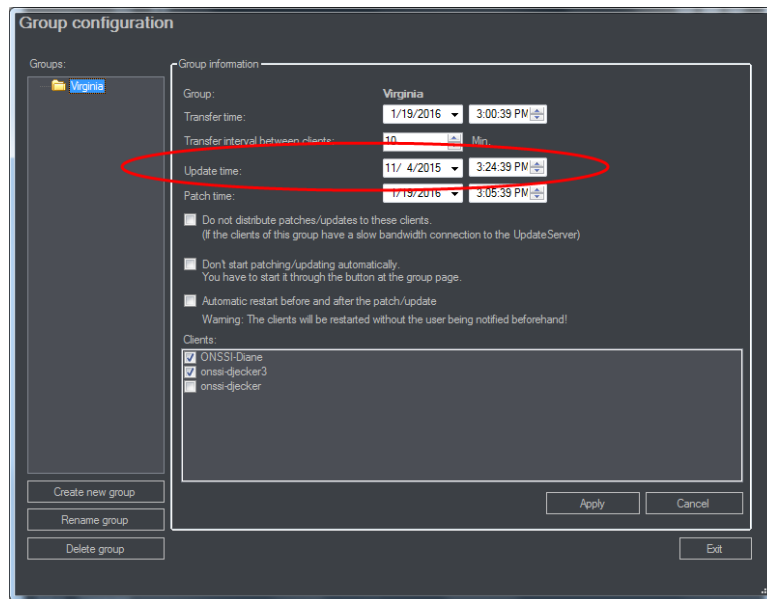
- 6. If you want to check for updates now without waiting for the next schedule Update time, click the **Check for patches/updates now** button.

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

To check the Update Time

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

Figure 11 Update time



Notice how now you can have different times for recorder patches/fixes and software upgrades.

Note: We recommend keeping the box 'Automatic restart before and after the patch/update' unchecked to avoid unnecessary restarts.

For more information on software upgrades, contact Technical Support.

3.8.2 Manually Apply Ocularis Recorder Upgrade Files

Use this procedure when the system with the Update Service on it does not have connectivity to the internet or for demo systems that are distributed across multiple computers. This procedure will apply the software upgrade files to the Update Service, allowing it to then distribute the upgrade throughout the system based on configured settings. Using the Update Service to upgrade the software is the most efficient way to update the system with the minimal amount of downtime. Use this to upgrade from R8 (found in v5.2) or R9 (found in v5.3) or R10 (found in 5.4) or R11 (found in 5.5) or R12 (found in 5.6) to R13 (found in 5.7) to R14 (found in 5.8) to R16 (found in 6.1).

Note: When manually uploading the software upgrade files, the Automatic Update service will start the upgrade process immediately for all clients/agents listed in the Default group. This will cause

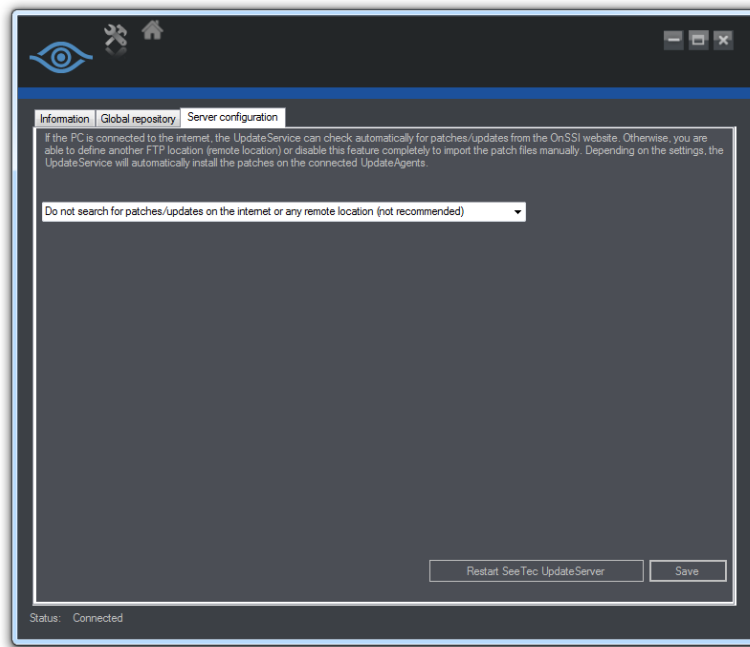
recorder components to stop and start as they are upgraded. Clients/agents in a configured group will be upgraded based on the configured schedule.

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

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

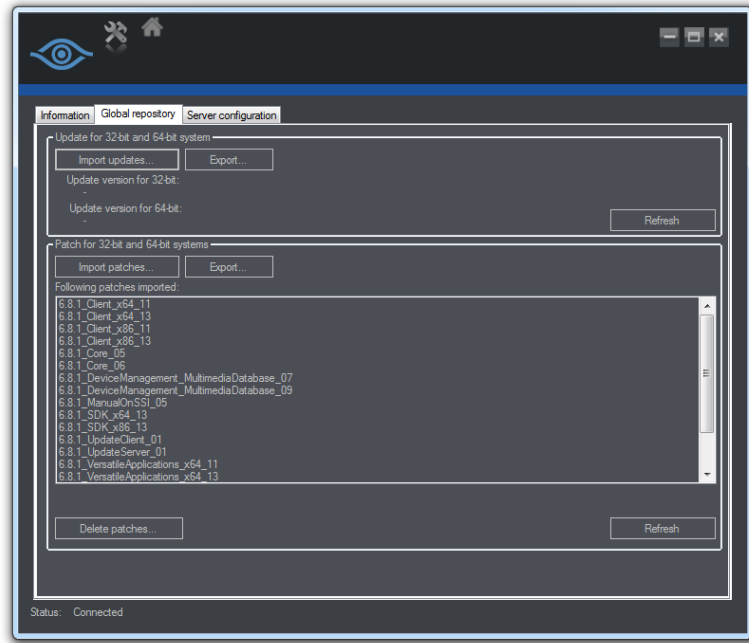
1. Open the 'Ocularis Recorder UpdateServer configuration' application and select the 'Server configuration' tab.
2. If not already selected, choose 'Do not search for patches/updates on the internet or any remote location (not recommended)' from the drop-down list.

Figure 12 Server configuration tab



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

Figure 13 Global repository tab



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

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

3.8.3 Uninstallation of Ocularis Recorder v5.8

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

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

There is no known data corruption when downgrading from Ocularis Recorder 5.7 to a prior version.

3.8.4 Post-Upgrade Steps

Version 5.5 and later adds support for the *Ocularis Client* zoom ribbon to control the optical zoom of PTZ cameras. This feature is currently supported on Axis, Hikvision and Hanwha Techwin cameras when using their corresponding Smart Driver. Check the Supported Devices web page to see if your camera supports absolute zoom since the time of this writing.

If you want to take advantage of this feature, a few additional steps are required. If you already performed these steps when you upgraded to v5.5 it is not necessary to repeat them again for v5.7.

1. After the recorder software has been updated to the newest recorder version, launch the *Ocularis Recorder Manager*.
2. Open the configuration screen for each applicable PTZ.
3. Click 'Query Device' to re-query the camera.
You must wait until the camera comes fully back online.
4. Once the camera is online, click 'Save' to insure feature compatibility.

3.9 Upgrade Ocularis Media Server

Ocularis Media Server installation files are now located on the website. You can download the installer from the software download page or access via link on the Ocularis Component Downloads page.

The link is: <https://www.qognify.com/support-training/software-downloads/>

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

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

3.9.1 Ocularis Web v6.1 and WebRTC

With Ocularis 6.1, WebRTC has been implemented for communication and security reasons. The first time users connect to Ocularis Media Server using a browser, they will need to import one or two certificates. Instructions are specific to each supported browser. Refer to the document *Ocularis Web – WebRTC Configuration* for detailed instructions. In addition to this, port 1935 is no longer used for live video. Port 8420 is now used for this purpose. Port 1935 is still reserved for sending M2O video from the Mobile App to Ocularis Media Server. Recorded video continues to use port 9090.

3.10 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.*

3.10.1 Activating the Ocularis SLC

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

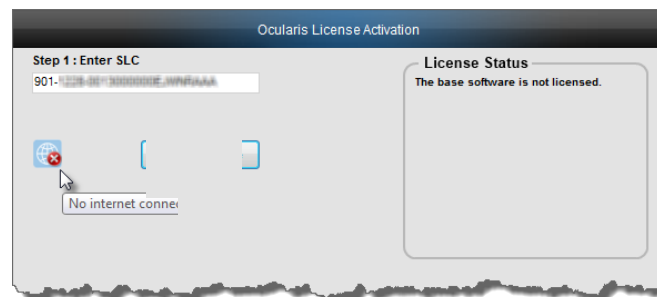
The steps to activate are different based on whether the Ocularis Base computer is connected to the internet or not.

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

3.10.1.1 To Activate an Ocularis license with Internet Connectivity

1. Launch the *Ocularis License Activation* application.

Figure 14 Licensing Ocularis Base



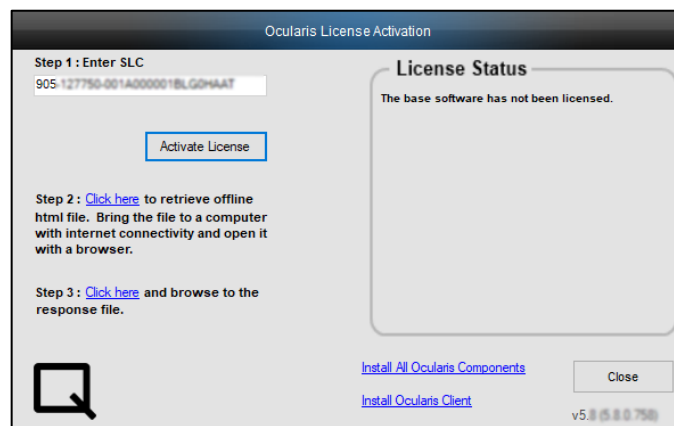
2. Enter the Ocularis SLC.
3. Click **Activate License**. The licensing application will collect relevant data including the SLC and send this over the internet to the licensing server. Qognify's licensing server validates the information and sends back the activation required to license the software. 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.

3.10.1.2 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 15 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\Qognify\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 15), 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.

3.10.1.3 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 the licensing server. Qognify'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\Qognify\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.

3.10.1.4 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 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 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 5) and activate the same SLC on this computer (see *Activate/Refresh Ocularis Base* on page 26). 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.