



Sendio® Email Security Platform

Upgrade Guide

Sendio 6.0

This *Upgrade Guide* will help you upgrade your Sendio software to version 6. Sendio 6 includes many enhancements and new features as well as the normal performance improvements and cumulative bug fixes from all previous Sendio releases. These are just a few of the new features:

SilverListing Spoof Protection (enabled by default)

- SilverListing has been extended to provide spoof detection through this new feature. By enabling SilverListing Spoof Protection if an email is received from a sender associated with an “Allow Contact” record but from a new IP address, SilverListing will be applied. Since all valid email messages from Allow Contacts come from a very small list of IP addresses the vast majority of email will be delivered immediately. For those email messages that come from an IP which has not previously passed the SilverListing test then SilverListing will be applied to confirm the message is not from a spammer.

Sender IP Address Bad Reputation (Enabled - Action set to Hold Message)

- The Commtouch IP Reputation feature will allow Sendio administrators to define how Sendio should handle messages from sources with an IP reputation that indicates a 90% or higher likelihood of sending spam. Our testing has shown the 90% value is the ideal value for stopping known spammers without increasing the chance of false positives. As such this value is not configurable.
- If the Commtouch service or our Premium AV service was not purchased then the Sendio IP Address Bad Reputation feature will be grayed out and unavailable.

When No Contact Matches (Default set to Hold Message)

- Very basic question – how should Sendio respond when there is neither a Contact nor an Administrator Policy that applies to a message? Previously this logic was tied directly with Sender Address Verification. This new feature allows you to configure the 2 elements (Contact Checking and SAV) separately. For example now messages can be Held without generating an SAV.

No Contact Match for Bulk Messages (Default set to Hold Message)

- Sendio has always included Bulk classifications within the user interface (to get a sense for what Bulk is you can change the message view in your Sendio web interface to Pending messages, show bulk), but with the release of Sendio 6 administrators will now be able to configure how Sendio should respond when there is neither a Contact nor an Administrator Policy that applies to a Bulk message.

Sender Address Verification (SAV) (Enabled by Default)

- This is the same as the existing option but only applies to non-Bulk messages. Sender Address Verification will be sent to new senders.

Send SAV for Bulk Messages (Disabled by Default)

- For messages tagged as Bulk will Sendio generate an SAV? Research indicates that extremely few SAV generated for Bulk messages are ever replied to.

Send SAV Acknowledgements (Enabled by Default)

- Based on customer feedback we now allow you to configure whether Sendio will send the SAV Acknowledgement to senders that reply to the SAV.

24h System Sender Response Limit (Value set to 50 by default)

- This option defines the maximum number of automatic responses (SAV, NDR, DSN) generated by a Sendio system to a particular email address in a 24 hour period.

24h Per User Sender Response Limit (Value set to 1 by default)

- This option defines the maximum number of automatic responses (SAV, NDR, DSN) from a given Sendio user to a particular email address in a 24 hour period.

Manual Time Synchronization

- From the SSH (PuTTY) interface > System Control section there is now a Sync Time option. Selecting this option will force Sendio to immediately synchronize the internal time with an NTP server.

OVERVIEW

Overall, the Sendio 6 upgrade process should take approximately 30 minutes. However there is one step in the process where a flag is set on each message in the Sendio database. Depending on how many messages are in the database, this step can take some time (30 - 90 minutes). It is very important that your connection to the Sendio unit is extremely reliable and that you do not, for any reason, disconnect the SSH session until the upgrade process is finished. If the upgrade process has been running for longer than 90 minutes please contact Sendio Support immediately. If you are performing the upgrade after our normal support hours (8:00AM - 5:00PM Pacific Time) please visit this web page and complete the form.

<http://www.sendio.com/support/support-requests/report-system-outage>

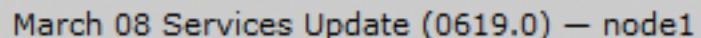
In the BRIEF DESCRIPTION field please enter SENDIO 6 UPGRADE. Someone from Sendio support will contact you shortly.

This *Upgrade Guide* covers the following steps:

1. Confirming the current Sendio version
2. Confirming backups
3. Updating to the latest March08 Maintenance Release (MR)
4. Upgrading to Sendio 5
5. Upgrading to Sendio 6

STEP 1: CONFIRM CURRENT VERSION

The easiest way to confirm the current version of your Sendio software is to login to the Sendio web interface and check the bottom right corner. You will see something like this:



March 08 Services Update (0619.0) — node1

If you are running version March 08 (10.0507) you can skip Step 3: Update to Latest MR. If you are already running Sendio 5 please jump directly to Step 5.

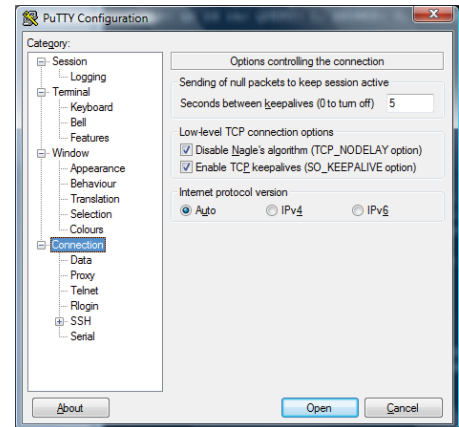
STEP 2: CONFIRM BACKUPS

It is very important to have a recent backup prior to upgrading your Sendio software. Based on your version check (above) you will have different options for pulling the backup files from the Sendio unit. Please refer to the *Sendio Backup & Restore Guide* for instructions on using the various methods for pulling backups. **DO NOT PROCEED UNTIL YOU HAVE AT LEAST 1 RECENT BACKUP.**

You will find the most recent version of the *Sendio Backup & Restore Guide* at <http://www.sendio.com/support/documentation>.

STEP 3: UPDATE TO LATEST MR

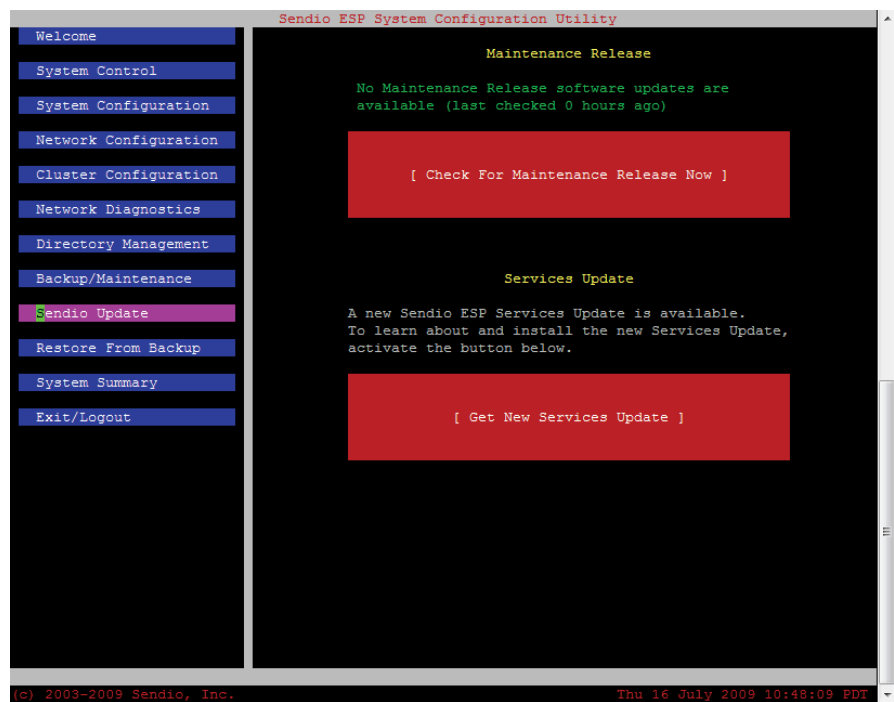
1. Preferably connect a VGA monitor and keyboard to Sendio appliance to apply the update.
2. If a local connection (step #1 above) is not feasible, login to the Sendio Console (SSH) interface using PuTTY or other SSH client. Confirm the PuTTY Keep Alive is set between 5 and 60 before connecting.
3. Arrow down to *Sendio Update* and press enter - you will see the screen shown below.
4. Right arrow to highlight **Apply Maintenance Release** and press Enter. If the top option says **Check for Maintenance Update** run that first followed by **Apply Maintenance Update**.
5. Throughout the process the screen will show progress.
6. Once the update has completed you will be prompted to logout of the Console interface.
7. Click **Log Out** and continue to next step.



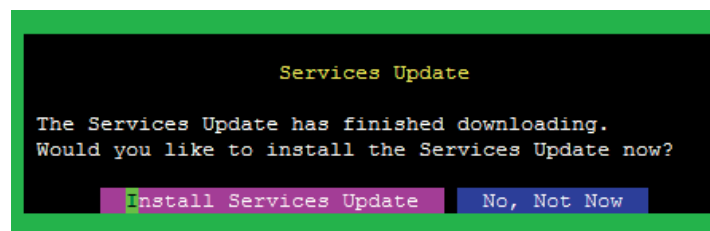
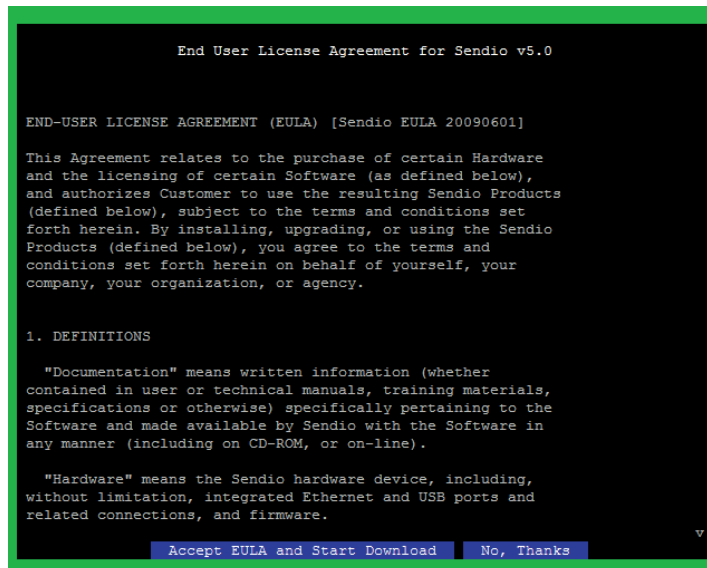
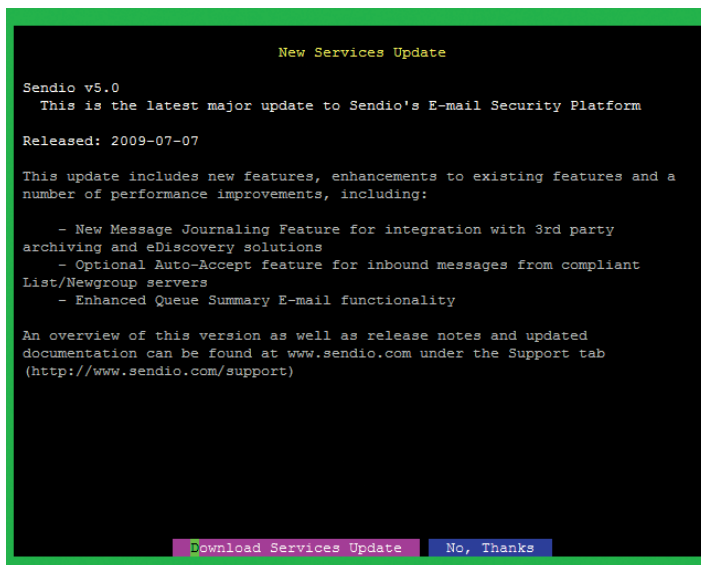
Set *Seconds between keepalives* to 5

STEP 4: UPGRADE TO SENDIO 5

1. Preferably connect a VGA monitor and keyboard to Sendio appliance to apply the upgrade.
2. If a local connection (step #1 above) is not feasible, login to the Sendio Console (SSH) interface using PuTTY or other SSH client. Confirm the PuTTY Keep Alive is set between 5 and 60 before connecting.
3. Arrow down to *Sendio Update* and press enter - you will see the following screen.
4. Right arrow to select **Get New Services Update** and press Enter
5. At the following screen select **Download Services Update** and press Enter
6. At the End User License Agreement (EULA) screen you will need to arrow down, while reading, to the very bottom before you can accept.
7. After selecting **Accept EULA and Start Download** the installation files will be downloaded to your ESP. After the download, and selecting **Okay**, you will be prompted to install the Services Update.
8. The process will go through many steps as well as stopping at certain points to complete longer processes.
9. At this point simply monitor the progress but do not be alarmed by extended delays.
10. Once the upgrade has completed you will be prompted to logout of the Console interface.



Sendio Update options



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Sendio ESP System Configuration Utility
Maintenance Release

Welcome
System Control
System
  from icepack-repo
  2009-07-16 10:23:47.459398: install of icebox-conf-openssh-4.5.20090520.0-0
  successful
Network
  2009-07-16 10:23:47.538986: Installing
Cluster
  icebox-icepack-4.5.090701.0-4.5.090701.0 from icepack-repo
Network
  2009-07-16 10:23:49.690826: install of
  icebox-icepack-4.5.090701.0-4.5.090701.0 successful
Directo
  2009-07-16 10:23:49.743456: Installing icebox-conf-mod_ssl-4.5.20090611.0-0
  from icepack-repo
Backup/
  2009-07-16 10:23:55.297368: install of icebox-conf-mod_ssl-4.5.20090611.0-0
  successful
Sendio
  2009-07-16 10:23:55.331676: Installing icebox-mimetools-4.5.20090608.0-0
  from icepack-repo
Restore
  2009-07-16 10:23:56.699016: install of icebox-mimetools-4.5.20090608.0-0
  successful
System
  2009-07-16 10:23:56.811154: Installing icebox-clustertools-4.5.20090703.0-0
  from icepack-repo
Exit/Lo
  2009-07-16 10:23:58.407718: install of icebox-clustertools-4.5.20090703.0-0
  successful
  2009-07-16 10:24:01.626370: install successful, cleaning up icepack-repo:
  2009-07-16 10:24:01.740263: removing icebox-clustertools-4.5.20090703.0-0
  2009-07-16 10:24:01.850443: removing icebox-conf-mod_ssl-4.5.20090611.0-0
  2009-07-16 10:24:01.960598: removing icebox-conf-openssh-4.5.20090520.0-0
  2009-07-16 10:24:02.070877: removing
  icebox-icepack-4.5.090701.0-4.5.090701.0
  2009-07-16 10:24:02.186562: removing icebox-mimetools-4.5.20090608.0-0
  2009-07-16 10:24:02.297984: Refreshing yum metadata...
  2009-07-16 10:24:03.175197: Removing NetworkManager-0.5.1-1.FC4.4 from the
  ESP Appliance
  Installing latest Sendio ESP software...

(c) 2003-2009 Sendio, Inc. Thu 16 July 2009 10:23:29 PDT

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2009-07-16 10:55:23.323469: Adding package
icebox-kaspersky-updater-5.7.17.51-5.0.20090706.0
2009-07-16 10:55:25.092563: Adding package
icebox-maintenanced-4.5.20090616.1-0
2009-07-16 10:55:25.484427: Adding package
icebox-magarchived-4.5.20090428.0-4.5.20090428.0
2009-07-16 10:55:25.763736: Adding package
icebox-prequeue-5.0.20090514.0-5.0.20090514.0
2009-07-16 10:55:26.086058: Adding package icebox-qmail-4.5.20090611.0-0
2009-07-16 10:55:26.832233: Adding package
icebox-remotemount-4.5.20090617.0-1
2009-07-16 10:55:27.087143: Adding package
icebox-savengine-5.0.090702.0-5.0.090702.0
2009-07-16 10:55:27.680006: Adding package
icebox-savstats-4.5.090616.0-4.5.090616.0
2009-07-16 10:55:27.969413: Adding package
icebox-servicecontrol-5.0.090511.0-5.0.090511.0
2009-07-16 10:55:28.215419: Adding package
icebox-silverlisting-4.5.20090501.0-4.5.20090501.0
2009-07-16 10:55:28.489223: Adding package
icebox-sysconfigshell-5.0.20090623.0-0
2009-07-16 10:55:28.841285: Adding package
icebox-top-config-5.0.20090519.0-0
2009-07-16 10:55:29.106262: Refreshing yum metadata in local repository...
2009-07-16 10:55:30.995789: Local repository up to date for ESP version
ICEBOX-5.0.20090708.0
2009-07-16 10:55:31.115636: Unlocking local icepack repository.

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Process successfully completed.
Okay

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Sendio ESP System Configuration Utility
Maintenance Release

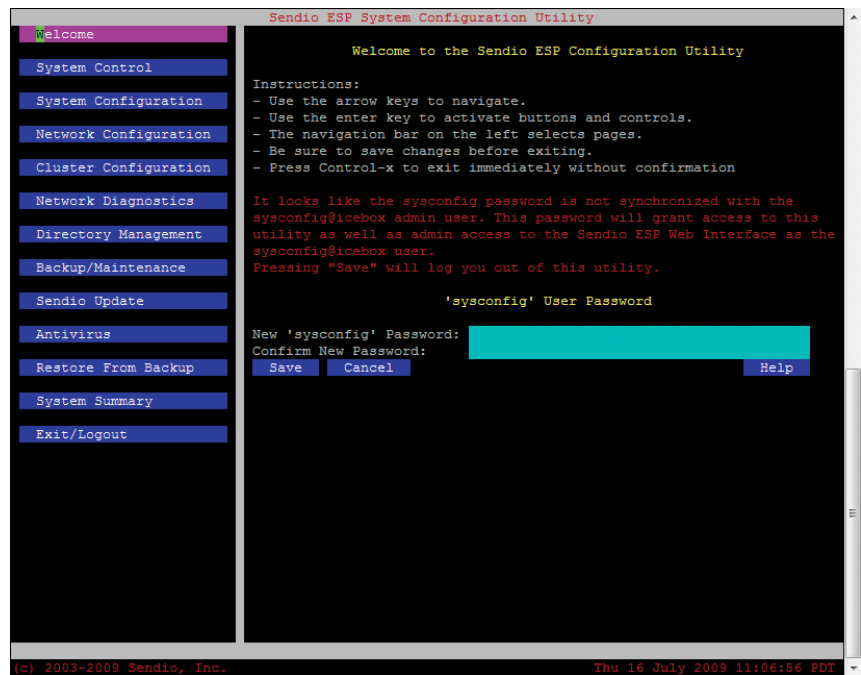
Welcome
System Control
System
  2009-07-16 10:26:40.732608: Removing wireless-tools-28-0.pre10.4 from the
  ESP Appliance
Network
  2009-07-16 10:26:42.610030: removal of wireless-tools-28-0.pre10.4
  successful
Cluster
  2009-07-16 10:26:42.655747: Removing wvdial-1.54.0-5 from the ESP Appliance
Network
  2009-07-16 10:26:43.720147: removal of wvdial-1.54.0-5 successful
  2009-07-16 10:26:43.720747: Removing xorg-x11-Mesa-libGL-6.8.2-37.FC4.49.2.1
  from the ESP Appliance
Directo
  2009-07-16 10:26:44.807975: removal of
  xorg-x11-Mesa-libGL-6.8.2-37.FC4.49.2.1 successful
Backup/
  2009-07-16 10
  xorg-x11-Mesa
Sendio
  2009-07-16 10
Restore
  2009-07-16 10
System
  2009-07-16 10
Exit/Lo
  2009-07-16 10
  2009-07-16 10:26:49.401629: Restoring services to their initial state...
  2009-07-16 10:26:50.429439: Restoring HTP Daemon:
  2009-07-16 10:26:51.265304: Started HTP Daemon
  2009-07-16 10:26:51.546379: Restoring Web Application:
  2009-07-16 10:26:53.459682: Started Web Application
  2009-07-16 10:26:57.890627: Unlocking local icepack repository.
  2009-07-16 10:27:08.017358: Sending an email to icepack-success@sendio.com
  from icepack-notification@sendio.com...
  -----
  Process successfully completed.
  Okay

Logout Required
Sendio ESP software has been updated, please log out of the sysconfig shell.
Log Out

(c) 2003-2009 Sendio, Inc. Thu 16 July 2009 10:31:43 PDT

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11. To confirm the upgrade was successful login to the Console Interface. If the upgrade completed successfully there will be a new Anti-Virus button on the left.



STEP 5: UPDATE TO SENDIO 6

1. Preferably connect a VGA monitor and keyboard to Sendio appliance to apply the update.
2. If a local connection (step #1 above) is not feasible, login to the Sendio Console (SSH) interface using PuTTY or other SSH client. Confirm the PuTTY Keep Alive is set between 5 and 60 before connecting.
3. Arrow down to *Sendio Update* and press enter - you will see the following screen.
4. Right arrow to highlight **Apply Maintenance Release** and press Enter. If the top option says **Check for Maintenance Update** run that first followed by **Apply Maintenance Update**.
5. Throughout the process the screen will show progress.
6. Once the update has completed you will be prompted to logout of the Console interface.
7. Click **Log Out** and continue to next step.
8. Login to the Sendio Console (SSH) and navigate to *Backup/Maintenance*
9. Arrow over to **Automatic Updates Enabled** and press the spacebar
10. Arrow down to **Save** and press Enter
11. Now all Sendio software updates will be automatically installed.
12. Congratulations, you have successfully upgraded to Sendio 6!