

# Windows 7 Upgrade Procedure

*Steps to complete BEFORE the Windows 7 upgrade is applied:*

*Backup steps for TPM related items are not required if TPM is off and not used or not present.*

## 1. Backup


### Backup your TPM Keys, TPM Key Passwords, and Certificates.

If your PC has multiple users of the TPM, each user must archive his/her keys.

1. Click **Start > All Programs > Wave Systems Corp > EMBASSY Security Center**  
When the EMBASSY Security Center window appears, select **Archive and Restore** (left navigation pane), then click on **Archive**. (On E series machines path is **Start > All Programs > Dell Control Point > EMBASSY Security Center**)
  2. This will start the Archive process by prompting you to select a location (and name) to store the archive. Select the location (we strongly recommend using external media, i.e. USB Flash Drive, CD-R, etc.) and click **OK** to continue.
  3. You will now be prompted to create a password for the archive. Do not lose this password; you will not be able to restore the keys without it.
  4. Next, enter the TPM owner password and press **OK** to continue.
  5. When the archive procedure is completed, you will see a message stating so.
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### Backup your PIM Data

If your PC has multiple users of PIM, each user must archive his/her data.

1. Click **Start > All Programs > Wave Systems Corp > Private Information Manager**  
Log in to PIM if you are prompted to do so. If the PIM icon is red instead of black, then double click the icon to log in. Once you are logged in to PIM then Right click on the System Tray icon  and click ' **Settings** ' .
2. Select the **Backup Tab** and then select **Backup**.
3. The PIM backup wizard will start, select **OK** to continue.
4. Select a target location (and name) for the backup and select **Save** . (We strongly recommend using external media, i.e. USB Flash Drive, CD-R, etc.)
5. You will now be prompted to create a password for the archive. Do not lose this password; you will not be able to restore the backup without it.
6. Next, enter the TPM owner password and press **OK** to continue.
7. PIM will backup the data and the TPM keys to the target location.

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## Backup your Vault Data

If your PC has multiple users of DM, each user must archive his/her data.

If the full version of DM is installed and you have created multiple Vaults, then each Vault must be backed up separately by following the process below.

1. Click **Start > All Programs > Wave Systems Corp > Document Manager** and Document Manager will open the default Vault upon start up or you can navigate to the desired Vault in Windows Explorer. (On E series machines path is **Start > All Programs > Dell Control Point > EMBASSY Security Center**)
2. You can backup in two ways:
  1. When using Document Manager, select **Archive > Backup** from the menu.
  2. When using Windows Explorer you can back up from the context menu (right click and select '**Vault Backup**').
3. Now the Wizard will prompt you to select a location (and name) to store the archive. Select the location (we strongly recommend using external media, i.e. USB Flash Drive, CD-R, etc.) and click OK to continue.
4. Create the password that is used to protect the archive file. Users should ensure that the archive password is not lost.
5. Enter the TPM owner password.
6. Document Manager will backup the data and the TPM keys to the target location.
7. If you have multiple Vaults then you need to repeat this process for each vault. If you are using the DM Vault Interface, select **Vault > Open** from the menu and then select the next vault to backup. If you are using Windows Explorer, select the **Vault/Drive** to login. Go to step 3. Repeat for all DM Vaults.

**NOTE:** Backup of Vaults containing a large amount of data may require several minutes to complete. This is also dependent upon the network traffic when backing up to a device on a network.

## 2.) Turn off Wave Gina / Credential Provider, Single-Sign On and Un-Initialize Self-Encrypting Drive

1. Click **Start > All Programs > Wave Systems Corp > EMBASSY Security Center** and navigate to Windows Login on left pane. (On E series machines path is **Start > All Programs > Dell Control Point > EMBASSY Security Center**)
2. Uncheck the box on right: **Enable Secure Windows Login**. This will turn off the Wave Gina/CP
3. The next step is to turn off Single-Sign On if it is being utilized. Click on the Trusted Drive icon found on left pane of ESC. Wait a moment for the Trusted Drive to be detected and the **Manage** button to become enabled.

4. Click on the **Manage** button then enter credentials. The next window that will appear is the Trusted Drive Advanced Settings.
5. In the Trusted Drive Advanced Settings window uncheck the box next to Single Sign On.
6. Now to un-initialize the self-encrypting drive: In the Trusted Drive Advanced Settings window click on the Un-Initialize, this will be followed by a message:

Are you sure you want to un-initialize the Trusted Drive? Click Yes. The self-encrypting drive will be un-initialized and ready to uninstall the Embassy Trust Suite Application.

## 3.) Uninstall

### Uninstallation Steps

1. Make sure you have backed up all data before removing the applications.
2. Go to **Start > Control Panel > Add or Remove Programs**
3. Scroll through the list and select the Embassy Trust Suite Application (D series platforms) or DCP Security Manager (E series platforms), and click on the **Change/Remove** button.
4. The Wave Installer screen is shown. Select **Next** to continue.
5. You are prompted to select an uninstall method, select as appropriate for your situation. To remove the application you must select **Remove all applications** (do not select **Remove Limited**) and press **Next**.
6. The uninstall process will be displayed, when the process has completed the **Next** button will be available, select it to continue.

You are now prompted to restart the computer now or at a later time, make your selection and press **Finish**.

## 4.) Upgrade to Windows 7

After steps 1-3 are complete above, apply the Windows 7 upgrade.

*Steps to complete AFTER the Windows 7 upgrade is applied:*

## 5.) Install Embassy Trust Suite by Wave

1. First go to <http://support.dell.com/> to download the latest software package for your platform. For E-series machines you must install driver pack provided by Dell before installing Wave any software. Double-click on installer to launch the software setup
2. Press **Next** , this will start the installation wizard.
3. You may now choose to either do an Express Installation or a Customized Configuration. Select as appropriate for your situation, then press **Next** .

4. You may now choose to either have the shortcuts displayed on the desktop or not. Make your selection, then press **Next** to continue with the installation process.
5. If you are running various applications at the time of this installation, please close them. When done closing the applications, click " **OK** ".
6. Press **Next** to continue with the installation process.
7. Now the Wave Installer will check the system for previous versions of the ETS software.
8. The Wave Installer will now install Wave Support Software and the Wave Infrastructure Software.
9. The Wave Installer will now install the various applications within the EMBASSY Trust Suite.
10. When the Wave Installer has completed installing all the applications, you will see the "Operations Complete" screen. Press **Next** . Now you will be prompted to Restart your computer, click **Yes**.

The EMBASSY Trust Suite software has installed successfully.

## 6.) Restore Your Data

*Restoring TPM related items are not necessary if TPM is off and not used or not present.*

Check to make sure that all data from XP or Vista is still available (i.e. run DM & PIM and login with Wave GINA / SSO).

If the data is not available then you need follow the instructions below to restore your data. This should only be necessary if you re-formatted your hard drive during the upgrade procedure.

If your PC has multiple users of the TPM, each user must restore his/her keys.

### Restore your TPM Keys

1. Click **Start > All Programs > Security by Wave Systems > EMBASSY Security Center**  
When the EMBASSY Security Center window appears, select **Archive and Restore** (left navigation pane), then click on **Archive**. (On E series machines the path is **Start > All Programs > Dell Control Point > EMBASSY Security Center**)
2. This will start the Restore process by prompting you to enter the location where your keys are stored. Select the location and click **OK** to continue.
3. You will now be prompted to enter the archive password. This is the password you created when you archived the keys.

When the restore procedure is completed you will see a message stating so.

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## Restore your Vault Data

1. Using the Document Manager Vault Interface, open the Vault to restore to or navigate to the desired Vault in Windows Explorer.
2. Select **Archive > Restore to New Vault** or **Restore to Current Vault** , whichever is your preference, from the menu. You can also Right-click on the Vault and select 'Vault Restore' from the context menu.
3. Select the **Vault archive** to be restored.
4. Enter the name of the new Vault and its location, and then select **OK**.
5. Repeat for all vaults.

Document Manager will restore the Vault data and the TPM keys, the password for the new Vault will be the same password as the Vault that was the source of the archive file.

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## Restore your PIM Data

1. Launch PIM by clicking **Start > All Programs > Security by Wave Systems > Private Information Manager**
2. The First Time Setup Wizard will run, do not cancel this procedure.
3. The Wizard will ask about restoring from a backup. Select **Yes** and follow the remaining instructions.
4. The user must enter the password for the archive before the restore will complete.

**NOTE :** The Restore operation will overwrite any previously existing data in Private Information Manager with the data from the backup file