



Passwordstate

Upgrade Instructions to V5.3

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## 1 Upgrade Overview

This document will detail instructions for upgrading Passwordstate from version 5.0 to 5.3 (this includes any build within version 5.0).

For upgrading from version 4.5, you can follow the instructions supplied in the document 'Upgrade\_Instructions\_FromV4.5.pdf'.

**Please Note:** Version 5.1 introduced the feature of continuous sharing of the Password Lists Navigation Tree with other users who have access to the same Password Lists. Because of this change, this upgrade will remove any nesting of Password Lists in the tree view which you may have created, and this will need to be redone once the upgrade is complete.

**Please Note:** Version 5.3 includes a few new features which may have changed some of your settings in Passwordstate. After the upgrade, please visit the 'Administration' area of Passwordstate and specify settings suitable for your organization:

- Who is allowed to create Password Lists, Password Folders and who can request access to Passwords
- If you would like to use the new 'Emergency Access' feature, you will need to specify a password, as well as which Security Administrators are allowed to be assigned the Role of 'Emergency Access' - by default all Security Administrators will be given this access right
- You can now also create multiple Password Generator options, and assign them to Password Lists if required

## 2 Backup Current Version Prior to Upgrading

Prior to upgrading to any version of Passwordstate, it's important you backup both the database and web tiers for Passwordstate, allowing you to restore to your previous version in the event of any issues during the upgrade procedure.

To capture a full backup of Passwordstate prior to upgrading, please consider the following:

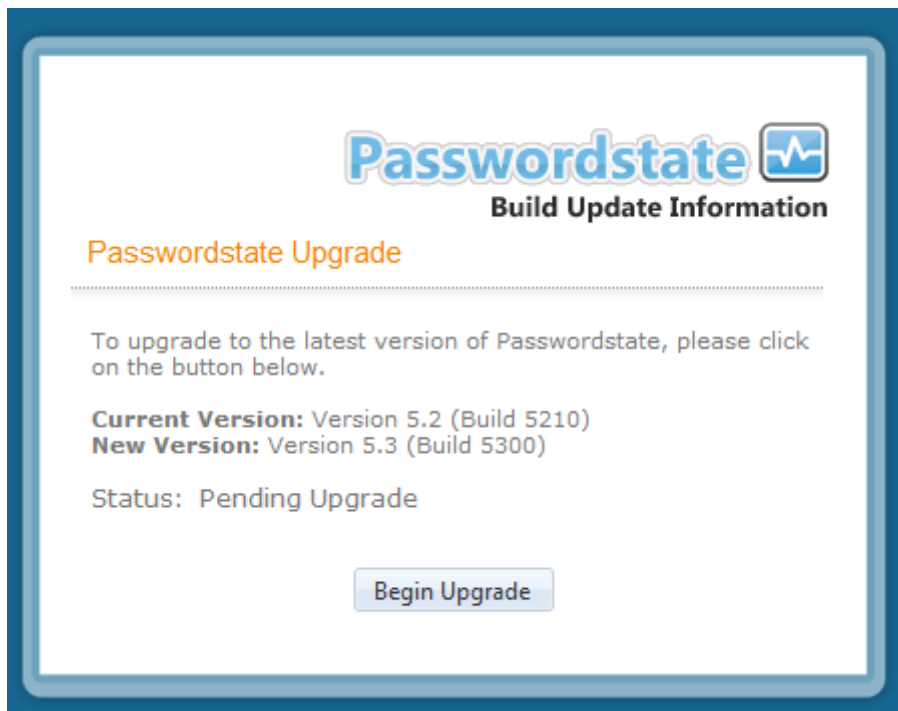
- Database Tier – ask your Database Administrator to take a full backup of your 'passwordstate5' database
- Web Tier – take a copy of the entire Passwordstate folder, which is located at 'c:\inetpub\passwordstate5' by default when you first install Passwordstate. This location may be different if you chose to install to a different folder

### 3 Upgrade Instructions

To upgrade to the latest version of Passwordstate please follow these instructions:

Note: High Availability Instance Considerations – If you are using the High Availability Instance of Passwordstate, please refer to the section ‘5 – High Availability Module Considerations’ as you will need to **stop SQL Server replication** for the Passwordstate 5 database before proceeding.

1. Download the latest copy of Passwordstate from here – <http://www.clickstudios.com.au/downloads/passwordstate.zip>
2. Take a copy of the web.config file in the root of the Passwordstate folder
3. Take a copy of the files in /images/lookupimages and /App\_Data/RadSpell (only required if you've added new Account Type Images or added custom words to the Editor's dictionary)
4. Uninstall Passwordstate from Control Panel (please note your database will not be touched during the uninstall)
5. Once uninstalled, reinstall Passwordstate
6. Replace the web.config and other files file from steps 2 & 3
7. Restart the Windows Service ‘Passwordstate Service’
8. If you have modified the standard ‘passwordstate’ cname DNS entry for the web site, or configured the web site to use a SSL certificate, you will need to redo these steps
9. When you first browse to the Passwordstate web site you will see the following screen. As per the instructions on the screen, click on the ‘Begin Upgrade’ button (Please note: if you are currently using a version prior to 5.1, you will be presented a screen first instructing you to make changes to the permissions for the ‘passwordstate5\_user’ SQL Account)
10. Once each of the relevant build updates is complete, you can begin to use Passwordstate by clicking on the ‘Start Passwordstate’ button. ( if you experience any issues with the upgrade, please refer to the log c:\inetpub\passwordstate5\setup\logs\UpgradeLog.txt)



## 4 High Availability Module Considerations

Prior to upgrading either the 'Primary' or 'High Availability' instance of Passwordstate, we must first stop SQL Server replicating data between the two database instances, and uninstall the 'High Availability' instance of the Passwordstate web tier.

### Stop SQL Server Replication

To stop SQL Server from replicating data from the primary to secondary SQL Server, you must delete the **publication** and **subscription** you configured as part of the document 'High\_Availability\_Installation\_Instructions.pdf'.

### Uninstall High Availability Instance of Passwordstate

To uninstall the High Availability instance of Passwordstate, please follow these instructions:

- Uninstall Passwordstate from Control Panel -> Programs -> Uninstall a program
- Ensure the folder 'c:\inetpub\passwordstate5' was successfully removed
- On your secondary SQL Server (the subscriber), delete the 'passwordstate5' database and 'passwordstate5\_user' SQL Account

**Please Note:** Once you have successfully upgraded the primary instance of Passwordstate, please follow the instructions in 'High\_Availability\_Installation\_Instructions.pdf' for reinstalling the High Availability instance of Passwordstate, and re-establishing SQL Server data replication.