



Click Studios

Passwordstate

Upgrade Instructions to V8.xx

Table of Contents

| | | |
|----------|--|----------|
| 1 | UPGRADE OVERVIEW | 3 |
| 2 | HIGH AVAILABILITY MODULE CONSIDERATIONS..... | 4 |
| 3 | IN-PLACE UPGRADE INSTRUCTIONS WITH INTERNET CONNECTIVITY | 5 |
| 4 | IN-PLACE UPGRADE INSTRUCTIONS WITHOUT INTERNET CONNECTIVITY | 6 |
| 5 | MANUAL UPGRADE INSTRUCTIONS | 7 |
| 6 | DATABASE SCHEMA UPDATES | 8 |


1 Upgrade Overview

This document will detail instructions for upgrading Passwordstate to version 8.x, from any version prior in the 6.xx to 8.xx build range.

If you need to upgrade from version 5.x, then please follow the instructions

'Upgrade_Instructions_From_V5.pdf', provided in your download, or download the file from here -

https://www.clickstudios.com.au/downloads/version8/Upgrade_Instructions_From_V5.pdf

-  Note: A default setting requires you to have the Automatic Backups feature working to use this In-Place Upgrade option. This can be disabled however on the screen Administration -> Passwordstate Administration -> Backups and Upgrades -> Backups & Upgrade Settings. If you do disable this option, it is recommended you take your own backups of the Passwordstate folder and database prior to any upgrades.

2 High Availability Module Considerations

If you are also using the High Availability Module for Passwordstate, the upgrade of both your Primary and HA instance should be done in this order.

Data Replication and Primary Server Considerations

1. If required, delete the SQL Server replication - Check '**6. Database Schema Updates**' below. If there are any schema changes for builds newer than the one you are currently on, you will need to delete the SQL Server replication – delete **both the Subscriber and Publisher details**
2. Upgrade your Primary Instance by following one of the following 3 sections below for performing an upgrade
3. Re-establish data replication, **if required** – using the instructions in the document 'High_Availability_Installation_Instructions.pdf'. This document can be downloaded from here - https://www.clickstudios.com.au/downloads/version8/High_Availability_Installation_Instructions.pdf

Upgrading the High Availability Web Files

1. On your HA web server, stop the Passwordstate Windows Service, and site in IIS
2. If using RSA's two-factor authentication, take a copy of the files in the /securid folder
3. Take a copy of the web.config file in the root of the Passwordstate Folder
4. Delete all files in the HA Server's Passwordstate folder
5. Copy across all files from your Primary server's Passwordstate folder to the HA folder
6. Overwrite the SecurID and Web.config files with copies taken in steps above
7. Start the site in IIS, and the Passwordstate Windows Service

Encryption Split Secrets: If your primary server's web.config file has Secret1 & Secret2 listed in the appSettings section, but your High Availability instance web.config file does not, then it is very important you copy these keys across.

Troubleshooting Steps


If after following the instructions above you experience a 'Error Has Occurred' screen when browsing to your HA site, please use the following steps to help troubleshoot the issue.

1. Ensure the Passwordstate folder, and everything beneath it, has Modify NTFS permissions for the NETWORK SERVICE account
2. Check SQL replication is working properly by execute the query below on both database servers – the results should be the same:

```
USE Passwordstate  
SELECT COUNT(*) FROM Auditing
```
3. Ensure the files in your Passwordstate folders are the same – check the timestamps on the files
4. Confirm you have PowerShell 4 or above on your HA web server
5. Test database connectivity from your HA web server by using SQL Server Management Studio, and making a connection to the database server using the SQL Account credentials stored in the web.config file – these credentials are stored in the can you open a connection to your HA database server with the credentials in this database connection string "PasswordstateConnectionString"

3 In-Place Upgrade Instructions with Internet Connectivity

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

 Note: A default setting requires you to have the Automatic Backups feature working to use this In-Place Upgrade option. This can be disabled however on the screen Administration -> Passwordstate Administration -> Backups and Upgrades -> Backups & Upgrade Settings. If you do disable this option, it is recommended you take your own backups of the Passwordstate folder and database prior to any upgrades.

1. Visit the upgrade page, either by clicking the new build notification at the top of the screen (if visible), or via the page Administration -> Passwordstate Administration -> Backup and Upgrades -> Upgrade Now button
2. If your Passwordstate installation does not allow automatically downloading new builds of Passwordstate, i.e. proxy settings aren't established to allow this, then you will be presented with some instructions for how to manually download the passwordstate_upgrade.zip file
3. Click on the 'Begin Upgrade' now button
4. Click on the 'Start Upgrade' button, at which time the following processes will occur:
 - a. Stop the Passwordstate Windows Service
 - b. Backup all the web files
 - c. Backup the database
 - d. Download the passwordstate_upgrade.zip file if needed
 - e. Extract the contents of the passwordstate_upgrade.zip file
 - f. Install the new files
 - g. Log you out of Passwordstate
5. You can now log back into Passwordstate, and continue the upgrade process

Once each of the relevant build updates is complete, you can begin to use Passwordstate by clicking on the 'Start Passwordstate' button. All steps of the upgrade process are logged to c:\inetpub\passwordstate\upgrades\UpgradeLog.txt (your directory path may be different)

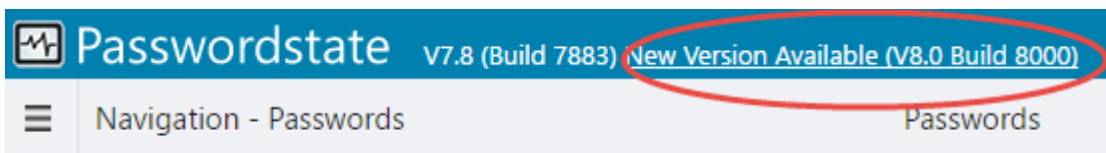
4 In-Place Upgrade Instructions without Internet Connectivity

If you would like to perform an In-Place Upgrade, but don't want, or have, Passwordstate configured to check for new builds and download directly from the internet, then you can follow these instructions:

1. Manually download the file http://www.clickstudios.com.au/downloads/passwordstate_upgrade.zip and place it in the Passwordstate /upgrades folder
2. Now using the SQL Server Management Studio tool, execute the following SQL statement (Note - you will need to enter the latest version and build number in this statement, which is always advertised on Click Studios' home page at <https://www.clickstudios.com.au>):

```
USE Passwordstate
UPDATE [SystemSettings]
SET NewVersionNo = '8.0', NewBuildNo = '8000'
```

3. Once you have executed this statement, open your browser and point it to your Passwordstate web site. You will then see the New Version notification at the top of the page, which you can click and continue with the upgrade process



- Note:** A default setting requires you to have the Automatic Backups feature working to use this In-Place Upgrade option. This can be disabled however on the screen Administration -> Passwordstate Administration -> Backups and Upgrades -> Backups & Upgrade Settings. If you do disable this option, it is recommended you take your own backups of the Passwordstate folder and database prior to any upgrades.

5 Manual Upgrade Instructions

If you prefer not to use the In-Place Upgrade feature, you can still upgrade Passwordstate manually by following these instructions:

1. Manually backup your database using the SQL Server Management Studio tool
2. If upgrading from Build 7507 or greater, it is recommended you first go to the Administration screen in Passwordstate and enable Maintenance Mode
3. Stop the Passwordstate Windows Service
4. Download the following file, and extract the files into the Passwordstate folder overwriting all files in there (this .zip file has a root Passwordstate folder in it – copy the contents of this root folder into your Passwordstate folder) - http://www.clickstudios.com.au/downloads/passwordstate_upgrade.zip
5. Ensure all the folders/files have Modify rights for the NETWORK SERVICE account - they should have inherited these permissions from the top-level folder
6. Restart the Passwordstate Windows Service
7. Now browse to the site, and you should be prompted to finish the upgrade by performing various tasks on the database (if there are schema changes in the build you're upgrading to, for anyone who is also using the High Availability instance, you will first need to stop SQL Server replication)

If you need to download any full versions of Passwordstate at any time, you can do so via the page <http://www.clickstudios.com.au/previous-builds.aspx>

6 Database Schema Updates

The following table below shows which build numbers there are database schema changes for. If you are upgrading from a build prior to any of the listed build numbers below, and you are using Transactional Replication with SQL Server, then please delete the Subscriber and Publisher before attempting to upgrade – as per the High Availability Module Considerations section above.

| BUILD NO | SCHEMA UPDATED |
|----------|----------------|
| 8058 | YES |
| 8037 | YES |
| 8000 | YES |
| 7883 | YES |
| 7817 | YES |
| 7798 | YES |
| 7789 | YES |
| 7721 | YES |
| 7668 | YES |
| 7646 | YES |
| 7641 | YES |
| 7615 | YES |
| 7583 | YES |
| 7580 | YES |
| 7551 | YES |
| 7507 | YES |
| 7476 | YES |
| 7434 | YES |
| 7422 | YES |
| 7393 | YES |
| 7301 | YES |
| 7273 | YES |
| 7253 | YES |
| 7243 | YES |
| 7223 | YES |
| 7185 | YES |

Click Studios

| | |
|------|-----|
| 7120 | YES |
| 7105 | YES |
| 7077 | YES |
| 7059 | YES |
| 7033 | YES |
| 7019 | YES |
| 7000 | YES |
| 6350 | YES |
| 6330 | YES |
| 6300 | YES |
| 6242 | YES |
| 6231 | YES |
| 6226 | YES |
| 6215 | YES |
| 6165 | YES |
| 6133 | YES |
| 6080 | YES |
| 6057 | YES |
| 6000 | YES |