



Click Studios

Passwordstate

Upgrade Instructions to V8.xx

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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

It will also detail instructions for upgrading the Mobile Client, Password Reset Portal and Remote Site Locations Agent if required.

 Note: If using our In-Place Upgrade feature, and you have chosen not to back up your Passwordstate folder or database, we recommend taking your own backups of these prior to upgrading Passwordstate.

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.

Step 1 - Data Replication and Primary Server Considerations

1. If you are using SQL Server Transactional Replication, **confirm if there are any database schema changes which require you to first delete the SQL Subscriber and Publisher** - Check 'Upgrade Dependency Matrix' below. If you are using SQL Clustering, or High Availability Groups, or Azure SQL, etc, this is not required
2. Upgrade your Primary Instance by following one of the following 3 sections below for performing an upgrade to your primary site first:
 1. In-Place Upgrade Instructions with Internet Connectivity
 2. In-Place Upgrade Instructions without Internet Connectivity
 3. Manual Upgrade Instructions
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

Step 2 - 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, and SQL Server 2012 Native Client
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)

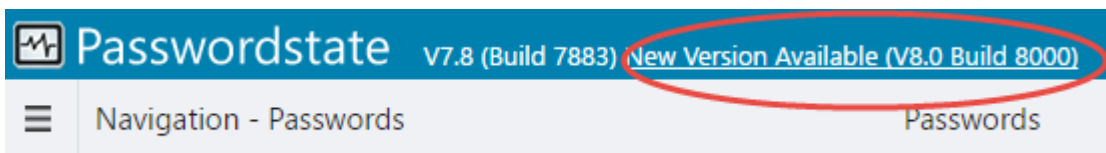
4 In-Place Upgrade Instructions without Internet Connectivity

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 upgrade file from <https://www.clickstudios.com.au/getupgradefile.aspx> (CDN Network) or https://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) - <https://www.clickstudios.com.au/getupgradefile.aspx> (CDN Network) or https://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 <https://www.clickstudios.com.au/previous-builds.aspx>

6 Mobile Client Upgrade Instructions

Please Note: If you do not have a separate installation of the Mobile Client web site, and are accessing the site via your normal Passwordstate web site, then you do not need to follow these instructions to perform a manual upgrade - upgrading the Mobile Client will occur as part of a standard upgrade of Passwordstate.

Please refer to the section 'Upgrades Dependency Matrix' below to determine if you need to follow the instructions below to upgrade the Mobile Client web site install. If needed, follow these instructions:

1. First upgrade your main Passwordstate installation
2. Stop the Passwordstate web site in IIS, and Passwordstate Windows Service
3. Delete all the files in the Passwordstate folder, except the /web.config file
4. Download the following file, and extract the files into the Passwordstate folder - https://www.clickstudios.com.au/downloads/passwordstatemobile_upgrade.zip. The default path should be c:\inetpub\passwordstate
5. Restart the Passwordstate Windows Service, and Passwordstate Mobile Client web site in IIS

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

Build 7580 Note: If you are upgrading from a build which is earlier than Build 7580, then it is very important to copy the Secret1 & Secret2 keys across from your primary instance of Passwordstate, otherwise the separate mobile client install will not work. These keys are located in the web.config file, in the appSettings section.

7 Password Reset Portal Upgrade Instructions

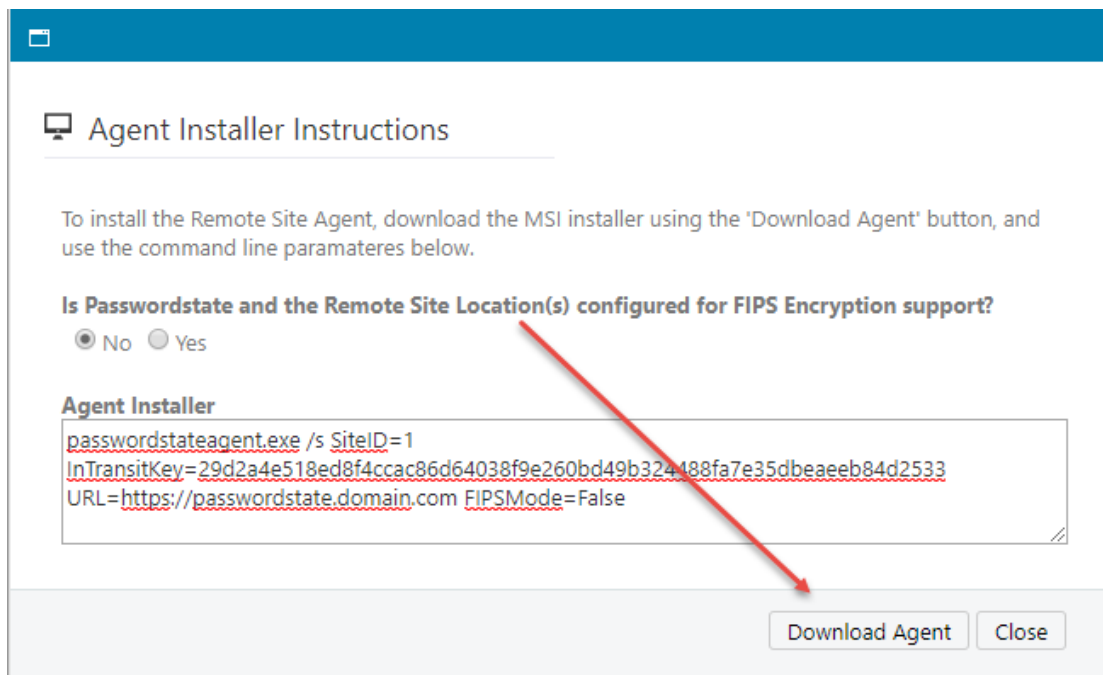
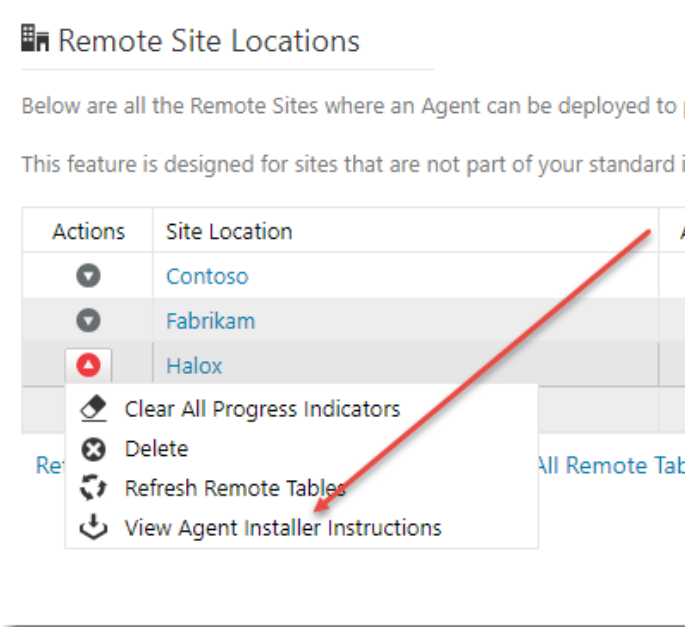
Please refer to the section 'Upgrades Dependency Matrix' below to determine if you need to follow the instructions below to upgrade the Password Reset Portal install. If needed, follow these instructions:


1. First upgrade your main Passwordstate installation
2. Download the following file, and extract the files into the Password Reset Portal's folder - https://www.clickstudios.com.au/downloads/passwordstateresetportal_upgrade.zip. By default, this folder is in the location c:\inetpub\PasswordstateResetPortal
3. Your portal will now be upgraded and ready for use

8 Remote Site Locations Agent Upgrade Instructions

Please refer to the section 'Upgrades Dependency Matrix' below to determine if you need to follow the instructions below to upgrade any deployed Remote Site Location Agents. If needed, follow these instructions:

1. First upgrade your main Passwordstate installation
2. From the screen Administration -> Remote Site Administration -> Remote Site Locations, you can re-download the new Agent so it can be deployed to each site, as per the screenshots below



 Note: If you have your own software which can deploy software silently, the install instructions you see above can be used, as this will upgrade the agent 'silently'

9 Upgrade Dependency Matrix

The following table below shows which Passwordstate Build Numbers require schema changes in the database, or any other dependant modules which also require upgrading at the same time.

Build No	Database Schema Updates	Mobile Client	Password Reset Portal	Remote Site Locations Agent	Browser Extensions
8256	Yes	No	No	Yes	No
8242	Yes	No	No	No	No
8225	No	No	No	No	No
8215	Yes	No	No	No	No
8205	No	No	No	No	No
8204	Yes	No	No	No	No
8180	Yes	No	No	No	No
8165	Yes	No	No	No	No
8150	No	Yes	No	No	No
8146	No	No	No	No	No
8136	No	No	No	No	No
8114	Yes	Yes	Yes	No	No
8097	No	No	No	No	No
8091	Yes	No	No	No	No
8071	No	No	No	No	No
8065	No	No	No	No	No
8058	Yes	No	No	Yes	No

8037	Yes	No	No	No	No
8000	Yes	Yes	No	Yes	No