



Click Studios

Passwordstate

Upgrade Instructions for Version 9

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1 Upgrade Overview

This document will detail instructions for upgrading Passwordstate 9 from any build number from 9000 to the latest build number. It will also detail instructions for upgrading other modules if required.

Please reference the Upgrade Matrix section and the end of this document, to confirm if any dependant modules also need to be upgraded, when you upgrade your core Passwordstate installation.

 **Note: If you are using a version of Passwordstate earlier than version 9, then please follow these instructions for the upgrade to version 9 -**

https://www.clickstudios.com.au/downloads/version9/Upgrade_to_Passwordstate9_Instructions.pdf

2 Checksum Validation

With any of the suggested files to download in this document, Click Studio strongly recommends you perform checksum validation on the files, before use. Please see suggestions below for how you perform checksums, and what valid checksums to confirm.

Performing Checksum Validation

To perform checksum validation of files, you can use the PowerShell command below – replace <FileName> as appropriate.

```
Get-FileHash <FileName> -Algorithm SHA256
```

Passwordstate Valid SHA256 Checksums

- PasswordstateManualUpgrade.zip -
85FD8F41DB06095E1563E6C06AF36CCC562D326C2A08D034658D0B1796FF517E
- Passwordstate_upgrade.zip -
D6FF409CDF7C5BA1D018DEFA8F440A3798371457BB2232FC28B8D2E2D3A8D673
- Passwordstateresetportal_upgrade.zip -
D578B7FF706D6A3BA341B58B11EF0E7E15FECF003EBE88BCFF88A3F01546E929
- Passwordstateappserver_upgrade.zip -
41A2B221FEA23054D1524A78D895268EBAC9C50638DA1BC56B1D63AB8CD9581C
- Passwordstategateway_upgrade.zip -
20094FCC3594AC4EED489F9A4D32967FB8A319B778E8A8CBB9AC395AEA43BE42


3 High Availability Module Considerations

If you are also using the High Availability Module for Passwordstate, upgrades must be done in the following order:

1. If you are using SQL Server Transactional Replication, then you must delete the subscriber and publisher first using SQL Server Management Studio, if there have been any database schema changes - 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 Server first, using one of the methods described in this document
3. Then upgrade your High Availability instance using one of the following methods:
 - a. You can use the "In-Place Upgrade" method directly from the Primary server. Please refer to the Security Administrator's manual from the Help Menu in Passwordstate for further instructions – look under the section Administration -> Authorised Web Servers.

Please Note: If you do not have Internet connectivity from where your HA Web server is installed, you will manually need to download the https://passwordstate-8665.kxcdn.com/version9/passwordstate_upgrade.zip and place it in the folder c:\inetpub\passwordstate\upgrades on your HA Web Server. That way the In-Place Upgrade feature will not try and download it.

- b. Or you can use the following documentation to perform a manual upgrade - https://www.clickstudios.com.au/downloads/version9/High_Availability_Server_Manual_Upgrade_Instructions.pdf
4. If using SQL Server Transactional Replication, and it was required to remove this prior to upgrade, you can re-establish by using the following instructions - https://www.clickstudios.com.au/downloads/version9/SQL_Server_Transactional_Replication.pdf


 Note: If you are using Transactional Replication, and you see a notification on your upgrade screen that replication still appears to exist, please execute the following commands using SQL Server Management Studio to clean up left over replication tables and data.

```
USE Master
```

```
EXEC sp_removedbreplication passwordstate
```

4 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. Click on the 'Begin Upgrade' now button
3. Click on the 'Start Upgrade' button, at which time the following processes will occur:
 - a. Stop the Passwordstate & Passwordstate-Gateway Window Services
 - 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. Start the Passwordstate & Passwordstate-Gateway Window Services
 - h. Log you out of Passwordstate
4. 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)

5 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:

 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. Manually download the upgrade file from https://passwordstate-8665.kxcdn.com/version9/passwordstate_upgrade.zip (CDN Network) 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>):

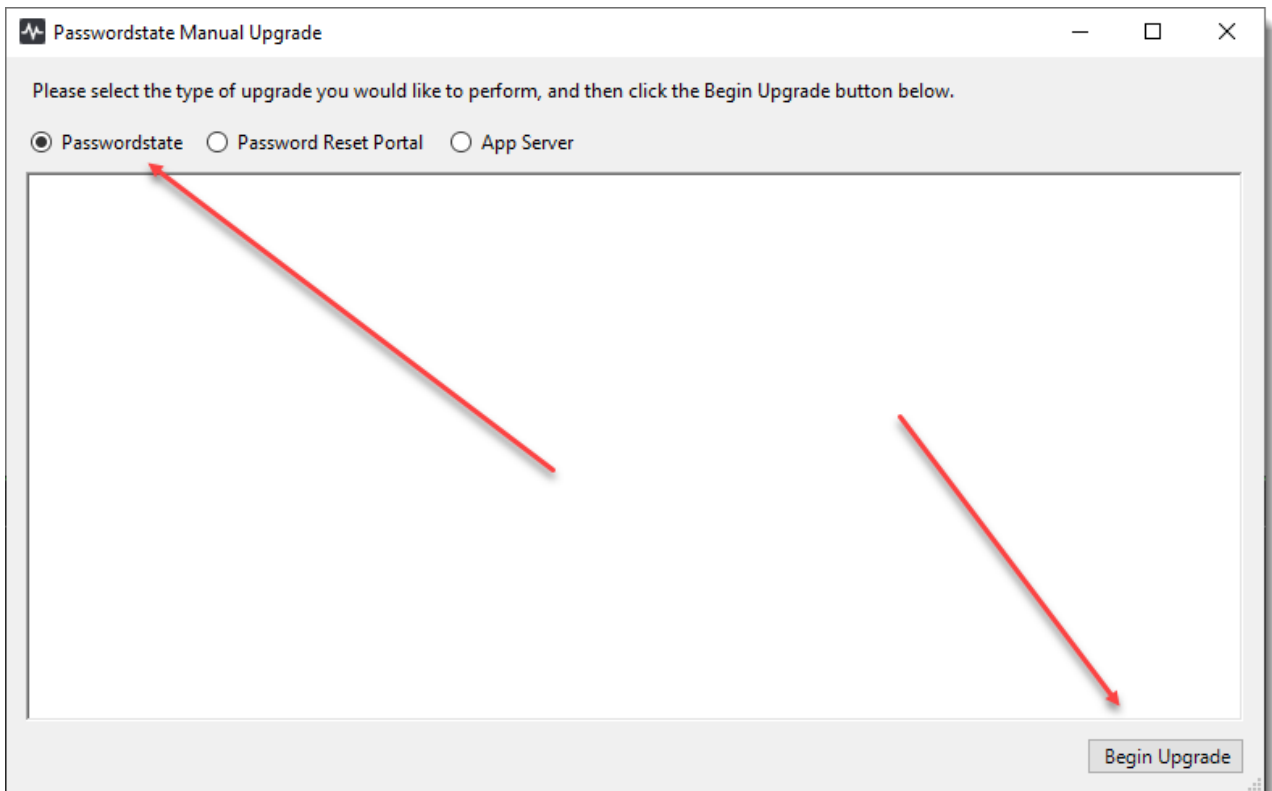
```
USE Passwordstate
UPDATE [SystemSettings]
SET NewVersionNo = '9.1', NewBuildNo = '9117'
```

3. Once you have executed this statement, open your browser and point it to your Passwordstate web site. Navigate to the page Administration -> Backups and Upgrades, click on the 'Upgrade Now' button
4. Click on the 'Begin Upgrade' now button, then on the 'Start Upgrade' button
5. Once replacing of all the files is complete, you can now log back into Passwordstate, and continue the upgrade process for updating your database

6 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, and take a copy of your Passwordstate folder – default path is c:\inetpub\passwordstate
2. Download the following file <https://passwordstate-8665.kxcdn.com/version9/PasswordstateManualUpgrade.zip>
3. Extract the zip file, and copy across PasswordstateManualUpgrade.exe to a folder on your Passwordstate web server
4. Run the exe as an Administrator, select the 'Passwordstate' option you see in the screenshot below, and click the 'Begin Upgrade' button (This process will automatically download the upgrade zip file for you, but if you do not have Internet connectivity from your Passwordstate web server, you can manually download the file https://passwordstate-8665.kxcdn.com/version9/passwordstate_upgrade.zip and place it in the folder c:\inetpub\passwordstate\upgrades)



5. After the upgrade from above is complete, close the PasswordstateManualUpgrade.exe and log into Passwordstate and complete the database upgrade process

7 Troubleshooting Maintenance Mode User During an Upgrade

When you begin the upgrade process of Passwordstate, Maintenance Mode is enabled to ensure no other users are using the software, during the time of the upgrade.

Once the first stage of the upgrade process is complete, you will be logged out of Passwordstate, and asked to login a second time to complete the second phase of the database upgrade process.

If for any reason you are unable to login with the same account you enabled Maintenance Mode with, then please follow these instructions:

1. Using SQL Server Management Studio, execute the commands below:

```
USE Passwordstate
```

```
UPDATE SystemSettings SET MaintenanceModeUserID = ''
```

2. Now restart your browser, and access your Passwordstate URL again.

8 Passwordstate App Server Upgrade Instructions

Please refer to the section 'Upgrades Dependency Matrix' below to determine if you need to follow the instructions below to upgrade the Passwordstate App Server install.

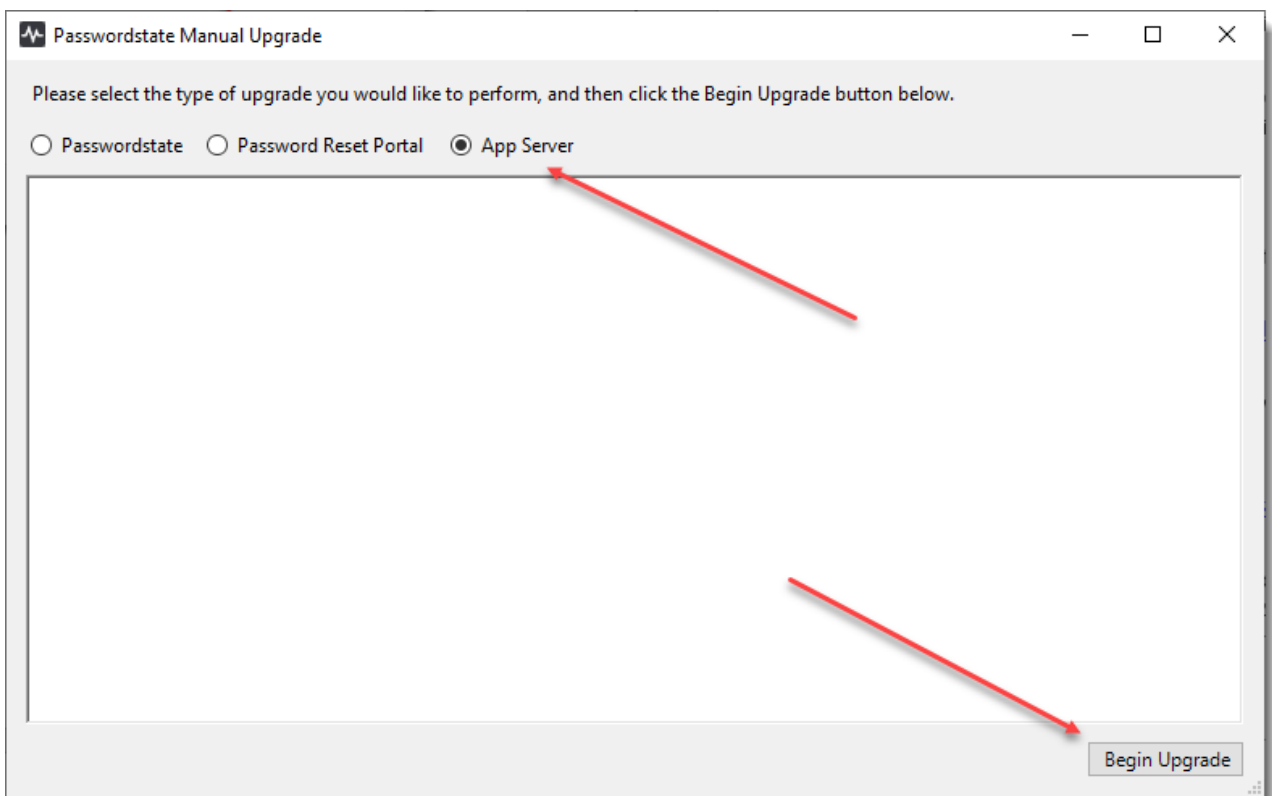
In this upgrade Matrix, if there are any builds which indicate the App Server, Self-Destruct or Browser Extensions require an upgrade from the build you are currently using, then follow either of these instructions below:

In-Place Upgrade

1. An In-Place Upgrade can be performed from within the Passwordstate UI from the screen Administration -> Authorized Web Servers. Please refer to the Security Administrators Manual under the Help Menu for more information

Manual Upgrade

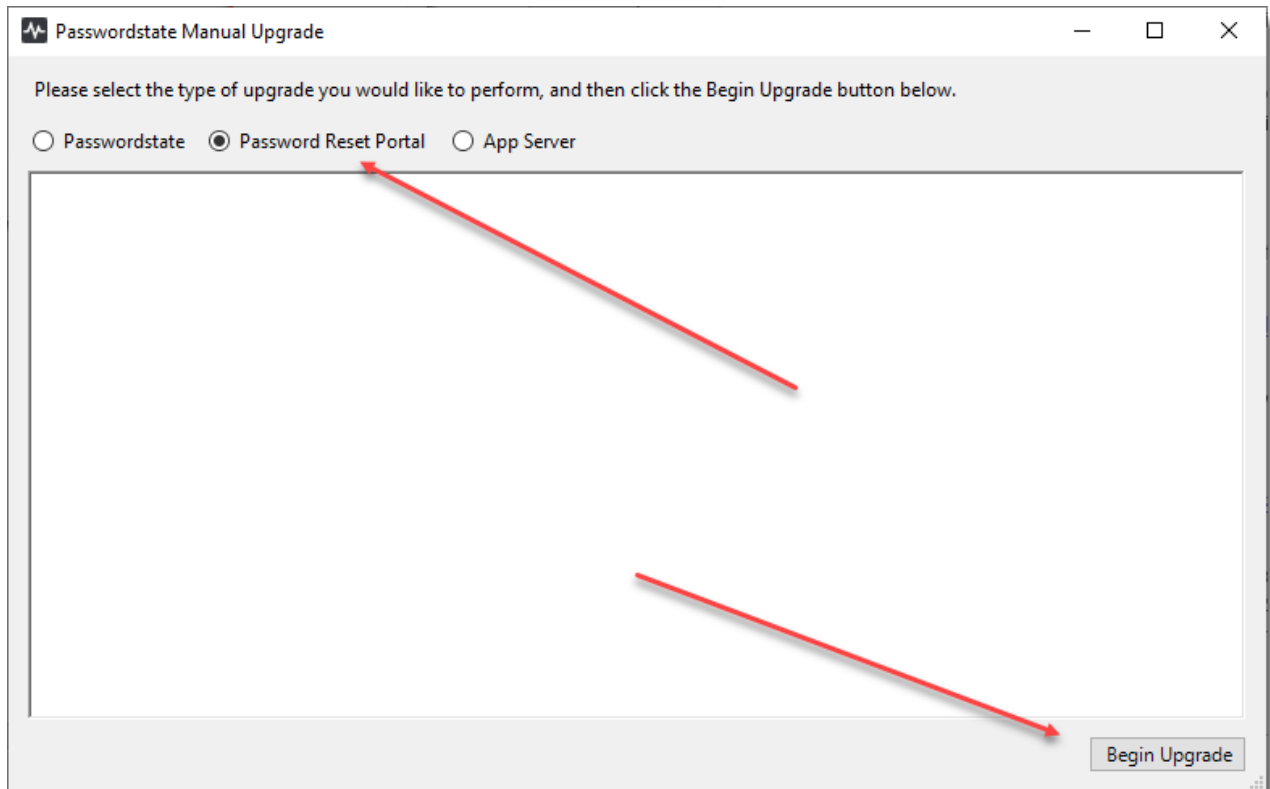
2. Download the following file <https://passwordstate-8665.kxcdn.com/version9/PasswordstateManualUpgrade.zip>
3. Extract the zip file, and copy across PasswordstateManualUpgrade.exe to a folder on your Passwordstate web server
4. Run the exe as an Administrator, select the 'App Server' option you see in the screenshot below, and click the 'Begin Upgrade' button (This process will automatically download the upgrade zip file for you, but if you do not have Internet connectivity from your Passwordstate web server, you can manually download the file https://passwordstate-8665.kxcdn.com/version9/passwordstateappserver_upgrade.zip and place it in the folder c:\inetpub\passwordstateappserver\upgrades)



9 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:

5. Download the following file <https://passwordstate-8665.kxcdn.com/version9/PasswordstateManualUpgrade.zip>
6. Extract the zip file, and copy across PasswordstateManualUpgrade.exe to a folder on your Passwordstate web server
7. Run the exe as an Administrator, select the 'Password Reset Portal' option you see in the screenshot below, and click the 'Begin Upgrade' button (This process will automatically download the upgrade zip file for you, but if you do not have Internet connectivity from your Passwordstate web server, you can manually download the file https://passwordstate-8665.kxcdn.com/version9/passwordstateresetportal_upgrade.zip and place it in the folder c:\inetpub\passwordstateresetportal\upgrades – manually create the upgrades folder if it does not exist)

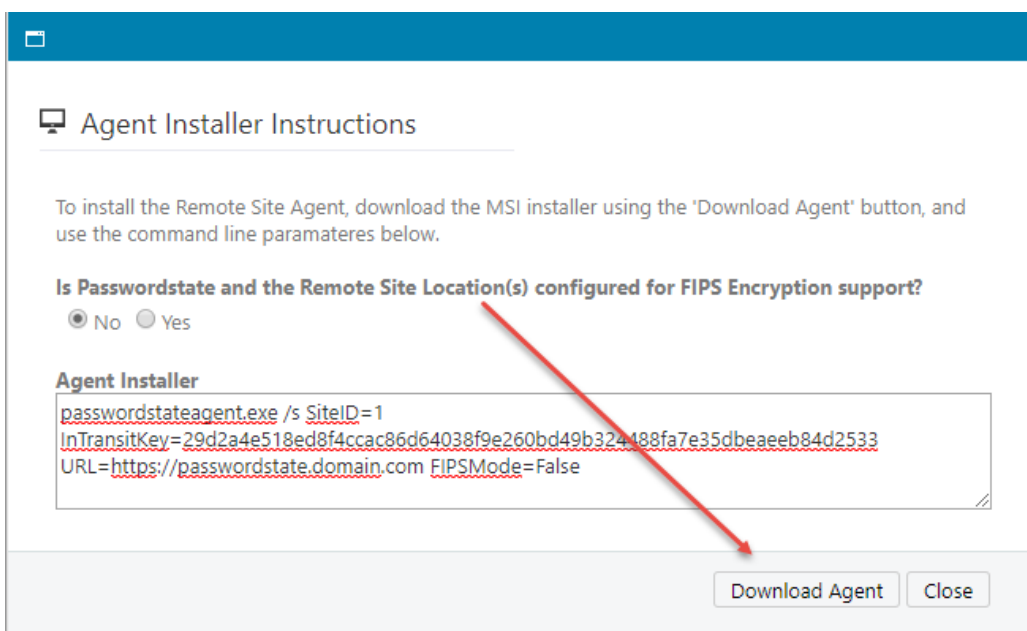
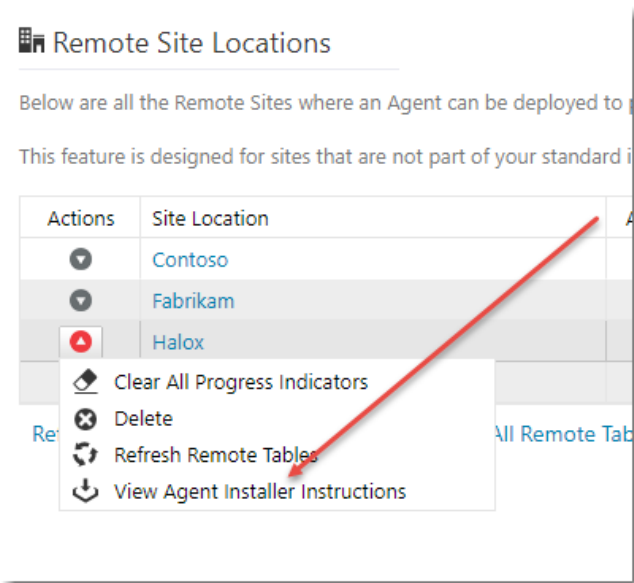


10 Remote Site Locations Agent Upgrade Instructions

In version 9, any deployed Remote Site Location Agents will automatically upgrade within 10 to 15 minutes after you have upgraded your main Passwordstate server – assuming the default poll time is set to 5 minutes.

Please Note: If there is no Internet Connectivity to automatically download the agent, then you will need to manually uninstall the agents and then re-install them, by following these instructions:

1. First upgrade your main Passwordstate installation
2. Uninstall the Agent from Add/Remove Programs
3. Manually delete the folder “C:\Program Files (x86)\Passwordstate Agent”, as there will be certainly files left behind
4. Now 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



11 Browser Based Remote Session Launcher Gateway

By default, the Browser Based Remote Session Launcher Gateway is embedded with your Passwordstate web site.

This Gateway can also be installed on a separate server to where you have Passwordstate installed if desired. If you have deployed the Gateway separately to your main Passwordstate web site, you will need to follow the instructions below to manually upgrade where your Gateway has been deployed to.

1. Stop the 'Passwordstate Gateway Maintenance' and 'Passwordstate-Gateway' Windows Services
2. Download the following file https://passwordstate-8665.kxcdn.com/version9/passwordstategateway_upgrade.zip, and extract the files into the folder C:\Program Files (x86)\Passwordstate Remote Session Gateway (this is the default install path, but yours might be different)
3. Restart the 'Passwordstate Gateway Maintenance' and 'Passwordstate-Gateway' Windows Services

****Note**** You do not need to upgrade the Browser Based Remote Session Launcher Gateway, if you are using the one that is embedded within your core Passwordstate website.

12 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, after you have upgraded your installation of Passwordstate.

Some of these modules do get updates to them over time, but you are not necessarily forced to upgrade them when you upgrade your main Passwordstate instance.

Build No	Database Schema Updates	App Server	Password Reset Portal	Remote Site Locations Agent	Browser Extensions	Self Destruct	Remote Session Launcher Gateway
9117	Yes	No	No	Yes	No	No	No
9112	Yes	No	No	No	No	No	No
9100	No	No	No	No	No	No	No
9073	No	No	No	No	No	No	No
9065	Yes	No	No	No	No	No	No
9050	Yes	Yes	Yes	Yes	No	Yes	Yes
9000	Yes	Yes	Yes	Yes	No	Yes	Yes