



Click Studios

Passwordstate

Upgrade Instructions to V5.6

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1 Upgrade Overview

This document will detail instructions for upgrading Passwordstate to version 5.6, from any version prior in the 5.xx range.

For upgrading from versions prior to 5.0, please visit the [Support](#) section of our web site for instructions.

Version 5.1 Upgrade Considerations

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.

Version 5.3 Upgrade Considerations

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

Version 5.4 Upgrade Considerations

Version 5.4 introduces a few changes for secondary authentication options which may affect previous settings for the following:

- ScramblePad Authentication for individual user accounts – if any users have elected to use the ScramblePad Authentication option for their individual account, then they will need to visit the 'Preferences' page after the upgrade and consider what secondary authentication options they would now like to use
- ScramblePad Authentication for all users – there are now new Secondary Authentication options which can be applied system wide, to members of security groups, or to individual accounts. Please consider these options under the 'Administration' area with this upgrade

Version 5.5 Upgrade Considerations

In version 5.5 we introduced a new feature called 'Authorized Web Servers'. Please be aware of this new feature if you intend to migrate your Passwordstate web site to a different web server – we now restrict which web server host names are authorized to run Passwordstate

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 High Availability Module Considerations

If you are also using the High Availability Module for Passwordstate, it's possible you may need to delete your SQL Server replication, and then re-establish the replication after upgrading, if the database schema has been updated as part of this build.

Please refer to the section **Step 7 – Database Schema Updates**, to determine if you need to follow the steps below. If you do not need to delete and re-establish your SQL Server replication, then you can **continue to Step 4 – Upgrade Instructions**.

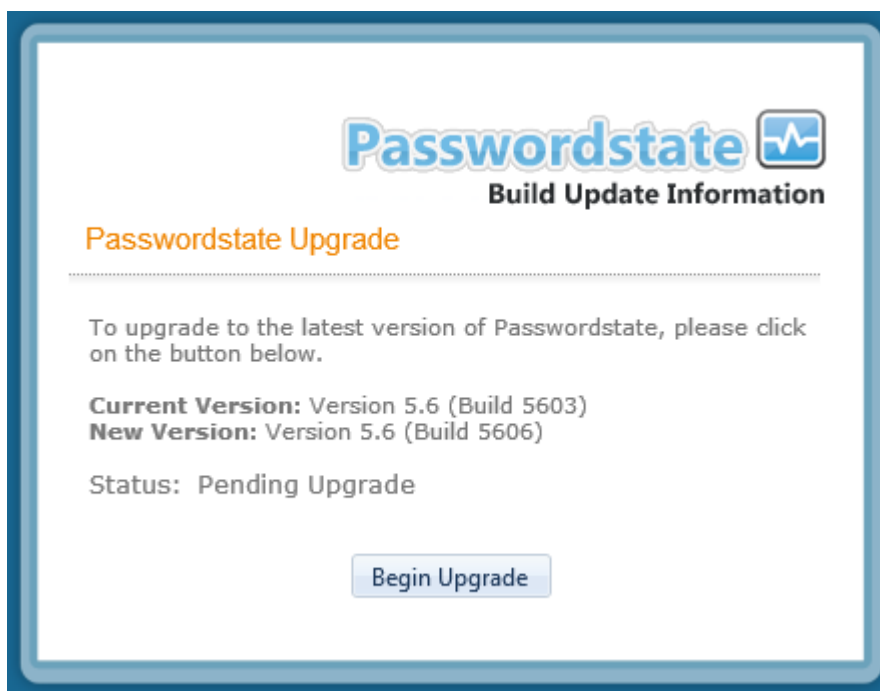
The intention of the following instructions is to allow you to continue using the High Availability instance of Passwordstate while you upgrade the Primary Instance.

1. Delete the SQL Server Subscriber and Publisher you established as part of the document 'High_Availability_Installation_Instructions.pdf'
2. Continue with Steps 4, 5 & 6 of this document to upgrade the Primary Instance of Passwordstate. Once the Primary Instance has successfully been upgrade, continue to the next step
3. Uninstall the High Availability instance of Passwordstate from the Control Panel, and ensure the folder 'c:\inetpub\passwordstate5' was successfully removed
4. On your secondary SQL Server (the subscriber), delete the 'passwordstate5' database and 'passwordstate5_user' SQL Account
5. Follow the instructions in 'High_Availability_Installation_Instructions.pdf' for reinstalling the High Availability instance of Passwordstate, and re-establishing SQL Server data replication.

4 Upgrade Instructions

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

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. Uninstall Passwordstate from Control Panel (please note your database will not be touched during the uninstall)
4. Once uninstalled, reinstall Passwordstate
5. Replace the web.config file from step 2
6. Restart the Windows Service 'Passwordstate Service'
7. 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
8. If your Active Directory requires additional privileges to query accounts and security group than the 'ApplicationPoolIdentity' account for the Passwordstate5 Application Pool in IIS, please refer to the sections '4 - Active Directory & IIS Application Pool' and '5 - Active Directory & Passwordstate Windows Service' before proceeding.
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



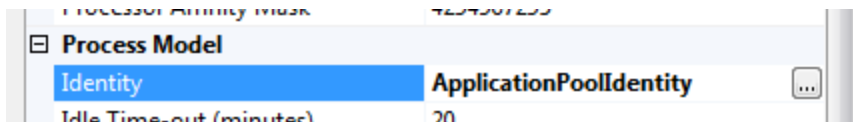
10. Once each of the relevant build updates is complete, you can begin to use Passwordstate by clicking on the 'Start Passwordstate' button. (if you experience any issues with the upgrade, please refer to the log c:\inetpub\passwordstate5\setup\logs\UpgradeLog.txt)

5 Active Directory & IIS Application Pool

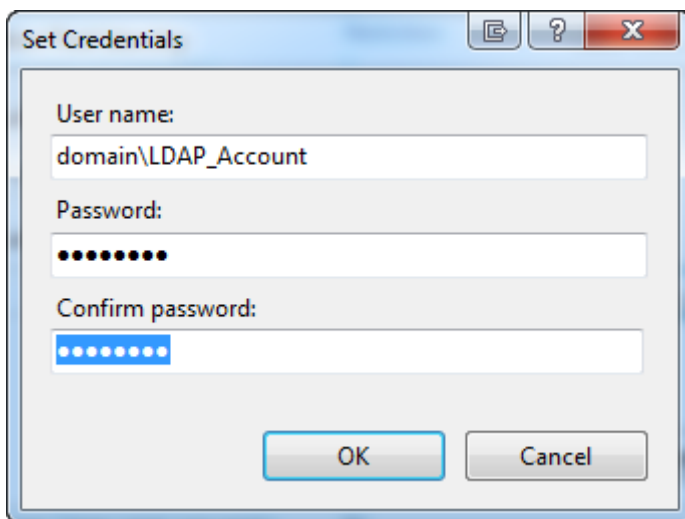
Passwordstate can query your Active Directory for the purpose of adding user accounts, and to synchronize memberships of domain security groups. By default, the account used is the 'NETWORK SERVICE' account which is part of Internet Information Services (IIS).

If you experience any errors when try to add users via Active Directory or query Security Groups, then it's likely your Active Directory setup only allows certain accounts to query it. If this is the case, then you will need to modify the IIS configuration to specify a different account. To do this, you can follow these instructions.

1. Open Internet Information Services (IIS) Manager on your web server
2. Click on 'Application Pools' in the 'Connections' panel
3. Right click on the application pool 'Passwordstate', and select 'Advanced Settings'
4. Look for the setting 'Identity' click on **ApplicationPoolIdentity**, and then on the ellipses button as per this screenshot:



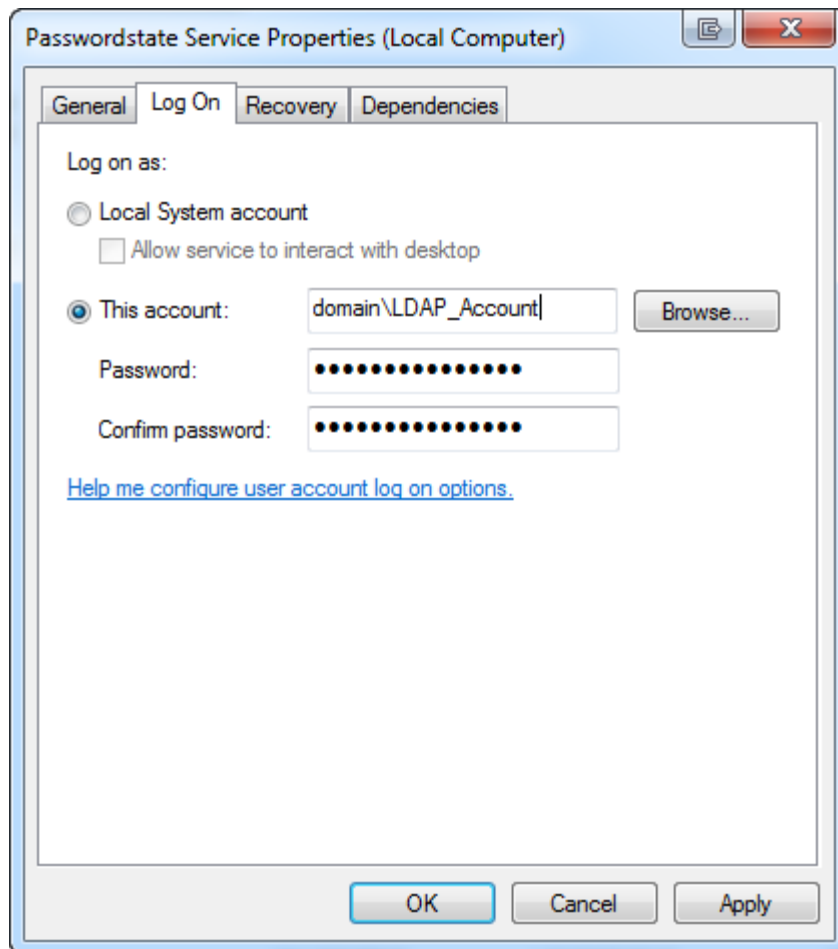
5. Select 'Custom account' and then specify the appropriate account details such as the example provided in the following screenshot:



6. Click on all the 'OK' buttons to close the windows, and then restart the Passwordstate site in IIS

6 Active Directory & Passwordstate Windows Service

In addition to modifying the Application Pool, you may need to also modify the 'Log On' rights for the Passwordstate Windows Service, as this service also queries Active Directory to synchronize accounts and Security Groups.



7 Database Schema Updates

The following table indicates which builds of Passwordstate needs to modify the database schema.

BUILD NO	SCHEMA UPDATED
Build 5606	No
Build 5603	Yes
Build 5595	Yes
Build 5581	Yes
Build 5570	Yes
Build 5565	No
Build 5556	No
Build 5547	Yes
Build 5532	YES
Build 5510	NO
Build 5508	NO
Build 5500	YES
Build 5470	NO
Build 5465	NO
Build 5462	NO
Build 5458	YES
Build 5426	YES
Build 5421	NO
Build 5416	YES
Build 5410	NO
Build 5402	NO
Build 5401	YES
Build 5400	YES
Build 5302	NO
Build 5300	YES
Build 5210	NO
Build 5203	NO

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Build 5200	YES
Build 5137	NO
Build 5118	YES
Build 5116	YES
Build 5115	NO
Build 5110	YES
Build 5102	NO
Build 5100	YES