Upgrading from Swivel 3-9 and Earlier on Microsoft Windows

Contents

Overview

This document covers upgrading Swivel on Microsoft Windows and supplements the article Upgrade PINsafe which should be used with this article. For Swivel appliance upgrades see the relevant patch files.

Prerequisites

- Existing Swivel installation version 3.9.4900 or earlier on Microsoft Windows Server 2000-2012, Windows XP, Windows Vista, Windows 7 or Windows 8 (including 8.1)

- Latest Swivel software to be installed

- Latest Swivel backup (requires the Tomcat service to be stopped if the internal DB is used) See Backup PINsafe on a Software Only Install

- To upgrade past Swivel 3.8 or later, you need Java 1.6.

- Swivel is compatible with versions of Tomcat versions 5.5 to 7.

If an external database such as MySQL or MSSQL is used make a backup of the database, since it may be modified if it was upgraded and you may need to go back to the previous version database state should something go wrong.

Upgrading from versions 3.2 to 3.9

Copy data

- Stop the Apache Tomcat service;

- It is highly recommended that you take a copy of the entire <path to Tomcat>\webapps\pinsafe\WEB-INF\ folder. DO NOT copy the files within the Tomcat folder, as this might cause multiple instances of Swivel to run. Make sure the backup is outside the Tomcat root folder, and preferably on a different computer altogether for safety.

Specifically the files you will need are:

<path to Tomcat>\webapps\pinsafe\WEB-INF\conf\config.xml <path to Tomcat>\webapps\pinsafe\WEB-INF\conf\ranges.xml <path to Tomcat>\webapps\pinsafe\WEB-INF\conf\config.properties <path to Tomcat>\webapps\pinsafe\WEB-INF\data\repository.xml

- If using the database "Internal" you will need:

<path to Tomcat>\webapps\pinsafe\WEB-INF\db

- If using an external database such as MySQL or MSSQL or Oracle, ensure you take a complete backup of the database

- If you have any custom transport classes, note that classes from 3.5 or earlier are not compatible with 3.6 or 3.7. Check with Swivel Secure if there is an upgrade available. When upgrading from 3.6 to 3.7, back up any custom transports as follows:

<path to Tomcat>\webapps\pinsafe\WEB-INF\classes\com\swiveltechnologies\pinsafe\server\transport

- If the Internal, or MySQL DB is not being used, backup the DB driver file you are using from <path to Tomcat>\webapps\pinsafe\WEB-INF\lib

Remove the old instance of Swivel

(This is only necessary if you are upgrading on the same server. Ensure your backup has been made).

- Ensure that the Tomcat service is started.

- Delete the current pinsafe.war in <path to Tomcat>\webapps

- Wait for the pinsafe folder to disappear. If the folder still remains after 30 seconds, you may need to delete it manually, as follows:

- If the pinsafe folder has not completely gone, stop Tomcat, delete the folder and then restart Tomcat.

Install a new instance of Swivel

Note: If moving to a new Microsoft Windows server, carry out the following install steps on the new server.

- Ensure that the Tomcat service is started.

- Copy the latest pinsafe.war file into the webapps folder and wait for the pinsafe folder to deploy;

- Once the new Swivel instance has deployed (the pinsafe folder has been created within webapps), verify that the Swivel service can be connected to and displays the new PINsafe version, from the local host use:

http://127.0.0.1:8080/pinsafe

If you have changed the Tomcat connector settings, use https and/or the modified port as appropriate.

- Login to Swivel admin (the DB is shipping) using the default credentials

- Check the location of the Data Storage Root folder from the Status screen.

- Stop Tomcat

- From the earlier backup, copy the conf, data and db directories to the Data Storage Root location, as previously written down

<path to Tomcat backup>\webapps\pinsafe\WEB-INF>

- Restore any custom classes or database libraries previously backed up.

- Start Tomcat, Swivel will startup and begin to upgrade the database configured in the config.xml

Testing

Verify that the Swivel service can be connected to, from the local host use:

http://127.0.0.1:8080/pinsafe

Verify that the new version is listed.

Known Issues

Troubleshooting

Transports absent after upgrade