Upgrading Swivel 3-2 to 3-9 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 on Microsoft Windows, 2000, 2003, 2008, XP, Vista, Win7

- Latest Swivel software

- 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 to Swivel 3.8 or later, you need Java 1.6. It is recommended that you update to the latest version of Java anyway.

- Swivel 3.8 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 versions 3.2 to 3.9

Copy data (3.2-3.9)

For upgrading from versions 3.9.1 and higher (excluding 3.9) the, the pinsafe.war file can be copied into the webapps folder as part of the upgrade, but make a copy of custom transports and the <database name>.jar file in WEB-INF/lib before upgrading and copy back in as below. Note from Swivel 3.9.1 the location of the Transient Data Storage.

- 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 PINsafe 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 PINsafe (3.2-3.9)

(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 PINsafe (3.2-3.9)

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 PINsafe server can be connected to and displays the new PINsafe version, from the local host use:

http://127.0.0.1:8080/pinsafe

- Stop Tomcat

Copy configuration and data files (3.2-3.9)

- Copy the previously made copies of the following files and folders to the new instance of Swivel.

Note: If moving to a new Microsoft Windows Server copy from the backup to location to the new server.

<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\data\repository.xml

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

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

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

Testing

Verify that the PINsafe server 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