SecurEnvoy
A Shearwater Group plc Company

www.securenvoy.com

SecurEnvoy Security Server Upgrade Guide

SecurEnvoy Security Server

Upgrade Guide 2020

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Pre-Planning (Prior to Upgrade)

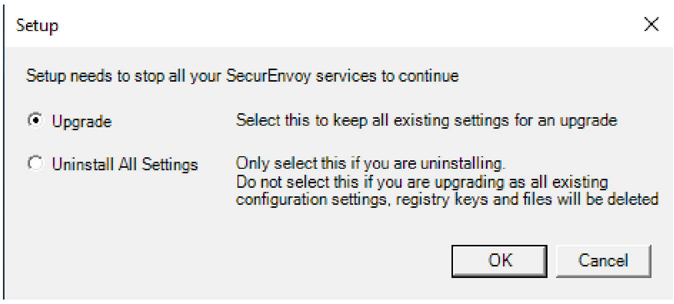
> **Note**: *SecurEnvoy Security Servers can be directly upgraded from V6.x to V9.x without a step upgrade. If a software version prior to version 6.x is in use, then a step upgrade will be required. Please contact support@securenvoy.com for access to previous software versions.*

- Backup SecurEnvoy Server(s).
  - *We would also recommend all customers to manually backup their SecurEnvoy Security Server directory.*
  - *For 32 bit installations - **C:\Program Files\SecurEnvoy\Security Server***
  - *For 64 bit installations - **C:\Program Files (x86)\SecurEnvoy\Security Server***
  - *Including any modified templates, as these will need to be copied back after the upgrade.*
- Snapshot SecurEnvoy Server(s).
- Backup copies of the *Config.db* and *Server.ini* files.
  - These files can be found in the SecurEnvoy Security Server Directory *(**C:\Program Files (x86)\SecurEnvoy\Security Server**)*
- Export SecurEnvoy Registry via Registry Editor
  - *HKEY_Local_Machine\Software\Wow6432Node\SecurEnvoy*
- Gather SMS Gateway information
  - *This includes any Proxy/Certificates and/or Firewall settings*
- Gather SecurEnvoy Service Account Information.
- Gather RADIUS Configuration/Settings information.
  - The RADIUS NAS file can be exported from *(**C:\Program Files (x86)\SecurEnvoy\Security Server\DATA\RADIUS\NAS**)*
- Gather any modified templates from the SecurEnvoy "Security Server" Directory.
  - These will be found in *(**C:\Program Files (x86)\SecurEnvoy\Security Server\DATA)***
- Report on All Managed Users and Export to a .CSV File.
  - *This can be achieved using the Reporting Wizard. (**C:\Program Files (x86)\SecurEnvoy\Security Server\REPORT**)*

> ***Pro Tip**: Please make sure that all SecurEnvoy Web Portals are closed in advance of the upgrade so that files which need to be replaced are not locked. A good method of doing this is to simply Stop IIS Web Services.*

Upgrading SecurEnvoy Security Server

Upgrades performed are delivered directly over the existing installation.



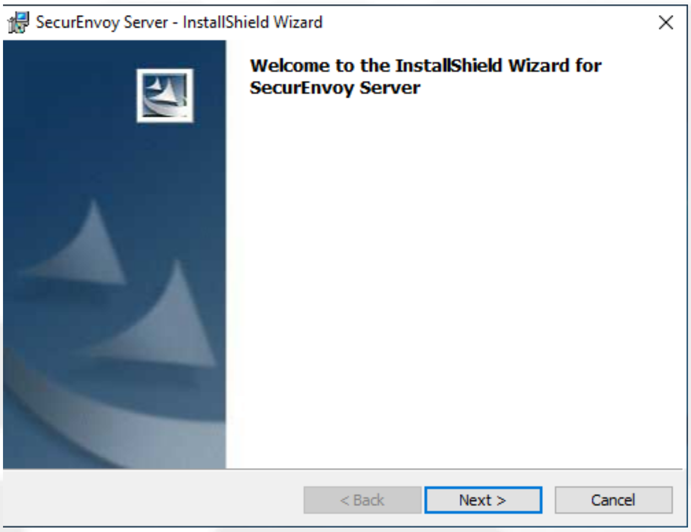
Setup

Setup needs to stop all your SecurEnvoy services to continue

● Upgrade — Select this to keep all existing settings for an upgrade

○ Uninstall All Settings — Only select this if you are uninstalling.
Do not select this if you are upgrading as all existing configuration settings, registry keys and files will be deleted

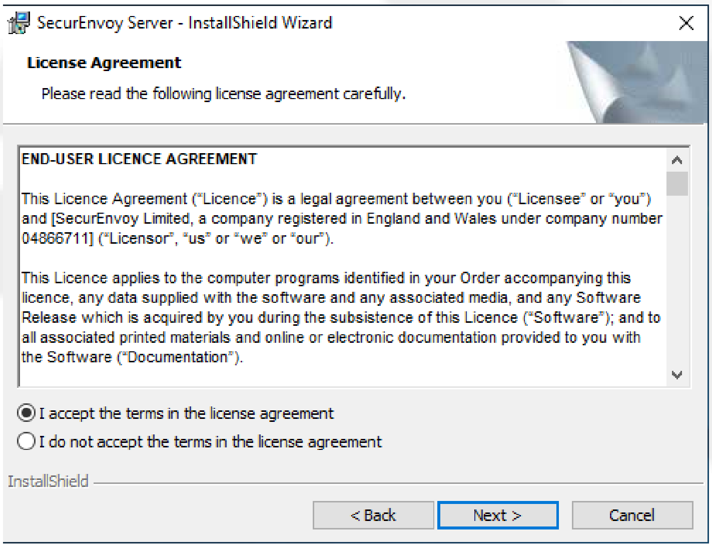
- Download the latest version of SecurEnvoy Software.
- Extract to the Server.
- Run Setup.exe.
- Select "Upgrade".



SecurEnvoy Server - InstallShield Wizard

Welcome to the InstallShield Wizard for SecurEnvoy Server

- Follow along with the on-screen prompts.



SecurEnvoy Server - InstallShield Wizard

License Agreement

Please read the following license agreement carefully.

END-USER LICENCE AGREEMENT

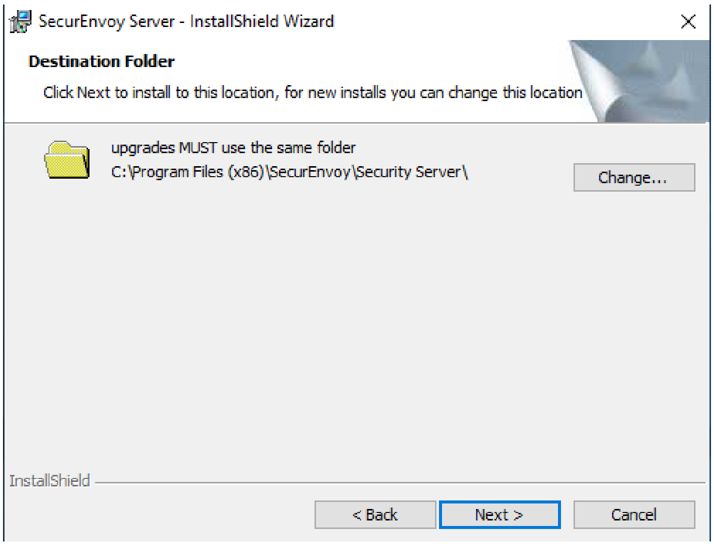
This Licence Agreement ("Licence") is a legal agreement between you ("Licensee" or "you") and [SecurEnvoy Limited, a company registered in England and Wales under company number 04866711] ("Licensor", "us" or "we" or "our").

This Licence applies to the computer programs identified in your Order accompanying this licence, any data supplied with the software and any associated media, and any Software Release which is acquired by you during the subsistence of this Licence ("Software"); and to all associated printed materials and online or electronic documentation provided to you with the Software ("Documentation").

● I accept the terms in the license agreement

○ I do not accept the terms in the license agreement

- Review and accept the licensing terms.



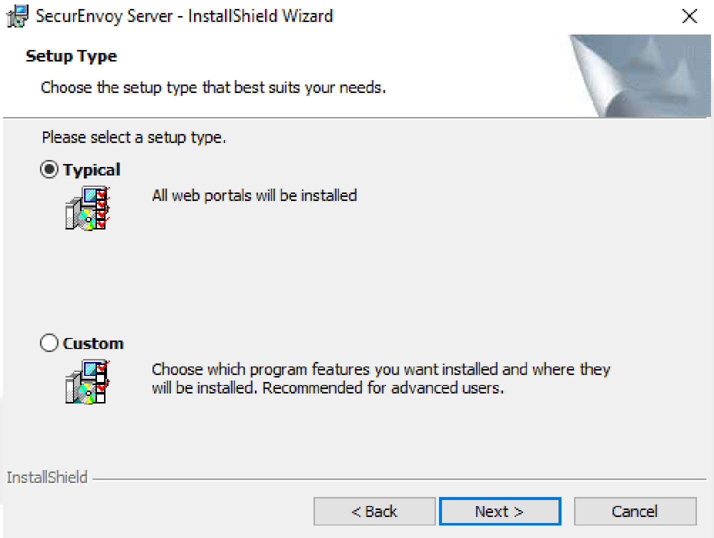
SecurEnvoy Server - InstallShield Wizard

Destination Folder

Click Next to install to this location, for new installs you can change this location

upgrades MUST use the same folder
C:\Program Files (x86)\SecurEnvoy\Security Server\

- The system installer will prompt for an install location.
- Because this is an upgrade, you must ensure that this location is the same as the original installation so files can be upgraded properly.



SecurEnvoy Server - InstallShield Wizard

Setup Type

Choose the setup type that best suits your needs.

Please select a setup type.

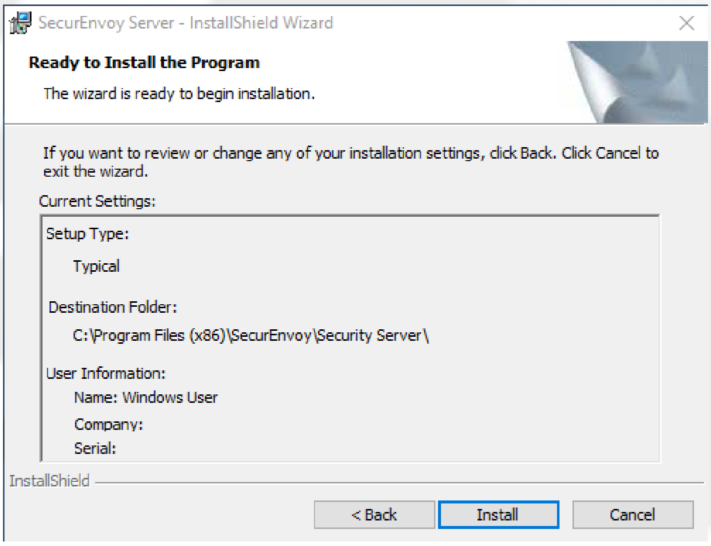
● **Typical**

All web portals will be installed

○ **Custom**

Choose which program features you want installed and where they will be installed. Recommended for advanced users.

- Select Typical for most upgrades.
- Select Custom only if you had a custom installation previously.



SecurEnvoy Server - InstallShield Wizard

Ready to Install the Program

The wizard is ready to begin installation.

If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.

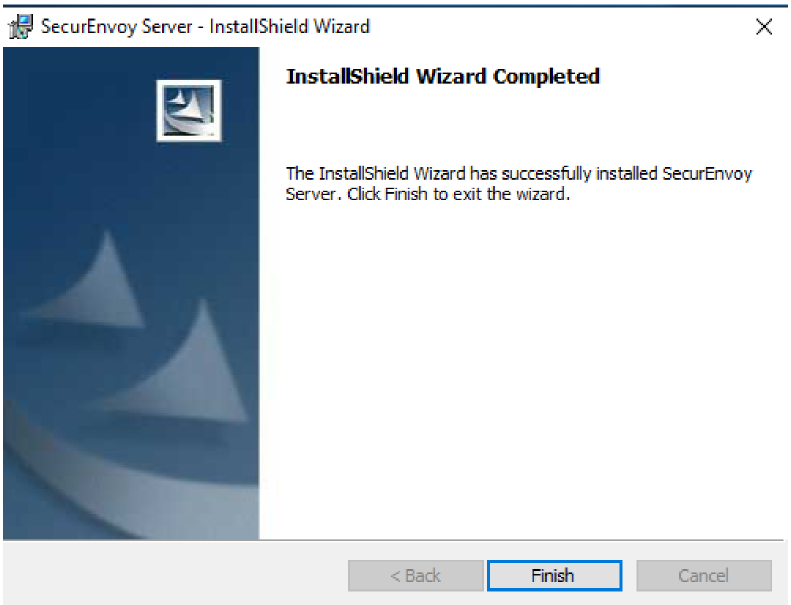
Current Settings:

Setup Type:
Typical

Destination Folder:
C:\Program Files (x86)\SecurEnvoy\Security Server\

User Information:
Name: Windows User
Company:
Serial:

- Once you click Install, the upgrade process will begin.



SecurEnvoy Server - InstallShield Wizard

InstallShield Wizard Completed

The InstallShield Wizard has successfully installed SecurEnvoy Server. Click Finish to exit the wizard.

- When the upgrade has completed, click Finish.

Post Upgrade Tasks

Once the upgrade has completed, you should launch the SecurEnvoy SecurAccess Admin Console. The Initial Setup Wizard will run, pre-populated with the settings from the previous installation. You have the option to change these settings or accept the existing ones as required.

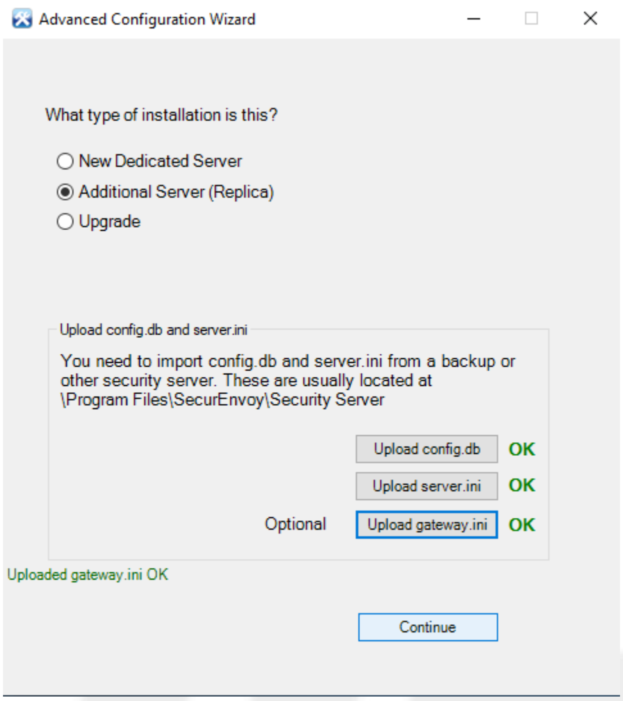
Installing an Additional SecurEnvoy Server

Some organizations wish to have more than one SecurEnvoy Security Server for failover, load balancing and other redundancy. SecurEnvoy itself does not have any load balancing features integrated within it, so this process will require load balancing services from a load balancer, like a F5, Citrix NetScaler or other.

Understanding that the services within SecurEnvoy will be using an SSL Certificate, it will be important to assure that you have configured SSL Session Persistency on your load balancer so that communication between the user and this system works properly.

There is no limitation on the number of SecurEnvoy Security Servers that can be used in a single environment. As long as they're setup as replicas.

Adding a second server is performed in the exact same manner as a standard installation, with only one exception.



What type of installation is this?

○ New Dedicated Server
● Additional Server (Replica)
○ Upgrade

Upload config.db and server.ini

You need to import config.db and server.ini from a backup or other security server. These are usually located at \Program Files\SecurEnvoy\Security Server

Upload config.db OK
Upload server.ini OK
Optional Upload gateway.ini OK

Uploaded gateway.ini OK

- Follow the previously described install steps, selecting Additional Server (Replica) as shown.

- Once you select Additional Server (Replica) you will be prompted for the following three files;
  - Config.db
  - Server.ini
  - Gateway.ini

These three files contain the working configuration for the first server you installed, but they do not contain:

- Radius Clients and settings.
- Custom templates.

> *Note:* Additional Servers must use the same Service Account as the original.

Upgrading SecurEnvoy Security Server & Decommissioning Old Servers.

> **Scenario**: *2 x Windows Server 2012R2, running SecurEnvoy on Security Server Version 8.1.504. Both Servers need to be decommissioned and replaced with 2 x Windows Server 2019, and SecurEnvoy needs to be upgraded to V9.4.505.*

- Upgrade the existing SecurEnvoy Server(s) from V8.1.504 to V9.4.505, following the Steps above in “Upgrading SecurEnvoy Security Server”.
  - *If the servers running SecurEnvoy are virtual servers, then we recommend taking a snapshot of these prior to upgrading.*
  - *We do not recommend running SecurEnvoy on different versions,*
- Build the new Windows 2019 Servers, install SecurEnvoy on these new servers as **replicas**. Please follow the steps in “Installing an Additional SecurEnvoy Server” to complete this.
  - *The Installation Wizard will require a copy of the server.ini, gateway.ini & config.db from the old server to be used on the new servers.*
- Introduce new servers into the current environment, and once satisfied, begin to decommission the old 2012R2 servers.
  - *We recommend keeping older servers in use for at least 1 week, to ensure SecurEnvoy is working as expected on the new servers.*
  - *We recommend turning off the SecurEnvoy Services on the old servers during this time. (SecurEnvoy Batch Server, SecurEnvoy Radius, SecurEnvoy Web SMS Gateway)*

RADIUS Clients

Because each SecurEnvoy Security Server manages its own RADIUS Clients, you can either:

- Recreate the RADIUS Clients manually, on the new SecurEnvoy servers.
- Copy the contents of *“C:\Program Files (x86)\SecurEnvoy\Security Server\Data\RADIUS\NAS”* from an existing SecurEnvoy Security Server. (If the configuration is the same).
    - Please remember to the make changes/modifications on your VPN/Radius devices.

Note: The default radius port is **UDP 1812**. Though under some cases (NPS installed) you may be required to change this.

Please Reach Out to Your Local SecurEnvoy Team…

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