idProducer Upgrade Procedure QRG

This guide covers upgrading idProducer software and its database in-place on the same server (i.e. these instructions do not describe moving an idProducer database).

REQUIREMENTS …

Backing up Databases and Assets:

- You must back up the SysGal and SysGalArc *databases* before upgrading System Galaxy.
- You must back up the *idProducer database* before upgrading idProducer.
- You can perform the database backups using GCS Service Manager utility or the SQL Server Database Management Studio (SSMS Tool).
- You must back up all System Galaxy assets, including badge template files.
- Move all backup files and databases to a safe location not on the computer being upgraded.

Stopping Apps and Services:

- You must shut down system galaxy software on the computer being upgraded. If this machine runs the services, you must stop all GCS Services before upgrading the Databases. A button to do so is provided in the installer screen at the appropriate location.
- You must shut down the idProducer Print Dispatcher by quitting the application from the Windows task tray icon.
- You must stop the idProducer Connection and Server services before upgrading the idProducer Software and Database. NOTE: The idProducer installer will interrupt the installation if anything is running. You will be unable to proceed until you stop the services.

# How to Upgrade idProducer (after System Galaxy upgrade is done)

You must upgrade System Galaxy servers and clients before upgrading the idProducer clients.

1. Upgrade *System Galaxy* to the latest version (v11.8.4.2 or higher),
   by running all three parts from the USB or the ISO file (sgsetup.hta)
   Step – 1: Prerequisites,
   Step – 2: Database Upgrade,
   Step – 3: SG Software Upgrade,

   The installer will auto-detect that the previous software is installed and will uninstall it before installing the new version.

2. Before you proceed to the idProducer installation, make sure you …

   a) Shut down the Print Manager from the System Tray by clicking on the icon and selecting Quit Application.

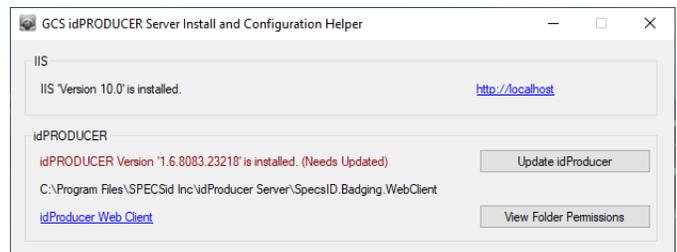   b) Stop the two idProducer Services for the Server and the Connector.
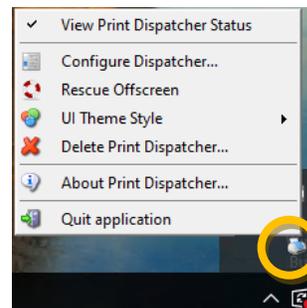
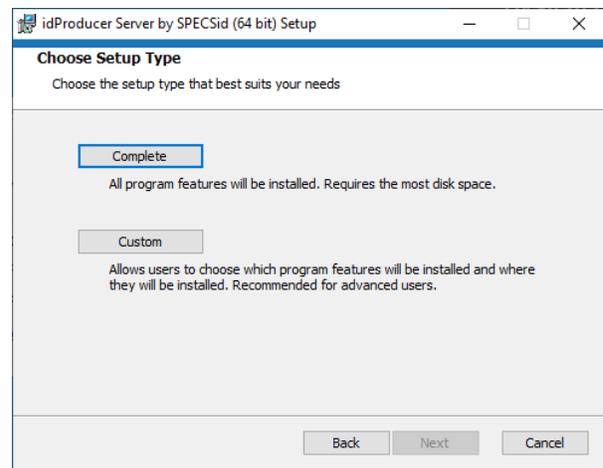3. Under Web Applications, click on the *Install idProducer* option on the USB/ISO Splash screen.

The installer will auto-detect that IIS is present and will prompt user that idProducer needs to be upgraded.

4. Click the **Update idProducer** button to launch the IDP installer program.

5. Accept the license (not pictured)

6. Choose to run a **Complete** install.

7. The software will be installed.

8. Click **FINISH** when done and wait for the IDP Configuration Manager to auto-start.
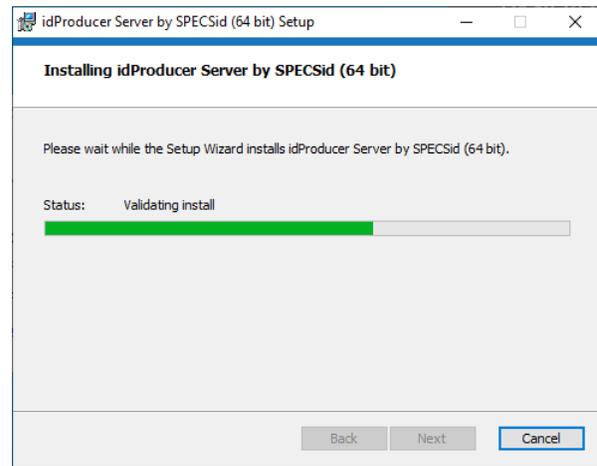
9. The IDP Configuration Manager will automatically launch and detect that the database needs to be upgraded.
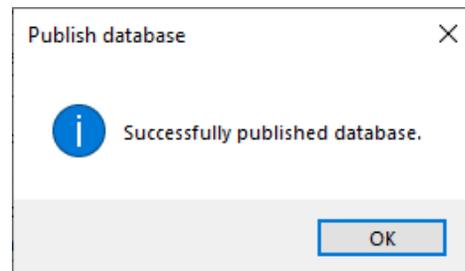
10. Click OK to continue with database upgrade.
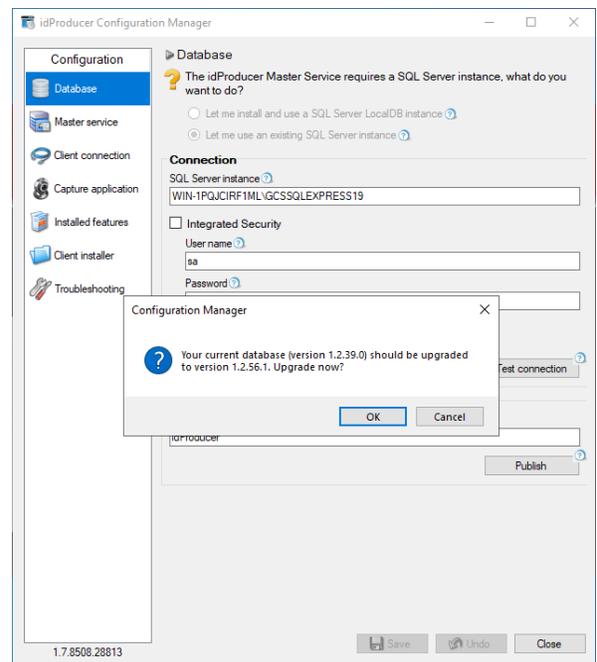
11. The Config Manager shows the DB being upgraded and Published at the bottom of the screen. Allow this operation to finish.
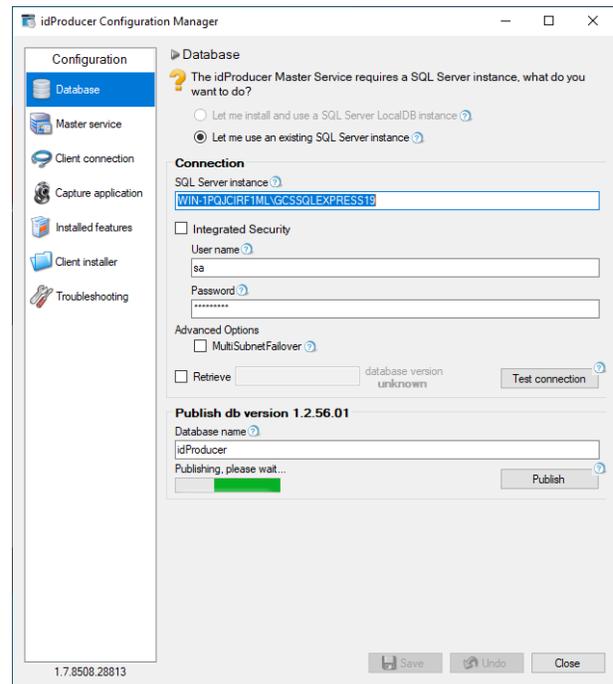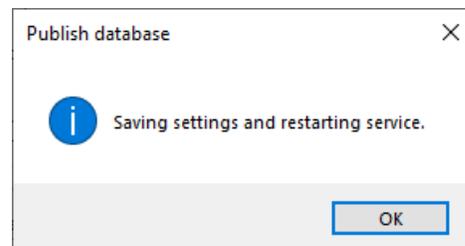

Successful Publish displays when the database upgrade is finished – and the Database is successfully published.

12. Click **OK** to close the confirmation message.

The system will automatically save your settings and restart idProducer services.

13. Click **OK** to Save Settings and restart Services.

When you are upgrading an existing system, the Config Manager should show the new DB version.

14. The Config Manager should show the *default sa login*. This login can be used for upgrading a system, however the end-user should harden their system by creating new passwords for all the default passwords.
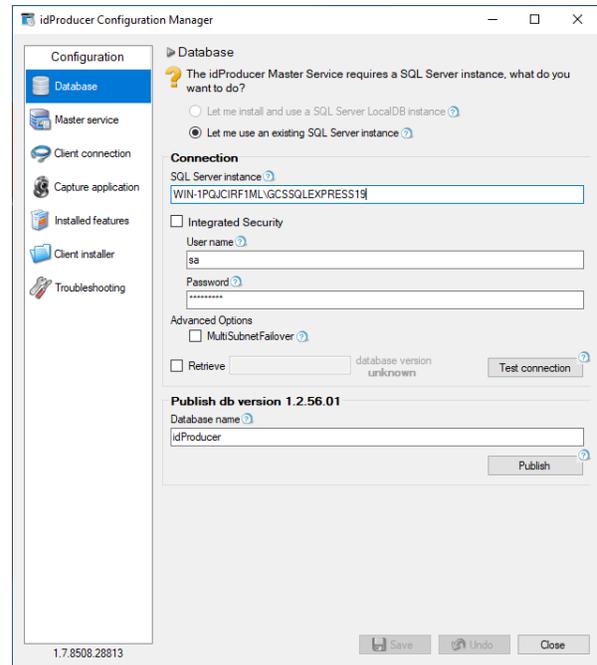
To verify that the database is upgraded, you can *RETRIEVE* the database version to verify that the numbers match.

- The *SA login* must be used.
- The **Retrieve option** must be "checked".
- The database name must be "idProducer". (i.e., must match the published database name)

15. Click **Test Connection** button to retrieve the *database version number*. The retrieved version should match the published version (see the blue arrows).
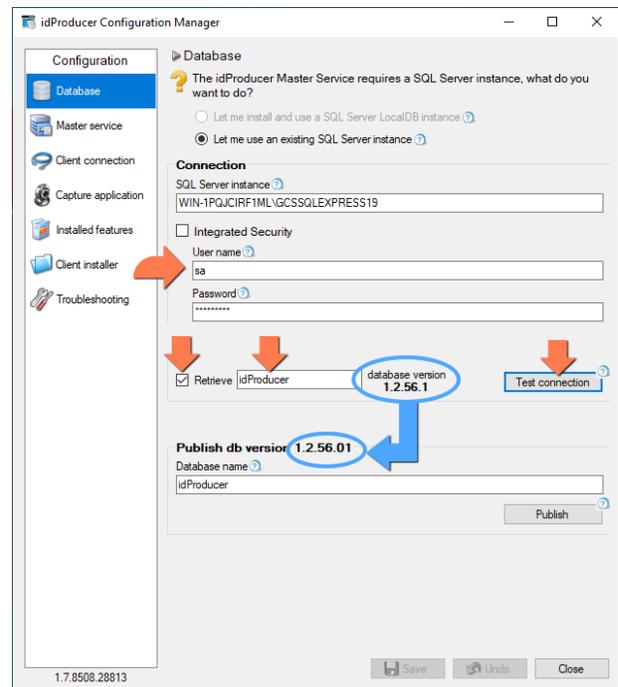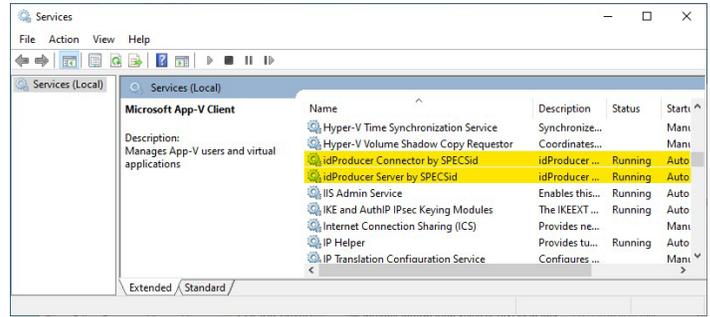
Clicking **Test Connection** will verify that you can successfully connect to the database.

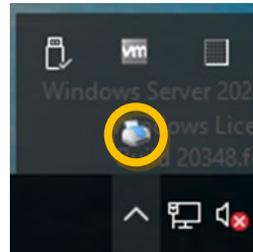16. Click **OK** to close dialog showing the connection was successful

17. Make sure the idProducer Services are running.

18. Verify the Print Dispatcher is installed and visible Windows task tray.

    NOTE: If the Print Dispatcher is not running, you can type 'idProducer Print Dispatcher' in the Windows search field and start the Print Dispatcher.

Verify the Print Dispatcher was upgraded from the Windows task …

19. Right-click on the *Print Dispatcher icon* and selecting 'About Dispatcher' from the menu.

    The new version number should be visible near the top of the About screen.
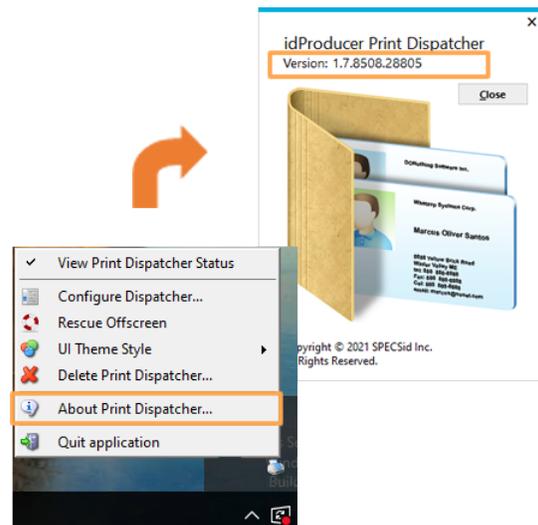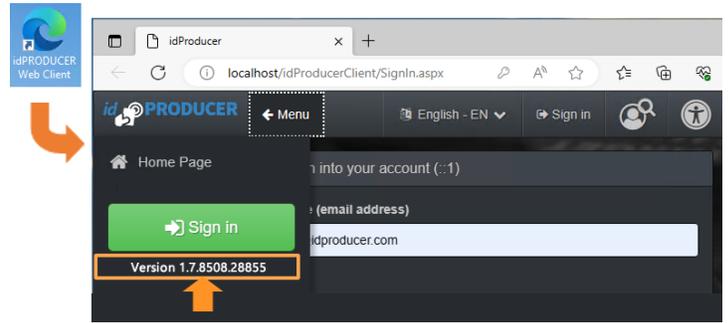

20. Log into the Print Dispatcher using the master login as normal.

Verify the idProducer Web Client software was updated to the new version   ...

21. Double-click the Web Client desktop icon and click **MENU button** to open the Menu Panel. The version is below the *Sign-In button*.

Verify your templates are all present by opening the Template Editor from the Web Client home page …

22. On the Client homepage, click on **Template Editor** icon.

23. When the *Template Editor* opens, you can select Customer Subscription name(s) and verify your templates are correctly displayed.

   - If you have a **Basic license**, all the templates will be on the Root, regardless of whether customers exist in Galaxy (as pictured).

   - If you have an **Advanced license**, there will be unique templates on each Subscription that correlates to a Galaxy Customer.
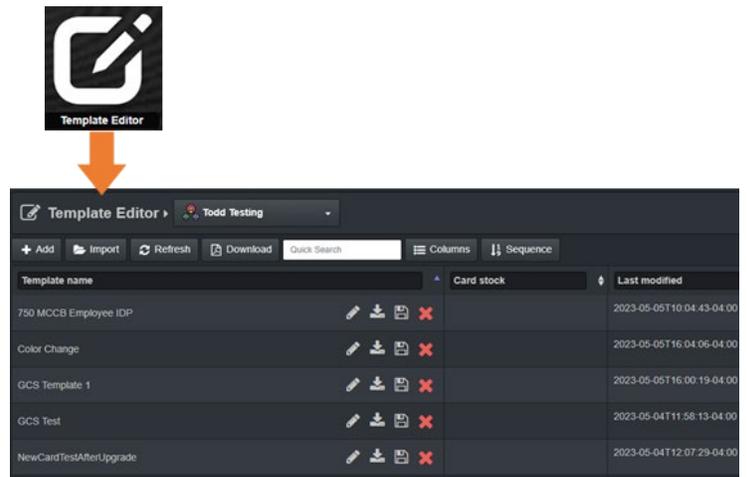
Menu: Configure > Cards > Badge Designs

24. Log into *System Galaxy* and open the Badge Designer screen and verify that your company badge templates are visible in the droplist. If you have customers, be sure the badges are visible for each customer as appropriate.

    a) Basic License No Customers: the "No Customer" is linked to the Root Subscription. Your templates will appear here whether you have customers or not.

    b) Basic License with Customers: IF you have customers, you will see all the same Template(s) listed under every *Customer Name* that is programmed in Galaxy. The root templates apply to every customer.

    c) Advanced License: Advanced license maps each Galaxy Customer Name to a corresponding idProducer Subscription. Each customer will list only the template(s) that correspond to the idProducer Subscription it is mapped to.
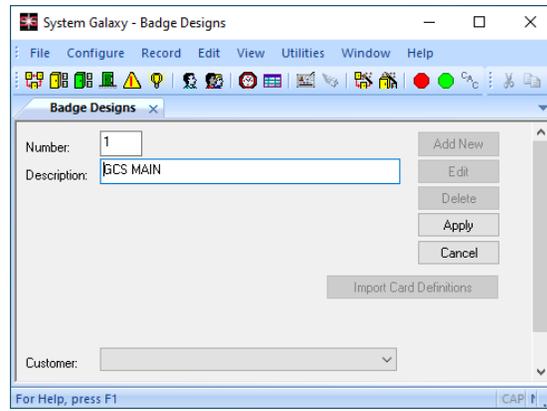
Basic Template from idProducer Root Subscription (no customers)
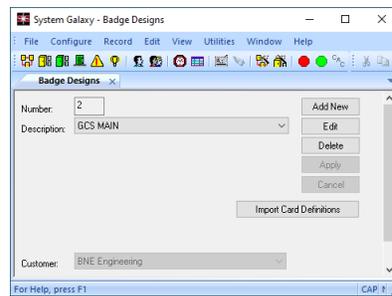
Example of Basic Template from Root Subscription for Basic license with customers configured.

Menu: Configure > Cards > Cardholders

25. Open the Cardholder screen and verify that your badges are available for existing cardholders and well as new cardholders.

    a) For Basic License, you should see all templates in the Cardholder Badge list for every cardholder, regardless of whether you have customers or not.

    b) For Advance License, you should only see the templates in the Cardholder Badge list that correspond to the templates in the related subscription.
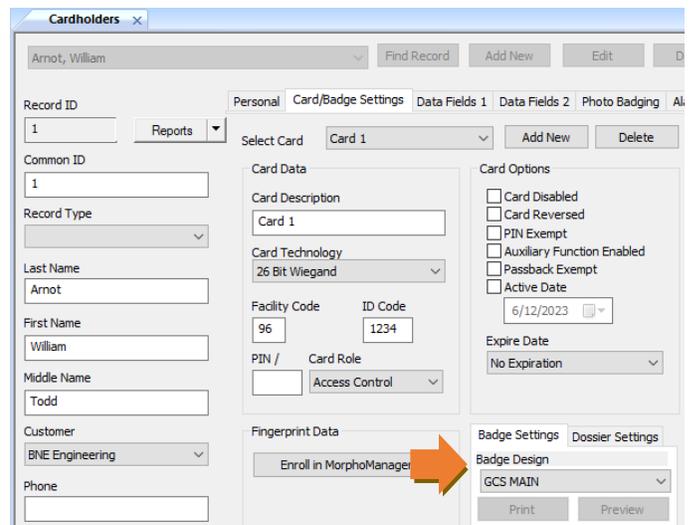
Menu: Configure > Options > System Settings

System Galaxy should automatically synchronize badges every time you launch System Galaxy.

26. To manually synch/import templates, open the System Setting screen on the Badging Options tab and follow the appropriate steps based on your license configuration:

    a) **Basic License WITH Customers**: <u>*"Check"* the option</u> *"Don't link Customers to idProducer Subscriptions (always use Root)"* as pictured in the screen provided.

    b) **Basic License without Customers**: <u>DO NOT check the option</u> *"Don't link Customers to idProducer Subscriptions (always use Root)"* [not pictured].

    c) **Advanced License**: <u>DO NOT check the option</u> *"Don't link Customers to idProducer Subscriptions (always use Root)"* [not pictured].

27. Click **OK** to confirm the data synch.

28. Click **YES** to restart the app to see changes.

    When you sign back into System Galaxy you should see the newly imported templates and any other changes made to the templates when you open the *Badge Designs screen* or the *Cardholder Screen*.

    See the previous page for instructions to open Badging and Cardholder screens.