

Installation Manager- User Guide

Overview

The **Installation Manager** is a Windows desktop application that helps you manage and update your SurePassID Authentication Server installation. This guide will walk you through each operation step-by-step.

Getting Started

Launching the Application

1. Locate InstallationManager.exe in your SurePassID installation folder
2. **Right-click** the file and select **"Run as administrator"**
3. The application window will open

Important: The application requires administrator privileges to modify system files and configurations.

Understanding the Interface

When you launch the application, you'll see:

- **Menu Bar:** Contains Operations, View, and Help menus
- **Current Installation Folder:** Shows the production folder being managed
- **Selected Operation:** Displays which operation is currently selected
- **Preview Mode Checkbox:** Lets you see changes before applying them
- **Log Window:** Shows real-time progress and messages
- **Start Button:** Begins the selected operation
- **Copy Log Button:** Copies log messages to clipboard
- **Cancel/Done Button:** Closes the application

Operation Types

The InstallationManager supports four main operations:

1. Upgrade Current Installation (In-Place Upgrade)

Upgrades your existing installation to a new version

2. Sync web.config to New Installation

Copies configuration from one installation to another

3. Install Maintenance Release

Applies updates and patches to your current installation

4. Rotate System Encryption Keys

Updates encryption keys for enhanced security

Step-by-Step Instructions

Operation 1: Upgrade Current Installation (In-Place Upgrade)

Use this when you want to upgrade your SurePassID installation to a newer version.

What It Does

- Backs up your current installation
- Updates all application files
- Migrates your configuration to the new version
- Upgrades the database if needed

Before You Begin

Backup your database (critical!)

? Schedule downtime with users

? Download the upgrade package

? Extract the upgrade files to a folder

Step-by-Step Process

Step 1: Select the Operation 1. Click **Operations** menu ? **Upgrade current installation** 2. A checkmark appears next to the selected operation

Step 2: Specify Folders 1. In the **Current Installation Folder** field: - Click the **Browse** button (folder icon) - Navigate to your SurePassID production folder - Example: C:\Program Files\SurePassID Corp\SurePassID Authentication Server\MfaServer - Click **OK**

Step 3: Enable Preview Mode (Recommended) 1. Check the **Preview Mode** checkbox 2. This lets you see what will change without actually changing it

Step 4: Start the Upgrade 1. Click the **Start** button 2. The upgrade dialog will appear

Step 5: Specify Upgrade Package 1. In the upgrade dialog, click **Browse** 2. Navigate to the folder containing your upgrade files 3. Example: C:\Temp\SurePassID_Upgrade_2025.4 4. Click **OK** 5. Click **Continue** to proceed

Step 6: Review Preview (If Enabled) 1. Review the log messages showing what will be changed 2. Look for any warnings or errors 3. If everything looks good, run again with Preview Mode unchecked

Step 7: Perform Actual Upgrade 1. Uncheck **Preview Mode** 2. Click **Start** again 3. Click **Continue** in the dialog 4. Wait for the upgrade to complete 5. Watch the log window for progress

Step 8: Verify Success 1. Look for “Operation completed successfully” message 2. Click **Copy Log** to save the log 3. Click **Done** to close the application

After the Upgrade

- Restart IIS or the application service
- Test user authentication
- Verify all features work correctly
- Keep the backup until you confirm everything works

Operation 2: Sync web.config to New Installation

Use this when you’re setting up a new installation and want to copy settings from your existing one.

What It Does

- Copies configuration settings from one installation to another
- Preserves destination-specific settings
- Does not modify binaries or the database

Before You Begin

Have both installations ready

Current (source) installation should be working

New (target) installation should be installed but not configured

Step-by-Step Process

Step 1: Select the Operation 1. Click **Operations** menu ? **Sync web.config to new installation** 2. A checkmark appears next to the selected operation

Step 2: Specify Source Folder 1. In the **Current Installation Folder** field: - Click the **Browse** button - Select your existing production folder - Example: C:\Program Files\SurePassID Corp\SurePassID Authentication Server\MfaServer

Step 3: Specify Target Folder 1. In the **New Installation Folder** field (this field becomes visible): - Click the **Browse** button - Select your new installation folder - Example: D:\SurePassID_New\MfaServer

Step 4: Start the Synchronization 1. Click the **Start** button 2. Wait for the process to complete 3. Watch the log for any warnings or errors

Step 5: Verify 1. Look for success message 2. Click **Copy Log** to save the log 3. Click **Done**

After Synchronization

- Review the new installation's web.config
- Test the new installation
- Verify database connectivity
- Check that all services work properly

Operation 3: Install Maintenance Release

Use this to apply patches, bug fixes, or minor updates to your current installation.

What It Does

- Backs up current binaries
- Replaces application files with updated versions
- Preserves all configuration settings
- Does not change the database

Before You Begin

Download the maintenance release package

Can be a ZIP file or extracted folder

Review the maintenance release notes

Step-by-Step Process

Step 1: Select the Operation 1. Click **Operations** menu ? **Install maintenance release** 2. A checkmark appears next to the selected operation

Step 2: Specify Production Folder 1. In the **Current Installation Folder** field: - Click the **Browse** button - Select your production folder - Example: C:\Program Files\SurePassID Corp\SurePassID Authentication Server\MfaServer

Step 3: Start the Process 1. Click the **Start** button 2. The maintenance release dialog will appear

Step 4: Select Package Type 1. You'll be asked: "Do you want to select a ZIP file?" - Click **Yes** for ZIP file - Click **No** for folder

Step 5a: If You Chose ZIP File 1. Browse to the maintenance release ZIP file 2. Example: C:\Downloads\SurePassID_MR_2025.4.1.zip 3. Click **Open**

Step 5b: If You Chose Folder 1. Browse to the extracted maintenance release folder 2. The folder must contain a "Server Update" subfolder 3. Example: C:\Temp\SurePassID_MR\ 4. Click **OK**

Step 6: Review and Confirm 1. The tool validates the package 2. If valid, it proceeds with the update 3. Watch the log window for progress

Step 7: Complete 1. Wait for "Operation completed successfully" 2. Click **Copy Log** to save the log 3. Click **Done**

After Maintenance Release

- Restart the application/IIS
- Test key functionality
- Verify version numbers updated
- Monitor for any issues

Operation 4: Rotate System Encryption Keys

Use this to enhance security by rotating the encryption keys used to protect sensitive data.

What It Does

- Generates new encryption keys
- Re-encrypts all encrypted data in the database
- Updates configuration files with new keys
- Maintains data integrity throughout

Before You Begin

++ CRITICAL: This operation modifies encrypted data in your database

Create a full database backup (mandatory!)

Verify backup is valid

Schedule extended downtime (30-60 minutes for large databases)

Ensure no users are logged in

Stop all application services

Step-by-Step Process

Step 1: Prepare the System 1. Notify all users of downtime 2. Stop IIS or application services 3. Create and verify database backup 4. Document current system state

Step 2: Select the Operation 1. Click **Operations** menu ? **Rotate system encryption keys** 2. A checkmark appears next to the selected operation

Step 3: Specify Production Folder 1. In the **Current Installation Folder** field: - Click the **Browse** button - Select your production folder - Click **OK**

Step 4: Start Key Rotation 1. Click the **Start** button 2. The key rotation wizard will launch

Step 5: Confirm Database Backup 1. The wizard will ask if you have backed up the database 2. Type **YES** to confirm (must be uppercase) 3. If you haven't backed up, type **Q** to quit and create backup first

Step 6: Confirm Key Rotation 1. You'll be asked to confirm you want to proceed 2. Type **ROTATE** to continue (must be uppercase) 3. The operation will begin

Step 7: Monitor Progress 1. Watch the log window carefully 2. Progress messages will appear as data is re-encrypted 3. This may take 30-60 minutes for large databases 4. **Do not interrupt the process**

Step 8: Verify Completion 1. Wait for “Key rotation completed successfully” message 2. Click **Copy Log** and save it 3. Click **Done**

Step 9: Post-Rotation Tasks 1. Restart application services 2. Test user authentication 3. Verify encrypted data is accessible 4. Keep database backup for at least 30 days

If Something Goes Wrong

?? **IMPORTANT:** If key rotation fails: 1. Review the log for error messages 2. **Do not** restart the application 3. Contact SurePassID support immediately 4. Have your database backup ready for potential restore

Using the Configuration Viewer

The Configuration Viewer lets you inspect your current settings.

Opening the Configuration Viewer

1. Click **View** menu ? **Configuration**
2. The Configuration Viewer window opens

What You’ll See

The viewer displays: - **Connection Strings:** Database connection information (passwords hidden) - **Key Vault:** Azure Key Vault references - **SMTP Settings:** Email notification configuration - **Twilio Settings:** SMS/Voice configuration - **Service URLs:** API and service endpoints - **Other Settings:** Additional configuration values

Using the Viewer

1. Scroll through the list to find settings
2. Settings are displayed in a tree view
3. Sensitive values like passwords are shown as “*****”
4. Copy any values you need for troubleshooting

Understanding Preview Mode

Preview Mode is a safety feature that shows what will happen without making actual changes.

When to Use Preview Mode

- ? Before any production upgrade
- ? When you're unsure about an operation
- ? To see what files will be modified
- ? To review configuration changes

How Preview Mode Works

1. **Enable:** Check the **Preview Mode** checkbox before clicking Start
2. **Run:** The operation runs but **does not** write any changes
3. **Review:** Examine the log messages showing planned changes
4. **Decide:** If comfortable, run again with Preview Mode off

What Preview Mode Shows

- Files that will be copied
- Configuration settings that will change
- Database migrations that will run
- Backup locations that will be created

What Preview Mode Doesn't Do

- Does not create backups
- Does not modify any files
- Does not change database
- Does not write to disk

Understanding the Log Window

The log window shows real-time messages during operations.

Log Message Types

INFO (normal text): Regular progress messages

WARNING (yellow): Non-critical issues to be aware of

ERROR (red): Problems that need attention

Reading the Log

Each message includes: - Timestamp - Message type - Description of what's happening

Copying the Log

1. Click the **Copy Log** button
2. Open Notepad or your preferred text editor
3. Press Ctrl+V to paste
4. Save with a meaningful name
5. Keep the log file for your records

What to Log

Always save logs for: - Production upgrades - Key rotations - Any operation that encounters errors - Troubleshooting sessions

Troubleshooting

Common Problems

"Could not find production folder"

Problem: The folder you selected is not a valid SurePassID installation

Solution: - Make sure you selected the correct folder - The folder should contain a MfaServer subfolder - Check that the installation is complete

"Database connection failed"

Problem: Cannot connect to SQL Server

Solution: - Verify SQL Server is running - Check the connection string in web.config - Test connectivity with SQL Server Management Studio

"Operation failed" during file copy

Problem: Cannot copy files

Solution: - Run as Administrator - Stop IIS or application services first - Check disk space - Verify antivirus is not blocking

"Invalid maintenance package"

Problem: The maintenance package structure is incorrect

Solution: - Verify you downloaded the correct package - If using a folder, ensure it contains "Server Update" subfolder - If using ZIP, try extracting it first and using the folder

Getting Help

If you encounter issues:

1. **Copy the log** using the Copy Log button
2. **Review the log** for ERROR messages
3. **Check this guide** for solutions
4. **Consult the Admin Guide** for advanced troubleshooting
5. **Contact support** with the log file if needed

Support Resources

- **Knowledge Base:** <https://support.surepassid.com/general-support>
- **Support Portal:** <https://support.surepassid.com>
- **Website:** <https://www.surepassid.com>

Best Practices

Before Any Operation

1. **Backup:** Always backup the database first
2. **Test:** Use preview mode when available
3. **Read:** Review release notes and documentation
4. **Schedule:** Plan downtime with users
5. **Verify:** Check prerequisites are met

During Operations

1. **Watch:** Monitor the log window
2. **Wait:** Don't interrupt operations in progress
3. **Note:** Write down any warnings or errors
4. **Save:** Copy the log when complete

After Operations

1. **Test:** Verify everything works
2. **Document:** Save logs and notes
3. **Monitor:** Watch for issues in the first 24 hours
4. **Backup:** Create a new backup of the upgraded system
5. **Retain:** Keep old backups for at least 30 days

Keyboard Shortcuts

- **Alt+O:** Opens Operations menu
- **Alt+V:** Opens View menu
- **Alt+H:** Opens Help menu
- **Ctrl+C:** Copies selected text (in log window)

Command Line Usage

You can launch the application with a production folder pre-selected:

InstallationManager.exe "C:\Program Files\SurePassID Corp\SurePassID Authentication Server\MfaServer"

This is useful for: - Creating shortcuts - Scripting - Multiple installations on one server

Frequently Asked Questions

Q: Do I need to stop the application before using this tool?

A: For most operations (upgrade, maintenance release, key rotation), yes. For viewing configuration, no.

Q: Can I run multiple operations at the same time?

A: No, run one operation at a time.

Q: What happens if the operation fails?

A: Check the log for error messages. For upgrades and maintenance releases, your backup can be used to restore.

Q: How long does each operation take?

A: - Configuration sync: 5-10 minutes - Maintenance release: 10-15 minutes
- In-place upgrade: 15-30 minutes - Key rotation: 30-60 minutes (varies with database size)

Q: Can I cancel an operation once it starts?

A: Not recommended once file modifications begin. Wait for completion or failure.

Q: Where are backups stored?

A: In a Backups folder with a timestamp, inside your installation folder.

Glossary

In-Place Upgrade: Updating software in its current location

Maintenance Release: Small updates that fix bugs or add minor features

Configuration Sync: Copying settings from one installation to another

Key Rotation: Changing encryption keys for security

Preview Mode: Dry-run that shows changes without making them

Production Folder: The folder containing your live SurePassID installation

Web.config: XML file containing application configuration settings

Appendix: File Locations

Typical Installation Paths

Production Installation:

C:\Program Files\SurePassID Corp\SurePassID Authentication Server\

MfaServer Folder:

C:\Program Files\SurePassID Corp\SurePassID Authentication Server\MfaServer\

Configuration File:

C:\Program Files\SurePassID Corp\SurePassID Authentication Server\MfaServer\web.config

Backup Folder:

C:\Program Files\SurePassID Corp\SurePassID Authentication Server\Backups\

Azure VLE Paths

Production Installation:

C:\home\site\wwwroot\

Configuration File:

C:\home\site\wwwroot\web.config

Need More Help?

- **Admin Guide:** For advanced configuration and troubleshooting
- **Quick Reference:** For command reference
- **Support Portal:** <https://support.surepassid.com>

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