

**SCHLAGE**

bright blue.

bright blue.

v2.0.1 Upgrade Manual

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## Overview

This document describes how to upgrade your **bright blue** system to version 2.0.1. Follow the directions below to upgrade your system.

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**Note:** The 2.0.1 upgrade can only be performed if you are currently running version 1.1.2. If you are running versions 1.0.4 or below, you must contact Technical Support for the v1.1.2 upgrade file and then upgrade to v1.1.2 before upgrading to v2.0.1. If you are running version 2.0.0 then you need to apply the 2.0.1 Patch, not the full upgrade. Please see the 2.0.1 Patch manual for details on upgrading from version 2.0.0 to 2.0.1. To determine your version number, click on the About button on the left of the main **bright blue** screen.

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## System Changes Due to Upgrade

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### Transaction History

During the upgrade all but the last 30 days of transaction history will be archived. This means that any reports that are run after the upgrade will only contain information from the last 30 days. If you wish to run reports that will include this data it is important to do so before upgrading. After the upgrade the data will be archived and accessible as a .csv file (readable by Microsoft Excel or other spread sheet programs).

### Database Backup

The upgrade process will remove all older database backup files from the onboard USB drive. Because of this we recommend backing up your database to your computer before running the upgrade and running a manual backup of the database as soon as the upgrade is finished. Please see the Backup Database sections of the Before Upgrade and After Upgrade chapters for more details.

# Before Upgrade

Before upgrading your **bright blue** system a few steps need to be followed:

- 1 Backup your database.
- 2 Disable SSL Encryption (if enabled).
- 3 Unlock any doors that you need access to during the upgrade.
- 4 Verify amount of Transaction History.
- 5 Download the Upgrade Files.

## Backup Database to Computer

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It is strongly recommended that the current version of the database be saved to your computer before upgrading.

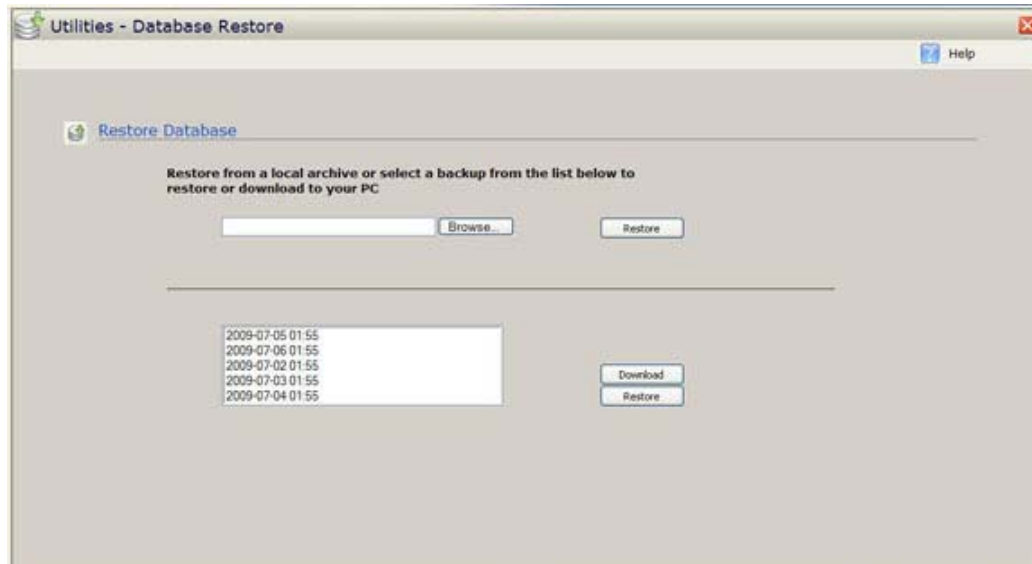
If Internet Explorer blocks the file from downloading you will need to enable downloading.

### To enable downloading:

- Follow the steps in the **Enabling downloads with Internet Explorer** section of the User's Manual. This will permanently enable downloading.  
OR
- Hold the **Ctrl** key down while clicking on the **Download** button in step 4 and while clicking on the **Save** button in step 5 (see steps 4 and 5 below). This will temporarily enable downloading.

### To save a copy of the database to your computer:

- 1 Go to Utilities.
- 2 Click on the **Restore database** button in the Database Utilities section. The Database Restore window will open.



- 3 In the bottom section of the window select the most recent database file.
- 4 Click on the **Download** button. The File Download window will open.
- 5 Click on the **Save** button. The Save As window will open.
- 6 Select where the file will be saved.
- 7 Click the **Save** button. The window will close and the file will be saved to your computer.

## Disable SSL Encryption

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Because of the size of the 2.0.1 upgrade file, SSL Encryption cannot be running during the upgrade. If you do have SSL Encryption turned on, follow the steps below to disable it.

### To determine if SSL encryption is on or off:

- 1 While on any **bright blue** page, Look at the address bar of the browser:
  - If the url starts with **http://** then SSL is off and you can continue with the upgrade.
  - If the url starts with **https://** then SSL is on and needs to be turned off before continuing with the upgrade.

### To disable SSL encryption:

- 1 Go to the **bright blue** controller board and gain access to it.
- 2 Find S1 on the board. It will be labeled as **S1 Config**.
- 3 Switch the first switch to the Off position (to the left).
- 4 Your SSI Encryption has been disabled.

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**Note:** Do not forget to turn SSL back on after upgrading.

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## Unlock Doors

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During the upgrade process all doors will be secured and credentials will not be able to open them. Depending on the size of your database, the upgrade could take the better part of an hour. If you wish to have any doors remain unsecured during this time, follow the steps below.

- 1 Click on the **Door Status and Control** button. The Door Status and Control section will open.
- 2 Select all the doors that should remain open during the upgrade.
- 3 Click on the **Unlock** button on the right. The Unlock pop-up window will open.
- 4 Select the **Unlock the selected door(s) and maintain the unlocked state until the "Resume" command is issued** option.
- 5 Click on the **Ok** button.

The selected doors will unlock and will remain unlocked until the upgrade is finished.

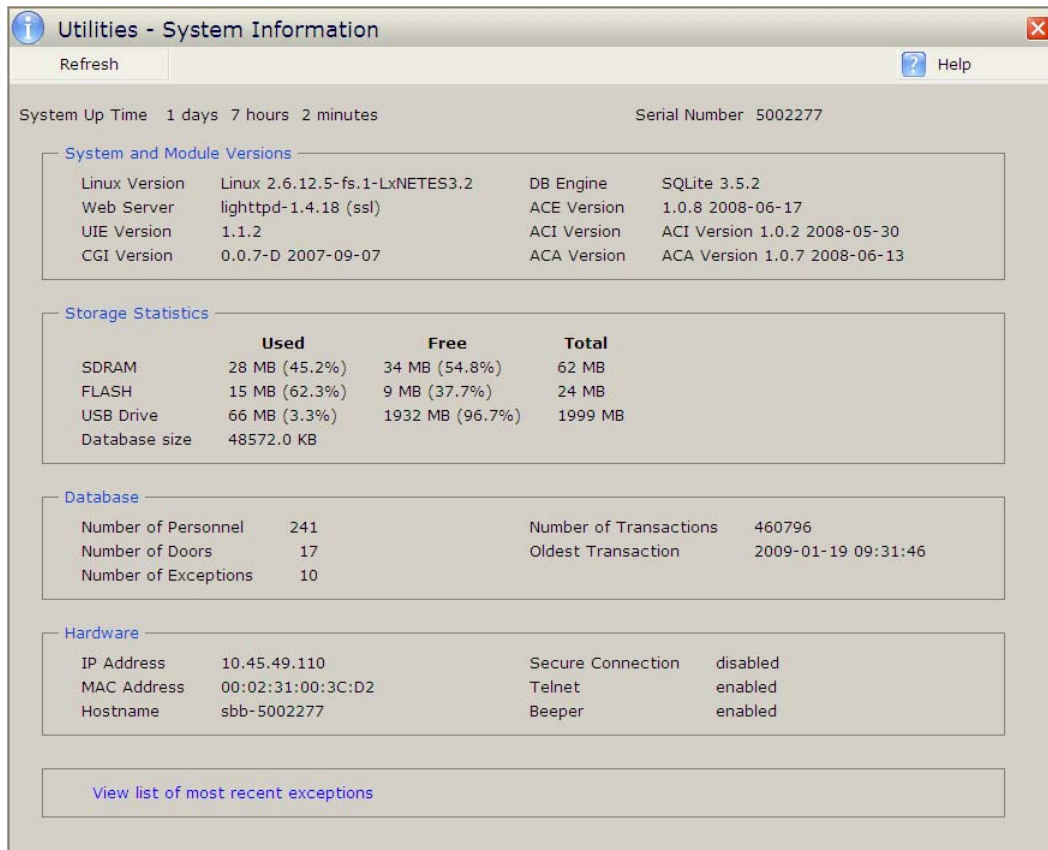
## Transaction History

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The amount of transaction history on your system will determine how long it takes for the system to upgrade to 2.0.1. A database with 460,000 transactions takes approximately 34 minutes to upgrade. Your amount of time will differ depending on the number of transactions.

### To determine the amount of transactions on your system:

- 1 Go to Utilities.
- 2 Click on the **View system information** button. The System Information window will open.



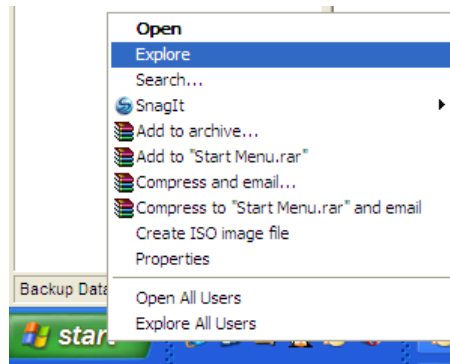
- 3 Look in the Database section. There you will see Number of Transactions. This section displays how many transactions are on your system.
- 4 Take note of this number. You will use it later to determine how long the upload will take.

## Download Upgrade Files

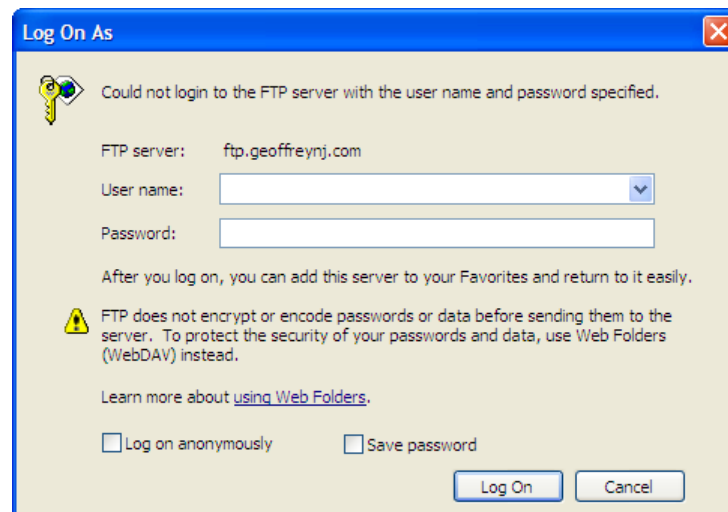
If you do not already have the **bright blue** 2.0.1 upgrade file and the readme.txt file it will be necessary for you to download them. If you already have the files you can skip this step.

To download the upgrade files:

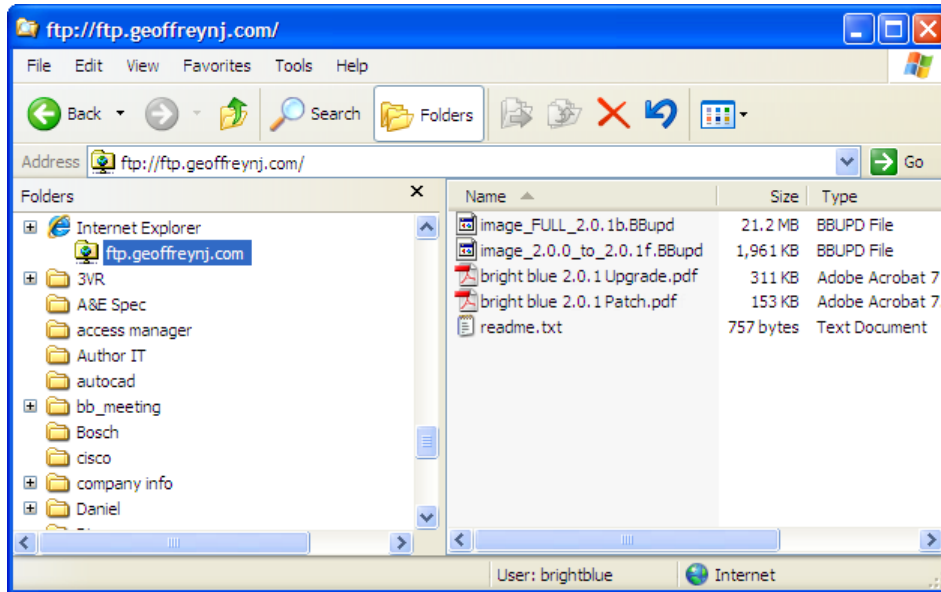
- 1 Open Windows Explorer.
  - a) Right Click on the **Start** button.



- b) Click on **Explore**. The Windows Explorer window will open.
- 2 Type **ftp.geoffreynj.com** into the Address bar at the top of the window.
- 3 Press **Enter**. The Log On As screen will open.



- 4 Type **brightblue** into the User name field.
- 5 Type **upgrade@2** into the Password field.
- 6 Click on the **Log On** button. The FTP site will open within Windows Explorer.



- 7 Select the image file (image\_FULL\_2.0.1b.BBupd) and the readme.txt file and copy them to your computer. Make sure the files are somewhere you can easily find them. (Also download any additional files you may need, such as the 2.0.1 upgrade patch file and the upgrade and patch manuals.)

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**Note:** It will take approximately 6 minutes for the files to download.

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Once the files have finished downloading, you are ready to upgrade your **bright blue** system.

# Upgrade

Once the steps above have been followed you are ready to upgrade your **bright blue** system. Upgrading consists of the following steps:

- 1 Upgrading to 2.0.1.
- 2 Waiting while the system converts old data to the new format.
- 3 Logging back in to the system.
- 4 Waiting while the system archives transaction history.

After these steps have been completed, it is recommended that you verify the upgrade and backup your database (details in the After Upgrade section).

## Upgrading to 2.0.1

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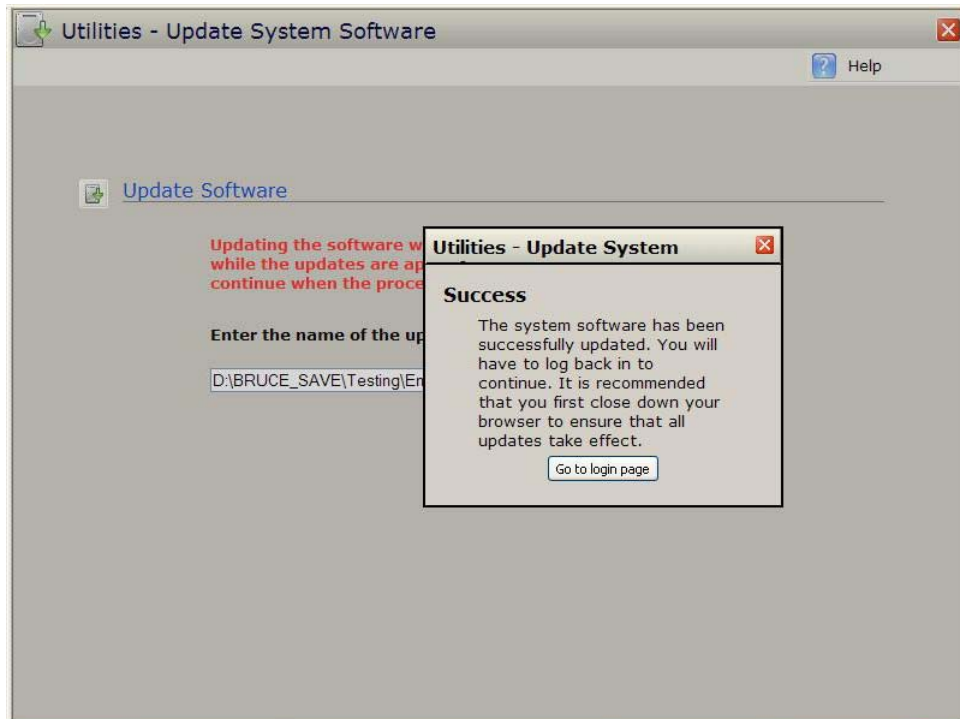
To upgrade your system to v2.0.1 follow the steps below:

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**Note:** Once you receive the Upgrade Successful message (see step 8 below) your system will still need to convert your old data to the new format. This conversion process can take up to 35 minutes, during which you will not be able to log in or telnet in to the system. After that process completes the system requires an ADDITIONAL 15 minutes to archive existing transaction history.

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- 1 Click on the **Utilities** button. The Utilities window will open.
- 2 Click on the **Update system software** button. The Update System Software window will open.
- 3 Click on the **Browse** button. The Choose file window will open.
- 4 Select the **bright blue** 2.0.1 upgrade file **image\_FULL\_2.0.1b.BBupd** from where it is located on your computer.
- 5 Click on the **Open** button. The Choose file window will close and the Update System Software window will now have the file path in the field.
- 6 Click on the **Upload** button. The **Uploading File** progress bar will open. This will take approximately 3 minutes. When finished a pop-up will open asking if you wish to continue.
- 7 Click on the **Continue** button on the left. The **Applying Updates** progress bar will open. This will take approximately 6 minutes.
- 8 Once this bar is finished this screen will open:



## Waiting While Data is Converted

- 1 At this point your system has been upgraded but you will need to wait while data is converted to the new format used by v2.0.1. Depending on your database size this step can take as much as **35 minutes** to complete. (A database with 460,000 transactions takes approximately 34 minutes to upgrade.) During this time you will not be able to log into the system or reach it via telnet and credentials will not work at secured doors.

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**Note:** Do not power down the **bright blue** controller during this time.

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- 2 Close the browser window - It is recommended that you close the browser window while the system converts your data to the new format. You must wait the appropriate amount of time before logging back in to the system. Reference the chart below for approximate times.

<b>Transactions</b>	65,000	135,000	270,000	405,000
<b>Upgrade Time (approx)</b>	5 mins	10 mins	20 mins	30 mins

## Waiting While Transaction History is Archived

- 1 After enough time has passed (reference the chart above) log in to the system.
- 2 Wait 15 minutes for the transaction history to finish archiving.
- 3 Check to make sure archiving is finished:
  - a) Go to Utilities

- b) Click on the **Save archived transactions** button. The Archived Transaction window will open.



- c) The list will populate as transactions are archived. The system will archive all but the last 30 days of transaction history. The process is finished when you can see the most recent month, minus 30 days.
- **Example 1:** You are upgrading on August 5, 2009. 30 days prior to August 5 is July 7th. So, when you see July, 2009 in the Archive Transactions window, the system has finished archiving.
  - **Example 2:** You are upgrading on August 31, 2009. 30 days prior to August 31 is August 1. So, when you see August, 2009 in the Archive Transaction window, the system has finished archiving.

## Troubleshooting

If you cannot successfully log into the system after upgrading to 2.0.1:

- Close the browser and restart it. Type in the URL of **bright blue** and log in.
- If 40 minutes pass after receiving the Upgrade Successful message, and the system won't allow you to log in, please call technical support for help.

If you accidentally click the **Go to login page** button after upgrading to 2.0.1:

- Close out of the browser and wait appropriate amount of time before logging back in.

If you successfully log into the system but credential acknowledgment is not taking place:

- Please wait. The transaction history has not been completely archived and your data has not finished being converted to the new format. The system must finish before coming back online.

## After Upgrade

After the upgrade has finished follow the steps below:

- 1 Verify successful upgrade.
- 2 Backup your new v2.0.1 database.
- 3 Access archived transaction history (if desired).

## Verifying Successful Upgrade

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### To verify the version number:

- 1 Click on the **About** button the left of the **bright blue** window. The About window will open.
- 2 Check where it says **Version**: It should read **2.0.1**.
- 3 If it reads as 2.0.1 you have successfully upgraded to **bright blue** version 2.0.1.

### To verify card reader operation:

- 1 Go to a card reader.
- 2 Swipe a valid credential.
  - If the door opens, move on to the next step.
  - If the door does not open, your system is still upgrading.
- 3 Repeat steps 1 and 2 at a few other card readers.
  - If they open, your system has finished upgrading.
  - If they do not open, wait a few minutes and repeat steps 1 and 2.

## Backup Database

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The older versions of your database will no longer work with 2.0.1 so it is recommended that, as soon as the upgrade is finished and verified, that you backup your new 2.0.1 database.

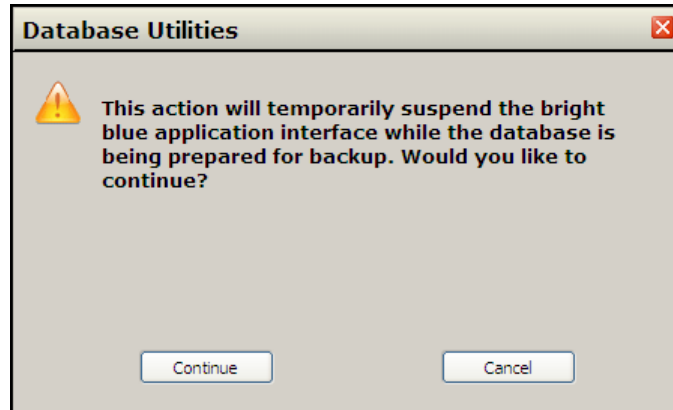
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**Note:** The upgrade removes all saved databases. You will not see any in the Nightly Backups section of the **Download and Restore database** window.

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### To backup your database:

- 1 Click on the **Utilities** button.
- 2 Click on the **Backup Database** button. The Backup confirmation pop-up window will open.



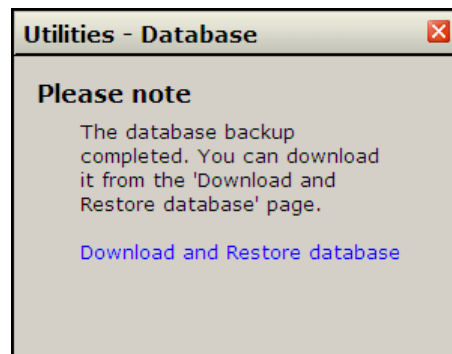
- 3 Click on **Continue**. The pop-up window will close and the progress window will open.

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**NOTE:** the system will be temporarily disabled while the database is backed up.

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- 4 When the progress window finishes the database will be backed up and the **Please note** pop-up window will open.



- 5 From here either:
  - a) Click on the **X** button in the top right corner of the pop-up to close it and return to the Utilities main page  
or
  - b) Click on **Download and Restore database** to go to the Download and Restore database page. You can save the new backup file to your computer from this section if you wish.

## Archive History

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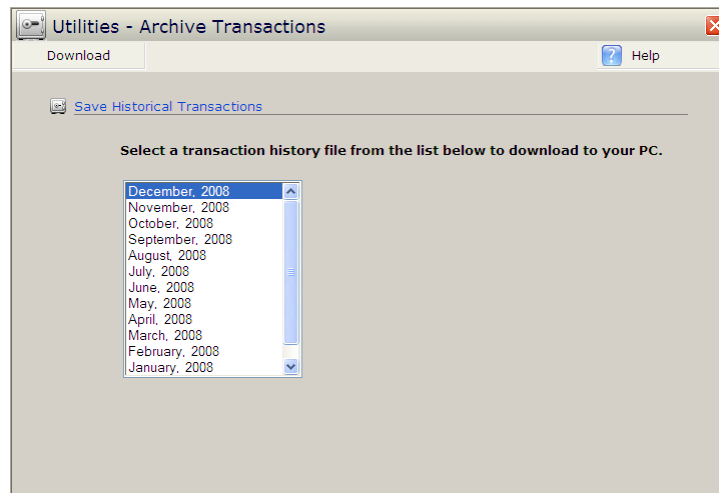
During the upgrade process all but the last 30 days of transaction history will be archived. That means that any reports run after the upgrade will only include information for the last 30 days. All transaction history previous to that has been archived.

### To enable downloading:

- Follow the steps in the **Enabling downloads with Internet Explorer** section of the User's Manual. This will permanently enable downloading.  
OR
- Hold the **Ctrl** key down while clicking on the **Download** button in step 4 and while clicking on the **Save** button in step 5 (see steps 4 and 5 below). This will temporarily enable downloading.

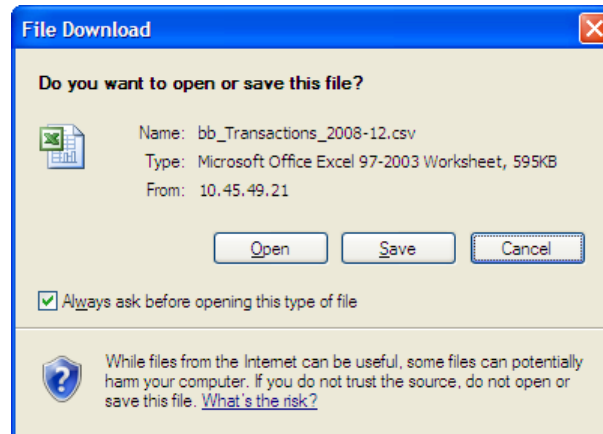
### To access the archived history:

- 1 Go to Utilities
- 2 Click on the **Save archived transactions** button. The Archived Transaction window will open.



- 3 Select the month you wish to download.

- 4 Click on the **Download** button. The File Download window will open.



- 5 Click on the **Save** button. The Save As window will open.
- 6 Select where the file will be saved.
- 7 Click on the **Save** button. The transaction history file will be saved to your computer.
- 8 Use Excel (or other .csv spreadsheet program) to open the file and view the information.

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**Note:** MS Excel has a 65,535 line maximum. If you exceed this maximum you receive a "Files not loaded completely" message. You will need to use a different spreadsheet program to open these files.

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