



# Click Studios

## Passwordstate

## Installation Instructions

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# 1 System Requirements - General

Passwordstate has the following system requirements:

## Web Server

Your web server which will host the Passwordstate web site can be any of the following Operating System versions:

- Microsoft Windows Server 2008 & IIS 7.0
- Microsoft Windows Server 2008 R2 & IIS 7.5
- Microsoft Windows Server 2012 & IIS 8.0
- Microsoft Windows Server 2012 R2 & IIS 8.5
- Microsoft Windows Server 2016 & IIS 10.0
- Windows 7 & IIS 7.5
- Windows 8 & IIS 8.0
- Windows 10 & IIS 10.0

**Note:** Microsoft **.Net Framework 4.5**, and **PowerShell 3.0 or above** must also be installed on your web server.

## Database Server

You will need to have one of the following supported SQL Server versions installed prior to installing Passwordstate, so Passwordstate can connect to SQL Server and create a database. SQL Server can be installed either on the same web server as Passwordstate, or on any other Windows Server in your environment.

- Microsoft SQL Server 2008
- Microsoft SQL Server 2008 Express
- Microsoft SQL Server 2008 R2
- Microsoft SQL Server 2008 R2 Express
- Microsoft SQL Server 2012
- Microsoft SQL Server 2012 Express
- Microsoft SQL Server 2014
- Microsoft SQL Server 2014 Express
- Microsoft SQL Server 2016
- Microsoft SQL Server 2016 Express

**Important:** SQL Server must be configured for mixed-mode authentication, so the Passwordstate web site can connect to SQL Server using an SQL Account. **Active Directory Accounts cannot be used to authenticate against the database.**

## 2 Installing Microsoft IIS and SQL Server

Before you install Passwordstate, you are required to already have Internet Information Servers (IIS) and SQL Server Express or above installed. Below are a couple of links to show how to install these if you require any help

- Install IIS (Web Server) - <https://www.clickstudios.com.au/community/index.php?/topic/1786-how-to-install-internet-information-services-iis/>
- Install SQL Server (Database Server) - [https://www.clickstudios.com.au/downloads/Installing\\_SQLServerExpress\\_2016.pdf](https://www.clickstudios.com.au/downloads/Installing_SQLServerExpress_2016.pdf)

### 3 Installing Passwordstate

To install Passwordstate, run 'Passwordstate.exe' and follow these instructions:

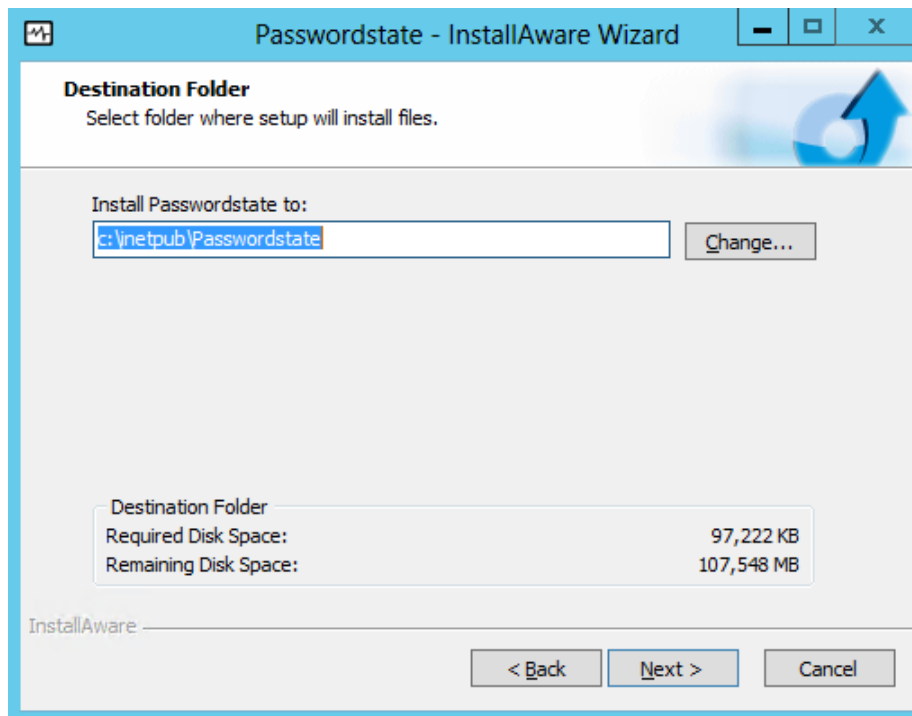
1. At the 'Passwordstate Installation Wizard' screen, click on the 'Next' button



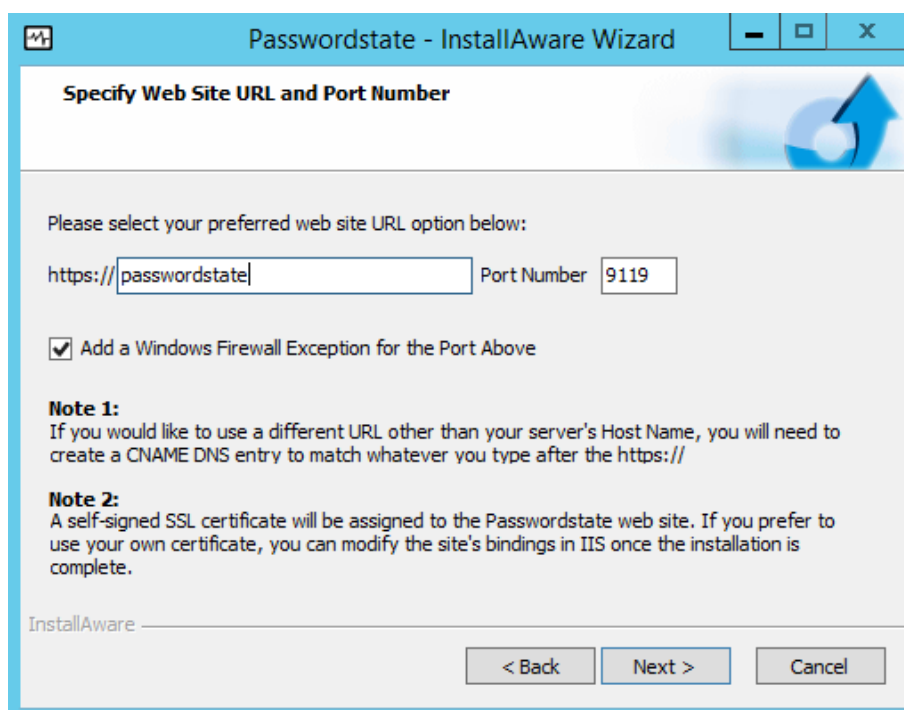
2. At the 'License Agreement' screen, tick the option 'I accept the terms in the License Agreement', then click on the 'Next' button



3. At the 'Destination Folder' screen, you can either accept the default path or change to a different location, then click on the 'Next' button



- At the 'Specify Web Site URL and Port Number' screen, specify the URL you would like to use, then click on the 'Next' button



- At the 'Completing the InstallAware Wizard for Passwordstate' screen, click on the 'Next' button



- Once installed, click on the 'Finish' button
- If you have a Firewall enabled on your web server, you may need to open up the port number you specified during the install (default is 9119), so that users are able to access the web site

## 4 SSL Certificate Considerations

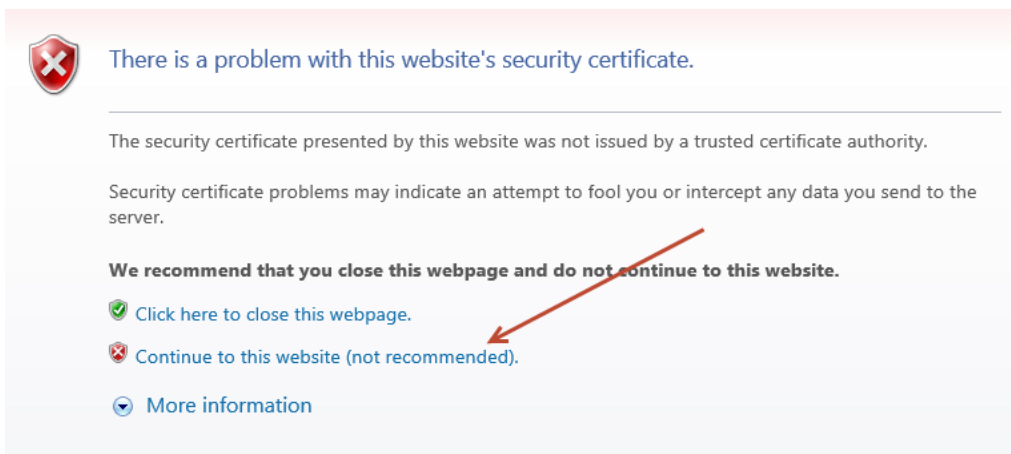
The installer for Passwordstate installs a self-signed SSL certificate on your web server, and binds it to the Passwordstate web site.

If you have your own SSL certificate installed on the web server you'd prefer to use, you can modify the bindings for the site in IIS, and select the appropriate certificate.

If you wish to continue using the self-signed SSL certificate, then you may want to instruct your users to "Install" the certificate on their computer, so the various Internet browsers don't complain about the certificate not being issued by a trusted authority.

To install the certificate, you can follow these steps:

1. Using Internet Explorer, browser to the Passwordstate web site
2. When you see the following screen, click on the 'Continue to this website' link

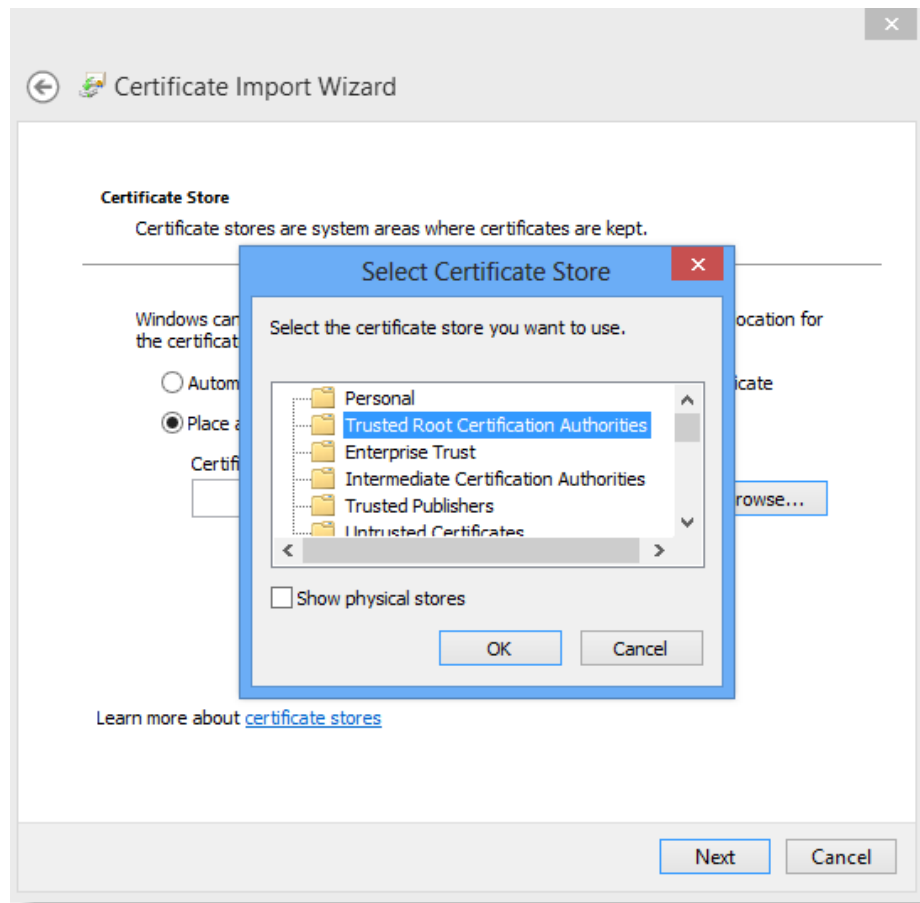


3. Now click on the 'Certificate error' link at the top of your screen



4. The click on 'View Certificates', then on the 'Install Certificate...' button
5. Select the 'Local Machine' Store Location, then click on the 'Next' button
6. Select 'Place all certificates in the following store' option, click on the 'Browse' button, and select 'Trusted Root Certification Authorities' as per the next screenshot

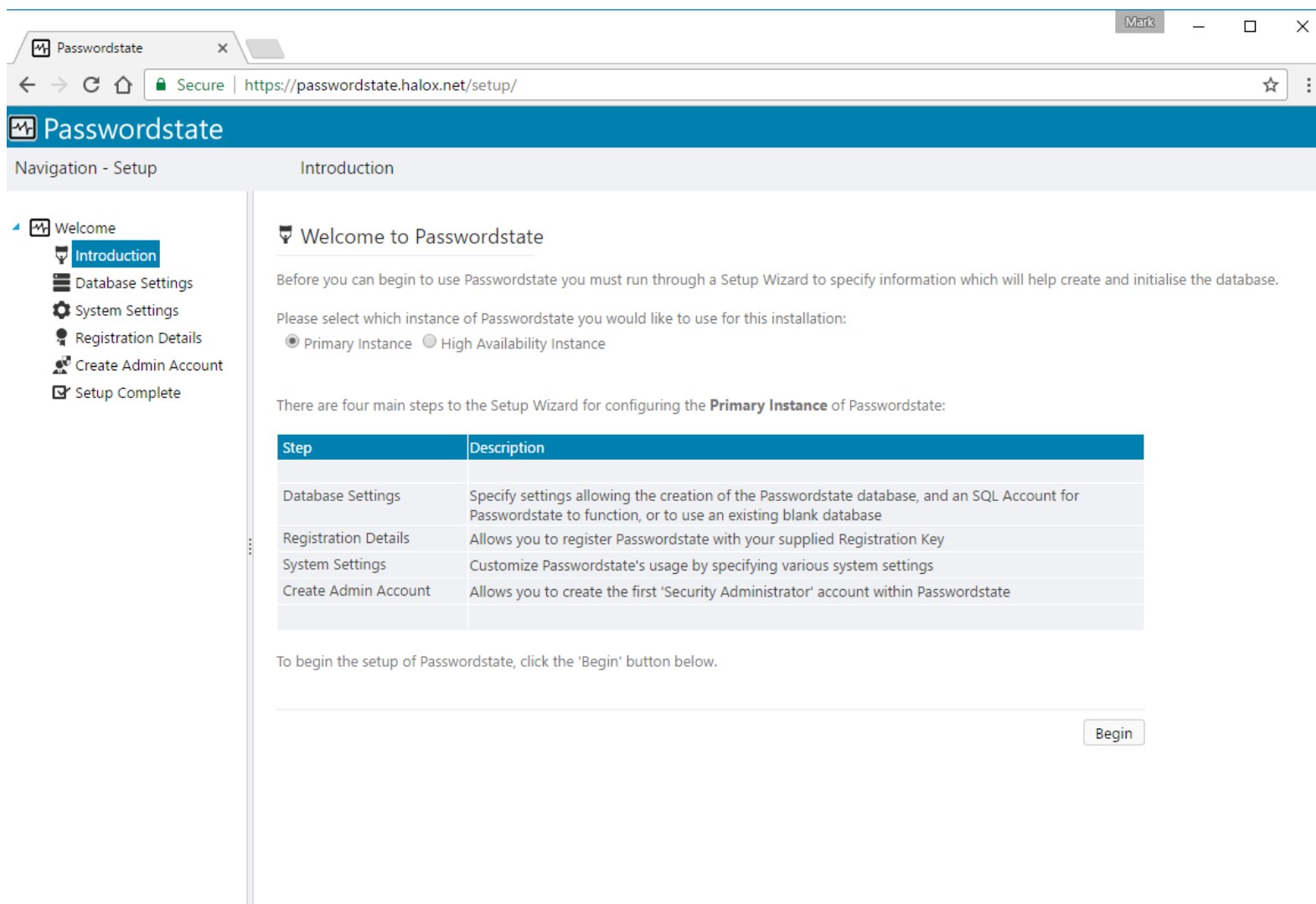




7. Now click on the 'OK' button, then the 'Next' and 'Finish' buttons
8. After the certificate is installed, you can close and re-open your browser to the Passwordstate web site, and it should no longer complain about an untrusted certificate

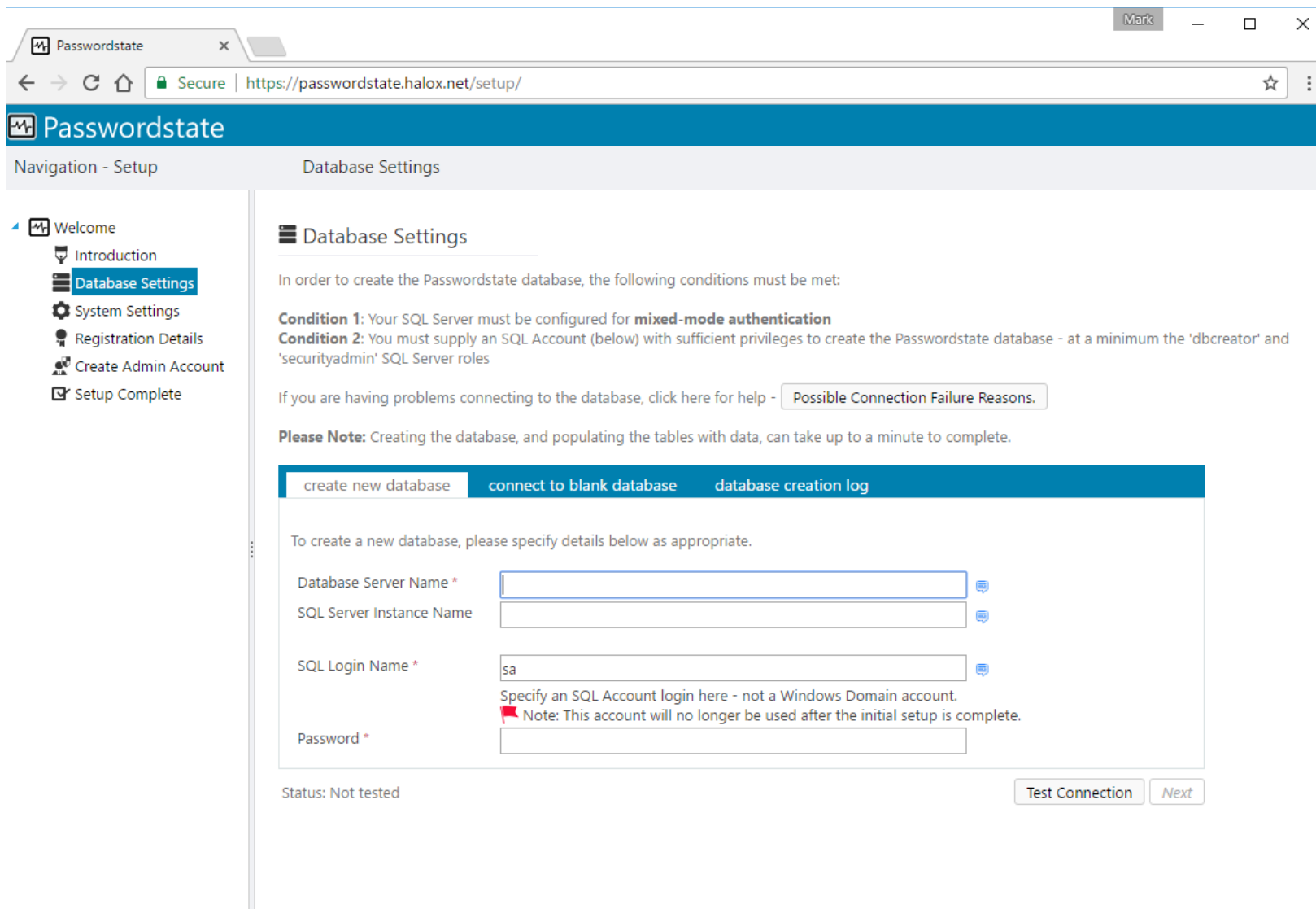
## 5 Configuring Passwordstate for First Time Use

**Introduction** - Now that Passwordstate is installed, you can direct your browser to the URL you specified during the initial install, and follow the initial Setup Wizard – this wizard will guide you through a series of questions for configuring Passwordstate for use.



**Database Settings – Create New Database** - On this screen you will need to specify database settings for creating the Passwordstate database. Please use the onscreen instructions if you have any issues connecting to the database.

**Please Note:** Creating the database, and populating the tables with data, could take up to a minute to complete.



The screenshot shows a web browser window with the URL <https://passwordstate.halox.net/setup/>. The page title is "Passwordstate" and the navigation bar includes "Navigation - Setup" and "Database Settings". The left sidebar contains a menu with "Welcome", "Introduction", "Database Settings" (highlighted), "System Settings", "Registration Details", "Create Admin Account", and "Setup Complete". The main content area is titled "Database Settings" and contains the following text:

In order to create the Passwordstate database, the following conditions must be met:

**Condition 1:** Your SQL Server must be configured for **mixed-mode authentication**

**Condition 2:** You must supply an SQL Account (below) with sufficient privileges to create the Passwordstate database - at a minimum the 'dbcreator' and 'securityadmin' SQL Server roles

If you are having problems connecting to the database, click here for help - [Possible Connection Failure Reasons.](#)

**Please Note:** Creating the database, and populating the tables with data, can take up to a minute to complete.

The "create new database" tab is selected, showing the following form:


To create a new database, please specify details below as appropriate.

Database Server Name \*

SQL Server Instance Name

SQL Login Name \*

Specify an SQL Account login here - not a Windows Domain account.

 Note: This account will no longer be used after the initial setup is complete.

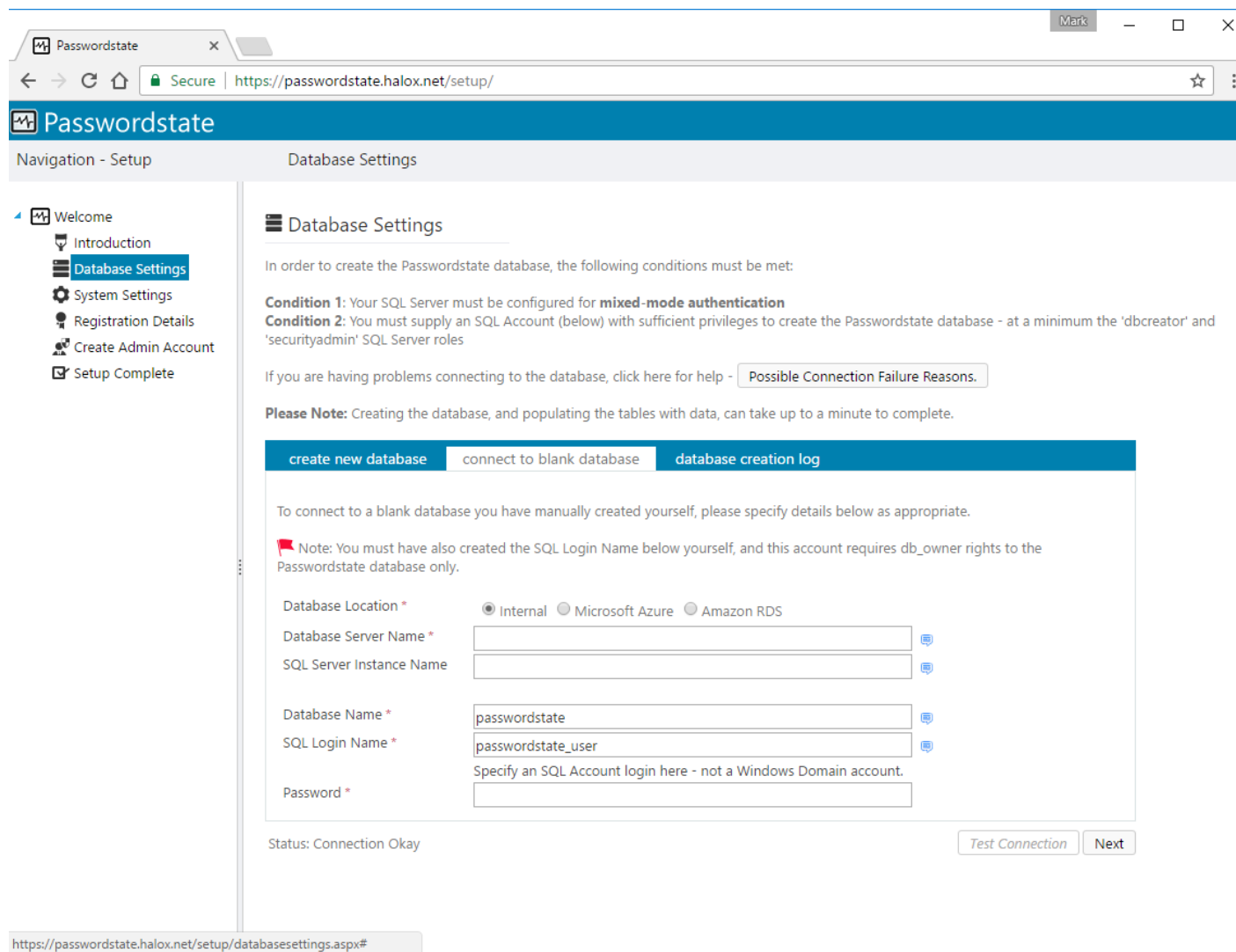
Password \*

Status: Not tested

[Test Connection](#) [Next](#)

**Database Settings – Connect to Blank Database** – If you prefer to create the blank Passwordstate database yourself prior to tables being created and populated with data, you can do so by clicking on the ‘Connect to Blank Database’ tab first.

**Please Note:** You must first create a blank database to connect to, and an appropriate SQL Account which has db\_owner rights to this database. If connecting to a Microsoft Azure or Amazon AWS database, please refer to their documentation for how to create the database and SQL Account.



The screenshot shows the Passwordstate web application in a browser window. The address bar displays <https://passwordstate.halox.net/setup/>. The page title is "Passwordstate" and the navigation bar shows "Navigation - Setup" and "Database Settings".

The left sidebar contains the following navigation items:

- Welcome
- Introduction
- Database Settings**
- System Settings
- Registration Details
- Create Admin Account
- Setup Complete

The main content area is titled "Database Settings". It includes the following text:

In order to create the Passwordstate database, the following conditions must be met:

- Condition 1:** Your SQL Server must be configured for **mixed-mode authentication**
- Condition 2:** You must supply an SQL Account (below) with sufficient privileges to create the Passwordstate database - at a minimum the 'dbcreator' and 'securityadmin' SQL Server roles

If you are having problems connecting to the database, click here for help - [Possible Connection Failure Reasons.](#)

**Please Note:** Creating the database, and populating the tables with data, can take up to a minute to complete.

Below this is a tabbed interface with three tabs: "create new database", "connect to blank database" (which is selected), and "database creation log".

The "connect to blank database" tab contains the following text:

To connect to a blank database you have manually created yourself, please specify details below as appropriate.

**Note:** You must have also created the SQL Login Name below yourself, and this account requires db\_owner rights to the Passwordstate database only.

The form fields are as follows:

- Database Location \*: ☒ Internal ☐ Microsoft Azure ☐ Amazon RDS
- Database Server Name \*:
- SQL Server Instance Name:
- Database Name \*:
- SQL Login Name \*:
- Password \*:

Below the form fields, it says "Status: Connection Okay". At the bottom right, there are two buttons: "Test Connection" and "Next".

The browser's address bar at the bottom shows the URL: <https://passwordstate.halox.net/setup/databasesettings.aspx#>

**System Settings** – On this screen you specify various system wide settings for Passwordstate usage. Explanation for each of these settings is detailed after this screenshot.

The screenshot shows the Passwordstate web application interface for the 'System Settings' step. The browser address bar shows 'https://passwordstate.halox.net/setup/'. The left sidebar contains a navigation menu with 'System Settings' highlighted. The main content area is titled 'System Settings' and includes a 'Next' button at the bottom right.

**System Settings**

Please specify the appropriate System Settings below, then click on the 'Next' button.

**Authentication Method**

Passwordstate has two authentication options for logging into the web site. Please choose if you would like AD Integrated Authentication, or Forms Based Authentication using a separate Login ID and Password.

☒ Active Directory Integrated ☐ Forms Based Authentication

**Active Directory Domain**

Please confirm the Active Directory settings are correct for your domain.

AD Domain NetBIOS Name \* :

LDAP Query String \* :

**Active Directory Domain Read Privileges**

Specify account with Read access to query AD Users and Security Groups:

UserName : \*

Password : \*

**FIPS Support**

If your environment needs to support FIPS compliance (Federal Information Processing Standards), please click the 'Yes' option below.

**Note:** FIPS support is generally not required, unless mandated by the US government for your organization. Once the FIPS supported encryption method is being used, it cannot be turned off.

☐ Yes ☒ No

**Emergency Access Account**

Please specify a Password for the Emergency Access account, and the URL for this login is 'https://passwordstate.halox.net/emergency'

Password: \*

Confirm Password: \*

**Email Settings**

Please specify the appropriate email details so Passwordstate can send emails (This can be configured later).

Email Server Host Name :

Email Server Port Number :

Send From Email Address :

Use Mailbox to Send : ☒ Yes ☐ No

Send Mail via TLS : ☐ Yes ☒ No

User Name :

Password :

Domain Name :

**Proxy Server Settings**

If required, specify proxy settings for checking for new builds (This can be configured later).

Proxy Server :

Format is "ServerName:PortNumber"

User Name :

Password :

Next

**Registration Details** – On this screen you need to specify your Registration details for Passwordstate. If you have not received your registration details, please visit [www.clickstudios.com.au](http://www.clickstudios.com.au).

The screenshot shows a web browser window with the URL <https://passwordstate.halox.net/setup/>. The page title is "Passwordstate" and the navigation bar includes "Navigation - Setup" and "Registration Details". The left sidebar contains a list of setup steps: Welcome, Introduction, Database Settings, System Settings, Registration Details (highlighted), Create Admin Account, and Setup Complete. The main content area is titled "Registration Details" and contains the following text:

Please specify your registration information for Passwordstate below, then click on the 'Next' button.

**Note 1:** If you did not receive your license key in your email, please contact us at [support@clickstudios.com.au](mailto:support@clickstudios.com.au).

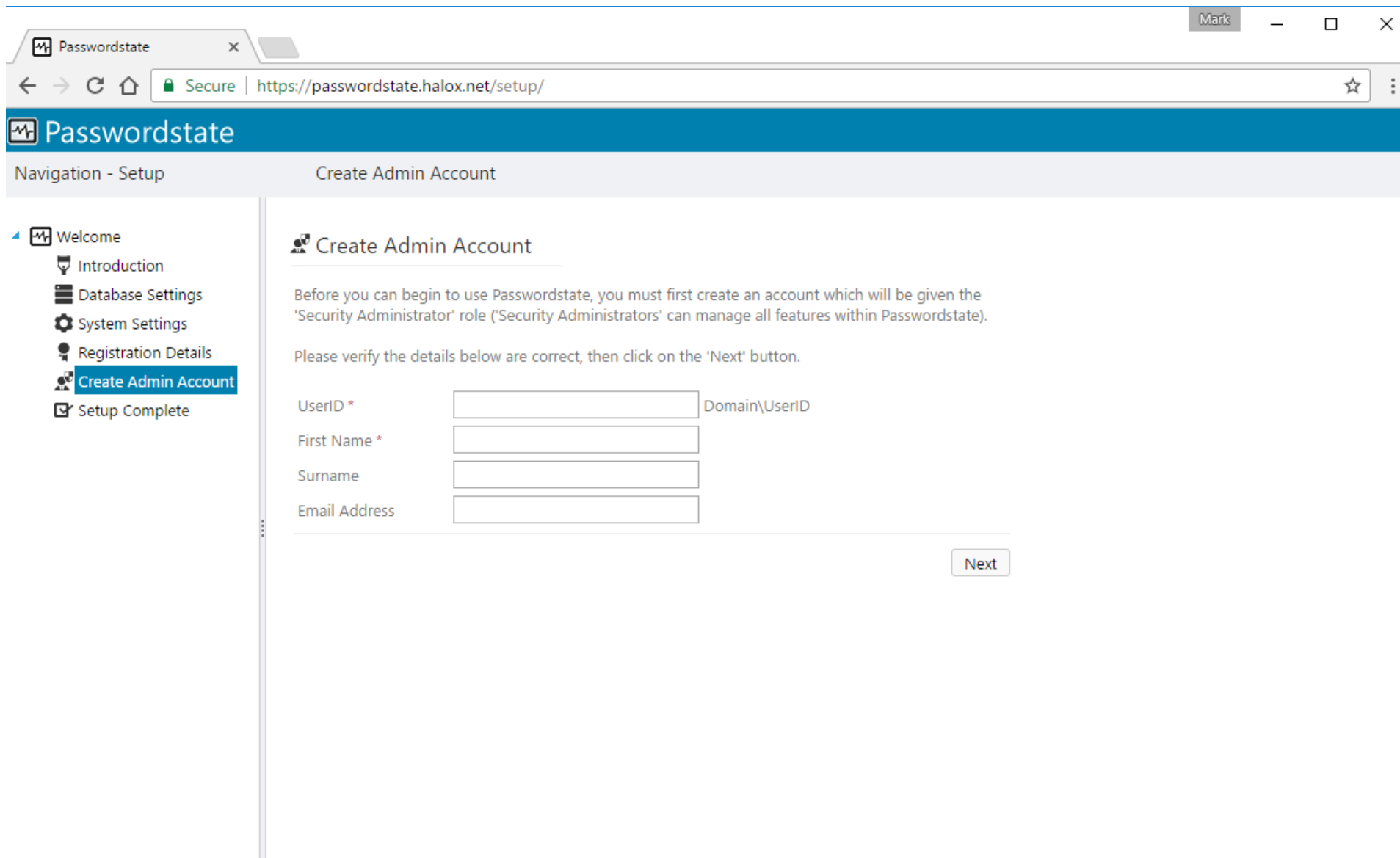
**Note 2:** During the first 30 days of using Passwordstate, you will be evaluating the Enterprise License (Unlimited Users). Once the 30 days has expired, it will revert back to the Free 5 User version - unless you purchase some licenses.

The form includes the following fields:

- License Type: Client Access Licenses
- Registration Name \* (text input)
- License Count \* (text input)
- Registration Key \* (text area)

A "Next" button is located at the bottom right of the form.

**Create Admin Account** – On this screen you specify details for the first user account to be created in Passwordstate. This account will be granted Security Administrator privileges, and assign all Security Administrator roles.



The screenshot shows a web browser window with the Passwordstate application. The browser's address bar shows the URL <https://passwordstate.halox.net/setup/>. The application has a blue header with the 'Passwordstate' logo. Below the header is a navigation bar with 'Navigation - Setup' and 'Create Admin Account'. On the left is a sidebar menu with the following items: 'Welcome', 'Introduction', 'Database Settings', 'System Settings', 'Registration Details', 'Create Admin Account' (which is highlighted in blue), and 'Setup Complete'. The main content area is titled 'Create Admin Account' and contains the following text: 'Before you can begin to use Passwordstate, you must first create an account which will be given the 'Security Administrator' role ('Security Administrators' can manage all features within Passwordstate). Please verify the details below are correct, then click on the 'Next' button.' Below this text are four input fields: 'UserID \*' (with a placeholder 'Domain\UserID'), 'First Name \*', 'Surname', and 'Email Address'. A 'Next' button is located at the bottom right of the form.

Navigation - Setup      Create Admin Account

Welcome

- Introduction
- Database Settings
- System Settings
- Registration Details
- Create Admin Account**
- Setup Complete

### Create Admin Account

Before you can begin to use Passwordstate, you must first create an account which will be given the 'Security Administrator' role ('Security Administrators' can manage all features within Passwordstate).

Please verify the details below are correct, then click on the 'Next' button.

UserID \*  Domain\UserID

First Name \*

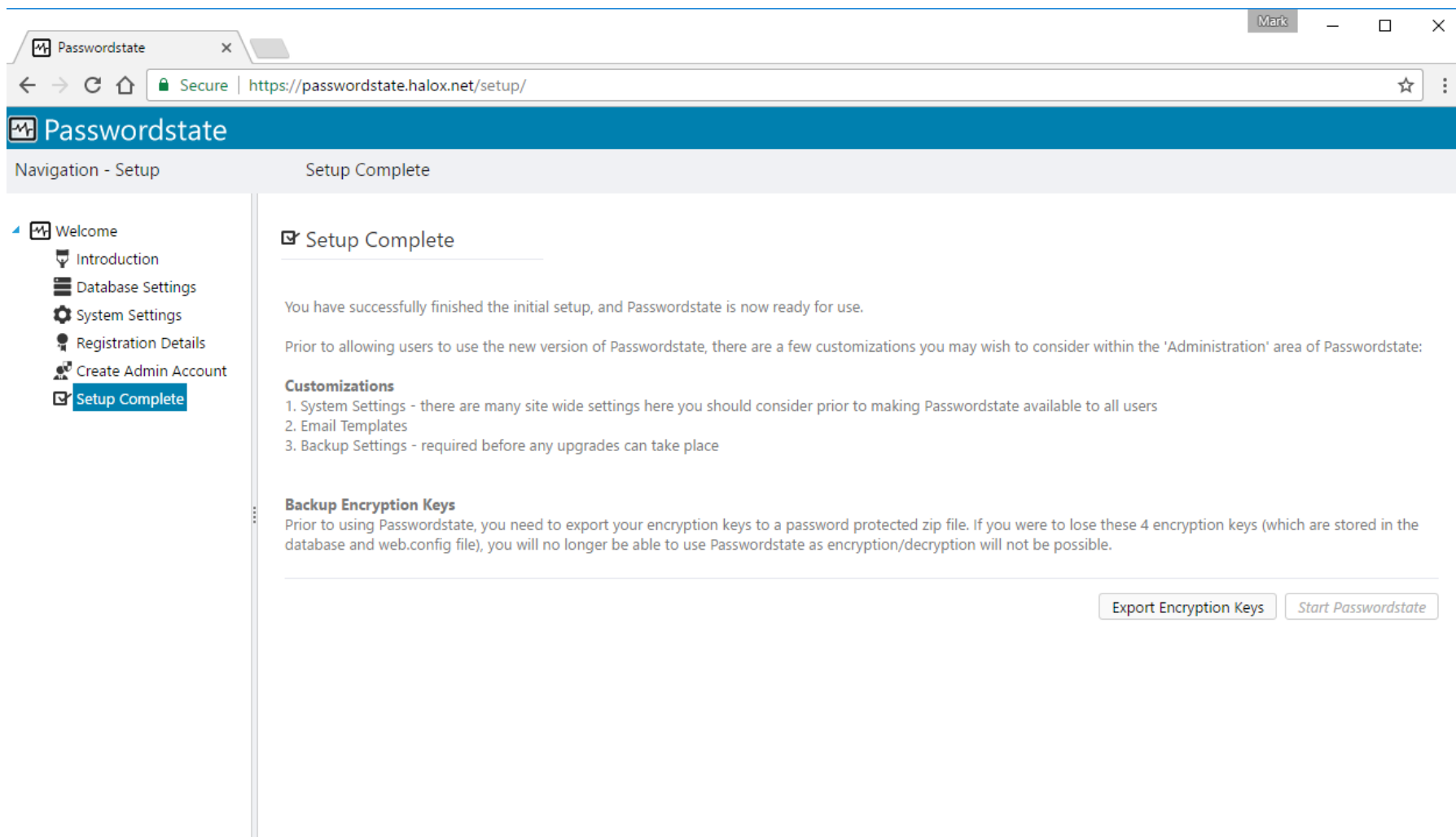
Surname

Email Address

Next

**Setup Complete** – The installation is now complete and you can begin using Passwordstate. Prior to granting access, or informing users of the new version, you may wish to review some of the system wide settings found under the 'Administration' area of Passwordstate.

**Export Encryption Keys** – It is very important you export your encryption keys for safe storage outside of Passwordstate. If you were to lose your web.config file in a disaster, Click Studios would not be able to help you rebuild your Passwordstate environment. The split encryptions keys are stored in the web.config file, and within the database.





## 6 Post Install Instructions

We also have additional information in our General Installation Guide, which answers many post install questions we have received from customers. Some of these questions include:

- Using a different URL for the site
- Encrypting settings in the web.config file
- Anti-Virus Considerations

Below is a link for our General Installation Guide if needed -

[https://www.clickstudios.com.au/downloads/version7/Installation\\_Instructions.pdf](https://www.clickstudios.com.au/downloads/version7/Installation_Instructions.pdf)