Pulsonix – Updating PostgreSQL

This document outlines the steps to upgrade the PostgreSQL version. There are some important steps that you must follow, such as backing up your old Vault, please read this document carefully.

A new version of the PostgreSQL ODBC driver would have been installed when you install the latest Vault Admin Setup patch. Clients will get the new ODBC driver from the latest Pulsonix patch.

Before Updating PostgreSQL

Configuring Vault Admin

You must configure the **Vault Admin** in order for the application to communicate with the PostgreSQL database server. If you have already done this, you can skip this step.

Open **Vault Admin** and navigate to the **Settings** page.

Fill in the **Role Name**, **Password**, **Server Name** and **Server Port** edit boxes with the details you specified when originally installing the Vault. The default values are:

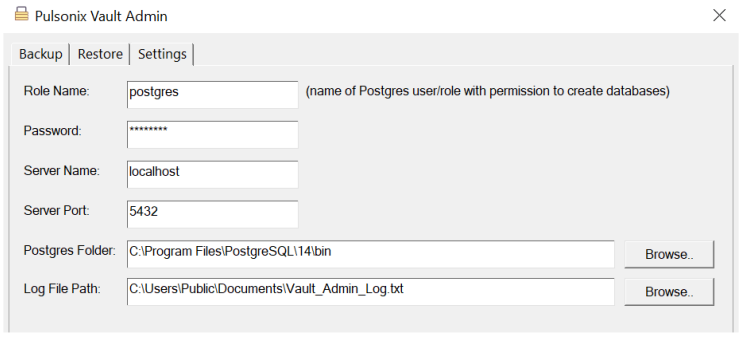
Property	Default Value
Role Name	postgres
Password	password
Server Name	localhost
Server Port	5432

Using the first **Browse…** button, navigate to and select the PostgreSQL 14.0 bin folder. A typical PostgreSQL installation will use the path:

C:\Program Files\PostgreSQL\14\bin

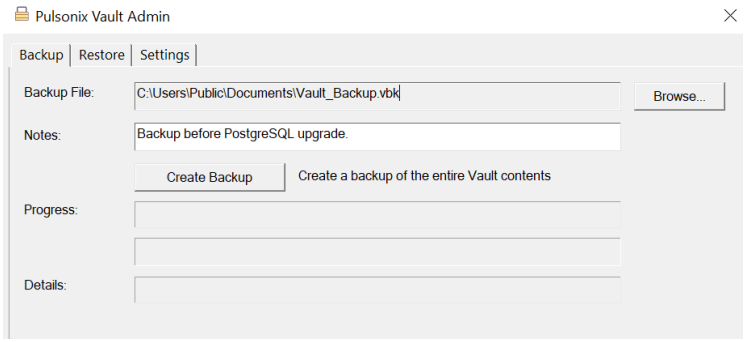
Using the second **Browse…** button, navigate to and select a destination for a log file to be created. This log file will contain information about the actions that **Vault Admin** does. The log file is required in case there is an issue during backup / restore process.

Once completed, click the **Apply** button to confirm your input. If you receive no error messages, then the settings were correct and have been applied successfully.

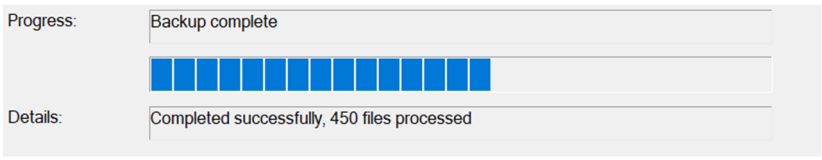


Backing up the Vault

Before you begin, you must backup your current Vault. To do this, open the **Vault Admin** and navigate to the **Backup** page. Use the **Browse…** button to specify the path for the backup. You can also optionally add a note which will be saved to the backup file. When ready, click the **Create Backup** button to start the backup. You will be prompted to 'Start backup now?', click **Yes** to continue.



The backup has completed successfully when the **Postgres** edit control states ‘Backup complete’ and the **Details** edit control states 'Completed successfully’.



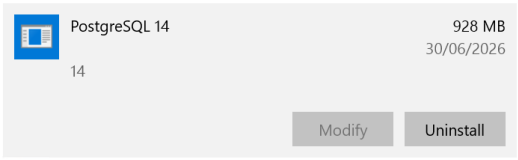
The backup file will be saved to the location defined by the **Backup File** path.

Updating PostgreSQL

This section covers the procedure to uninstall the current version of PostgreSQL from your computer and then install the new version.

Uninstalling the Current Version

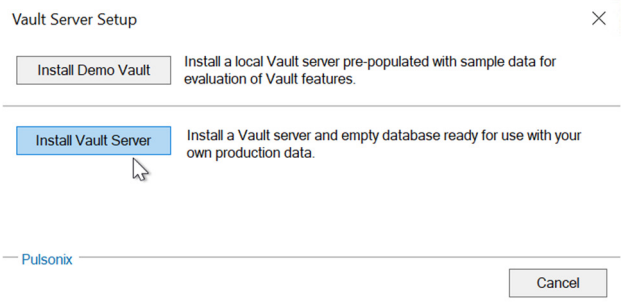
From the Windows Start menu, navigate to **Settings > Apps.** On this page, look for the current version of PostgreSQL and click **Uninstall** and then in the popup **Uninstall**.



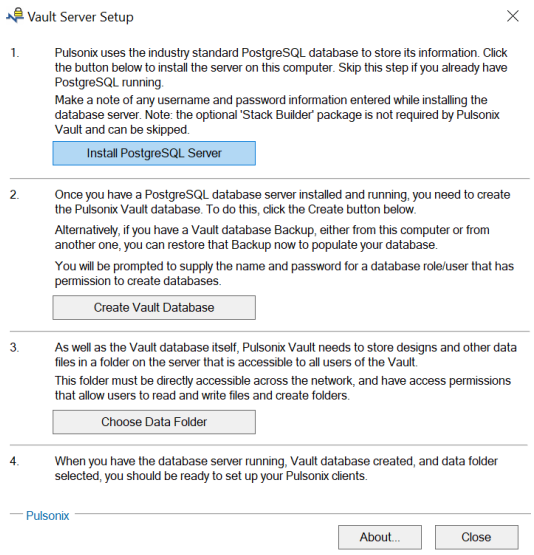
In the PostgreSQL setup wizard, select **Entire Application** and click **Next >**. This will start the uninstallation. Once the uninstallation has been completed, click **Ok** to exit.

Installing the New PostgreSQL Version

To do this, you will use the **Vault Server Setup** application. Once launched, click **Install Vault Server**.



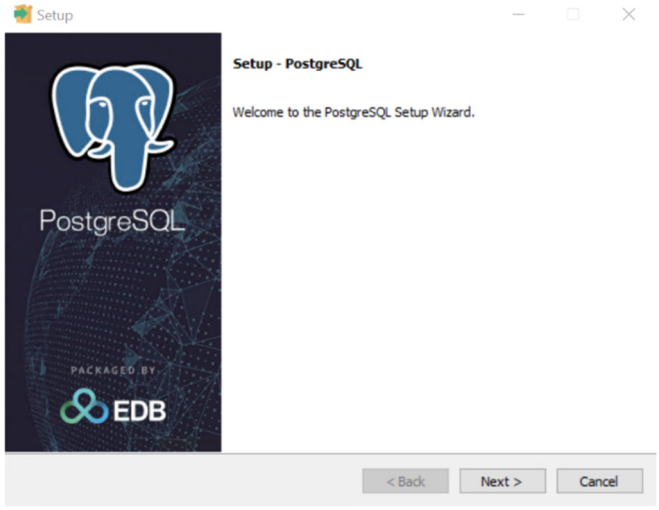
On the next dialog, you will perform each step listed starting with **Install PostgreSQL Server**.



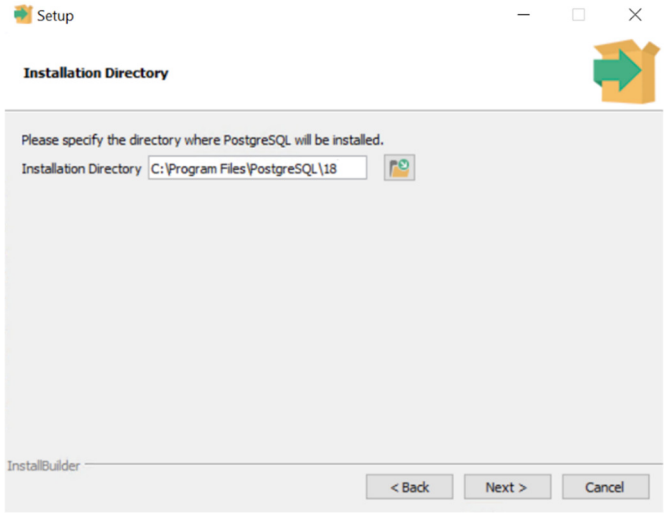
1. Install PostgreSQL Server

Click on the **Install PostgreSQL Server** button. You will be prompt that the PostgreSQL Setup program will be run, click **OK** to continue. This will launch the PostgreSQL Setup Wizard.

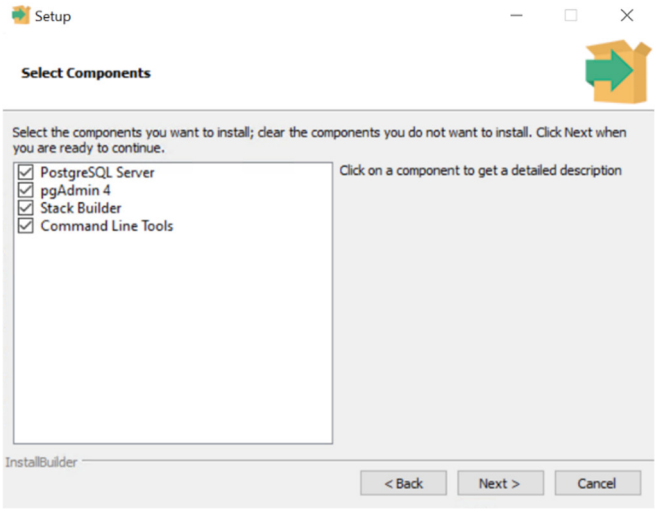
Once the PostgreSQL Setup wizard appears, click **Next >** to continue.



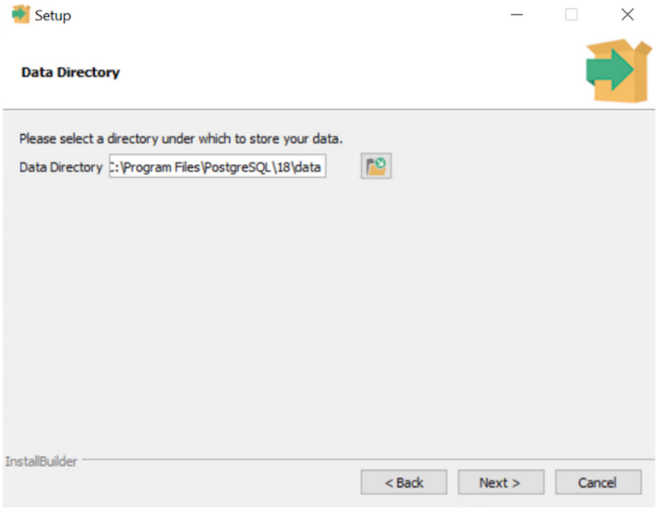
Specify the PostgreSQL installation path or keep it to the already set value (recommended). Click **Next >** to continue.



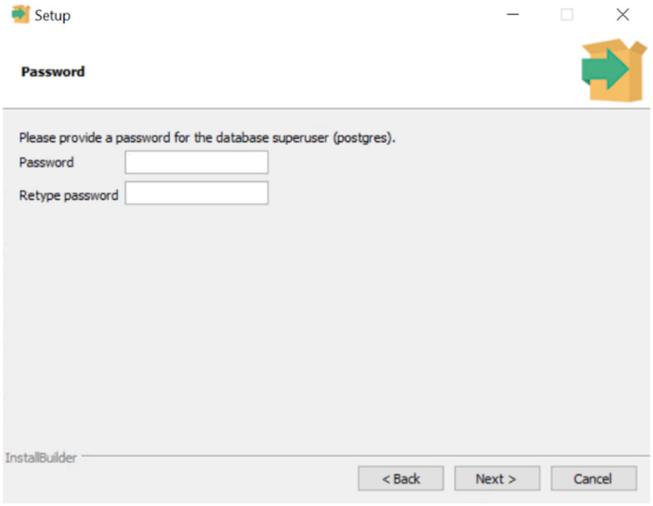
Ensure that all components are ticked and click **Next >** to continue.



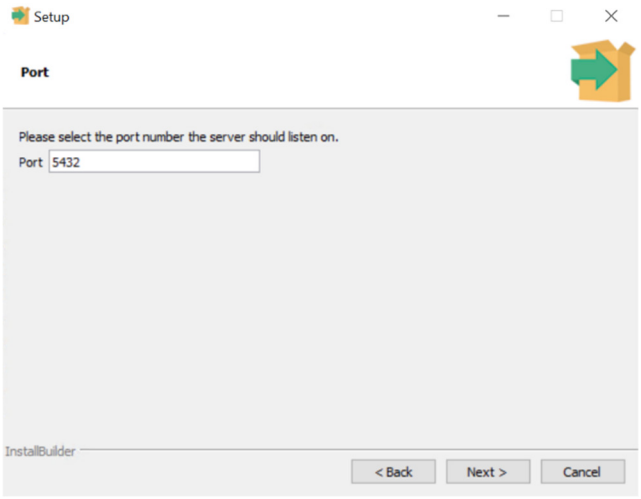
Specify the PostgreSQL data directory or keep it to the already set value (recommended). Click **Next >** to continue.



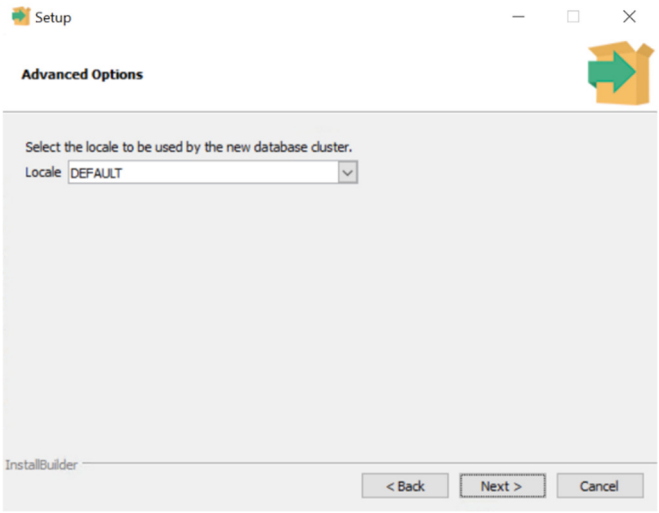
Now enter a password for the 'Postgres' role. Keep a record of your input as this will be used later to configure, backup and restore your Vault database. Once entered, click **Next >** to continue.



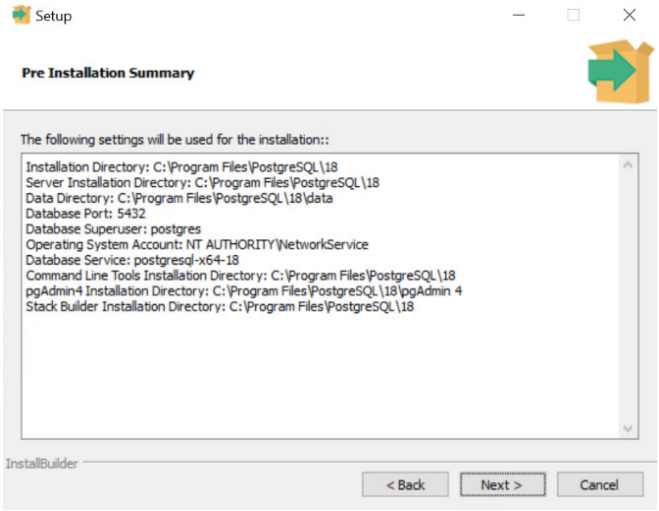
Specify the port number to be used by PostgreSQL or keep it to the already set value (recommended). You will also need to keep a record of this for use later. Click **Next >** to continue.



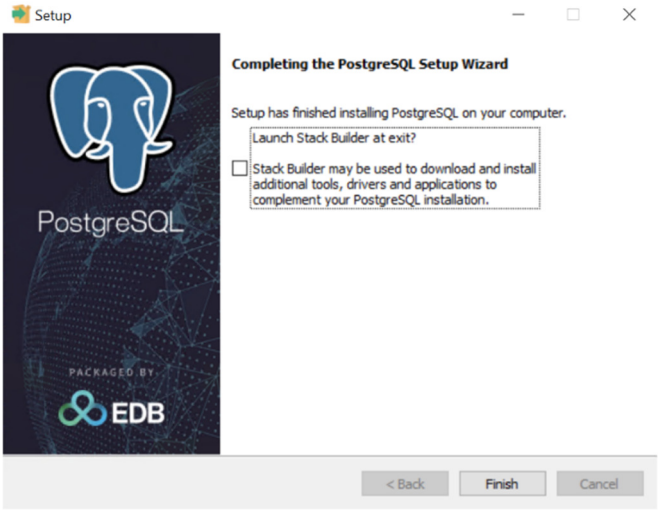
Specify the locale to be used or keep it to the already set value (recommended). Click **Next >** to continue.



You will now be presented an overview of what the installer will do. Click **Next >** and then **Next >** again on the next page to begin the installation.

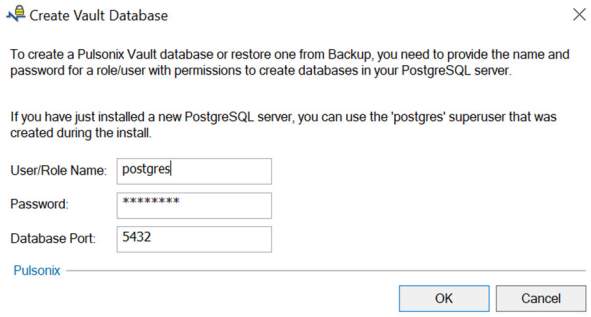


Once the installation is complete, untick **Stack Builder** and click **Finish**.



2. *Create Vault Database*

Once PostgreSQL is installed, click **Create Vault Database**. You will be prompt that an empty Vault database will be created, click **OK** to continue. This will open the **Create Vault Database** dialog. Input the **User / Role Name**, **Password** and **Database Port** that you specified during the PostgreSQL installation. Once entered, click **OK** to continue.



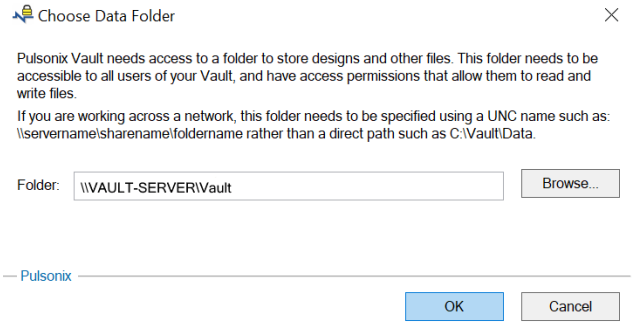
3. *Choose Data Folder*

Once step 2 has been completed, click **Choose Data Folder** to open the **Choose Data Folder** dialog. Click the **Browse…** button to select the Vault data folder.

Note* - The folder path must be a UNC path (e.g. \\VAULT-SERVER\Vault) **instead of a local path**.

Note** - You should use the same Vault data folder that was used before you did the PostgreSQL update.

Click **OK** to continue.

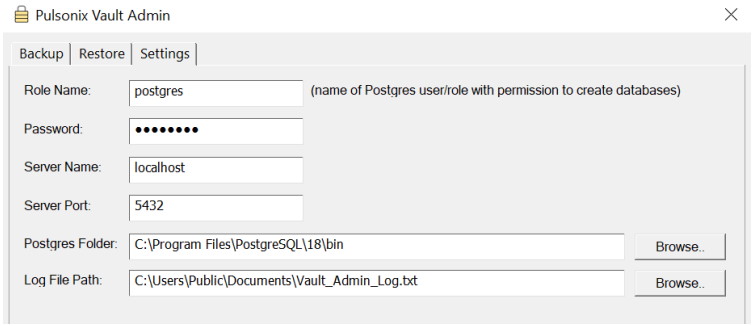


Restoring the Vault

Updating Vault Admin Settings

Using the **Vault Admin** application, navigate to the **Settings** page and ensure all the details are correct with those you have specified during the PostgreSQL installation. You will most likely need to update the **Postgres Folder** value to

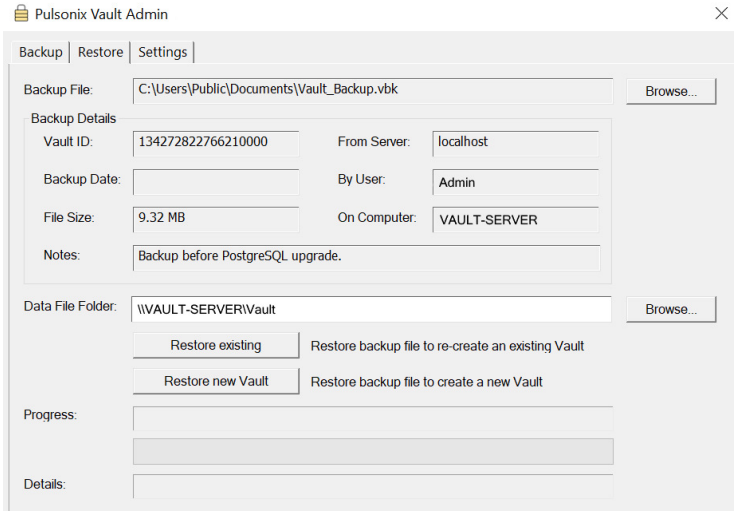
point to the new PostgreSQL version bin folder. Once complete, click **Apply** to confirm. If you receive no error messages, then the settings were correct and have been applied successfully.



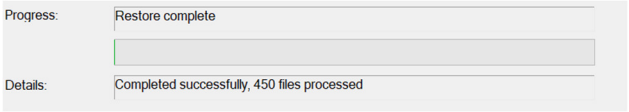
Restoring the Vault Backup

Navigate to the **Restore** page to start the Vault restoration process.

Click the first **Browse…** button to locate the Vault Backup (.vbk) file that you created in the Backing up the Vault section. Next, click the second **Browse…** button to navigate to and select the Vault data folder. This should be the same location used before you upgraded PostgreSQL. **Make sure that you use a UNC path (\\Server-Name\Folder) instead of a local path.** Once selected, click on the **Restore existing** button to start restoring the Vault from the backup file.



The restore has completed successfully when the **Postgres** edit box states ‘Restore Complete’ and the **Details** edit box states ‘Completed successfully’.



Finished

PostgreSQL has now been updated successfully.