

# Upgrade Process for SelectSurvey.NET v4 to v5

## Need Help?

Upgrade/Installation Service can be purchased from your customer account page.

## Process Summary:

1. Copy “Files to copy to IIS” into web site folder
2. Update web.config
3. Run database upgrade scripts

## Detailed Instructions for completing the above 3 steps:

### Important Changes (PLEASE READ):

- Ensure that the Microsoft .NET 4.6.1 Framework is installed on the web server and specified in IIS for the application pool for the web site that contains SelectSurvey.NET to meet TLS 1.2 requirement.
- License key must be set in web.config to avoid Free Trial message.
- Customer ID must be set in “admin tools” > “application wide settings” in the text box provided to avoid Free Trial message.
- When upgrading, the default for password encryption is set to ON in the new web.config. If you were not using password encryption in the past, you will either need to 1) set it to OFF In web.config, or 2) set everyone’s password to force reset upon next login so they will be encrypted. Otherwise no one will be able to login after upgrading with their old login. The setting to look for is:

```
<add key="DATABASE_PASSWORD_ENCRYPTION" value="yes"/>
```

### V5 Specific Security Changes not included in the above steps:

1. After you upgrade and login, **make a READ ONLY database token** from “Admin Tools” > “Database Tokens”

- a. Update all pre-existing database questions and dynamic tokens to use the new token ID (instead of your legacy connection string)

Run in MS SQL Query Analyzer after selecting your survey database:

```
Select db_token_id from sur_db_token
```

```
--change “x” below to the id from query above.
```

```
update sur_dynamic_token set db_token_id = x
```

```
--change “x” below to the id from query above.
```

```
update sur_item set database_dsn='x' where item_type_id in (22,36,37)
```

2. **Create an “Archive Database”** (optional but recommended in case someone deletes their survey and responses accidentally). This feature copies the survey and responses to an

archive database and the user can restore it through the interface on the survey list page themselves without IT having to restore a database backup. When they archive a survey it deletes it from the production database after it is successfully copied to the archive database.

- a. Create a separate empty database using the new db install scripts. Call the database name the same as your production db name with “\_Archive” after it. Such as:
  - i. Acme\_Production (production database)
  - ii. Acme\_Archive (archive database)
- b. Add the archive connection string to your web.config:

```
<add key="SURVEY_ARCHIVE_CONNECTION"
value="Server=yourserver;Database=Acme_Archive;UID=username;PWD=password;" />
```

If you don't want to or can't create an archive database, make sure the archive connection string is EMPTY so that an error does not occur:

```
<add key="SURVEY_ARCHIVE_CONNECTION" value="" />
```

3. **Update your application wide settings after you login the first time:** All of the below settings are in “admin tools” > “application wide settings”
  - a. Enter your CUSTOMER ID so you don't get a license error.
  - b. Select a new responsive template as the DEFAULT SURVEY TEMPLATE (or create one branded for your company by copying a new one from “templates > create > from copy” choose any template that starts with the word “THEME”
  - c. Enforce SSL
  - d. Allow X-Frames from trusted URL (otherwise the respondent file upload will not work – it will be denied by security setting) If you DON'T want to use that question type, leave it set to DENY X-FRAMES for security.
4. **Set your logo in “Admin Tools” > “White label branding”** so it will show on the login page.
  - a. Click “admin tools” > “white label branding” upload your logo that is 290 pixels wide by clicking upload logo button. Make sure the path shows in the textbox as “UploadedImages/yourlogo.jpg” (make sure your image name does not contain spaces and special characters that would cause it to break in a URL.)

## Upgrade Process for SelectSurvey.NET v5

Upgrading from older SelectSurvey.NET 1.x to latest release of SelectSurvey.NET v5.

### ▼ Preparation

- Locate and Unzip the SelectSurvey distribution you're upgrading your installation to.
- Make a backup copy of the current web.config file off of the production server.
- Make a backup copy of the “UploadedImages” folder and contents from the production server.
- Make a complete backup of your database.

### ▼ Step 1

Delete all files and sub-directories in the "SelectSurveyNET" folder on the production Server EXCEPT for the following:

- UploadedImages folder and contents
- web.config
- Database

DO NOT DELETE your "SelectSurveyNET" directory

### ▼ Step 2

- Copy all files and folders from within the "Copy to IIS" folder that was unzipped in the preparation step to the "SelectSurveyNET" directory on the production server. Click "Overwrite" to overwrite anything in the "UploadedImages" folder (but maintain the images you have in this folder).

### ▼ Step 3

Copy the site specific information from the backup web.config file into the new web.config file in the new implementation.

*DO NOT use the web.config file from the previous version, as we are constantly adding new keys that the application relies on.*

- Database Connection
- Database Type
- Database Driver
- SMTP server
- License keys
- Other settings

Question: Where did the date settings and other web.config settings go?

Answer: In version 4.024.002 and higher, we moved most web.config settings to the admin tools "application wide settings" page for easier management. To change those settings, you must login as admin into the application, click "admin tools" then click "application wide settings".

When upgrading, the default for password encryption is set to ON in the new web.config. If you were not using password encryption in the past, you will either need to 1) set it to OFF In web.config, or 2) set everyone's password to force reset upon next login so they will be encrypted. Otherwise no one will be able to login after upgrading with their old login. The setting to look for is:

```
<add key="DATABASE_PASSWORD_ENCRYPTION" value="yes"/>
```

### ▼ Step 4

- Upgrade database from v4 to v5:
- Select survey database from dropdown in SQL management studio.  
Right click database and click "new query"  
Copy/paste into the query window and execute in this order:  
(From the zip folder Documentation/MSSQLScripts/MSSQL 2005 and 2008 and 2012 and AZURE/Upgrade)
  - Run 1<sup>st</sup>: "old version upgrade scripts to v5.000.x/upgradeNET-[your old version]-to-latest.txt.
  - Run 2<sup>nd</sup>: "upgrade/upgradeNET-v5.000.x-to-latest.txt" into query analyzer and execute.

### ▼ Step 5

- Login as admin, click "admin tools" click "application wide settings"

- Add your customer ID (REQUIRED.. if left blank you will see a 15 day trial message)
- set the root url path
- set the admin email
- set the file upload default location to filesystem (requires setting write permissions to UploadedImages folder.)
- verify all other settings, you can leave as default or change as desired.

#### ▼ **Step 6**

- If you are using languages other than English, login as admin, click “admin tools” then click “globalization / translation”. Click on all translation links below this heading, select each language being used, then click save at the bottom of the page to automatically add all new translated variables to each language that are newly added. If you don’t do this you may get “dbnull” errors for missing translation entries. Also, we have additional language scripts that you can run to install default values for other languages. Look in the Documentation/TranslatedFiles folder for scripts for each language.
- If you are using Select Poll, locate the Js/function.js file (there are new and updated js files so you will have to re-apply any customizations you have made to files in this folder) the js/functions.js file has your URL path in it for the Poll application to work. Open this in notepad and make sure the URL path is correct if you are using SelectPoll

## **License Key (required)**

A production license key is required to run on a production server and the development/test license key is required to run on the test server. If you do not have a valid license key you will see a 15 day trial message at the top of the page.

## **Where do I find my license key?**

**Your license keys show up next to each product you have purchased on the “product download” page in your customer account page on classapps.com.**

To generate a license key, login to your customer account on classapps.com, click "product downloads", find the link "Generate" next to the product you need a key for. Type in the product URL that shows from the test button below if you are not sure what your product URL is. Click "generate" link. The page will refresh and display your license key. Copy the license key into your web.config file in the space provided in the value quotations on the line that says "LICENSE\_KEY" in the appSettings section of the web.config file. The license key goes in the web.config file which is in the folder on the web server where the survey application resides.

If the license key is empty you are in 15 day trial mode.

If you have questions please contact technical support by emailing tech@classapps.com for assistance.

## **Security for On-Premise Installs**

An admin person must login, go to admin tools and check all GDPR security

- Make sure you are using the latest version of the software. You MUST update software to get critical security updates.

- Ensure that the "Enforce SSL" setting in admin tools is turned on.
- Ensure that the encryption flag in the web.config is turned on.
- Ensure that you have a firewall in place.
- Ensure that you have antivirus in place.
- Ensure that all windows updates have been installed on the web server and database server.
- Ensure that your database is encrypted and backups are encrypted.
- Ensure that your permissions and settings on the web server follow Microsoft's best practices.
- Ensure that staff are properly trained in HIPAA guidelines and that you follow HIPAA guidelines internally.
- Ensure that staff are properly trained in GDPR guidelines and that you follow GDPR guidelines internally.
- Activate Microsoft SQL TDE (more info:  
<https://docs.microsoft.com/en-us/sql/relational-databases/security/encryption/transparent-data-encryption?view=sql-server-2017>)

## **Securing the UploadedImages folder to prevent file upload vulnerability.**

The "Respondent File Upload" feature and all features that allow uploading of images or files pose a potential risk for malicious files to be uploaded.

### **How to Allow File Upload while minimizing risk:**

- Make sure you are using the latest version of SelectSurvey.NET v4.077.012 or later OR you have disabled the file upload question type (from admin tools activate/deactivate question types) AND removed write permissions on the "UploadedImages" folder.
- Make sure you have antivirus installed and running on the web server and that it is scanning the UploadedImages folder, or the folder you have specified for the "Respondent File Upload" question type.
- Make sure the folder specified for respondent file uploads is isolated and permissions on that folder are limited only to that folder.
- Train survey designers to specify file restrictions when adding the "Respondent File Upload" question type on a survey (the edit item page has checkboxes to restrict files to specific types)
- Make sure the web.config that only allows static files in the UploadedFiles folder (or whatever folder you have specified in admin tools>application wide settings for this) is there (can be copied from v4.077.012 or later from UploadedImages folder)
- Remove any files from the UploadedImages folder that are not static. That includes .html, .htm, .asp,

.aspx, etc.

- Make sure you run windows updates on the web server
- Follow Microsoft Security Recommended Best Practices
- Make sure you are doing daily backups of files and databases on the server.
- Make sure you have the robots.txt that disallows bots and crawlers in the root of your survey site ( this file is included with the software do not delete it)

## **How to Disable file uploading and eliminate risk:**

- Remove folder and file permissions on the file upload folder designated in Admin Tools > Application Wide Settings. By default this is the “UploadedImages” folder on the web server right beneath the survey web folder itself.
- Remove UploadFile2.aspx from the web folder.
- Make sure you have the robots.txt that disallows bots and crawlers in the root of your survey site ( this file is included with the software do not delete it)

## **How to Disable the “Respondent File Upload” Question Type:**

To disable the ability for survey designers and administrators from adding the “Respondent File Upload” question type to a survey, login as an admin user, click “Admin Tools” > “Activate/De-Activate Question Types”. Select the “Respondent File Upload” question type from the drop down list and click the arrow to move it to the disabled list of questions. If you are disabling file upload, you should also disable the question type, so that it does not show up as an option in the application.

- Make sure you have the robots.txt that disallows bots and crawlers in the root of your survey site ( this file is included with the software do not delete it)