



Product Patch Guide

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1 Introduction

The instructions below will guide you through the process of updating your Checkbox 5 or 6 installation to the latest version. To apply the update, you will need access to the web server hosting Checkbox and to the database that contains Checkbox data.

THIS GUIDE PROVIDES INSTRUCTIONS FOR UPDATING A VERSION 5.X OR 6.X INSTALLATION OF CHECKBOX TO THE LATEST VERSION. TO UPGRADE FROM 4.7, PLEASE SEE THE UPGRADE GUIDE.

CHECKBOX PATCH IS NOT SUPPORTED VIA HTTPS. PLEASE ENSURE THAT YOU ARE ATTEMPTING TO COMPLETE THE PATCH PROCESS USING AN HTTP CONNECTION. WHEN YOU HAVE COMPLETED THE PATCH PROCESS PLEASE REFER TO THE SSL DOCUMENTATION ON HOW TO CONFIGURE THE APPLICATION FOR SSL

2 Required Access

Before you set begin to set up the Checkbox Messaging service, please make sure that you have a supported version installed. The messaging service will only work with Checkbox 6.0 or higher. If you have an earlier version of Checkbox you will need to either upgrade or patch your installation for it to work properly.

The Checkbox Messaging Service does not have to be installed on the same server as the Web Application, or the Database, however the Messaging Service does need to be on a server with access to the database.

Server/Software	Required Access Level
Web Server	Manage files in the Checkbox® installation folder.
Database	Ability to run queries in the Checkbox database that alter data, alter tables, and drop/create stored procedures.

3 Instructions

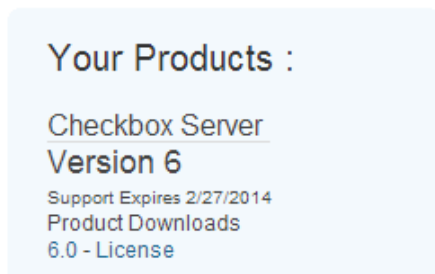
3.1 Backup Your Existing Files and Database

Checkbox installation files and data will be modified during the update process. To minimize the risk of any downtime or data loss, it is highly recommended to make a backup of your current Checkbox web site AND to make a backup of the database that contains Checkbox data.

3.2 Download the Latest Checkbox Version

Download the latest version of Checkbox from the Customer Area of the Checkbox web site. The Customer Area can be found at: <http://www.checkbox.com/login>.

Once you login, the right side of the screen will show your available products and licenses. Click on the product version to download. The exact version numbers shown will change as the latest version of Checkbox® changes.



3.3 Extract Application Files

Copy the file downloaded in Step 2 to the web server that hosts Checkbox and then extract the files to a temporary location. *Do not extract the files to the location of your Checkbox installation.*

3.4 Backup Files

Copy the following files to a location outside of your Checkbox installation folder. Make a note of where the files are placed since you will need them later:

- a) *web.config* file located in root of Checkbox installation folder.
- b) Checkbox license (.lic) file located in Checkbox /bin folder. ***(If you are patching from Checkbox 5 to Checkbox 6, you will need a new license from the product download area)***

3.5 Deploy Application Files

- a) Delete all files and folders in your existing Checkbox installation.
Please note that several changes have been made to the Checkbox installation file structure. Failing to delete all files may result in Checkbox failing to work properly.
- b) Copy the files in step 3 into the Checkbox installation folder.
- c) Copy the license backed up in step 4 to the /bin folder of the Checkbox installation. Please do not copy the web.config file. In the next step we'll selectively copy some settings instead.

3.6 Restore Settings to web.config

After completing step 5, the *web.config* file in your Checkbox folder will no longer have any of your custom settings. Open the file in a text editor and restore the settings preserved from your *web.config.backup.txt* file.

In the `<appSettings />` section, restore the *value* attributes for the following keys:

- a. *ApplicationURL*
- b. *ApplicationRoot*
- c. *AllowedURLRewriteExtensions*
- d. *FacebookAppld*

In addition to the custom values above, change the value of the *InstallSuccess* key from *false* to *true*.

Next, restore the *connectionString* values for the following *name*:

- a. *DefaultConnectionString*

Finally, we need to allow the default IIS user (*Users – IIS_IUSRS*) write and modify access to the *web.config* file.

3.7 Create Temp Folder for Uploads and Imports

Inside the folder containing the Checkbox application files, create a folder named */Temp* that will be used to store the temporary files created in the upload and import processes of Checkbox. Ensure that the user context for the Checkbox application pool has full control over this folder. (If you are not sure about which context to use, the *Users – IIS_IUSRS* group should work for most situations.)

3.8 Run the Patch Installer

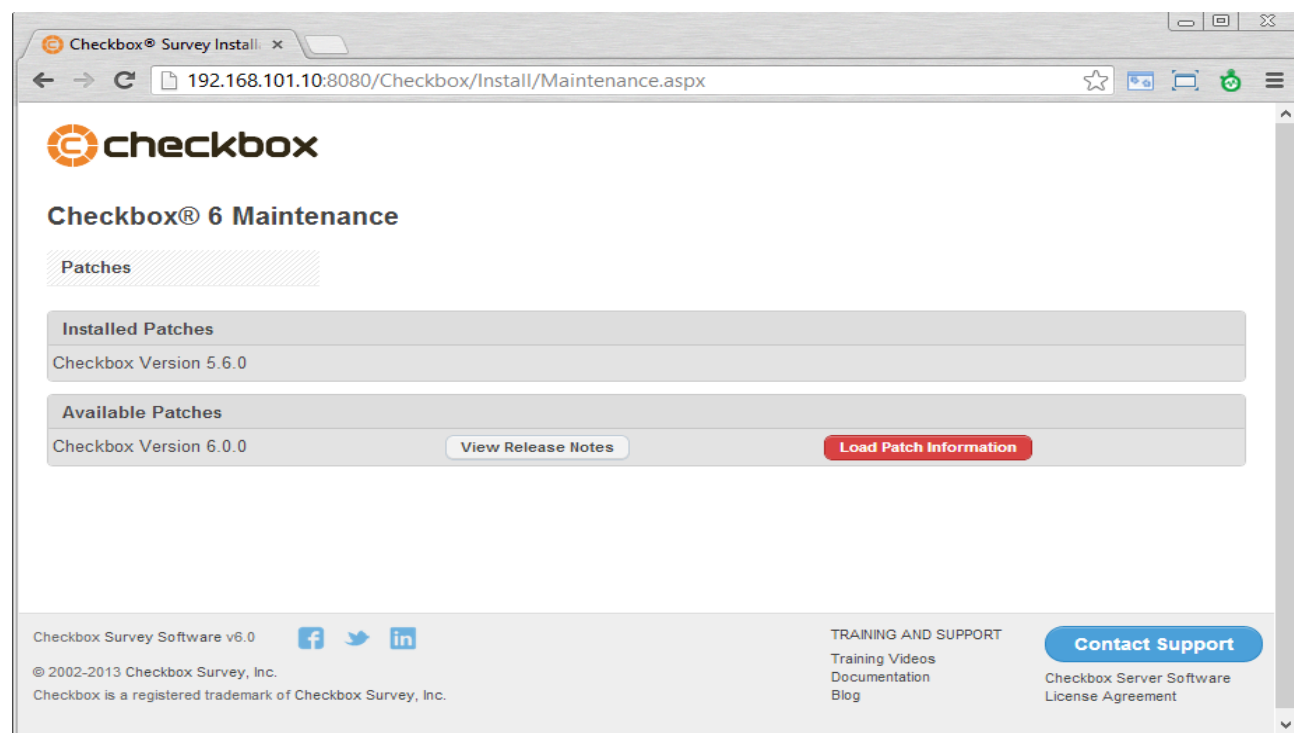
3.8.1 Open Maintenance Page

Open a web browser and navigate to *Install/Default.aspx* in your Checkbox installation. Depending on how your server is configured, the URL will probably be line one of the following:

[http://\[YOUR_CHECKBOX_URL\]/Install/Default.aspx](http://[YOUR_CHECKBOX_URL]/Install/Default.aspx)

[http://\[YOUR_CHECKBOX_URL\]/Checkbox/Install/Default.aspx](http://[YOUR_CHECKBOX_URL]/Checkbox/Install/Default.aspx)

You should be taken to the Checkbox 6 Maintenance page. Since the page is only available to Checkbox users in the “System Administrator” role, you may be required to login first.

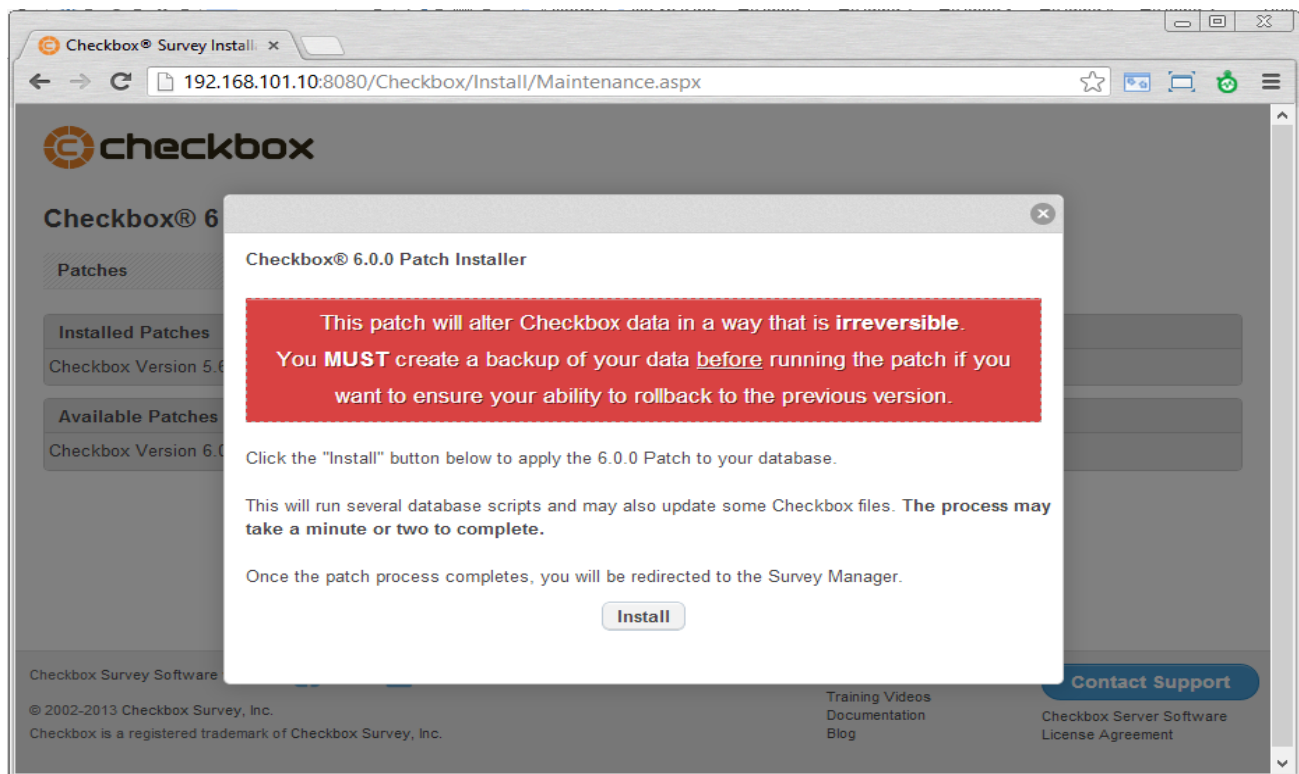


What to do if you do not see the maintenance screen:

- a) **Checkbox Installation Screen Displayed** – You may see this screen instead if the web.config settings were not restored in Step 3.6. Ensure that the “InstallSuccess” <appSetting/> value is set to “true”.
- b) **Error: “The SqlConnection property has not been initialized”**- This error indicates that the connection string was not restored to the web.config in step 3.6
- c) **Error: “A network-related or instance-specific error occurred while establishing a connection to SQL Server”** - A wide variety of issues can cause this error, ranging from incorrect or invalid data in the DefaultConnectionString value. If you are testing the patch in a staging environment, ensure that the specified SQL server and login information is correct and that the server can be reached from your staging server

3.8.2 Run Patch Installer

In the list of available patches, click the “Install” button for the patch. The patch installer should load in the right side of the page and you should see the following:



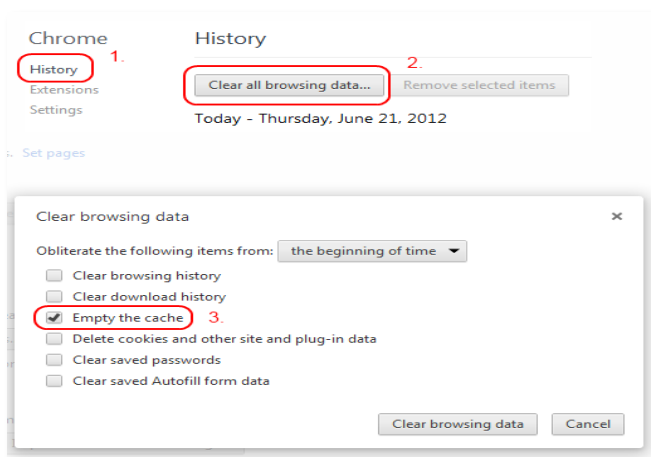
Click “Install” to run the patch installer. The patch process runs several SQL scripts and will also update the Checkbox web.config. Installation time will depend on several factors, but the process may take several minutes to complete. Once

the process completes, a “*Success*” message will be shown and you will be automatically redirected to the Checkbox default page.

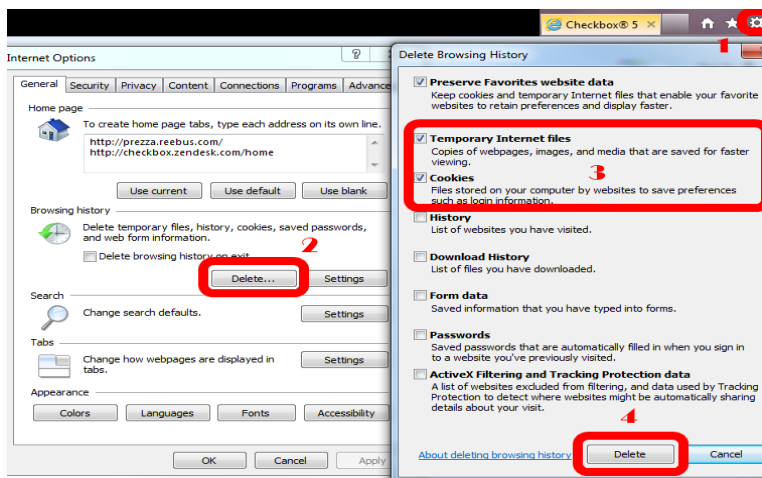
3.8.3 After Install – Clear Cache

If you are a System Administrator/Survey Editor, please clear your browser cache after the update process is complete. This will ensure that you load the most recent version to your browser.

Chrome Example:



IE Example:



4 Important Notes

1. If you would like to enable SSL please see the appropriate documentation file located in the Documentation folder of your Checkbox download.
2. If you are patching from a version prior to 6.3 you must also update the messaging service. Instructions to do so can be found in the updating messaging service documentation file in the documentation folder of your Checkbox download.