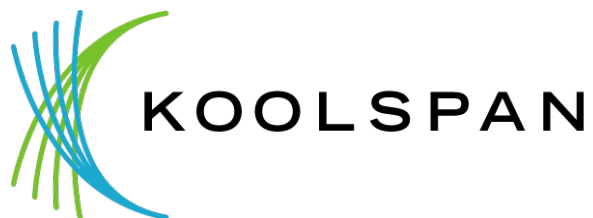


# **Koolspan, Inc. – SecurEdge Manager v4.0 Upgrade Guide**

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## 1. Summary

Version 4.0 of the KoolSpan SecurEdge Manager is an entirely new platform for managing your KoolSpan devices and keys. Many new features are implemented in v4.0 and it will serve as the platform for many new features. New features in this initial release include:

- A completely redesigned user interface
- Compatibility with Windows 2000, 2003, XP and Vista\*
- LDAP Integration – Can query LDAP directory resources (Microsoft Active Directory, Novell eDirectory, etc.) when assigning user names to KoolSpan Client Keys
- Live-state connectivity information for KoolSpan Locks
- Secure Lock management via the lock's public port

\*note – KoolSpan's code is Vista-ready. As of January 1, 2007, the smartcard manufacturer (Gemalto) had not yet released Vista compatible smartcard drivers

Implementation of these new features has required major changes from previous versions of SecurEdge Manager. As such, migration from v3.x (or earlier) of the SecurEdge manager is a major upgrade and care must be taken to ensure a smooth transition and uninterrupted functioning of your KoolSpan network. Prior to proceeding, please review this entire guide.

## 2. Required Software

- SecurEdge Manager Version 4.0.135
- SecurEdge Client Version 3.4.1 or version 4.0
- SecurEdge Lock Firmware v4.1.21 & v4.0.21 (one or both depending up what type of locks are in use)

## 3. Upgrade Support

If you encounter any difficulties during the upgrade process, please contact the KoolSpan technical support team immediately:

Phone: (240) 880-4400, Option 2  
eMail: [support@koolspan.com](mailto:support@koolspan.com)



## 4. Prerequisites

### 4.1 Current Manager Software

Version 3.3.130 is required prior to upgrade. If running a previous version, please contact KoolSpan Technical Support before proceeding.

### 4.2 Lock Firmware

Rev. "C" locks should be running v4.0.21

Rev. "E" locks should be running v4.1.21

#### 4.2.1 Determining the Lock Type and Firmware Version of KoolSpan Locks

- If the lock's power connector is in the rear (opposite panel from the Ethernet ports) it is a Rev. "E" lock.
- If the lock's power connector is in the front (on the same panel as the Ethernet ports), use your current version of SecurEdge Manager to check the current firmware version

**Note:** Do not assume that the version number displayed in the main manager window is the correct one. Please check the firmware version by going to the "Settings" dialog and querying the lock's current settings. The current firmware version will be displayed in the upper-left corner of the "Settings" dialog.

Rev. "C" locks will have firmware versions beginning with the following:

- v3.xx
  - v4.xx (v4.01 to 4.07)
  - v4.0.xx
- Locks returning firmware versions beginning with 1.x or 2.x are earlier models that are not fully compatible with the SecurEdge Manager v4.0. Please contact KoolSpan technical support regarding these locks.

#### 4.2.2 Upgrading Firmware

- Use your existing KoolSpan manager (v3.3.130) to upload the new firmware
- After the lock reboots, perform an upload to each lock with the "Delete Existing" option selected (**THIS IS A CRITICAL STEP!**)
- Following the upload, verify that each lock is working normally (i.e. users can authenticate, child bridges are authenticated to parent bridges)



- KoolSpan SecurEdge Client – Wherever possible, local or remote KoolSpan clients should be running version 3.4.1 or greater. Client versions 3.2 and 3.3 will continue to function, but may not be as robust and will not provide accurate error reporting when communicating with locks running more current firmware versions.

## 5. Upgrade Procedures

### 5.1 Verification of Pre-Requisites

As described in “Prerequisites”, please verify the following:

- That the current KoolSpan infrastructure is managed by SecurEdge Manager v3.3.130
- All Rev. “E” locks are running lock firmware v4.1.21 or greater
- All Rev. “C” locks are running lock firmware v4.0.21 or greater

### 5.2 Database Backup

Locate and make a backup copy of your present KoolSpan database(s). There should be one database for every Master Key in use. Databases are located in the following directory:

**%systemdrive%\Program Files\KoolSpan\KoolSpan SecurEdge Manager\**

Database file names end with the file extension “.mdb” and the first eight characters of the name will match the printed serial number of the corresponding Master Key. For Example:

Master Key Serial Number: 000017BA  
Database File Name: **000017BA**4B534D55.mdb

### 5.3 Un-installation of Previous Manager

Uninstall the previous version of SecurEdge Manager via the Windows Control Panel Add/Remove Programs applet

### 5.4 Installation of SecurEdge Manager v4.0

Install SecurEdge Manager v4.0 and follow on-screen installation instructions.

## 5.5 Upgrading the KoolSpan Database

- Run SecurEdge Manager 4.0

**Note:** The KoolSpan Manager and Client applications cannot run simultaneously. You can close the KoolSpan client before initiating the manager, or alternatively, SecurEdge Manager v4.0 will prompt you and close the client application for you.

- Insert the KoolSpan Master Key for the network to be upgraded. You should receive the following prompt:

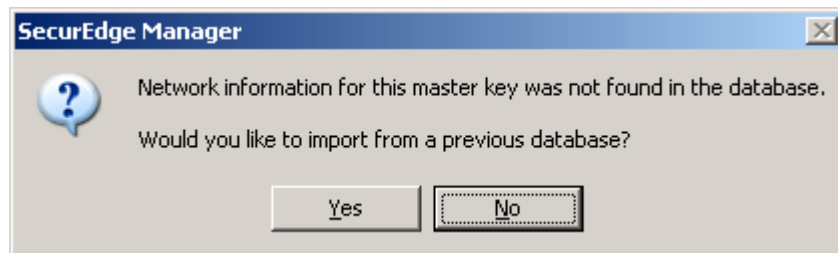


Figure 1 - Database Upgrade

- Choose “Yes”, and then navigate to and select the corresponding .mdb file for the inserted Master Key. This file should still be located at:

`%systemdrive%\Program Files\KoolSpan\KoolSpan SecurEdge Manager\`

**Note:** If you are unable to locate the file, use the backup file created in Step #2.

- The SecurEdge Manager should import the file and populate the main management window with all of the locks, client keys and master/clone keys for your KoolSpan network.

## 6. Verify Settings and Proper Operation

Following the upgrade is recommended that you verify the settings and operations as described below.

**Note:** If your organization is using KoolSpan Child locks for bridging, please pay particular attention to section 6.2

### 6.1 General System Tests

#### 6.1.1 Verify Lock Settings

In the left-hand pane of the manager, select each lock and verify its settings by right-clicking and selecting “Properties”. Verify the following:

- On the “General” tab, verify that the lock is set to the proper “Operating Mode”. This should be set to “Normal” for remote access locks, Wi-Fi security locks and Parent Bridges. Child Bridges should be set to “Child”.
- On the “Network” tab, verify the proper internal and external addresses for the lock

#### 6.1.2 Client Testing

Use a KoolSpan client key to test local and remote authentication to each applicable lock as necessary

### 6.2 Special Instructions for Child Bridges

#### 6.2.1 Bridge Behavior during Upgrades

Following the upgrade from SecurEdge Manager v3.x to v4.x, it is **very important to verify the “Parent Lock IP Address” settings on child bridges.**

Versions 3.x and earlier did not fully track the relationships between parent locks and child locks. Portions of that information were stored within the locks only. Version 4.x fully tracks parent-child relationships. However, as some information is not available to be imported from the v3.x database, v4.x can only make a “best effort” to determine the relationships. The resulting information may not be entirely accurate and requires verification after upgrading.

#### 6.2.2 Example of Incorrect Bridge Settings after Upgrade

- During an upgrade, SecurEdge Manager may see that Lock B is an authorized child of Lock A.
- In determining the “Parent Lock IP Address” (or addresses) for Lock B, the Manager will insert its known IP address (from the database) for Lock A

- In some cases this will be correct. In other cases, it may be that Lock B (child) accesses Lock A (parent) via a firewall with NAT or port forwarding in use
- In such a case, the value for “Parent Lock IP Address” should really be the public IP address used for translation to the lock’s private IP
- If the “Settings” page for the Child Lock is accessed and this condition is not corrected, an incorrect parent IP address can be unintentionally written to the Child Lock and it will no longer be able to authenticate with its Parent

### 6.2.3 Recommended Procedure for Testing Child Locks

- 1) Access the “Lock Properties” page:

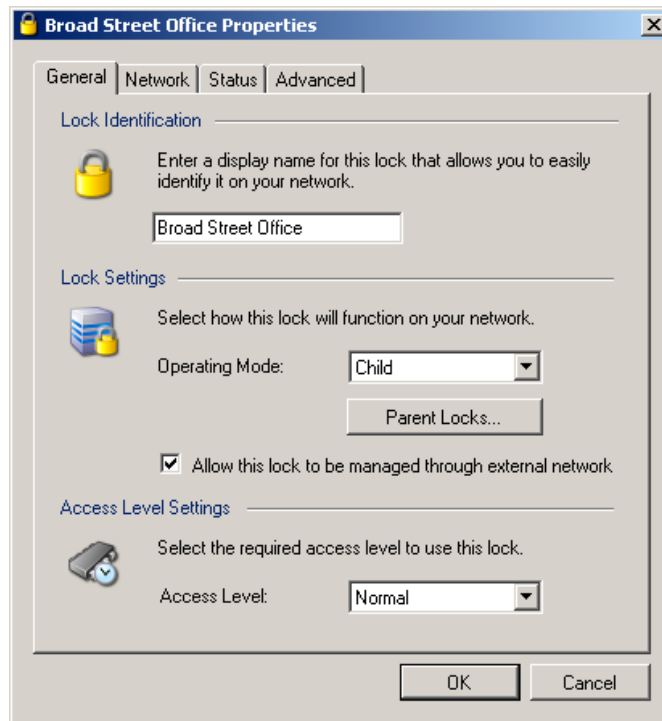


Figure 2 - Lock Properties Page

- 2) Select "Parent Locks". Verify that all appropriate Parent Locks are list with the correct IP address and port number for each:

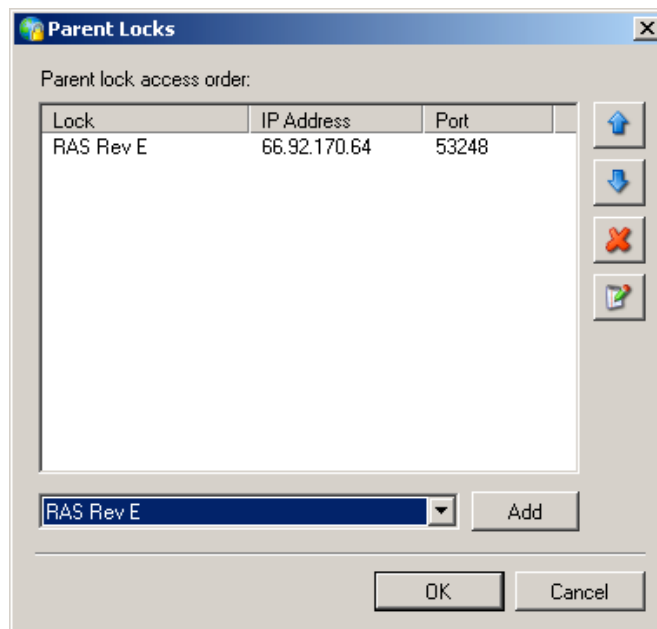


Figure 3 - Parent Locks Dialog

- 3) After verifying the IP addresses and port numbers, select "OK" to close the "Parent Locks" dialog, then select "OK" again to close the "Lock Properties" screen.
- 4) If possible, reboot the Child Lock and make sure that it properly re-authenticates to its Parent Lock. If a reboot cannot be done immediately, please schedule for an appropriate time.

## 7. Post Upgrade

Following a successful upgrade your network will now be ready to proceed with KoolSpan's test procedures for the evaluation program. Also, for additional information on the SecurEdge Manger, please see the **SecurEdge Manager Administrator's Guide** (version 4.0) for details on features and functions.