



TechSmith Relay[®] (Self-Hosted) Upgrade Guide

Version 5.0

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Table of Contents

Upgrade to a New Release	1
Upgrade from 1.x to the Current Version	2
Upgrade from 1.0 to the Current Version	2
Upgrade from 2.0 and Later to the Current Version	4
Upgrade Recorders	5
Migrate TechSmith Relay to a New Server	6
Migrate the TechSmith Relay Application and Database to a New Server	7
Migrate Only the TechSmith Relay Database to a New Server	10
Migrate Only the TechSmith Relay Application to a New Server	12
Back Up the Database	14
Restore the Camtasia Relay Database	16

Upgrade to a New Release

This document covers two specific upgrade cases:

- ▶ [Upgrade from 1.x to the Current Version](#)
- ▶ [Upgrade from 2.0 and Later to the Current Version](#)

The installer detects your current setup and will present you with different screens depending on what release you are upgrading from.

It is strongly recommend that you backup your current database before starting any upgrade.

Installers

- ▶ `TechSmithRelayServer_x64.exe`

Use this installer for upgrading TechSmith Relay on a 64-bit server operating system.

If you need additional assistance, you can contact TechSmith Technical Support at <http://support.techsmith.com/>. Additional contact information is provided at <http://www.techsmith.com/contact.asp>.

After you complete an upgrade, you may want to review the current known issues for TechSmith Relay 5.0. You can find the list of known issues in the TechSmith Support Center: <https://support.techsmith.com/hc/en-us>

TechSmith Relay Recorders

For information about upgrading TechSmith Relay recorders, please see [Upgrade Recorders](#).

Upgrade from 1.x to the Current Version

If you are currently running TechSmith Relay (formerly Camtasia Relay) version 1.0 and want to upgrade to the most current version of TechSmith Relay, it is important to know that this is a two step upgrade. There is NOT a direct upgrade option from version 1 to the current version of TechSmith Relay.

Before you start, you will need one of the available TechSmith Relay installers:

▶ `Relay_Server_Setup_2.0_x64.exe`

Use this installer for upgrading TechSmith Relay on a 64-bit server operating system.

If you need assistance locating these installers, see the TechSmith Support Center:
<https://support.techsmith.com/hc/en-us>.

Upgrade from 1.0 to the Current Version

1. Upgrade the TechSmith Relay (formerly Camtasia Relay) server to version 2.0 by running the 2.0 installer. Follow the instructions in the installer to complete the upgrade.
2. If it is not already installed, you are prompted to install .NET Framework 3.5 with Service Pack 1. This is likely to be the longest part of the installation.

The installation of .NET Framework 3.5 with Service Pack 1 requires a server reboot, so to minimize downtime for the TechSmith Relay server, you may wish to schedule the upgrade during off-peak hours.

After the .NET Framework has been installed, the TechSmith Relay server upgrade continues.

3. The installer prompts for the password for the “RelayAdmin” user which is used as the default admin account for the TechSmith Relay website. If using the Express setup installation path, this password is also used as the password for the “Relay” SQL user for the database.
4. Continue with [Upgrade from 2.0 and Later to the Current Version](#).

Considerations

- ▶ All server settings are preserved during the upgrade.
- ▶ All user information is preserved.
- ▶ All profiles and publish settings are preserved, but some concepts changed with version 2.0. Please log into the TechSmith Relay website as an administrator and review the online help.
- ▶ Job information (i.e. presentations) ARE NOT preserved.

- ▶ 1.0.x recorders do not work with a current server.
 - Presenters running on the Windows operating system are able to record and submit presentations, but they cannot upload to the server. The recorder appears offline and run as not connected to the server. Once presenters install the new version, any submitted presentations will then upload to the server.
 - Presenters running on Mac operating systems receive a message to download a new recorder, but there is a known bug that crashes the recorder when you click the button to download the upgrade. These presenters need to download and install the most recent recorder to do any further recording.
- ▶ When the user installs a current recorder and has jobs from version 1.0 pending on their computer, the 1.0 jobs are converted to current version jobs and submitted automatically. The titles and descriptions are preserved, but the user and profile ARE NOT preserved. The presentation is uploaded to the server using the Upload and Decide Later profile with a guest user that has the original presenter's email address. This allows the administrator to push through or delete the jobs, and it also allows the presenters to log in and see their old jobs.

A result of this is that jobs in a pending state (Needs Attention or Error) before upgrade are uploaded again. Depending on the server settings, the presenter and administrator may get an email saying a guest has uploaded a presentation on the presenter's behalf.

- ▶ All installations of TechSmith Relay (formerly Camtasia Relay) 1.0, 1.1, and 1.2 used the same encryption key. If you installed 2.0 as an upgrade to versions 1.0, 1.1, or 1.2 then your server/team uses this same key.

For security reasons, you may wish to change your server/team to use a random encryption key. You can accomplish this using the TechSmith Relay Configuration Protection Tool. You can find the instructions for using this tool in the **TechSmith Relay Server Security Administrator Guide**, found on the TechSmith website: <http://www.techsmith.com/tutorial-techsmith-relay-self-hosted-current.html>.

Upgrade from 2.0 and Later to the Current Version

All server settings, users, profiles, publish settings, and presentations are preserved during an upgrade.

We recommend that you backup your current database before starting any upgrade.

1. Log in to the TechSmith Relay website as an administrator.
2. Go to System > Servers.
3. Select each server and click **Take Server Offline**. This lets the servers continue to process all existing presentations but not accept any additional presentations.
4. When all encoding and publishing jobs have moved to Completed, click **Shutdown**.

Any presentations that are not completed are canceled. After Relay is upgraded and the server brought back online, all canceled jobs are automatically retried.

5. Run the installer and follow the instructions in the installer to complete the upgrade.
6. When the upgrade is complete, repeat the upgrade on all teamed servers. The upgrade process automatically restarts the servers.

You must upgrade all teamed servers to the same version.

While upgrading a server team, if you fail to upgrade a server in the team, it is possible to bring the server still running the older version online. If this happens, this server connects to the old version database and appears to be working correctly but it cannot interact with the upgraded current servers.

Upgrade Recorders

Following the upgrade of the server, you can notify the presenters that a new version of the TechSmith Relay recorder is available. Presenters are also notified through the recorder that there is a new version available for download and installation.

The recorder is available from the homepage after a presenter logs into the TechSmith Relay server.

To deploy the recorder in a Windows enterprise environment, the MSI file can be used. Log in to your TechSmith Relay website as an administrator and open the help for more information.

Presenters should close the TechSmith Relay recorder if it is open and then run the new recorder installer. The previous recorder is uninstalled and the new version is installed. They do not lose any saved recordings and any submitted recordings will upload after the upgrade.

For recorder clients downloaded from a 4.1.0 or later server, an upgrade notification is displayed in the toolbar of the recorder when a new version of the TechSmith Relay recorder is available.

Server Certificate Errors

By default, TechSmith Relay recorders fail to connect to a TechSmith Relay Server with an invalid server certificate.

If your organization is using a self-signed server certificate on the TechSmith Relay server, then you have the following options to allow recorders to connect to the server:

- ▶ Add the self-signed server certificate to client's trusted certificate stores
- ▶ If self-signed server certificate is added to a client's trusted certificate store, users on that client machine should be able to use a web browser to connect to the TechSmith Relay server website without having to click through a server certificate warning.
- ▶ Modify the recorder's configuration to ignore all server certificate errors
 - By default, the configuration option to Ignore Server Certificate Errors is not enabled.
 - If you need to allow TechSmith Relay recorders to connect to a server with an invalid server certificate, you must enable this option. When enabled, recorders ignore all server (SSL) certificate errors when connecting to the TechSmith Relay server.
 - When you change this option, TechSmith Relay's Manager Service must be restarted on all teamed servers for it to take effect. Any recorders installed before changing this option must be updated or they will fail to connect to the TechSmith Relay server.

Migrate TechSmith Relay to a New Server

The following procedures cover the three different scenarios for migration of TechSmith Relay components to a new server:

- ▶ [Migrate the TechSmith Relay Application and Database to a New Server](#)
- ▶ [Migrate Only the TechSmith Relay Database to a New Server](#)
- ▶ [Migrate Only the TechSmith Relay Application to a New Server](#)

Important Information

- ▶ These procedures are necessary only if you wish to maintain your TechSmith Relay database information moving forward. The database includes information such as users, profiles, publishing destinations, and historical presentation information.

If you do not wish to maintain this data and would rather start with a fresh installation on the new server, first deactivate your current server and then follow the process in the TechSmith Relay Installation Guide, which is available in the TechSmith Relay tutorials section: <http://www.techsmith.com/tutorial-techsmith-relay-self-hosted-current.html>

- ▶ These procedures require taking your TechSmith Relay server offline and then into a shutdown mode. It is recommended that you read through the whole procedure prior to actual migration. You should familiarize yourself with the procedures and understand how the procedure may impact presentation processing for TechSmith Relay presenters.
- ▶ Prior to using the procedures in this document, the following prerequisites must be met:
 - TechSmith Relay 2.0 (known as Camtasia Relay 2.0) or above installed on the current server.
If the version of Camtasia Relay is lower than 2.0, see [Upgrade from 1.x to the Current Version](#) for more information.
 - SQL Server Management Studio installed on a machine that can access the databases of both the current SQL server and the new server.
 - SQL Server installed with an instance called Relay installed on both servers.
It is recommended that you install SQL Server 2014 R2 Express Edition of SQL Server. To download the installer, go to <http://www.microsoft.com/sqlserver/2008/en/us/express.aspx>.
- ▶ If you have upgraded TechSmith Relay on your current server, you may have multiple databases, with different names, in your Relay SQL instance. Make sure you choose the most recent TechSmith Relay database. The names for the TechSmith Relay databases are:

TechSmith Relay Version	Database Name
2.0	Relay20

TechSmith Relay Version	Database Name
3.0.0	Relay300
3.0.1	Relay301
3.0.2	Relay302
3.0.3	Relay303
3.1.0	Relay310
4.0.0	Relay400
4.0.1	Relay401
4.0.2	Relay402
4.0.3	Relay403
4.1.0	Relay410
4.1.1	Relay411
4.1.2	Relay412
4.2.0	Relay420
4.2.1	Relay421
4.3.0	Relay430
4.4.0	Relay440
5.0.1	Relay501

Migrate the TechSmith Relay Application and Database to a New Server

1. Log in to the TechSmith Relay website as an administrator on the source (current) server.
2. Go to System > Servers. Click **Take Server Offline**.

The server continues to process all existing presentations but does not accept any additional presentations.

3. When all encoding and publishing jobs have moved to Completed, click **Shutdown**.

Any presentations that are not completed are canceled. (After the database is moved and the TechSmith Relay server is brought back online, all canceled jobs are automatically restarted.)

4. Go to System > Activation.
5. Click **Deactivate**.
6. Please back up the TechSmith Relay database using instructions found in [Back Up the Database](#).
7. Copy the database backup file to the target server.
8. Using the same path and name of the media directory on the source server, create a media directory on the target server.

The media directory location was set during the initial installation of TechSmith Relay.

The location of the media directory on the target server must be exactly the same as the source server. To find this information, open a web browser and go to `https://(RelayWebsiteName)/Relay/relayconfig.aspx`. The path is located in the `MediaDirectory` row.

9. Copy the contents of the media directory from the source server to the target server.
10. On the source server, navigate to `[install directory]/Utilities` and open the Configuration Protection Tool (`ConfigurationProtectionTool.exe`).
11. Click **Load Current Server Settings**.

Later in this procedure, you will need the SQL username and password for TechSmith Relay. If you do not already have this information, click the SQL Connection tab. The username and password are listed.

12. Go to the Import/Export tab.
13. Click **Export Settings to File** to export the server encryption settings.
14. Move the resulting XML file to the target server.
15. If you want currently installed TechSmith Relay recorders to be able to connect to the target server, the server must keep the same endpoint (often the Fully Qualified Domain Name) as the source server. If the endpoint is not kept the same, presenters must download and install new recorders from the target server in order to connect.

To keep the same endpoint on the target server, perform one of the following procedures:

- If the TechSmith Relay recorders address the server by host name only (e.g. `https://relay`):
 - Rename your source server to free the computer name. For information on how to do this, see <http://support.microsoft.com/kb/295017>.
 - Reboot the source server.
 - Change the target server to the original name of the source server.
 - Reboot the target server.
- If the TechSmith Relay recorders address the server by the fully-qualified domain name (e.g. `https://relay.university.edu`) and the server name is different than the DNS host

name:

- Name the target server as desired.
 - Modify the DNS record for the TechSmith Relay endpoint to point to the IP address of the target server.
 - If the TechSmith Relay recorders address the server by the fully-qualified domain name (e.g. `https://relay.university.edu`) and the server name matches the DNS host name:
 - Confirm that the TechSmith Relay endpoint DNS name is the result of dynamic DNS registration. Your Active Directory or DNS administrator should be able to provide this information.
 - Rename your source server to free the computer name. For information on how to do this, see <http://support.microsoft.com/kb/295017>.
 - Reboot the source server.
 - Change the target server to the original name of the source server.
 - Reboot the target server.
 - Verify that the DNS record for the Relay endpoint reflects the IP address of the target server.
16. Restore the database on the target server using the instructions found in [Restore the Camtasia Relay Database](#).
 17. In the Object Explorer pane of SQL Server Management Studio, go to Relay Database Instance > Security > Logins.
 18. Right-click Logins and select **New Login**.

The following assumes that `Relay` is used as the database user. If you chose to use a different database user during initial installation of TechSmith Relay, substitute that user name for the user named `Relay` in the following process.

19. Enter `Relay` (or your selected database user) for the Login name.
20. Enable the SQL Server authentication option and enter the same password used on the source server. (See tip in step 11.)
21. Disable the User must change password at next login option.
22. Right-click Logins and select **New Login**.
23. Enter `RelayCache` (use `RelayCache` even if you selected a different name for the database user) for the Login name.
24. Enable the SQL Server authentication option and enter the same password used on the source server.
25. Disable the User must change password at next login option.
26. Replacing `RelayDbName` with your TechSmith Relay database name, run the following query against the Relay instance on the target SQL server:

The following SQL statement assumes that `Relay` is used as the database user. If you chose to use a different database user during initial installation of TechSmith Relay, substitute that user name for the user named `Relay` in the following process.

```
USE RelayDbName

ALTER USER Relay WITH LOGIN = Relay

ALTER USER RelayCache WITH LOGIN = RelayCache

USE master

ALTER DATABASE RelayDbName SET SINGLE_USER WITH ROLLBACK
IMMEDIATE

ALTER DATABASE RelayDbName SET ENABLE_BROKER

ALTER DATABASE RelayDbName SET MULTI_USER
```

27. Run the TechSmith Relay installer on the target server, making sure to:
 - Select **Keep your existing database**.
 - Set the media directory the same as what it was on the source server.
 - Use the same Relay SQL user password as on the source server's database.
 - The TechSmith Relay website and manager service will not be able to access the database unless the Relay SQL password on the target server is the same password that was used on the source server's database.
28. Go to [install directory]/Utilities and open the Configuration Protection Tool (ConfigurationProtectionTool.exe).
29. Go to the Import/Export tab.
30. Click **Browse**, locate the XML file that you created on the source server, and then click **Open**.
31. Click the SQL Connection tab. Change the Data Source to the instance name (e.g. yours-
servername\Relay) on the target server.
32. Go to the Encryption tab.
33. Click **Install New Key**.
34. Log in to the server website as an administrator.
35. Go to System > Activation and enter your license key.
36. You can now uninstall TechSmith Relay from the source server.
37. If the target server was not updated to have the same endpoint as the source server (step 15), there is still an entry for the source server's endpoint in the database. Contact TechSmith Technical Support (<http://support.techsmith.com>) for assistance removing the source endpoint.

Migrate Only the TechSmith Relay Database to a New Server

1. Log in to the TechSmith Relay website as an administrator on the source (current) server.
2. Go to System > Servers. Click **Take Server Offline**.

The server continues to process all existing presentations but will not accept any additional presentations.

3. When all encoding and publishing jobs have moved to Completed, click **Shutdown**.

Any presentations that are not completed are canceled. (After the database is moved and the TechSmith Relay server is brought back online, all canceled jobs are automatically restarted.)

4. Please back up the TechSmith Relay database using instructions found in [Back Up the Database](#).
5. Copy the database backup file to the target (new) server.
6. Restore the database on the target server using the instructions found in [Restore the Camtasia Relay Database](#).
7. In the Object Explorer pane of SQL Server Management Studio, go to Relay Database Instance > Security > Logins.
8. Right-click Logins and select **New Login**.

The following assumes that `Relay` is used as the database user. If you chose to use a different database user during initial installation of TechSmith Relay, substitute that user name for the user named `Relay` in the following process.

9. Enter `Relay` (or your selected database user) for the Login name.
10. Enable the SQL Server authentication option and enter the same password used on the source server.
11. Disable the User must change password at next login option.
12. Right-click Logins and select **New Login**.
13. Enter `RelayCache` (use `RelayCache` even if you selected a different name for the database user) for the Login name.
14. Enable the SQL Server authentication option and enter the same password used on the source server.
15. Disable the User must change password at next login option.
16. Replacing `RelayDbName` with your TechSmith Relay database name, run the following query against the Relay instance on the target SQL server:

The following SQL statement assumes that `Relay` is used as the database user. If you chose to use a different database user during initial installation of TechSmith Relay, substitute that user name for the user named `Relay` in the following process.

```
USE RelayDbName

ALTER USER Relay WITH LOGIN = Relay

ALTER USER RelayCache WITH LOGIN = RelayCache

USE master

ALTER DATABASE RelayDbName SET SINGLE_USER WITH ROLLBACK
IMMEDIATE

ALTER DATABASE RelayDbName SET ENABLE_BROKER
```

```
ALTER DATABASE RelayDbName SET MULTI_USER
```

17. Uninstall the TechSmith Relay server software on the server. This allows a reinstall while pointing to a different database server.
18. Run the TechSmith Relay installer on the server, making sure to:
 - Select the Advanced installation option.
 - When prompted for a SQL Server Connection, specify the target database server name (`TargetServerName\Relay`) as the SQL Server name.
 - Select **Keep your existing database**.
 - Set the media directory to the same directory that it was before the uninstall.
 - Use the same Relay SQL user password as on the source server's database.
 - The TechSmith Relay website and manager service will not be able to access the database unless the Relay SQL password on the target server is the same password that was used on the source server's database.
19. Log in to the server website as an administrator.

Migrate Only the TechSmith Relay Application to a New Server

It is recommended that you let all existing presentations finish processing before performing the migration. To do this you must first take the server offline, which prevents it from further accepting presentation uploads, and then lets it process those presentations. Instructions for performing those functions are listed below.

1. Log in to the TechSmith Relay website as an administrator on the source (current) server.
2. Go to System > Servers. Click **Take Server Offline**.

The server continues to process all existing presentations but will not accept any additional presentations.

3. When all encoding and publishing jobs have moved to Completed, click **Shutdown**.

Any presentations that are not completed are canceled. (After the database is moved and the TechSmith Relay server is brought back online, all canceled jobs are automatically restarted.)

4. Go to System > Activation.
5. Click **Deactivate**.
6. Using the same path and name of the media directory on the source server, create a media directory on the target server.

The media directory location was set during the initial installation of TechSmith Relay.

The location of the media directory on the target server must be exactly the same as the source server. To find this information, go to `yourservername/Relay/relayconfig.aspx`. The path is located in the MediaDirectory

row.

7. Copy the contents of the media directory from the source server to the target server.
8. On the source server, navigate to `[install directory]/Manager` and open the Configuration Protection Tool (`ConfigurationProtectionTool.exe`).
9. Click **Load Current Server Setting**.
10. Go to the Import/Export tab.
11. Click **Export Settings to File** to export the server encryption settings.
12. Move the resulting XML file to the target server.
13. If you want currently installed TechSmith Relay recorders to be able to connect to the target server, the server must keep the same endpoint (often the Fully Qualified Domain Name) as the source server. If the endpoint is not kept the same, presenters must download and install new recorders from the target server in order to connect.

To keep the same endpoint on the target server, perform one of the following procedures:

- If the TechSmith Relay recorders address the server by host name only (e.g. `https://relay`):
 - Rename your source server to free the computer name. For information on how to do this, see <http://support.microsoft.com/kb/295017>.
 - Reboot the source server.
 - Change the target server to the original name of the source server.
 - Reboot the target server.
- If the TechSmith Relay recorders address the server by the fully-qualified domain name (e.g. `https://relay.university.edu`) and the server name is different than the DNS host name:
 - Name the target server as desired.
 - Modify the DNS record for the TechSmith Relay endpoint to point to the IP address of the target server.
- If the TechSmith Relay recorders address the server by the fully-qualified domain name (e.g. `https://relay.university.edu`) and the server name matches the DNS host name:
 - Confirm that the TechSmith Relay endpoint DNS name is the result of dynamic DNS registration. Your Active Directory or DNS administrator should be able to provide this information.
 - Rename your source server to free the computer name. For information on how to do this, see <http://support.microsoft.com/kb/295017>.
 - Reboot the source server.
 - Change the target server to the original name of the source server.
 - Reboot the target server.

- Verify that the DNS record for the TechSmith Relay endpoint reflects the IP address of the target server.
14. Run the TechSmith Relay installer on the target server, making sure to:
 - Change the SQL Server name listed to the database server of your installation when prompted for a SQL Server Connection.
 - Select **Keep your existing database**.
 - Set the media directory the same as what it was on the source server.
 - Use the same Relay SQL user password as on the source server's database.

The TechSmith Relay website and manager service will not be able to access the database unless the Relay SQL password on the target server is the same password that was used on the source server's database.
 15. Go to `[install directory]/Manager` and launch the Configuration Protection Tool.
 16. Go to the Import/Export tab.
 17. Click **Browse**, locate the XML file that you created on the source server, and click **Open**.
 18. Go to the SQL Connection tab. Change the Data Source to the instance name (e.g. `yours-
servername\Relay`) on the target server.
 19. Go to the Encryption tab.
 20. Click **Install New Key**.
 21. Log in to the server website as an administrator.
 22. Go to System > Activation and enter your license key.
 23. You can now uninstall TechSmith Relay from the source server.
 24. If the target server was not updated to have the same endpoint as the source server (step 15), there is still an entry for the source server's endpoint in the database. Contact TechSmith Technical Support (<http://support.techsmith.com>) for assistance removing the source endpoint.

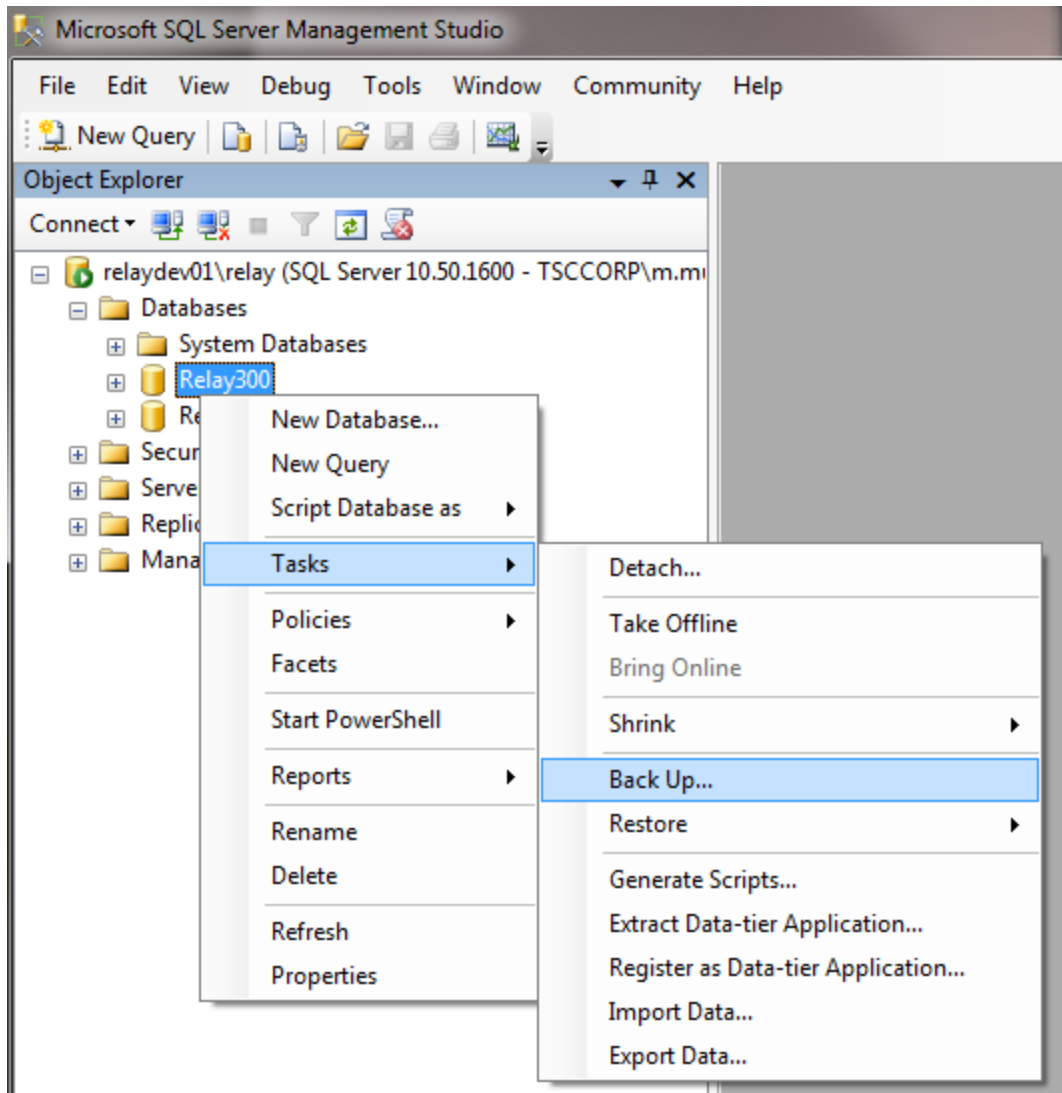
Back Up the Database

The following procedure covers how to back up the TechSmith Relay database using SQL Server Management Studio. For additional information and other ways to perform a backup, see the following:

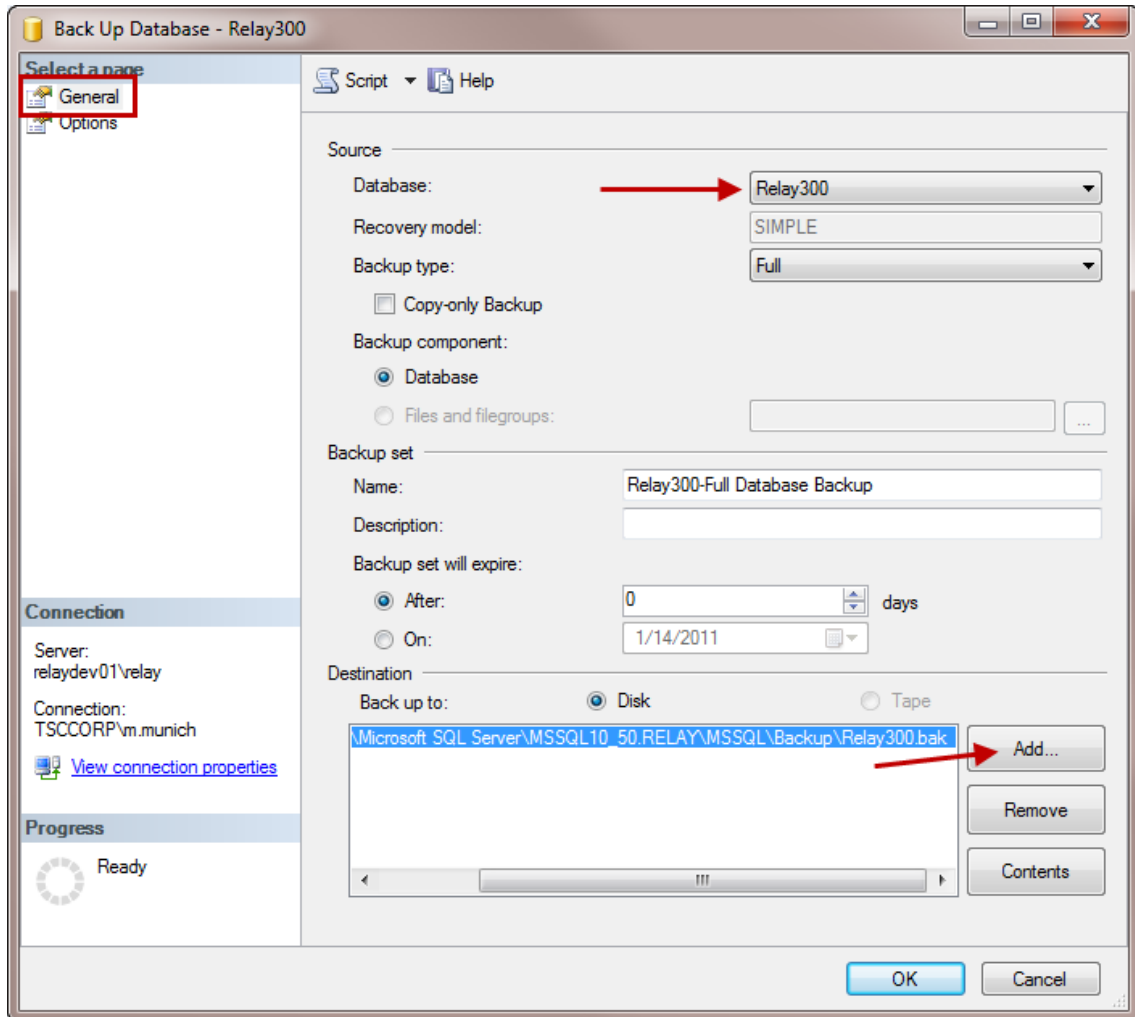
- ▶ TechSmith Relay Technical Reference Guide (available in the TechSmith Relay Tutorials section: <http://www.techsmith.com/tutorial-techsmith-relay-self-hosted-current.html>)
- ▶ How to: Back Up a Database (SQL Server Management Studio): [https://msdn.microsoft.com/en-us/library/ms187510\(v=sql.110\).aspx](https://msdn.microsoft.com/en-us/library/ms187510(v=sql.110).aspx)

This procedure can be performed locally on the database server or from a remote management workstation with SQL Server Management Studio installed if remote access to the database server has been allowed. However, disk locations denoted in the backup procedure will always be local to the database server.

1. Right-click the database to back up and select Tasks > Back Up.

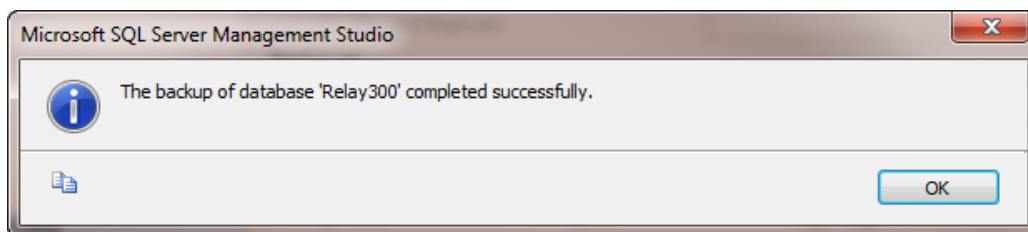


2. On the General tab, select backup type Full and set a location on disk for the backup file.



3. Choose to back up to an existing backup set or to append to a new backup set. Selecting Verify backup when completed is recommended. Then, click **OK**.

The backup is complete.



Restore the Camtasia Relay Database

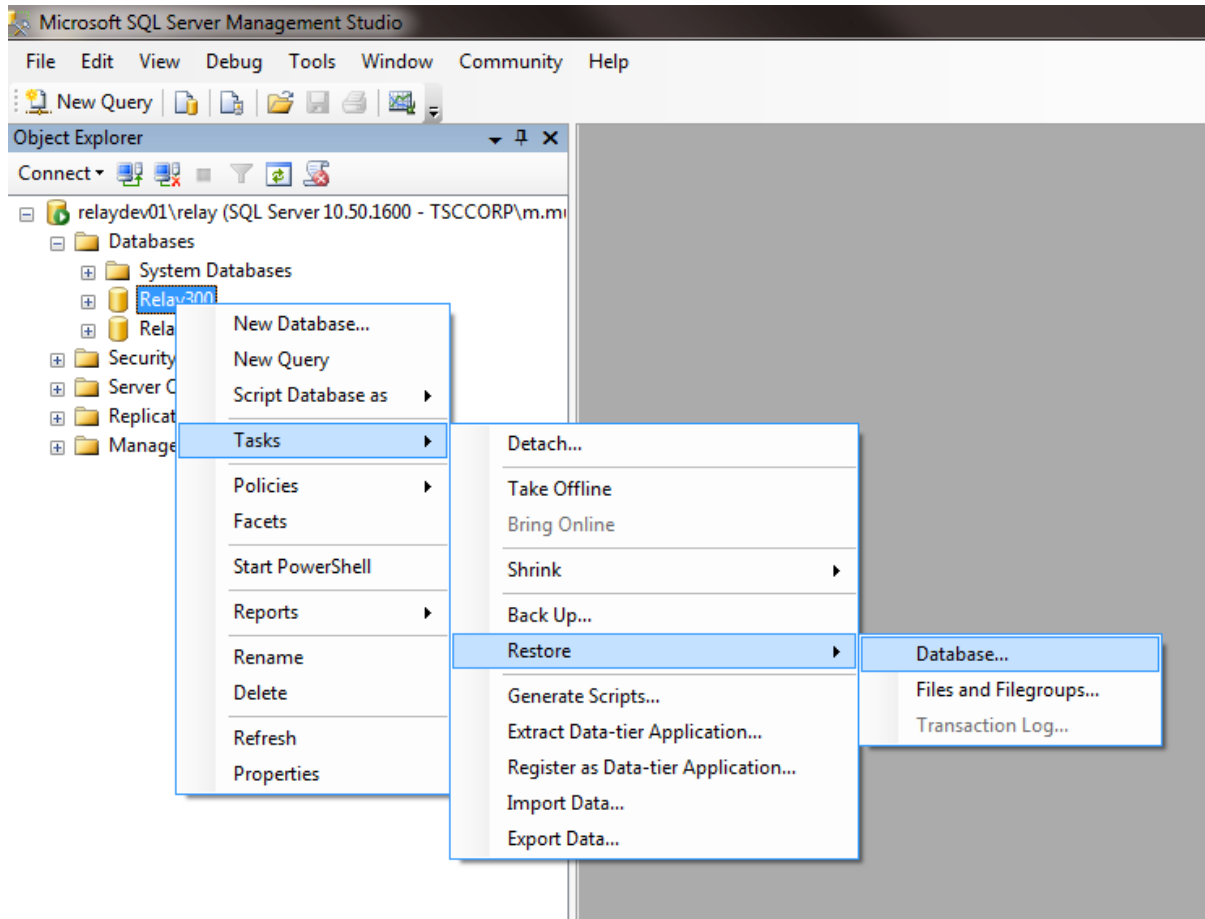
The following procedure covers how to restore the TechSmith Relay database using SQL Server Management Studio. For additional information and other ways to perform a backup, see the following:

- TechSmith Relay Technical Reference Guide (available on TechSmith.com: <http://www.tech-smith.com/tutorial-techsmith-relay-self-hosted-current.html>)

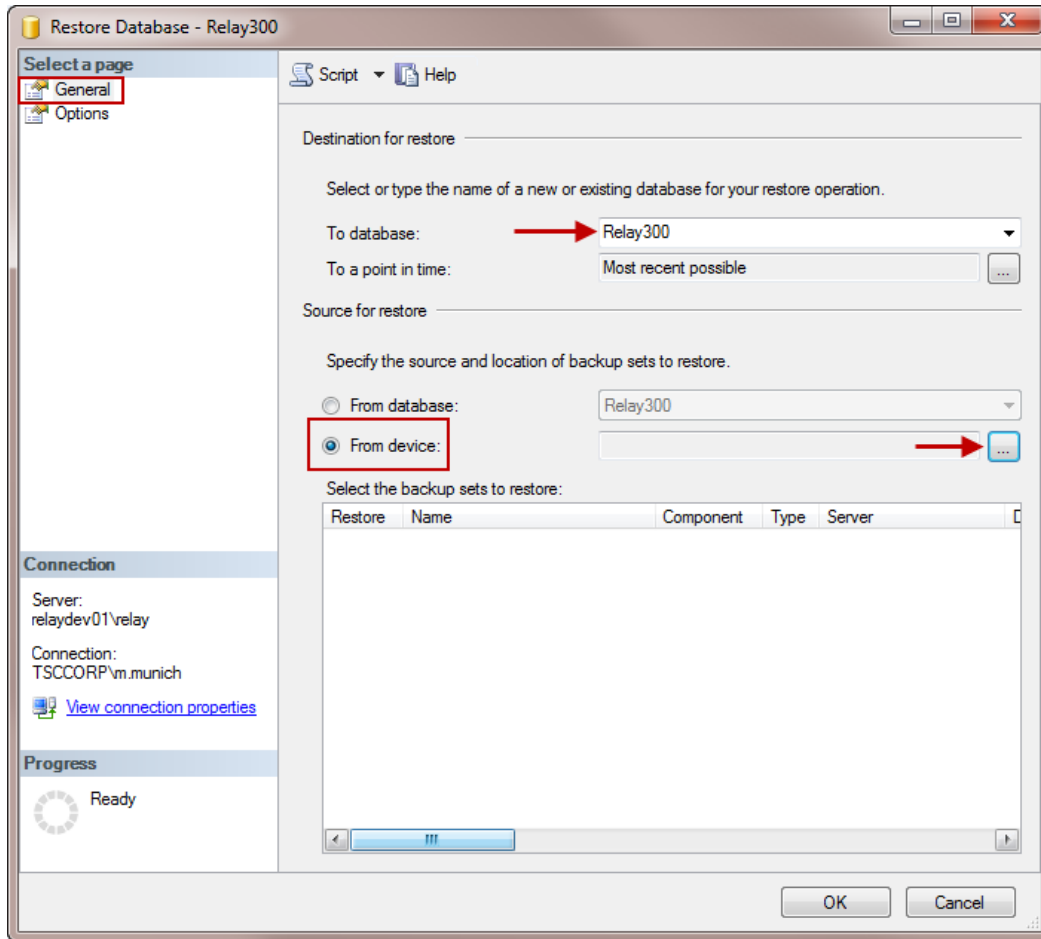
- ▶ How to: Restore a Database Backup (SQL Server Management Studio): <http://msdn.microsoft.com/en-us/library/ms177429.aspx>

To restore a database backup file using SQL Server Management Studio:

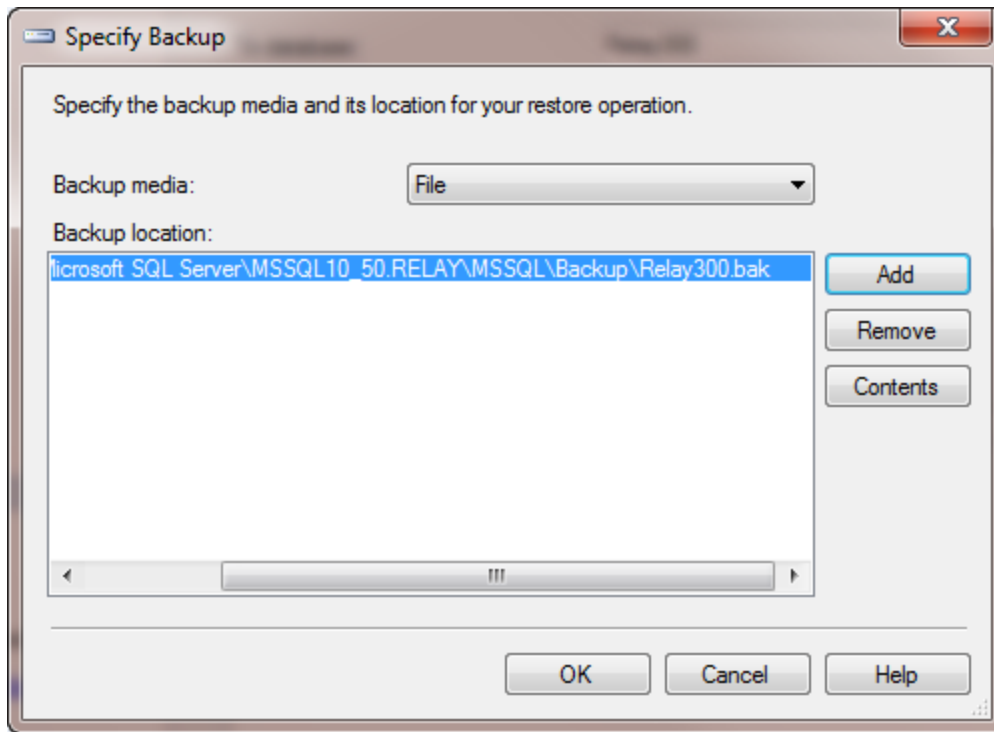
1. Place the backup file in a folder on the database server that can be locally accessed by SQL Server.
2. Open SQL Server Management Studio.
3. Right-click the existing database or Databases (if restoring to a new database) and select Tasks > Restore > Database.



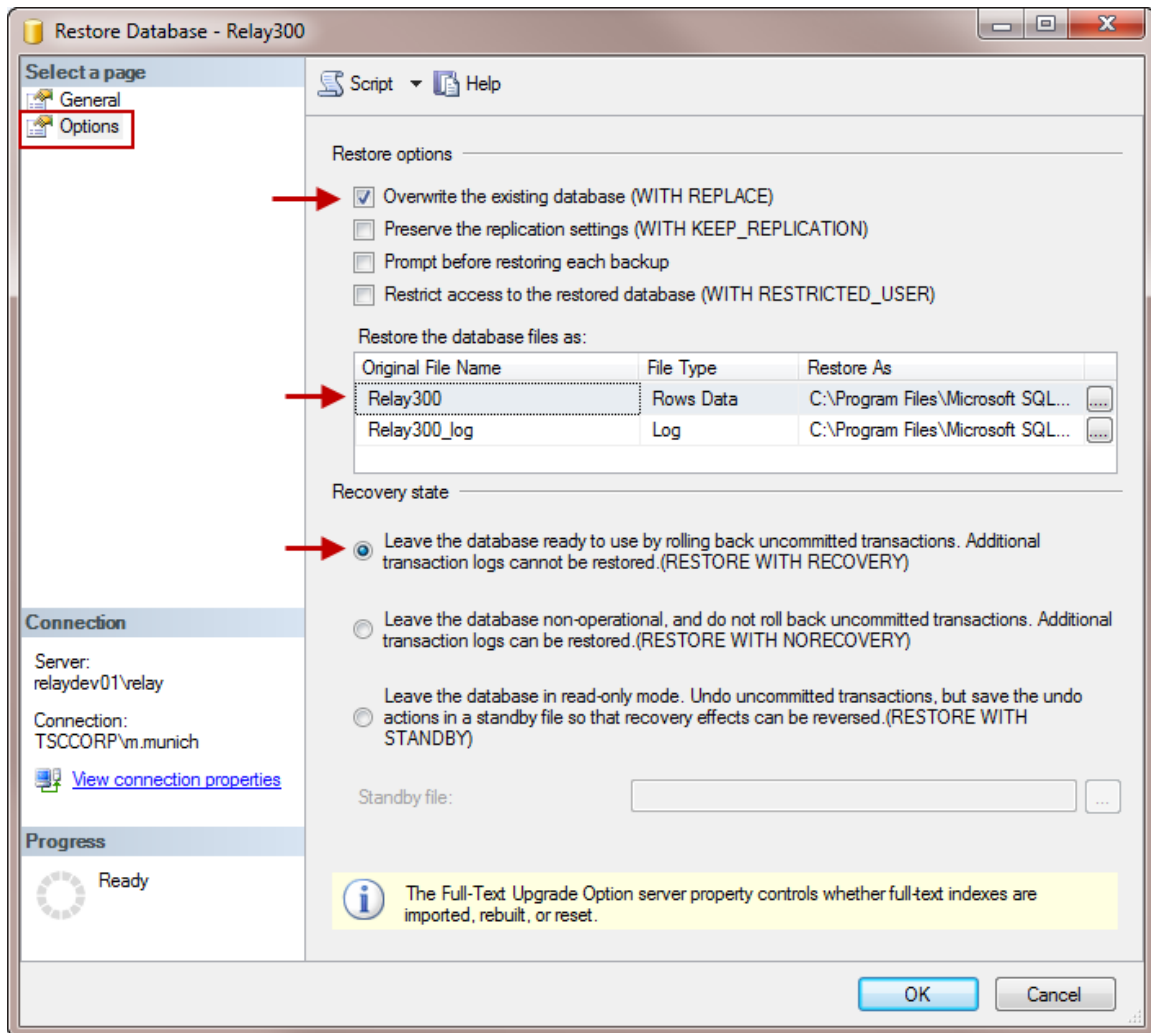
4. Set the database name to restore. Select From Device and click ... to select the backup file.



5. Click Add to select the location of your database backup file. Click OK.



6. Set Restore options to overwrite the database (if applicable), restore files to correct path, and Leave the database ready to use. Click OK.



The database is now restored.

