



BeyondTrust

Privileged Remote Access Upgrade Guide

Table of Contents

Upgrade the BeyondTrust Privileged Remote Access Software	3
Upgrade Preparation	3
Client Upgrades	3
Upgrade a Single B Series Appliance with Automatic Updates	5
Upgrade a BeyondTrust Appliance B Series Single with Manual Updates	6
Upgrade Two B Series Appliances in a Failover Configuration	7
Considerations	7
Synchronous Upgrade of Two B Series Appliances in a Failover Relationship	8
Backup and Sync	8
Update Appliance A	8
Verify and Test	9
Update Appliance B	10
Reestablish Failover Relationship	10
Asynchronous Upgrade of Two B Series Appliances in a Failover Relationship	11
Backup and Sync	11
Update Appliance B	11
Verify and Test	12
Make Appliance B the Primary B Series Appliance	13
Update Appliance A	14
Reestablish Failover Relationship	14
Upgrade the BeyondTrust Hardware	15
Disclaimers, Licensing Restrictions and Tech Support	17
Disclaimers	17
Licensing Restrictions	17
Tech Support	17

Upgrade the BeyondTrust Privileged Remote Access Software

Please visit the [Release Notes](#) to get the details of each release of BeyondTrust Privileged Remote Access software.

Upgrade Preparation

- Prior to upgrading, always create a backup of your settings and configuration from **/login > Management > Software**. As a best practice, also export a copy of your SSL certificates and private key, and save them locally to ensure continuity in case of a failure on the upgrade.
- For major software releases, customers with current maintenance contracts are placed into a rollout schedule. Once your upgrade is ready, BeyondTrust will alert you via email to begin this upgrade procedure.
- Installation usually takes between 15 minutes to an hour. However, if you are storing a large amount of data on your B Series Appliance (e.g., session recordings), the installation could take significantly longer.
- BeyondTrust recommends performing upgrades during scheduled maintenance windows. Your BeyondTrust site will be temporarily unavailable during the upgrade. All logged in users and active sessions will be terminated.
- BeyondTrust also recommends testing the update in a controlled environment prior to deploying into production. Testing can best be performed when you have two B Series Appliances in a failover relationship and when you update asynchronously. (See "[Verify and Test](#)" on page 12).
- If you experience any issues during the Base update, do not restart the B Series Appliance. Please contact BeyondTrust Technical Support.
- If you have two B Series Appliances set up in a failover configuration, consider whether you want to update synchronously or asynchronously.
 - With synchronous updating, the primary B Series Appliance is updated first and maintains its role as primary. This method does involve some downtime; it is recommended for simple deployments and scenarios that will not suffer from being offline during the update.
 - With asynchronous updating, the backup B Series Appliance is updated first and then assumes the role of primary. This method has minimal downtime; it is recommended for larger deployments and scenarios that rely on maintaining solid uptime. Some complexity is involved, as the network may have to be modified in order to fail over to the backup B Series Appliance.

Client Upgrades

Only certain upgrades require client software to update. Base software updates and license add-ons do not require client software updates. Site version updates do require client updates, however. Most client updates occur automatically, but the expected update procedure for each type of client is reviewed below.

- Your installed access consoles will need to be upgraded after the site upgrades. Typically, this occurs automatically the next time the user run the access console.



IMPORTANT!

When upgrading to a newly built site software package, verify that all certificate stores are managed appropriately and are up-to-date prior to upgrading to a new BeyondTrust version. Failure to do so may cause a majority of your existing Jump Clients

to appear offline.

- Access consoles previously deployed on locked-down computers using [MSI](#) may need to be re-deployed once the upgrade is complete.
- If the extractable access console or extractable Jump Client feature has been enabled for your site by BeyondTrust Technical Support, then you can download an MSI installer to update access consoles and/or Jump Clients prior to upgrading the B Series Appliance. To do this, check for the new update either manually or automatically. Note that the updated clients will not come online until their B Series Appliance is updated. It is not necessary to uninstall the original client prior to deploying the new one, as the new one should automatically replace the original installation. It is a best practice, however, to keep a copy of the old MSI to remove the outdated installations after the B Series Appliance is updated should this removal prove necessary. The new MSI is unable to do so.
- After an upgrade, deployed Jump Clients automatically update.
 - If large numbers of Jump Clients attempt to update simultaneously, they may flood the B Series Appliance, severely crippling performance both on the B Series Appliance and the network, depending on the available bandwidth and hardware. To regulate the amount of bandwidth and resources consumed by Jump Client updates, go to **/login > Jump > Jump Clients** and set the **Maximum Number of Concurrent Jump Client Upgrades** to a lower number.
 - Jump Clients queue for update upon their first check-in with the B Series Appliance subsequent to the B Series Appliance's update. These check-in events occur at regular intervals outbound from the Jump Client host over TCP port 443 to the B Series Appliance. Jump Clients check in immediately after an upgrade is complete on the B Series Appliance.
 - If a Jump Client has not yet been updated, it is labeled as **Upgrade Pending**, and its version and revision number appear in the details pane. While you can modify an outdated Jump Client, you cannot Jump to it. Attempting a Jump does, however, move that Jump Client to the front of the upgrade queue.
- After an upgrade, deployed Jumpoints should automatically update.

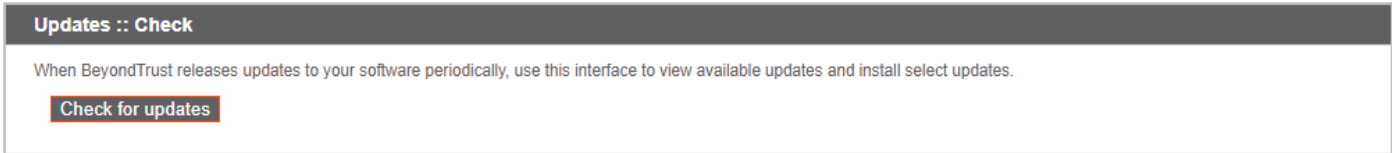


Note: When upgrading to a new software version, please allow some time for all Jump Clients to come back online before moving forward with any other upgrading processes.

- BeyondTrust Connection Agents will update automatically after the site upgrades.
- BeyondTrust Integration Clients will not automatically update after the site upgrades. Integration Clients will need to be re-installed manually. Integration Client installers are available from the **Downloads** page of beyondtrustcorp.service-now.com/csm.
- Upon upgrading, it is strongly recommended to regenerate any installer packages previously created for Jump Clients and access consoles. The clients themselves will update as described above.

Upgrade a Single B Series Appliance with Automatic Updates

In most cases, BeyondTrust customers can download and install updates with no assistance from BeyondTrust Technical Support. To see if an upgrade is available, log in to your BeyondTrust Appliance B Series (/appliance). On the **Updates** page, click on **Check for updates**.



If a software update is available, it will appear under **Available Updates**. Once you click **Install This Update**, the B Series Appliance will download and automatically install the new version of the BeyondTrust software.



IMPORTANT!

When upgrading to a newly built site software package, verify that all certificate stores are managed appropriately and are up-to-date prior to upgrading to a new BeyondTrust version. Failure to do so may cause a majority of your existing Jump Clients to appear offline.



Note: Some packages require another package to be installed first. Install the available package to enable the dependent one.

If you are still unable to perform automatic updates, please see "[Upgrade a BeyondTrust Appliance B Series Single with Manual Updates](#)" on page 6.

Upgrade a BeyondTrust Appliance B Series Single with Manual Updates

If you are unable to use automatic updates (e.g., if your B Series Appliance exists on a restricted network), you may perform manual updates.

Log into your BeyondTrust Appliance B Series and go to the **Updates** page. Click the **Appliance Download Key** link to generate a unique B Series Appliance key. From a non-restricted system, submit this key to BeyondTrust's update server at <https://btupdate.com>. Download any available updates to a removable storage device and then transfer those updates to a system from which you can manage your B Series Appliance.

From the **Updates** page, browse to the file from the **Manual Installation** section and then click the **Update Software** button to complete the installation. The B Series Appliance will install the new version of the BeyondTrust software.



IMPORTANT!

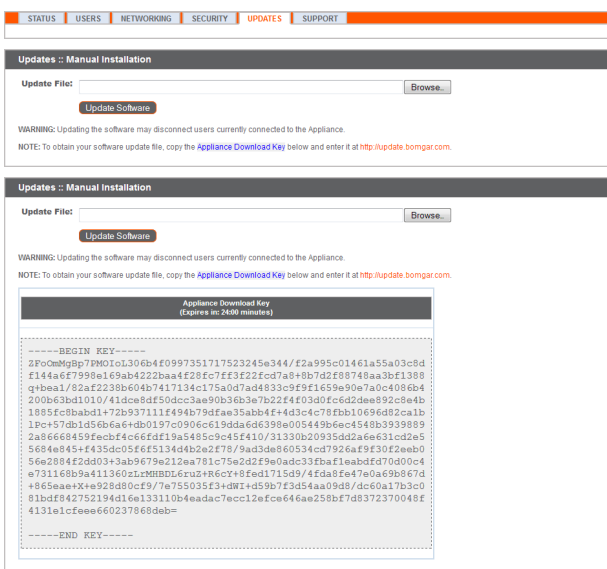
When upgrading to a newly built site software package, verify that all certificate stores are managed appropriately and are up-to-date prior to upgrading to a new BeyondTrust version. Failure to do so may cause a majority of your existing Jump Clients to appear offline.



Note: Be prepared to install software updates directly after download. Once an update has been downloaded, it no longer appears in your list of available updates. Should you need to re-download an update, contact BeyondTrust Technical Support.



Note: If you receive an error, please make sure the time listed on the **/appliance > Status > Basics** page is correct. Many functions of the B Series Appliance, including the Appliance Download Key, rely on this time being correct. If the time is not correct, please check the NTP setting on the **Networking > IP Configuration** page.



STATUS | USERS | NETWORKING | SECURITY | UPDATES | SUPPORT

Updates :: Manual Installation

Update File:

WARNING: Updating the software may disconnect users currently connected to the Appliance.

NOTE: To obtain your software update file, copy the [Appliance Download Key](#) below and enter it at <http://update.bomgar.com>.

Updates :: Manual Installation

Update File:

WARNING: Updating the software may disconnect users currently connected to the Appliance.

NOTE: To obtain your software update file, copy the [Appliance Download Key](#) below and enter it at <http://update.bomgar.com>.

Appliance Download Key
(Expires in: 2400 minutes)

```

-----BEGIN KEY-----
2Pocm9Bp7Pm0toL306b4f0997351717523245e344/f2a995c01461a55a03c8d
f144a6f7998e169ab4222baa4f28fc7ff3f22fcd7a8+8b7d2f88748aa3b1388
q+bea1/82af2238b604b7417134c175a0d7ad4833c9f9f1659e90e7a0c4086b4
200b63bd1010/41dce8df50dccc3ae90b363e7b22f4f03d0fcc6d2de892c8e4b
1895fcbabd1+72b37111494b79dfae35abb4e+4d3c4c7f8b10696d82ca1b
1Pc+57db1d56b6a+db0197c0906c615dda6d6398e005449b6ec4548b393989
2a86668459fecbf4c666fd19a5485c9c45f410/31330b20935dd2a6e631cd2e5
568e845+f435dc05f6f5134d4b2e2f78/9ad3d8860534cd7926af9f30f2eeb0
56e284f22d03+3ab9679e212ea781c75e2d259e0ac33EbaflEaebdEd70d00c4
e7311689a411360a1rMHHDL6ru2+86cY+8fed1715d9/4fda8fa7e0a69b67d
+865eae+Xe928d80cf9/7e755035f3+dWt+d59b7f3d54aa09d8/dc60a17b3c0
81bdf842752194d1e133110b4eadac7ecc12efce646ae258bf7d8372370048f
4131e1cfeee660237868deb=
-----END KEY-----

```

Upgrade Two B Series Appliances in a Failover Configuration

IMPORTANT!

BeyondTrust recommends scheduling maintenance windows during low traffic hours.

There are two alternatives for upgrading in a failover environment: synchronous upgrade and asynchronous upgrade.

Synchronous Upgrade of Two B Series Appliances in a Failover Relationship

With synchronous updating, the primary B Series Appliance is updated first and maintains its role as primary. This method does involve some downtime; it is recommended for simple deployments and scenarios that will not suffer from being offline during the update.

- **Benefit:** No failover event.
- **Drawback:** Longer production site downtime.

Asynchronous Upgrade of Two B Series Appliances in a Failover Relationship

With asynchronous updating, the backup B Series Appliance is updated first and then assumes the role of primary. This method has minimal downtime; it is recommended for larger deployments and scenarios that rely on maintaining solid uptime. Some complexity is involved, as the network may have to be modified in order to fail over to the backup B Series Appliance.

- **Benefit:** Minimal production down time.
- **Drawback:** Requires failover activity.

Considerations

1. Select the failover upgrade alternative that best fits your downtime and continuity needs.
2. Schedule two separate maintenance windows in which to complete the upgrade.
3. Expect the upgrade process to take the same amount of time on both B Series Appliances.
4. Plan an interim period between the two maintenance windows adequate enough to confirm the new software version in your production environment but brief enough to minimize the exposure of temporarily not having a failover configuration.

Synchronous Upgrade of Two B Series Appliances in a Failover Relationship

With synchronous updating, the primary B Series Appliance is updated first and maintains its role as primary. This method does involve some downtime; it is recommended for simple deployments and scenarios that will not suffer from being offline during the update.

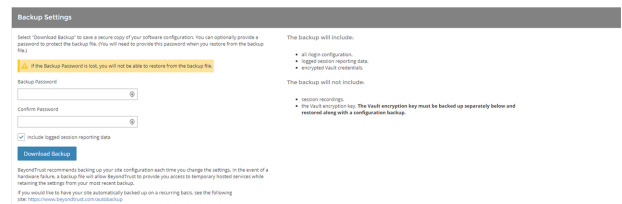
BeyondTrust recommends performing upgrades during scheduled maintenance windows. Your BeyondTrust site will be temporarily unavailable during the upgrade. All logged in users and active sessions will be terminated. You will need to schedule two separate maintenance windows in which to complete the upgrade. Installation usually takes between 15 minutes to an hour. However, if you are storing a large amount of data on your B Series Appliance (e.g., session recordings), the installation could take significantly longer. Plan an interim period between the two maintenance windows adequate enough to confirm the new software version in your production environment but brief enough to minimize the exposure of temporarily not having a failover configuration. BeyondTrust also recommends testing the update in a controlled environment prior to deploying into production. If you experience any issues during the Base update, do not restart the B Series Appliance. Please contact BeyondTrust Technical Support.

In these instructions, **Appliance A** is the primary B Series Appliance (i.e., the B Series Appliance to which the primary hostname resolves), while **Appliance B** is the backup B Series Appliance.

Backup and Sync

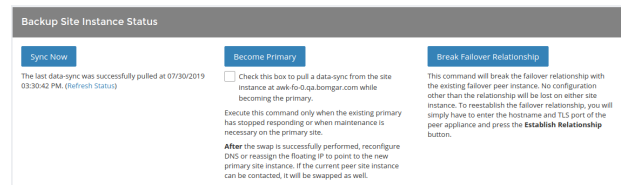
Prior to upgrading, make a backup of your current BeyondTrust software settings. On **Appliance A**, go to **/login > Management > Software**.

Click the **Download Backup** button, and save the backup file to a secure location.



Go to **/login > Management > Failover**, click **Sync Now**, and wait for synchronization to complete.

Once synchronization has finished, click **Break Failover Relationships**.



Update Appliance A

Update **Appliance A** using either the automatic or the manual update method.


Automatic

In most cases, BeyondTrust customers can download and install updates with no assistance from BeyondTrust Technical Support. To see if an upgrade is available, go to **/appliance > Updates**.



Click on **Check for updates**.

If a software update is available, it will appear under **Available Updates**. Once you click **Install This Update**, the B Series Appliance will download and automatically install the new version of the BeyondTrust software.



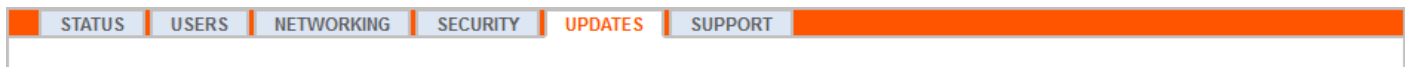
Note: "BeyondTrust" software updates often depend on one or more "Base Software" updates. Install the available Base Software updates to enable the dependent BeyondTrust updates. Then download a backup and immediately install the BeyondTrust software updates before doing anything else, such as failing over or installing updates on another B Series Appliance.

If automatic updates fail when expected to work, please see the [Support Portal](#) for more information.

Manual


If you are unable to use automatic updates (e.g., if your B Series Appliance exists on a restricted network), you may perform manual updates.

Go to **/appliance > Updates**.

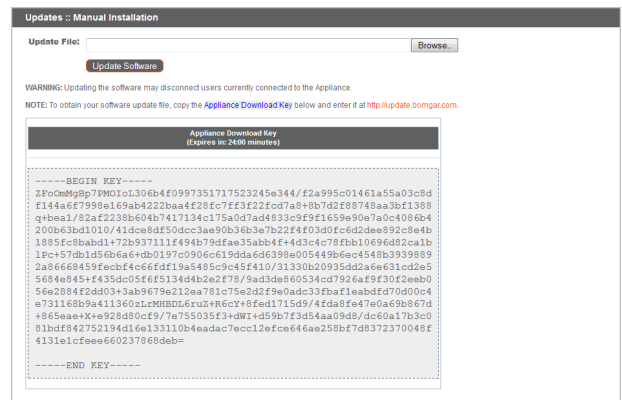
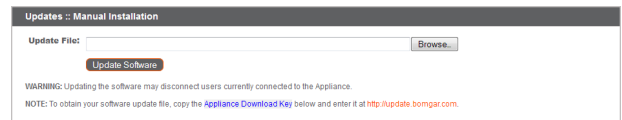


Click the **Appliance Download Key** link to generate a unique B Series Appliance key. From a non-restricted system, submit this key to BeyondTrust's update server at <https://btupdate.com>. Download any available updates to a removable storage device and then transfer those updates to a system from which you can manage your B Series Appliance.

From the **Updates** page, browse to the file from the **Manual Installation** section and then click the **Update Software** button to complete the installation. The B Series Appliance will install the new version of the BeyondTrust software.



Note: Be prepared to install software updates directly after download. Once an update has been downloaded, it no longer appears in your list of available updates. Should you need to re-download an update, contact BeyondTrust Technical Support.



Verify and Test

After completing the upgrade process, verify that the update completed successfully and that your software is working as expected. Your installed access consoles will need to be upgraded after the site upgrades. Typically, this occurs automatically the next time the user run the access console. To check the software build that a console is running, log into the console and then click **Help > About**. Also be sure that you can make a connection to a remote computer via a session.



Note: Access consoles previously deployed on locked-down computers using MSI may need to be re-deployed once the upgrade is complete. If the extractable access console or extractable Jump Client feature has been enabled for your site by BeyondTrust Technical Support, then you can download an MSI installer to update access consoles and/or Jump Clients prior to upgrading the B Series Appliance. To do this, check for the new update either manually or automatically. Note that the updated clients will not come online until their B Series Appliance is updated. It is not necessary to uninstall the original client prior to deploying the new one, as the new one should automatically replace the original installation. It is a best practice, however, to keep a copy of the old MSI to remove the outdated installations after the B Series Appliance is updated should this removal prove necessary. The new MSI is unable to do so.

Update Appliance B

Update **Appliance B** using either the automatic or the manual update method as defined above. Then verify and test that the update completed successfully.

Reestablish Failover Relationship

From **Appliance A**, go to `/login > Management > Failover`.



Note: To configure a valid connection, both B Series Appliances must have identical Inter-Appliance keys. See the `/login > Management > Security` page to verify the key for each B Series Appliance.

Reestablish the failover relationship with the backup B Series Appliance, using **Appliance B** as the backup and keeping **Appliance A** as the primary.

Establishing the relationship between the two B Series Appliances occurs on the **Failover** page of the B Series Appliance intended to be the primary B Series Appliance. The addresses that are entered here will establish the relationship and allow either B Series Appliance to connect to each other at any time. The **New Backup Site Connection Details** tell the primary B Series Appliance how to connect to the B Series Appliance that will become the backup B Series Appliance. The **Reverse Connection Details to this Primary Site** are given to the backup B Series Appliance and tell it how to connect back to this primary B Series Appliance. You must use a valid hostname or IP address and TLS port number for these fields. When all of these fields are set, click the **Establish Relationship** button to attempt to establish the relationship.



Note: Whenever possible, BeyondTrust recommends using the unique IP address of each B Series Appliance when configuring these settings.

Once the relationship has been established, extraneous tabs are removed from the backup site. It takes about 60 seconds for the first data synchronization to initiate, but you may also click the **Sync Now** button to force synchronization and pull the most current information from the primary B Series Appliance into the memory of the backup B Series Appliance. Synchronization itself may take anywhere from a few seconds to a few hours, depending on the amount of data that needs to be synchronized. The **Failover** page lists the last date and time of data synchronization when synchronization is completed.

Asynchronous Upgrade of Two B Series Appliances in a Failover Relationship

With asynchronous updating, the backup B Series Appliance is updated first and then assumes the role of primary. This method has minimal downtime; it is recommended for larger deployments and scenarios that rely on maintaining solid uptime. Some complexity is involved, as the network may have to be modified in order to fail over to the backup B Series Appliance.

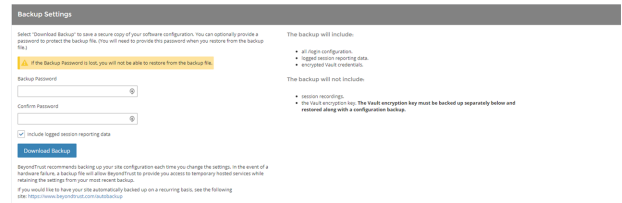
BeyondTrust recommends performing upgrades during scheduled maintenance windows. Your BeyondTrust site will be temporarily unavailable during the upgrade. All logged in users and active sessions will be terminated. You will need to schedule two separate maintenance windows in which to complete the upgrade. Installation usually takes between 15 minutes to an hour. However, if you are storing a large amount of data on your B Series Appliance (e.g., session recordings), the installation could take significantly longer. Plan an interim period between the two maintenance windows adequate enough to confirm the new software version in your production environment but brief enough to minimize the exposure of temporarily not having a failover configuration. BeyondTrust also recommends testing the update in a controlled environment prior to deploying into production. If you experience any issues during the Base update, do not restart the B Series Appliance. Please contact BeyondTrust Technical Support.

In these instructions, **Appliance A** is the primary B Series Appliance (i.e., the B Series Appliance to which the primary hostname resolves), while **Appliance B** is the backup B Series Appliance.

Backup and Sync

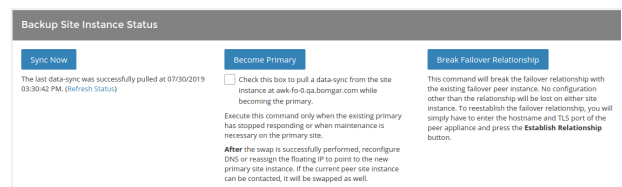
Prior to upgrading, make a backup of your current BeyondTrust software settings. On **Appliance A**, go to **/login > Management > Software**.

Click the **Download Backup** button, and save the backup file to a secure location.



Go to **/login > Management > Failover**, click **Sync Now**, and wait for synchronization to complete.

Once synchronization has finished, click **Break Failover Relationships**.



Update Appliance B

Update **Appliance B** using either the automatic or the manual update method.


Automatic

In most cases, BeyondTrust customers can download and install updates with no assistance from BeyondTrust Technical Support. To see if an upgrade is available, go to **/appliance > Updates**.



Click on **Check for updates**.

If a software update is available, it will appear under **Available Updates**. Once you click **Install This Update**, the B Series Appliance will download and automatically install the new version of the BeyondTrust software.



Note: "BeyondTrust" software updates often depend on one or more "Base Software" updates. Install the available Base Software updates to enable the dependent BeyondTrust updates. Then download a backup and immediately install the BeyondTrust software updates before doing anything else, such as failing over or installing updates on another B Series Appliance.

If automatic updates fail when expected to work, please see the [Support Portal](#) for more information.

Manual


If you are unable to use automatic updates (e.g., if your B Series Appliance exists on a restricted network), you may perform manual updates.

Go to **/appliance > Updates**.

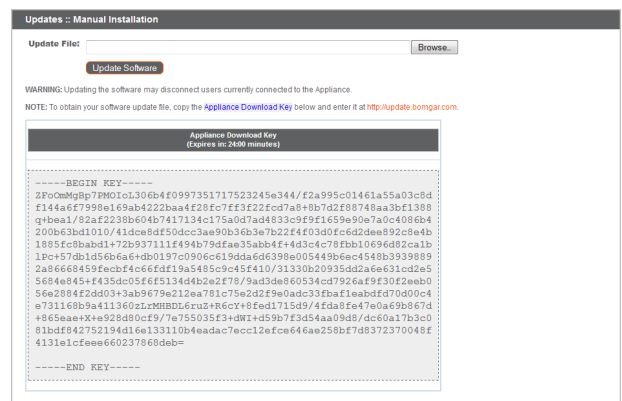
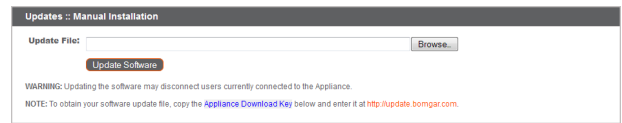


Click the **Appliance Download Key** link to generate a unique B Series Appliance key. From a non-restricted system, submit this key to BeyondTrust's update server at <https://btupdate.com>. Download any available updates to a removable storage device and then transfer those updates to a system from which you can manage your B Series Appliance.

From the **Updates** page, browse to the file from the **Manual Installation** section and then click the **Update Software** button to complete the installation. The B Series Appliance will install the new version of the BeyondTrust software.



Note: Be prepared to install software updates directly after download. Once an update has been downloaded, it no longer appears in your list of available updates. Should you need to re-download an update, contact BeyondTrust Technical Support.



Verify and Test

After completing the upgrade process, verify that the update completed successfully and that your software is working as expected.

On a minimum of two local machines that can access **Appliance B**, edit the [hosts file](#) so that your site hostname resolves to the IP address of **Appliance B**. On one computer, run the access console. Your installed access consoles will need to be upgraded after the site

upgrades. Typically, this occurs automatically the next time the user run the access console. To check the software build that a console is running, log into the console and then click **Help > About**. Also be sure that you can make a connection to a remote computer via a session.



Note: Access consoles previously deployed on locked-down computers using *MSI* may need to be re-deployed once the upgrade is complete. If the extractable access console or extractable Jump Client feature has been enabled for your site by BeyondTrust Technical Support, then you can download an MSI installer to update access consoles and/or Jump Clients prior to upgrading the B Series Appliance. To do this, check for the new update either manually or automatically. Note that the updated clients will not come online until their B Series Appliance is updated. It is not necessary to uninstall the original client prior to deploying the new one, as the new one should automatically replace the original installation. It is a best practice, however, to keep a copy of the old MSI to remove the outdated installations after the B Series Appliance is updated should this removal prove necessary. The new MSI is unable to do so.

Make Appliance B the Primary B Series Appliance

Set **Appliance B** to the primary role following the steps previously determined in your failover plan: shared IP switch, DNS swing, or NAT swing.



Note: If you are using the BeyondTrust Integration Client and have configured it based on IP address rather than hostname, be sure to verify that it can extract data from **Appliance B** after redefining **Appliance B** as the primary B Series Appliance.



Note: Data from sessions completed on either B Series Appliance while failover is not enabled will automatically sync once the failover relationship has been re-established.

Shared IP Switch

On **Appliance A**, go to **/appliance > Networking > IP Configuration**.



Click on the shared IP address to edit it, and uncheck the **Enabled** box. Then click **Save Changes**.

Immediately, go to **/appliance > Networking > IP Configuration** on **Appliance B**. It is helpful to have this page already open in a separate browser tab.

Click on the shared IP address to edit it, and check the **Enabled** box. Then click **Save Changes**.

As soon as the switch is made, you can resume normal activity. All requests to your site will be served by **Appliance B**.

DNS Swing

Access the DNS controller and locate the DNS entry for your BeyondTrust site. Edit the entry to point to the IP address for **Appliance B**. Once the DNS entry has propagated, you can resume normal activity. All requests to your site will be served by **Appliance B**.

NAT Swing

Access the NAT controller and locate the NAT entry for your BeyondTrust site. Edit the entry to point to the IP address for **Appliance B**. As soon as the change is made, you can resume normal activity. All requests to your site will be served by **Appliance B**.

Update Appliance A



Note: Each customer environment is different, and while BeyondTrust does test each feature, we cannot test each and every scenario a customer may encounter. Please confirm that the BeyondTrust software is working in your environment before updating Appliance A.

Update **Appliance A** using either the automatic or the manual update method as defined above. Then verify and test that the update completed successfully.

Reestablish Failover Relationship

From **Appliance B**, go to **/login > Management > Failover**.



Note: To configure a valid connection, both B Series Appliances must have identical Inter-Appliance keys. See the **/login > Management > Security** page to verify the key for each B Series Appliance.

Reestablish the failover relationship with the backup B Series Appliance, using **Appliance A** as the backup and **Appliance B** as the primary.

Establishing the relationship between the two B Series Appliances occurs on the **Failover** page of the B Series Appliance intended to be the primary B Series Appliance. The addresses that are entered here will establish the relationship and allow either B Series Appliance to connect to each other at any time. The **New Backup Site Connection Details** tell the primary B Series Appliance how to connect to the B Series Appliance that will become the backup B Series Appliance. The **Reverse Connection Details to this Primary Site** are given to the backup B Series Appliance and tell it how to connect back to this primary B Series Appliance. You must use a valid hostname or IP address and TLS port number for these fields. When all of these fields are set, click the **Establish Relationship** button to attempt to establish the relationship.



Note: Whenever possible, BeyondTrust recommends using the unique IP address of each B Series Appliance when configuring these settings.

Once the relationship has been established, extraneous tabs are removed from the backup site. It takes about 60 seconds for the first data synchronization to initiate, but you may also click the **Sync Now** button to force synchronization and pull the most current information from the primary B Series Appliance into the memory of the backup B Series Appliance. Synchronization itself may take anywhere from a few seconds to a few hours, depending on the amount of data that needs to be synchronized. The **Failover** page lists the last date and time of data synchronization when synchronization is completed.

Upgrade the BeyondTrust Hardware

When you upgrade your B Series Appliance from either one physical B Series Appliance to another or between a physical and a PRA Virtual Appliance, you must both install the new B Series Appliance and transfer data from the original B Series Appliance.

1. Install the new B Series Appliance per the appropriate setup guide.
 - BeyondTrust PRA Virtual Appliance Installation: <https://www.beyondtrust.com/docs/privileged-remote-access/getting-started/deployment/virtual-sra/index.htm>
 - BeyondTrust Appliance B Series Hardware Installation: <https://www.beyondtrust.com/docs/privileged-remote-access/getting-started/deployment/hardware-sra/index.htm>
2. Back up your current B Series Appliance's software settings.
 - a. On your current B Series Appliance, go to **/login > Management > Software**.
 - b. In the **Software :: Backup Settings** section, click the **Download Backup** button.
 - c. Save the backup file to a secure location.
3. Import your existing SSL certificate chain into the new B Series Appliance.
 - a. On your current B Series Appliance, go to **/appliance > Security > Certificates**.
 - b. In the **Security :: Certificates** section, check the box beside the certificate that is assigned to the active IP address. Then, from the dropdown menu at the top of this section, select **Export**.



Note: Exporting certificates does not remove them from the B Series Appliance.

- c. On the **Security :: Certificates :: Export** page, check the options to include the certificate, the private key, and the certificate chain. It is strongly recommended that you set a passphrase for the private key.
 - d. On your new B Series Appliance, go to **/appliance > Security > Certificates**.
 - e. In the **Security :: Certificate Installation** section, click the **Import** button.
 - f. Browse to the certificate file that you exported previously and then click **Upload**.
4. Choose a default certificate to serve your clients.
 - a. On your new B Series Appliance, go to **/appliance > Security > Certificates**.
 - b. In the **Security :: Certificates** section, locate the entry for your SSL certificate. This usually has an **Issued To** field containing the fully qualified domain name of your B Series Appliance (e.g., access.example.com).
 - c. Confirm there are no warnings listed for the new certificate. If there is a warning, please go to the [Support Portal](#) for assistance.
 - d. Once all warnings are resolved, click the radio button in the **Default** column for the certificate you wish to serve your clients.
 5. Install the new software package.
 - a. On your new B Series Appliance, go to **/appliance > Updates**.
 - b. Either click **Check for Updates** or use the **Appliance Download Key** per the on-screen instructions.
 - c. Click **Install This Update**. A EULA will need to be signed prior to installation.
 6. Import your software configuration settings from the old B Series Appliance.
 - a. Log into your new B Series Appliance's **/login** interface. The first-time login credentials are **admin** and **password**.
 - b. Go to **/login > Management > Software**.

- c. In the **Software :: Restore Settings** section, browse to the backup file you downloaded earlier and then click **Upload Backup** to restore the backup to the new B Series Appliance.

At this point, you can update your DNS server to direct traffic to the IP address of the new B Series Appliance, and you can start testing access sessions on your new B Series Appliance. Once you have confirmed that it is functioning properly, you can return the old B Series Appliance, if physical, or delete it, if virtual. To return a physical B Series Appliance, take these steps:

1. Log into the **/appliance** web interface of the old B Series Appliance.
2. Browse to the **Status > Basics** page, and click **Reset Appliance to Factory Defaults**.
3. Wait for the reset to complete, and then click **Shut Down This Appliance**.
4. Package the B Series Appliance for shipping.
5. Affix the BeyondTrust return shipping label to the outside of the box and contact your shipper for a pickup. If you do not have a label for shipment, contact BeyondTrust Technical Support.

Disclaimers, Licensing Restrictions and Tech Support

Disclaimers

This document is provided for information purposes only. BeyondTrust Corporation may change the contents hereof without notice. This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. BeyondTrust Corporation specifically disclaims any liability with respect to this document and no contractual obligations are formed either directly or indirectly by this document. The technologies, functionality, services, and processes described herein are subject to change without notice.

All Rights Reserved. Other trademarks identified on this page are owned by their respective owners. BeyondTrust is not a chartered bank or trust company, or depository institution. It is not authorized to accept deposits or trust accounts and is not licensed or regulated by any state or federal banking authority.

Licensing Restrictions

One BeyondTrust Privileged Remote Access license enables one support representative at a time to troubleshoot an unlimited number of remote computers, whether attended or unattended. Although multiple accounts may exist on the same license, two or more licenses (one per concurrent support representative) are required to enable multiple support representatives to troubleshoot simultaneously.

One BeyondTrust Privileged Remote Access license enables access to one endpoint system. Although this license may be transferred from one system to another if access is no longer required to the first system, two or more licenses (one per endpoint) are required to enable access to multiple endpoints simultaneously.

Tech Support

At BeyondTrust, we are committed to offering the highest quality service by ensuring that our customers have everything they need to operate with maximum productivity. Should you need any assistance, please log into the [Customer Portal](https://beyondtrustcorp.service-now.com/csm) at <https://beyondtrustcorp.service-now.com/csm> to chat with Support.

Technical support is provided with annual purchase of our maintenance plan.