

PlateSpin® 12.2.2 Migrate Installation and Upgrade Guide

June 2018

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License bought for PlateSpin Migrate 9.3 and later versions cannot be used with PlateSpin Migrate 9.2 and prior versions.

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About This Guide

This guide provides information to help you install your PlateSpin Migrate product.

- ◆ Chapter 1, “Installing PlateSpin Migrate,” on page 7
- ◆ Chapter 2, “Troubleshooting Installation Problems,” on page 33
- ◆ Chapter 3, “Upgrading PlateSpin Migrate,” on page 35
- ◆ Appendix A, “Documentation Updates,” on page 45

Audience

This guide is intended for IT staff, such as data center administrators and operators, who use PlateSpin Migrate in their ongoing workload migration projects.

Additional Documentation

This guide is part of the PlateSpin Migrate documentation set. For a complete list of publications supporting this release, visit the [PlateSpin Migrate 12.2.2 Documentation website \(https://www.netiq.com/documentation/platespin-migrate-12-2-2/\)](https://www.netiq.com/documentation/platespin-migrate-12-2-2/).

Documentation Updates

The most recent version of this guide can be found at the [PlateSpin Migrate Documentation website \(https://www.netiq.com/documentation/platespin-migrate-12-2-2/\)](https://www.netiq.com/documentation/platespin-migrate-12-2-2/).

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1 Installing PlateSpin Migrate

PlateSpin Migrate is a Windows application that runs on server operating systems. Its functionality depends on several software components, including the Microsoft Internet Information Services (IIS) Web server software along with its feature extension modules, the ASP.NET Web application framework, the Microsoft .NET Framework library and runtime, as well as a dedicated Microsoft SQL Server database instance.

- ◆ [Section 1.1, “Preparing to Install PlateSpin Migrate,” on page 7](#)
- ◆ [Section 1.2, “Installing Prerequisite Software,” on page 12](#)
- ◆ [Section 1.3, “Installing PlateSpin Migrate Software Components,” on page 18](#)
- ◆ [Section 1.4, “Installing the PlateSpin Migrate Software Components Using a Batch File,” on page 28](#)
- ◆ [Section 1.5, “Checking for Software Updates,” on page 30](#)
- ◆ [Section 1.6, “Modifying the Password for the SQL Server Express System Administrator User,” on page 30](#)
- ◆ [Section 1.7, “Security Best Practices for PlateSpin Hosts,” on page 31](#)

1.1 Preparing to Install PlateSpin Migrate

For trouble-free installation and operation of PlateSpin Migrate, you should review the system requirements and plan your installation.

- ◆ [Section 1.1.1, “System Requirements for PlateSpin Server,” on page 7](#)
- ◆ [Section 1.1.2, “System Requirements for PlateSpin Migrate Client,” on page 9](#)
- ◆ [Section 1.1.3, “System Requirements for PlateSpin Migrate Web Interface,” on page 10](#)
- ◆ [Section 1.1.4, “General Guidelines for Server Installation,” on page 10](#)
- ◆ [Section 1.1.5, “National Language Support,” on page 12](#)

1.1.1 System Requirements for PlateSpin Server

PlateSpin Server hosts must meet the system requirements in [Table 1-1](#). See also [“General Guidelines for Server Installation” on page 10](#).

Table 1-1 Host Requirements for PlateSpin Server

Requirement	Details
Dedicated host	Physical or virtual server

Requirement	Details
Operating System	<p>Any of the following Windows Server versions:</p> <ul style="list-style-type: none"> ◆ Windows Server 2016 ◆ Windows Server 2012 R2 <p>NOTE: You must activate the Microsoft license for your Windows operating system prior to installing PlateSpin Migrate.</p>
Processor	<p>Recommended (physical): multi-core, 2 GHz or higher</p> <p>Recommended (VM): 2 or more Virtual CPUs</p>
Memory	Recommended: 8 GB RAM
Disk Space	<p>Minimum 50 GB</p> <p>Additional space might be necessary if you plan to use the same system as a PlateSpin Image Server. The amount of additional space depends on the number and size of workload images that you intend to store on a given image server. See “Designating a PlateSpin Image Server” in the <i>PlateSpin Migrate 12.2.2 User Guide</i>.</p>
Database Server	<p>A dedicated Microsoft SQL Server database instance (local or remote), running on one of the following:</p> <ul style="list-style-type: none"> ◆ Microsoft SQL Server 2017 Express Edition <p>A copy of this database software is included in your PlateSpin Migrate software distribution.</p> <p>NOTE: For upgrades of PlateSpin Migrate Server, your existing installation of Microsoft SQL Server 2014 Express is supported. The SQL Server Express software is not updated as part of the upgrade.</p> <ul style="list-style-type: none"> ◆ Microsoft SQL Server 2016 ◆ Microsoft SQL Server 2014 ◆ Microsoft SQL Server 2008 R2 <p>While multiple PlateSpin Migrate Servers can use the same remote database server, each Migrate Server requires a separate dedicated database instance.</p> <p>NOTE: Prior to installing the product, ensure that your existing SQL Server database server and named database instance meet the Database guidelines.</p>

Requirement	Details
Prerequisite Software	<p>NOTE: You can install prerequisite software manually or use the PowerShell script provided on the PlateSpin Migrate Download site. See “Installing Prerequisite Software” on page 12.</p> <ul style="list-style-type: none"> <input type="checkbox"/> To perform a batch-file installation of PlateSpin Migrate, you must install Visual C++ 2013 on the host server. See “Installing Visual C++ 2013 for Batch-File Installation of PlateSpin Migrate” on page 13. <input type="checkbox"/> All Windows hosts (recommended) <ul style="list-style-type: none"> ◆ Ensure that a licensed version of the OS is installed and the license has been activated. ◆ Apply the latest applicable OS updates (service packs, cumulative security updates, drivers, and so on). <input type="checkbox"/> For Windows Server 2016 systems: <ul style="list-style-type: none"> ◆ Disable User Account Control (UAC). ◆ Install Microsoft .NET Framework 4.7.1. You can download .NET software from Microsoft: <ul style="list-style-type: none"> ◆ .NET Framework 4.7.1 ◆ Install Microsoft IIS 10.0 <p>For more details, see “Installing Prerequisite Software on Windows Server 2016 Systems” on page 13.</p> <input type="checkbox"/> For Windows Server 2012 R2 systems: <ul style="list-style-type: none"> ◆ Disable User Account Control (UAC). ◆ Install Microsoft .NET Framework 4.7.1. You can download .NET software from Microsoft: <ul style="list-style-type: none"> ◆ .NET Framework 4.7.1 ◆ Install Microsoft IIS 8.0 <p>For more details, see “Installing Prerequisite Software on Windows Server 2012 R2 Systems” on page 16.</p>
TLS Protocol	<p>PlateSpin Migrate requires Transport Layer Security (TLS) 1.0 and higher to be enabled on the intended PlateSpin Server host.</p> <p>For remote databases, TLS 1.0 is required for the SQL Server host operating system during the installation. After the installation is complete, you can use TLS 1.2 for communications between Migrate server and the SQL Server if the SQL Server supports it.</p>

1.1.2 System Requirements for PlateSpin Migrate Client

You can install the PlateSpin Migrate Client on the PlateSpin Server host or on a separate computer. For information about migration tasks supported by Migrate Client, see [“Deciding on the Migration Interface”](#) in the *PlateSpin Migrate 12.2.2 User Guide*.

A standalone PlateSpin Migrate Client host must meet the system requirements in [Table 1-2](#).

Table 1-2 Host Requirements for PlateSpin Migrate Client

Requirement	Details
Operating System	Any of the following, running on dedicated hardware or in a virtual machine: <ul style="list-style-type: none">◆ Windows Server 2016◆ Windows 8.1, 8◆ Windows Server 2012, Windows Server 2012 R2◆ Windows 7◆ Windows Server 2008, Windows Server 2008 R2 <p>NOTE: You must activate the Microsoft license for your Windows operating system prior to installing PlateSpin Migrate Client.</p>
Disk Space	Minimum 3 GB
Windows Software Components	Microsoft .NET Framework 2 SP2, 3.5 SP1, and 4.7.1. You can download .NET software from Microsoft: <ul style="list-style-type: none">◆ .NET Framework 2 SP2◆ .NET Framework 3.5 SP1◆ .NET Framework 4.7.1
TLS Protocol	PlateSpin Migrate Client requires Transport Layer Security (TLS) 1.0 and higher to be enabled on the intended PlateSpin Client host.

1.1.3 System Requirements for PlateSpin Migrate Web Interface

PlateSpin Migrate provides a Web Interface that you can use to plan and execute automated migrations of workloads. The PlateSpin Migrate Web Interface is automatically installed when you install the PlateSpin Migrate Server. For information about migration tasks supported by Migrate Web Interface, see “[Deciding on the Migration Interface](#)” in the *PlateSpin Migrate 12.2.2 User Guide*.

For information about supported web browsers and browser configuration requirements, see “[Supported Web Browsers](#)” in the *PlateSpin Migrate 12.2.2 User Guide*.

For more information about working with the PlateSpin Migrate Web Interface, see “[About the PlateSpin Migrate Web Interface](#)” in the *PlateSpin Migrate 12.2.2 User Guide*.

1.1.4 General Guidelines for Server Installation

Follow installation guidelines in [Table 1-3](#) for trouble-free installation and operation of PlateSpin Migrate.

Table 1-3 Pre-Installation Checklist

Guideline	Remarks
<input type="checkbox"/> Dedicated Host	Install the PlateSpin Server on a dedicated physical or virtual machine. See also Co-location .

Guideline	Remarks
<input type="checkbox"/> Credentials	<p>Perform all installation procedures using an account with administrative privileges.</p> <p>When you install PlateSpin Migrate Server on a domain computer, you must log in to the PlateSpin Server during installation, removal, or upgrade as a domain user who is a member of the Domain Admin group and the local Admin group.</p> <p>Windows Authentication for your Microsoft SQL Server Standard Edition or Enterprise Edition database server is supported in domain environments. If you use Windows Authentication for your database server, when you perform the PlateSpin Migrate Server installation or upgrade, you must log in to the PlateSpin Server as the domain user with SQL Admin rights. This user must also have local administrator rights to the PlateSpin Server. In addition, the Service User you specify for SQL Server credentials must have local administrator rights.</p>
<input type="checkbox"/> IP Address	Assign the PlateSpin Server host a static IP address.
<input type="checkbox"/> Co-location	<p>Do not co-locate the PlateSpin Server with:</p> <ul style="list-style-type: none"> ◆ Your domain controller ◆ Existing web servers with IIS applications ◆ A workload that you intend to migrate by using the product ◆ Other PlateSpin software (PlateSpin Protect and PlateSpin Recon)
<input type="checkbox"/> Database	<p>The Microsoft SQL Server Express Edition included with PlateSpin Migrate cannot be installed on a domain controller in accordance with Microsoft Developer Network recommendations.</p> <p>If you intend to use your own Microsoft SQL Server database (instead of the Microsoft SQL Server 2017 Express Edition included in your software distribution), ensure that it is supported and conforms to the product's database requirements. See SQL Server Installation Requirements for Platespin Protect and Migrate (KB Article 7009809).</p> <p>While multiple PlateSpin Migrate Servers can use the same remote database server, each Migrate Server requires a separate database instance.</p> <p>For deployment guidelines based on your operational needs, see "Database Server" in the PlateSpin Migrate 12.2.2 User Guide.</p> <p>The database server and database instance for the Migrate Server must be available and configured to work with PlateSpin Migrate before you attempt to install the product. See "Installing the Database Server" on page 20.</p>
<input type="checkbox"/> UAC	Disable the User Account Control (UAC) during installation, removal, or upgrade.
<input type="checkbox"/> Installation Workflow	<p>Install the prerequisite software in the indicated order. Below is a high-level workflow for a typical PlateSpin Migrate installation:</p> <ol style="list-style-type: none"> 1. Supported operating system, followed by corresponding Windows Updates 2. ASP.NET/IIS, followed by corresponding Windows Updates 3. (Optional) Enable FIPS-Compliant Data Encryption 4. SQL Server database, followed by applicable Microsoft updates 5. PlateSpin Server 6. (Conditional on your migration goals) PlateSpin Migrate Client

1.1.5 National Language Support

In addition to the English version of PlateSpin Migrate, the product has been localized for installation and use on machines configured for the Chinese Simplified, Chinese Traditional, French, German, and Japanese languages. See “[Configuring Language Settings for International Versions](#)” in *PlateSpin Migrate 12.2.2 User Guide*.

Documentation is available in these languages as well as Spanish and Portuguese (Brazilian).

1.2 Installing Prerequisite Software

Before you install PlateSpin Migrate on the intended PlateSpin Migrate host server, you must install a [supported version of Microsoft Windows Server](#) and activate the Windows license, then install the [Prerequisite Software](#): Visual C++ (for batch-file installation), ASP.NET, IIS, and .NET Framework. You can optionally enable FIPS-compliant data encryption.

You can use the *Install PlateSpin Migrate Prerequisites* script provided on the Micro Focus Download site to install any missing software and apply the appropriate configuration on the intended PlateSpin Migrate server host. Alternatively, you can manually install and configure the prerequisite software on the intended PlateSpin Migrate server host by using the procedures in this section.

NOTE: The installation of prerequisite software might require a reboot of the intended PlateSpin Migrate host server. Depending on what prerequisite software needs to be installed, Internet access might be required.

To use the *Install PlateSpin Migrate Prerequisites* script to install prerequisite software:

- 1 Log in to the intended PlateSpin Migrate server as a user with Administrator privileges.
- 2 Launch a web browser, go to the [Micro Focus Downloads](#) page, then proceed to the appropriate PlateSpin Migrate Download page.
- 3 Download the `Install_PlateSpin_Migrate_Prerequisites_v2.zip` file to the intended PlateSpin Migrate host server.
- 4 In a ZIP tool, use **Extract > All files/folders** to extract the files to a location on the server:

```
Install PlateSpin Migrate Prerequisites.ps1
Install PlateSpin Migrate Prerequisites.bat
readme.txt
```

- 5 Run the BAT file to execute the `Install PlateSpin Migrate Prerequisites.ps1` PowerShell script. In an Explorer browser, right-click `Install PlateSpin Migrate Prerequisites.bat` and select **Open**.

The PowerShell script automatically installs and configures the prerequisite software only on a [supported version of Microsoft Windows Server](#) operating system where you have previously activated the Windows license. The installation of prerequisite software might require a reboot of the intended PlateSpin Migrate host server. Depending on what prerequisite software needs to be installed, Internet access might be required.

- 6 Continue with “[Installing PlateSpin Migrate Software Components](#)” on page 18.

To manually install prerequisite software:

NOTE: Because the packaging and distribution of these software components varies among different versions of the supported Windows Server platforms, procedures vary slightly. Use the appropriate procedure for the target platform in the indicated order of installation and setup.

- 1 Log in to the intended PlateSpin Migrate server as a user with Administrator privileges.
- 2 Install Visual C++.
See [Installing Visual C++ 2013 for Batch-File Installation of PlateSpin Migrate](#).
- 3 Install Windows Server components ASP .NET, IIS, and .NET Framework:
 - ♦ [Installing Prerequisite Software on Windows Server 2016 Systems](#)
 - OR-
 - ♦ [Installing Prerequisite Software on Windows Server 2012 R2 Systems](#)
- 4 (Optional) Enable FIPS-compliant data encryption.
See [Enabling Support for FIPS-Compliant Data Encryption Algorithms \(Optional\)](#).
- 5 Continue with “[Installing PlateSpin Migrate Software Components](#)” on page 18.

1.2.1 Installing Visual C++ 2013 for Batch-File Installation of PlateSpin Migrate

Before you perform a batch-file installation of PlateSpin Migrate server, you must install Visual C++ 2013 on the planned Migrate server. This software is required to properly install the Event Messaging service that is used by PlateSpin Transformation Manager. A redistributable package of Visual C++ 2013 is available in the `PlateSpinMigrateSetup-12.2.2.X.exe` file. You can alternatively download the Visual C++ 2013 package from Microsoft and install it.

To install VC++ 2013 on the planned Migrate server:

- 1 Extract the `PlateSpinMigrateSetup-12.2.2.X.exe` to a location on the planned server host for PlateSpin Migrate.
- 2 In a file browser, navigate to the `..\Migrate-12.2.2.X\PlateSpinImage\VCruntime-x64` folder.
- 3 Run `vcredist_x64.exe` as Administrator.

1.2.2 Installing Prerequisite Software on Windows Server 2016 Systems

Use the following procedure to install [prerequisite software](#) on the Microsoft Windows Server 2016 servers where you plan to install PlateSpin Migrate Server. Before you begin, ensure that you are familiar with the “[System Requirements for PlateSpin Server](#)” on page 7 and “[General Guidelines for Server Installation](#)” on page 10.

To install required Microsoft software components:

- 1 Use the Local User Administrator (LUA) account to log in to your intended PlateSpin Server host.

- 2 Use Server Manager to install Web Server (IIS) and other software required by PlateSpin Server:
 - 2a Open Server Manager. Select **Start > Windows Administrative Tools > Server Manager**.
 - 2b In the Server Manager toolbar, select **Quick Start > Configure this local server > Add roles and features**.
 - 2c In the Add Roles and Features wizard, proceed to the Installation Type tab, then continue through the wizard:

Add Roles and Features Wizard	Action
1. Installation Type	Select Role-based or feature-based installation , then click Next .
2. Server Selection	Select your intended PlateSpin Server host, then click Next .
3. Server Roles	Select Web Server (IIS) , then click Next .
4. Pop-up prompt to Add features that are required for Web Server (IIS)	Select Include management tools , click Add Features to confirm your selection, then click Next on the Server Roles page to proceed to the Features list.
5. Features	<p>Keep the default set of features for the Web Server and add other required features along with their sub-features as shown, then click Next.</p> <ul style="list-style-type: none"> <input type="checkbox"/> .NET Framework 4.6 Features (3 of 7 installed) <ul style="list-style-type: none"> ◆ .NET Framework 4.6 ◆ ASP.NET 4.6 ◆ WCF Services (1 of 5 installed) <ul style="list-style-type: none"> — TCP Port Sharing <input type="checkbox"/> XPS Viewer
6. Web Server (IIS)	Read the information, then click Next .

Add Roles and Features Wizard	Action
7. Role Services	<p>Keep the default set of role services for the Web Server and add other required role services along with their sub-role services as shown, then click Next.</p> <p>NOTE: .NET 4.6 is installed by the OS. PlateSpin Server will use .NET 4.7.1, as installed in Step 2f.</p> <p>Web Server (IIS) > Role Services (23 of 43 installed):</p> <ul style="list-style-type: none"> <input type="checkbox"/> Web Server (17 of 34 installed) <ul style="list-style-type: none"> ◆ Common HTTP Features (4 of 6 installed) <ul style="list-style-type: none"> — Default Document — Directory Browsing — HTTP Errors — Static Content ◆ Health and Diagnostics (2 of 6 installed) <ul style="list-style-type: none"> — HTTP Logging — Request Monitor ◆ Performance (1 of 2 installed) <ul style="list-style-type: none"> — Static Content Compression ◆ Security (5 of 9 installed) <ul style="list-style-type: none"> — Requesting Filtering — Basic Authentication — IP and Domain Restrictions — URL Authorization — Windows Authentication ◆ Application Development (5 of 11 installed) <ul style="list-style-type: none"> — .NET Extensibility 4.6 — Application Initialization — ASP.NET 4.6 — ISAPI Extensions — ISAPI Filters <input type="checkbox"/> Management Tools (6 of 7 installed) <ul style="list-style-type: none"> ◆ IIS Management Console ◆ IIS 6 Management Compatibility (4 of 4 installed) <ul style="list-style-type: none"> — IIS 6 Metabase Compatibility — IIS 6 Management Console — IIS 6 Scripting Tools — IIS 6 WMI Compatibility ◆ IIS Management Scripts and Tools
8. Confirmation	Review the roles, role services, and features to be installed, then click Install .

2d Wait for the installation to complete, then close the Add Roles and Features wizard.

2e Exit Server Manager.

2f Download and install [Microsoft .NET Framework 4.7.1 \(https://www.microsoft.com/en-us/download/details.aspx?id=56116\)](https://www.microsoft.com/en-us/download/details.aspx?id=56116) on your intended PlateSpin Server host.

1.2.3 Installing Prerequisite Software on Windows Server 2012 R2 Systems

Use the following procedure to install [prerequisite software](#) on the Microsoft Windows Server 2012 R2 servers where you plan to install PlateSpin Migrate Server. Before you begin, ensure that you are familiar with the [“System Requirements for PlateSpin Server”](#) on page 7 and [“General Guidelines for Server Installation”](#) on page 10.

To install required Microsoft software components:

- 1 Use the Local User Administrator (LUA) account to log in to your intended PlateSpin Server host.
- 2 Use Server Manager to install Web Server (IIS) and other software required by PlateSpin Server:
 - 2a Open Server Manager. Select **Start > All Programs > Administrative Tools > Server Manager**.
 - 2b In the Server Manager toolbar, select **Manage > Add Roles and Features**.
 - 2c In the Add Roles and Features wizard, proceed to the Installation Type tab, then continue through the wizard:

Add Roles and Features Wizard	Action
1. Installation Type	Select Role-based or feature-based installation , then click Next .
2. Server Selection	Select your intended PlateSpin Server host, then click Next .
3. Server Roles	Select Web Server (IIS) , then click Next .
4. Pop-up prompt to Add features that are required for Web Server (IIS)	Select Include management tools , then click Add Features to confirm your selection, then click Next on the Server Roles page to proceed to the Features list.
5. Features	<p>Keep the default set of features for the Web Server and add other required features along with their sub-features as shown, then click Next.</p> <p>NOTE: .NET 4.5 is installed by the OS. PlateSpin Server will use .NET 4.7.1, as installed in Step 2f.</p> <ul style="list-style-type: none"> <input type="checkbox"/> .NET Framework 4.5 Features (3 of 7 installed) <ul style="list-style-type: none"> ◆ .NET Framework 4.5 ◆ ASP.NET 4.5 ◆ WCF Services (1 of 5 installed) <ul style="list-style-type: none"> — TCP Port Sharing <input type="checkbox"/> XPS Viewer
6. Web Server (IIS)	Read the information, then click Next .

Add Roles and Features Wizard	Action
7. Role Services	<p>Keep the default set of role services for the Web Server and add other required role services along with their sub-role services as shown, then click Next.</p> <p>Web Server (IIS) > Role Services (23 of 43 installed):</p> <ul style="list-style-type: none"> <input type="checkbox"/> Web Server (17 of 34 installed) <ul style="list-style-type: none"> ◆ Common HTTP Features (4 of 6 installed) <ul style="list-style-type: none"> — Default Document — Directory Browsing — HTTP Errors — Static Content ◆ Health and Diagnostics (2 of 6 installed) <ul style="list-style-type: none"> — HTTP Logging — Request Monitor ◆ Performance (1 of 2 installed) <ul style="list-style-type: none"> — Static Content Compression ◆ Security (5 of 9 installed) <ul style="list-style-type: none"> — Requesting Filtering — Basic Authentication — IP and Domain Restrictions — URL Authorization — Windows Authentication ◆ Application Development (5 of 11 installed) <ul style="list-style-type: none"> — .NET Extensibility 4.5 — Application Initialization — ASP.NET 4.5 — ISAPI Extensions — ISAPI Filters <input type="checkbox"/> Management Tools (6 of 7 installed) <ul style="list-style-type: none"> ◆ IIS Management Console ◆ IIS 6 Management Compatibility (4 of 4 installed) <ul style="list-style-type: none"> — IIS 6 Metabase Compatibility — IIS 6 Management Console — IIS 6 Scripting Tools — IIS 6 WMI Compatibility ◆ IIS Management Scripts and Tools
8. Confirmation	Review the roles, role services, and features to be installed, then click Install .

2d Wait for the installation to complete, then close the Add Roles and Features wizard.

2e Exit Server Manager.

2f Download and install [Microsoft .NET Framework 4.7.1 \(https://www.microsoft.com/en-us/download/details.aspx?id=56116\)](https://www.microsoft.com/en-us/download/details.aspx?id=56116) on your intended PlateSpin Server host.

1.2.4 Enabling Support for FIPS-Compliant Data Encryption Algorithms (Optional)

PlateSpin Migrate supports data encryption algorithms that are compliant with FIPS (*Federal Information Processing Standards*, Publication 140-2).

If compliance with FIPS is required, it must be enabled on the intended PlateSpin Server host prior to the installation of the PlateSpin Server. This is because PlateSpin Migrate runs in FIPS-compliant mode only if it detects that a workload's operating system is running in FIPS-compliant mode.

NOTE: FIPS-compliant mode has a performance impact and might slow down the data transfer rate up to 30%.

To enable FIPS-compliant algorithms:

- 1 Enable FIPS-compliant algorithms in the security options of your PlateSpin Migrate host's local security policies:
 - 1a Run `secpol.msc` and browse to **Local Policies > Security Options**.
 - 1b Enable the **System cryptography: Use FIPS compliant algorithms for encryption** security option.
- 2 Configure ASP.NET for FIPS support:

- 2a Access the `machine.config` file located in the following directory of your PlateSpin Server host:

```
..Windows\Microsoft.Net\Framework\vX.X.XXXXX\Config
```

- 2b Add the following under the `<system.web>` element:

```
<machineKey validationKey="AutoGenerate,IsolateApps"
decryptionKey="AutoGenerate,IsolateApps" validation="3DES"
decryption="3DES"/>
```

- 3 Access the `web.config` file in each of the below listed directories of your PlateSpin Server host and add the following under the `<system.web>` element of each of the `web.config` file:

```
<machineKey validationKey="AutoGenerate,IsolateApps"
decryptionKey="AutoGenerate,IsolateApps" validation="3DES" decryption="3DES"/>
```

- ◆ `PlateSpin Migrate Install Directory\PlateSpin Forge\web\`
- ◆ `PlateSpin Migrate Install Directory\Web\`
- ◆ `PlateSpin Migrate Install Directory\ConfigurationEditor.Web\`
- ◆ `PlateSpin Migrate Install Directory\Protection.WebServices\`
- ◆ `PlateSpin Migrate Install Directory\OfxWeb\`

1.3 Installing PlateSpin Migrate Software Components

After you have installed and configured the prerequisite software, you are ready to install and configure software components for PlateSpin Migrate.

- ◆ [Section 1.3.1, "Starting the PlateSpin Migrate Installation Launcher," on page 19](#)
- ◆ [Section 1.3.2, "Installing the Database Server," on page 20](#)

- ♦ [Section 1.3.3, “Installing PlateSpin Server,” on page 24](#)
- ♦ [Section 1.3.4, “Installing the PlateSpin Migrate Client,” on page 27](#)

1.3.1 Starting the PlateSpin Migrate Installation Launcher

To install or upgrade the product, you must use the PlateSpin Migrate Setup utility (PlateSpinMigrateSetup-12.X.X.X.exe). It extracts files and opens the Installation Launcher for Migrate components. The file is available from [Micro Focus Downloads \(https://www.microfocus.com/support-and-services/download/\)](https://www.microfocus.com/support-and-services/download/).

- 1 From [Micro Focus Downloads \(https://www.microfocus.com/support-and-services/download/\)](https://www.microfocus.com/support-and-services/download/), download the PlateSpinMigrateSetup-12.X.X.X.exe installation program. Copy it to an accessible location on your intended PlateSpin Server host.
- 2 Log in to the PlateSpin Server host as a user with administrator rights.
Ensure that you are logged in with sufficient rights to perform the installation or upgrade. See [Credentials guidelines in Table 1-3, “Pre-Installation Checklist,” on page 10.](#)
- 3 Run the installation program and click **Next** to launch the prerequisites check utility.
The prerequisites check queries the host where you intend to install the PlateSpin Server. It verifies that all of the required software is installed or enabled. If you see any cautions or omissions, you need to either enable or install the prerequisite software before you proceed with the installation.
- 4 Click **Next** to open the Installation Launcher.
The installation program extracts the required files and opens the Installation Launcher window.
- 5 Use the Installation Launcher to do one of the following:

Installation Launcher Option	Remarks
Install SQL Server Express	
Installs the SQL Server Express Edition included with your PlateSpin Migrate Distribution	<p>A database server is required before you install the product. You can use SQL Server Express, or use your own Microsoft SQL Server Standard Edition or Enterprise Edition installed locally or remotely.</p> <p>For requirements, see:</p> <ul style="list-style-type: none"> ♦ “Database Server” on page 8 ♦ Database guidelines <p>For installation and database server configuration instructions, see “Installing the Database Server” on page 20.</p>
Install PlateSpin Server	
Installs PlateSpin Server	<p>For requirements and guidelines, see</p> <ul style="list-style-type: none"> ♦ Table 1-1, “Host Requirements for PlateSpin Server,” on page 7 ♦ Table 1-3, “Pre-Installation Checklist,” on page 10 <p>You must install and configure prerequisite software before you install the product. See “Installing Prerequisite Software” on page 12.</p> <p>For instructions, see “Installing PlateSpin Server” on page 24.</p>

Installation Launcher Option	Remarks
Upgrades PlateSpin Server	<p>For requirements and preparation for upgrade, see “Prerequisites for Upgrade” on page 35.</p> <p>Ensure that your server meets the software prerequisites before you upgrade the product. See “Prerequisite Software” on page 9.</p> <p>For instructions, see</p> <ul style="list-style-type: none"> ◆ “Upgrading Migrate” on page 38 ◆ “Upgrading to a New Host Platform” on page 39
Install PlateSpin Migrate Client	
Installs PlateSpin Migrate Client	<p>For requirements, see Table 1-2, “Host Requirements for PlateSpin Migrate Client,” on page 10.</p> <p>For instructions, see “Installing the PlateSpin Migrate Client” on page 27.</p> <p>For upgrade, uninstall PlateSpin Migrate Client using Windows Uninstall Programs, then re-install PlateSpin Migrate Client.</p>

1.3.2 Installing the Database Server

You must set up a database server and configure a database instance before you install the product. Refer to [Table 1-4](#) to determine what tasks are needed for your preferred database server deployment.

Table 1-4 Database Server Deployment Options for PlateSpin Server

Location	Installation and Configuration	Database Connection and Credentials
Microsoft SQL Server Express Edition		
Local (default)	Install SQL Server Express Edition on the intended PlateSpin Server. See “Installing the SQL Server Express Edition Database Server” on page 21 .	<p>Accept the local database server and database instance when you are prompted for the database connection.</p> <p>. \PLATESPINDB</p> <p>Use SQL Authentication and accept the default database credentials presented for the SQL system administrator (sa) user in the Login ID and Password.</p>

Location	Installation and Configuration	Database Connection and Credentials
Microsoft SQL Server Standard Edition or Enterprise Edition		
Local	After you install SQL Server Standard Edition or Enterprise Edition locally on the intended PlateSpin Server, you must configure SQL Server for use with PlateSpin Migrate. See “Configuring Your Local Microsoft SQL Server Database Server” on page 22.	Point to your custom local database server when you are prompted for the database connection. You need the database server name and database instance name. (local)\<database_instance_name> NOTE: If you use Windows Authentication, you must log in as the domain user with SQL Admin rights when you upgrade or update PlateSpin Server. This user must have local administrator rights. Also, the user you specify as the database Service User must have local administrator rights.
Remote	For your existing remote SQL Server, you must configure SQL Server for use with PlateSpin Migrate and configure your network to allow a connection with PlateSpin Migrate. See “Configuring Your Remote Microsoft SQL Server Database Server” on page 23.	Point to your external database server when you are prompted for the database connection. You need the database server name and database instance name. <database_server>\<database_instance_name> The port number is required if you use dynamic ports. <database_server>\<database_instance_name>,<port_number> NOTE: If you use Windows Authentication, you must log in as the domain user with SQL Admin rights when you upgrade or update PlateSpin Server. This user must have local administrator rights. Also, the user you specify as the database Service User must have local administrator rights.

- ◆ [“Installing the SQL Server Express Edition Database Server”](#) on page 21
- ◆ [“Configuring Your Local Microsoft SQL Server Database Server”](#) on page 22
- ◆ [“Configuring Your Remote Microsoft SQL Server Database Server”](#) on page 23

Installing the SQL Server Express Edition Database Server

If you do not have an existing [Microsoft SQL Server database server](#) to use with PlateSpin Migrate, you can install Microsoft SQL Server 2017 Express Edition, which is included in your PlateSpin Migrate software distribution. The SQL Server Express installation sets up SQL authentication.

NOTE: The Microsoft SQL Server Express Edition included with PlateSpin Migrate cannot be installed on a domain controller in accordance with [Microsoft Developer Network recommendations](#).

To install Microsoft SQL Server Express:

- 1 Log in to the PlateSpin Server host as a user with administrative privileges.
If the computer is a domain computer, you must log in as a domain user who is a member of the Domain Admin group and the local Admin group.
- 2 On your intended database server host, start the Installation Launcher.
See [“Starting the PlateSpin Migrate Installation Launcher” on page 19](#).
- 3 Click **Install SQL Server Express** and follow the on-screen instructions.
The program installs a database server and the database instance required for the operation of PlateSpin Migrate. It also sets generates credentials needed for SQL authentication.

NOTE: A password for the SQL system administrator (sa) user is automatically generated during the installation of Microsoft SQL Server Express Edition. Keep the default sa credentials throughout the PlateSpin Migrate Server installation.
After the installation is complete and you have activated the license for the product, you should modify the SQL administrator password. See [“Modifying the Password for the SQL Server Express System Administrator User” on page 30](#).

- 4 Continue with [“Installing PlateSpin Server” on page 24](#).

Configuring Your Local Microsoft SQL Server Database Server

If you install your Microsoft SQL Server Standard Edition or Enterprise Edition on the intended PlateSpin Migrate server, you must configure specific settings in SQL Server and in your environment before you install the product.

NOTE: Using this local SQL Server database server to service other applications in your environment can negatively impact the performance of PlateSpin Migrate.

- 1 Ensure that your database server is running a supported version of Microsoft SQL Server. See [“Database Server” on page 8](#).
- 2 Ensure that you have a dedicated, named database instance to use with your intended PlateSpin Migrate server.
You need the database server name and database instance name during the product installation.
- 3 (Conditional, Windows Authentication) Windows Authentication for your existing database server is available in a domain environment. If you plan to use Windows Authentication to access the Microsoft SQL Server database, you must configure the following in Active Directory:
 - ♦ You must add the Microsoft SQL Server database server to the domain.
 - ♦ You need two domain user accounts for the PlateSpin Migrate installation.
 - ♦ **A Domain user with the sysadmin role set:** This user with SQL Admin rights is required to create databases, tables, and other schema objects.
 - ♦ **PlateSpin Service user:** The service user can be a low-privileged domain user in the domain. However, the service user must be a local administrator on the PlateSpin Migrate Server and should be granted that permission prior to the installation.

NOTE: If the Windows user’s password changes, you must update the password for the PlateSpin Service user and for the IIS App Pool. Consider using a Windows user whose password never expires to avoid the situation.

NOTE: If you use Windows Authentication, you must log in as the domain user with SQL Admin rights when you upgrade or update PlateSpin Server. This user must have local administrator rights. Also, the user you specify as the database Service User must have local administrator rights.

- 4 Continue with [“Installing PlateSpin Server” on page 24.](#)

Configuring Your Remote Microsoft SQL Server Database Server

If you use a remote Microsoft SQL Server database server, you must configure specific settings in your environment before you install the product. These settings allow the remote connection between your SQL Server and PlateSpin Server.

NOTE: You can use the same remote Microsoft SQL Server database server to host database instances for multiple PlateSpin Protect and PlateSpin Migrate servers. Each database instance must be uniquely named and configured separately for its associated PlateSpin Server.

To prepare your existing SQL server:

- 1 Ensure that your database server is running a supported version of Microsoft SQL Server. See [“Database Server” on page 8.](#)
- 2 Ensure that you have a dedicated, named database instance to use with your intended PlateSpin Migrate server. You need the database server name and database instance name during the product installation.
3. Ensure that you configure Microsoft SQL Server to allow both TCP/IP and Named Pipe connections.
- 4 (Conditional, Windows Authentication) Windows Authentication for your existing database server is available in a domain environment. If you plan to use Windows Authentication to access the Microsoft SQL Server database, you must configure the following in Active Directory:
 - ◆ You must add the Microsoft SQL Server database server to the domain.
 - ◆ You need two domain user accounts for the PlateSpin Migrate installation.
 - ◆ **A Domain user with the `sysadmin` role set:** This user with SQL Admin rights is required to create databases, tables, and other schema objects.
 - ◆ **PlateSpin Service user:** The service user can be a low-privileged domain user in the domain. However, the service user must be a local administrator on the PlateSpin Migrate Server and should be granted that permission prior to the installation.

NOTE: If the Windows user’s password changes, you must update the password for the PlateSpin Service user and for the IIS App Pool. Consider using a Windows user whose password never expires to avoid the situation.

NOTE: If you use Windows Authentication, you must log in as the domain user with SQL Admin rights when you upgrade or update your PlateSpin Server. This user must have local administrator rights. Also, the user you specify as the database Service User must have local administrator rights.

- 5 Open the following ports on the firewall to support authentication to your remote SQL Server:
 - ◆ **Ports 49152-65535/TCP:** Allow traffic for RPC for LSA, SAM, Netlogon.
 - ◆ **Port 1433/TCP:** Allow traffic for Microsoft SQL Server.

- ♦ **Custom ports:** If you configure SQL Server to use a custom TCP port, you must open that port on the firewall.

NOTE: If you do not use dynamic ports, you must specify the dedicated port in the **Database Server** field.

6 (Conditional) If you want to use dedicated ports with PlateSpin Migrate, you must open the ports on the firewall:

6a On the database server, determine which ports need to be opened:

6a1 In the SQL Server Configuration Manager, expand SQL Server Network Configuration, select **Protocols for <your-database-instance-name>**, then right-click **TCP/IP** and select **Properties**.

6a2 In the TCP/IP Properties dialog, select the **IP Addresses** tab.

6a3 Under **IPAll**, you will see the ports used by the specified database instance of SQL Server in **TCP Dynamic Ports** for a dynamic port or **TCP Port** for a static port. If **TCP Port** or **TCP Dynamic Ports** is set to any value other than 0, open the specified ports on the firewall. These are the ports you use to connect to the SQL Server.

For example, if the **TCP Dynamic Ports** field is set to 60664, and the **TCP Port** field is set to 1555, then you must enable Port 60664 and 1555 in the firewall rules on the SQL server.

6b Open the ports on the firewall.

NOTE: If you have a value set for dynamic ports, you may not see your server in the list of SQL servers when you click **Browse** during an installation or upgrade process. In this case, you must specify the server manually in the **Database Server** input field of the PlateSpin Migrate installation.

For example, if your server name is `MYSQLSERVER`, the database instance name is `PLATESPINDB`, and the dedicated port set for the dynamic port is `60664`, you type the following text, and then select the desired authentication type:

```
MYSQLSERVER\PLATESPINDB,60664
```

You must open the port on the firewall.

7 Continue with “[Installing PlateSpin Server](#)” on page 24.

1.3.3 Installing PlateSpin Server

1 Before you install PlateSpin Server, you must ensure the following requirements are met:

- ♦ The PlateSpin Server host meets the minimum system requirements. See “[System Requirements for PlateSpin Server](#)” on page 7.
- ♦ The PlateSpin Server host has the necessary prerequisite software installed. See “[Installing Prerequisite Software](#)” on page 12.
- ♦ A database server is available and has a dedicated database instance for PlateSpin Migrate. See “[Installing the Database Server](#)” on page 20.

2 Log in to the PlateSpin Server host as a user with administrative rights.

If the server is a domain computer, you must log in as a domain user who is a member of the Domain Admin group and the local Admin group.

If you use Windows Authentication for your SQL Server Standard Edition or Enterprise Edition database server, you must log in as the domain user with SQL Admin rights. This user must also have local administrator rights. In addition, the Service User you specify for SQL Server credentials must have local administrator rights.

3 On the PlateSpin Server host, launch the Installation Launcher.

See “Starting the PlateSpin Migrate Installation Launcher” on page 19.

4 Click **Install PlateSpin Server** and follow the on-screen instructions.

5 Read the software license agreement, select the **I accept the terms in the license agreement** option, then click **Next**.

You must accept the software license agreement before installing the product.

6 Specify a location for the temporary setup files, then click **Next**.

7 (Database Server, Windows Authentication) If you use Windows Authentication for your existing database server (that you are using instead of SQL Server Express Edition), configure the database connection and provide appropriate credentials for the database administrator and database service user.

Installation Screen	Do the following:
Database Connection Information	<ol style="list-style-type: none"> Click Browse to select the Database Server. <code><database_server>\<database_instance_name></code> If you use dynamic ports, you must also type the port number: <code><database_server>\<database_instance_name>,<port_number></code> Select Windows Authentication as the Authentication Type. Windows Authentication is supported only in a domain environment. Click Next.
Database Administrative Credentials	<ol style="list-style-type: none"> Specify the credentials for the Database Administrator. For example: Down-Level Logon User: <code>CORPDOM\sqladmin</code> Password: <code><sqladminPwd></code> NOTE: You must specify the domain administrator credentials or the credentials of a domain user having sufficient administrator and database rights. Click Validate Credentials to validate the credentials. Click Next.

Installation Screen	Do the following:
Database User Credentials	<ol style="list-style-type: none"> Do one of the following: <ul style="list-style-type: none"> Select Same as the Database Administrator to use the database administrator credentials to access the database service. Specify the credentials for the Database Service user. For example: Down-Level Logon User: <i>CORPDOM\sqluser1</i> Password: <i><sqluser1Pwd></i> The Service User must also have local administrator rights. Click Validate Credentials to validate the credentials. Click Next.
Confirm SQL Connection	<ol style="list-style-type: none"> Review the information. Click Back to edit the SQL connection information or click Next to continue.

- 8** (Database Server, SQL Authentication) If you use SQL Authentication for the database server, configure the database connection and provide appropriate credentials for the database administrator.

Use this option if you are using the Microsoft SQL Server Express Edition database server included in PlateSpin Migrate. The Installation automatically generates a password for the SQL system administrator user (*sa*) and uses it during the installation.

NOTE: You should set a custom password after the PlateSpin Server installation is completed and you have activated the license. See [“Modifying the Password for the SQL Server Express System Administrator User” on page 30.](#)

Installation Screen	Do the following:
Database Connection Information	<ol style="list-style-type: none"> Click Browse to select the Database Server. SQL Server Express database: Leave the default selection of <code>.\PLATESPINDB</code> in the drop-down list and keep the suggested <i>sa</i> user credentials on the next screen. NOTE: If you subsequently move your PlateSpin Migrate database instance or change your SQL Server password, you must reset the PlateSpin Migrate database connection settings. See KB Article 7970523 (https://www.netiq.com/support/kb/doc.php?id=7970523). Existing database: Browse to select from a list of available database servers. For example: <code>.\PLATESPINDB</code> <code><database_server>\<database_instance_name></code> <code><database_server>\<database_instance_name>,<port_number></code> Select SQL Authentication as the Authentication Type. Click Next.

Installation Screen	Do the following:
Database Administrative Credentials	<ol style="list-style-type: none"> 1. Specify the credentials for the Database Administrator for SQL authentication. If you use the SQL Server Express database, keep the default values: Login ID: sa Password: <generated-password-obscured> 2. Click Validate Credentials to validate the credentials. 3. Click Next.
Confirm SQL Connection	<ol style="list-style-type: none"> 1. Review the information. 2. Click Back to edit the SQL connection information or click Next to continue.

- 9 After you specify and validate credentials for the database server, click **Next**.
- 10 On the IIS Configuration screen, specify whether you want to allow HTTP or HTTPS connections. To allow unsecured connections (HTTP), select the **Allow unsecured connections (HTTP)** option.
If your IIS server has a signed SSL certificate, the communication protocol is HTTPS by default. Your browser might display a `untrusted connection` warning message. For information on how to proceed, see your browser-specific documentation.
- 11 Click **Next**, verify the installation settings, then click **Install** and follow the on-screen prompts.

NOTE: This process of installing the PlateSpin Migrate server might take several minutes to complete.

- 12 (Optional) Select **Start the Migrate web client** to launch the PlateSpin Migrate Web Client immediately after the installation is complete.
You can use the PlateSpin Migrate Web Interface to activate the license. For more information, see “[License Activation Using the Web Interface](#)” in the *PlateSpin Migrate 12.2.2 User Guide*.
- 13 (Optional) Continue with “[Installing the PlateSpin Migrate Client](#)” on page 27.

1.3.4 Installing the PlateSpin Migrate Client

You have two installation options for the PlateSpin Migrate Client:

- ◆ “[Installing the Client from within the Installation Launcher](#)” on page 27
- ◆ “[Downloading the Client from Your PlateSpin Server](#)” on page 28
- ◆ “[Starting the Client and Activating the License](#)” on page 28

Installing the Client from within the Installation Launcher

Use this option to install the Client on the same host with your PlateSpin Server immediately after the completion of the Server installation.

- 1 Complete the Server installation.
See “[Installing PlateSpin Server](#)” on page 24.

- 2 In the Installation Launcher window, click **Install PlateSpin Client** and follow the on-screen instructions.

The installation program installs and configures the PlateSpin Migrate Client, preparing it to run.

Downloading the Client from Your PlateSpin Server

Use this option to install the Client on a remote host by using a Web browser at any time after the completion of the Server installation.

- 1 Complete the PlateSpin Server installation.
See “[Installing PlateSpin Server](#)” on page 24.
- 2 Make sure your intended PlateSpin Migrate Client host meets the minimum system requirements.
See “[System Requirements for PlateSpin Migrate Client](#)” on page 9.
- 3 On your intended PlateSpin Migrate Client host, open a Web browser and navigate to the following URL:

```
http://server_host/platespinmigrate
```

Replace *server_host* with the actual name or IP address of your PlateSpin Server host. If the PlateSpin Server is installed on the local computer, replace *server_host* with `localhost`. If SSL is enabled, use the `https` protocol in the URL.

The browser loads the PlateSpin Server’s home page.

- 4 Click the PlateSpin Migrate Client download link, download the PlateSpin Migrate Client software, and install it by following the on-screen instructions.

Starting the Client and Activating the License

To start the client, click **Start > Programs > PlateSpin Migrate > PlateSpin Migrate Client**. When you install and launch the PlateSpin Migrate Client for the first time, the License Wizard opens and prompts you to activate your copy of the software. For help with product licensing, see “[PlateSpin Migrate Product Licensing](#)” in the *PlateSpin Migrate 12.2.2 User Guide*.

You can also use the PlateSpin Migrate Web Interface to activate the license. For more information, see “[License Activation Using the Web Interface](#)” in the *PlateSpin Migrate 12.2.2 User Guide*.

1.4 Installing the PlateSpin Migrate Software Components Using a Batch File

To silently install the PlateSpin Migrate Software Components:

- 1 From [Micro Focus Downloads](https://www.microfocus.com/support-and-services/download/) (<https://www.microfocus.com/support-and-services/download/>), download the `PlateSpinMigrateSetup-12.X.X.X.exe` installation program and save it on your intended PlateSpin Server host where you have installed and configured the prerequisite operating system and applications. See [Section 1.2, “Installing Prerequisite Software,”](#) on page 12.
- 2 Double-click the `PlateSpinMigrateSetup-12.x.x.x.exe` and extract the contents to a folder of your preference, such as `C:\Install\`.

IMPORTANT: Do not extract the contents of the `.exe` file to the default folder.

- 3 After the files are extracted, click **Cancel** to exit the installation wizard.

4 Depending on your desired installation type, copy and paste one of the following scripts to a batch file and execute the batch file after modifying the installation path as applicable.

◆ **For a local Microsoft SQL Server Express Edition database:**

```
C:\Migrate-12.2.2.X\PlateSpinImage\ServerInstall\setup.exe /s /v/qn /v"/
l*v c:\install.log" ^

/v"DBINSTALLTYPE=customerinstall" ^

/v"IS_SQLSERVER_SERVER=(local)\PLATESPINDB" ^

/v"IS_SQLSERVER_USERNAME= domain\sqladminUser " ^

/v"IS_SQLSERVER_USER_USERNAME= domain\sqlServiceUser " ^

/v"IS_SQLSERVER_PASSWORD=sqlauthenticationpwd"
```

◆ **For a remote Microsoft SQL Server Express database:**

```
C:\Migrate-12.2.2.X\PlateSpinImage\ServerInstall\setup.exe /s /v/qn /v"/
l*v c:\install.log" ^

/v"INSTALLDIR=c:\Migrate" ^

/v"DBINSTALLTYPE=remotedb" ^

/v"IS_SQLSERVER_SERVER=BM7W2K12SQL\BM8INSTANCE,59977" ^

/v"IS_SQLSERVER_AUTHENTICATION=0" ^

/v"IS_SQLSERVER_USERNAME= domain\sqladminUser " ^

/v"IS_SQLSERVER_USER_USERNAME= domain\sqlServiceUser " ^

/v"IS_SQLSERVER_USER_PASSWORD=sqlauthenticationpwd"
```

Property	Definition
DBINSTALLTYPE	Specifies the database install type: <ul style="list-style-type: none"> ◆ For an embedded database: customerInstall ◆ For a remote database: remotedb
INSTALLDIR	Specifies the installation directory. For example: C:\Program Files\PlateSpin Migrate Server
IS_SQLSERVER_AUTHENTICATION	Specifies the authentication method to be used: <ul style="list-style-type: none"> ◆ For Windows authentication: 0 ◆ For SQL authentication: 1
IS_SQLSERVER_SERVER	Specifies the database server: <ul style="list-style-type: none"> ◆ For a local database: (local)\PLATESPINDB ◆ For a remote database: DatabaseServerName\databaseInstance
IS_SQLSERVER_PASSWORD	Specifies the password for the database administrator.
IS_SQLSERVER_USER_PASSWORD	Specifies the password for the database service user.
IS_SQLSERVER_USERNAME	Specifies the database administrator user name in the format domain\sqladminUser.
IS_SQLSERVER_USER_USERNAME	Specifies the database service user name in the format domain\sqlServiceUser.

1.5 Checking for Software Updates

When the PlateSpin Migrate Client starts, it automatically checks the current version of the product and displays any available updates in the Update Availability dialog box.

To prevent the system from automatically checking for updates every time:

- 1 In the Update Availability dialog box, select the **Do not check for update at startup** option.
- 2 Click **OK**.

To re-enable automatic software update checks:

- 1 In the PlateSpin Migrate Client, click **Tools > Options**.
- 2 In the **General** tab, select **Restore Defaults**.
- 3 Click **OK**.

To manually check for version updates:

- 1 In the PlateSpin Migrate Client, click **Help > Check for Update**.

The system checks the current version of the product and shows updates if they are available. To download a specific software update or hotfix, follow the provided URL.

1.6 Modifying the Password for the SQL Server Express System Administrator User

If you installed Microsoft SQL Server Express Edition, the installation automatically generated a password for the SQL system administrator user (*sa*). You can use your Windows Administrator credentials and SQL management tools to modify the password without needing to know the generated password.

NOTE: For improved security, we strongly recommend that you modify the password for the *sa* credentials after the PlateSpin Server installation is completed and you have activated the license for the product. After you set a custom password for the *sa* user, you must be able to provide the password when you apply future upgrades for PlateSpin Server software.

The Microsoft SQLCMD (*sqlcmd*) utility is included in the SQL Server Express software. You can use this tool to modify the SQL system administrator password for your SQL Server Express database engine. After you change the password, you must update the information for PlateSpin Server and restart the Platespin Server service.

To change the SQL Server Express *sa* user password:

- 1 Log in to the PlateSpin Server host as the local Administrator user.
- 2 Launch the Administrator Command Prompt.
- 3 Modify the SQL system administrator password. Enter

```
sqlcmd -S .\PlateSpinDB -E -Q "ALTER LOGIN sa WITH PASSWORD = '{NewPassword}'"
```

This SQLCMD syntax executes the query that follows the -Q option, and then exits the SQLCMD utility.

NOTE: Run the command on the SQL Server Express host if you installed it on a different server.

This command uses the `ALTER LOGIN` syntax rather than the `sp_password` stored procedure as recommended by Microsoft in the [sp_password \(Transact-SQL documentation\)](#).

For information about syntax and commands for SQLCMD, see [SQLCMD Utility](#) on the Microsoft website.

- 4 Update PlateSpin with the new password for the SQL system administrator user. Enter

```
%PROGRAM FILES%\PlateSpin Migrate
Server" \bin\PlateSpin.UpdateConnectionString.exe /instance=.\PlateSpinDB /
username=sa /password=${NewPassword}
```

- 5 Restart the PlateSpin Server service. Enter

```
%PROGRAM FILES%\PlateSpin Migrate
Server\bin\RestartPlateSpinServer\RestartPlateSpinServer.exe
```

1.7 Security Best Practices for PlateSpin Hosts

As a security best practice, you should apply patches that address security vulnerabilities to your PlateSpin Migrate Server host and PlateSpin Migrate Client host, as you would for other Windows servers in your enterprise.

Micro Focus is aware of the side-channel analysis vulnerabilities described in CVEs 2017-5715, 2017-5753 and 2017-5754, known as Meltdown and Spectre. The current recommended actions have been applied on the PlateSpin Server images in the cloud.

We strongly recommend that you continue to apply security updates that address such threats as recommended by Microsoft for the Windows operating system for the PlateSpin Server host and PlateSpin Migrate Client host. Consult the vendor documentation for information. See [Protect Your Windows Devices Against Spectre and Meltdown \(https://support.microsoft.com/en-us/help/4073757/protect-your-windows-devices-against-spectre-meltdown\)](https://support.microsoft.com/en-us/help/4073757/protect-your-windows-devices-against-spectre-meltdown) on the Microsoft Support website.

2 Troubleshooting Installation Problems

- Section 2.1, “Common Installation Issues and Solutions,” on page 33
- Section 2.2, “Knowledgebase Articles about Installation Troubleshooting,” on page 34
- Section 2.3, “Removing PlateSpin Software,” on page 34

2.1 Common Installation Issues and Solutions

Problems or Messages	Solutions
An unexpected error occurs when trying to install the PlateSpin Server to a non-default location	When you install the PlateSpin Server in a non-default directory, you must also grant the ASP.NET user account full access to that directory. For example, if you want to install the server in <code>D:\PM_9</code> , you must make sure that the ASP.NET user account has full access to <code>D:\PM_9</code> .
HTTP 403 Error	<p>PlateSpin Migrate uses ASP.NET for its Web services. If ASP.NET is not installed on the server, the Web services do not function correctly, and the installation fails with this error.</p> <p>ASP.NET is included as part of the .NET Framework. When you install the .NET Framework, IIS must already be installed on the server for ASP.NET to be configured. If the .NET Framework was installed prior to IIS, simply uninstall and reinstall the .NET Framework.</p>
Cannot connect to IIS with http or https...	<p>During installation, an error message appears indicating that PlateSpin Migrate cannot connect to IIS with HTTP or HTTPS, when Setup attempted to connect with the existing IIS Server. The cause of this error generally indicates a problem with the IIS Server.</p> <ul style="list-style-type: none">• Ensure that IIS and ASP.NET are installed properly. See KB Article 7920595 (https://www.netiq.com/support/kb/doc.php?id=7920595).• To ensure that ASP.NET is properly registered with IIS, run the following command: <pre>"C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis.exe" -i</pre> <p>If the above steps do not resolve the issue, refer to the detailed instructions for reinstalling IIS and configuring IIS for isolation mode in KB Article 7920710 (https://www.netiq.com/support/kb/doc.php?id=7920710).</p>
Installing PlateSpin Migrate on a computer that has other applications running on IIS	This can cause problems during and after installation. If possible, avoid installing the product on a computer that has other applications running on IIS.

2.2 Knowledgebase Articles about Installation Troubleshooting

ID	Description
7920710	ERRMSG: Install Error: Cannot connect to IIS with http or https...
7920718	INFO: IIS and NTFS Permissions requirements for PlateSpin Migrate
7920595	INFO: Installing IIS and ASP.NET v2.0

2.3 Removing PlateSpin Software

The procedure below outlines the required steps for uninstalling the software components of PlateSpin Migrate and performing an optional manual cleanup. This might be necessary when upgrading or recovering from problems with a previous installation.

For information on a post-migration cleanup of source workloads, see “[Post-Migration Cleanup of Source Workloads](#)” in the *PlateSpin Migrate 12.2.2 User Guide*.

NOTE: This procedure does not remove license information from the server.

- 1 Use the Windows Control Panel to uninstall the PlateSpin Migrate Client.
- 2 Use the Windows Control Panel to uninstall the PlateSpin Server.
- 3 (Optional) If you opted to install the local database server from within the PlateSpin Migrate installation program and if you no longer need it, use the Windows Control Panel to uninstall Microsoft SQL Server Express Edition.
- 4 Ensure that the program directories of PlateSpin Migrate components were removed:
 - 4a Make sure the PlateSpin Server home directory was removed:
`..\PlateSpin Migrate Server`
 - 4b Make sure the PlateSpin Migrate Client home directory was removed:
`..\PlateSpin Migrate Client`
 - 4c (Optional) If you installed a local Microsoft SQL Server Express Edition database server and if you chose to uninstall it, remove the directory:
`..\Program Files\Microsoft SQL Server`

WARNING: Do not delete the SQL directory if you have another SQL server installed on the PlateSpin Migrate server host.

- 5 Open IIS Manager and ensure that the `ofxweb` and `PlateSpinMigrate` virtual directories are deleted.
- 6 Reboot the host.

3 Upgrading PlateSpin Migrate

To upgrade your PlateSpin Server to PlateSpin Migrate 12.2.2, you must have an existing installation of PlateSpin Migrate 12.2.1 running on Windows Server 2012 R2, with or without interim patches and hotfixes applied. Other direct upgrades are not supported.

NOTE: Direct upgrade from an existing installation of PlateSpin Migrate 12.2.1 running on Windows Server 2008 R2 is not supported. See [“Upgrading to a New Host Platform”](#) on page 39.

- ◆ [Section 3.1, “Prerequisites for Upgrade,”](#) on page 35
- ◆ [Section 3.2, “Preparing for Upgrade,”](#) on page 37
- ◆ [Section 3.3, “Upgrading Migrate,”](#) on page 38
- ◆ [Section 3.4, “Upgrading to a New Host Platform,”](#) on page 39
- ◆ [Section 3.5, “Post-Upgrade Tasks,”](#) on page 43

3.1 Prerequisites for Upgrade

Before you begin the upgrade, ensure that you meet these upgrade prerequisites and preparatory tasks in [Table 3-1](#).

Table 3-1 Checklist for Preparing to Upgrade PlateSpin Migrate

Status	Prerequisite Task	Notes
<input type="checkbox"/>	1. Ensure that your VM containers are running supported hypervisors and that the container credentials are valid throughout the upgrade process.	See “Supported Target Virtualization Platforms” and “Supported Target Cloud Platforms” in the <i>PlateSpin Migrate 12.2.2 User Guide</i> . See “Ensuring Valid Credentials for Target Cloud Containers” on page 37.
<input type="checkbox"/>	2. Use Run Diagnostics to generate detailed diagnostic reports on jobs executed before the upgrade. Post upgrading, the diagnostics reports are not available for jobs that you executed prior to the upgrade.	See “Generating Diagnostic Reports” in the <i>PlateSpin Migrate 12.2.2 User Guide</i> .
<input type="checkbox"/>	3. Back up your PlateSpin database files.	See “Backing Up Your Database Files Before Upgrade” on page 37.
<input type="checkbox"/>	4. Back up your custom Linux blkwatch drivers. You will need to upload these drivers again after the upgrade.	See “Backing Up Your Custom Linux blkwatch Drivers Before Upgrade” on page 37.
<input type="checkbox"/>	5. Make a record of any customized PlateSpin Configuration (.config) parameters that control the server’s default behavior. You will need to restore these settings after the upgrade.	

Status	Prerequisite Task	Notes
<input type="checkbox"/>	6. Ensure that all replication schedules are paused and that no replications are running. Wait for any replications that are underway to complete, or abort the running operations.	
<input type="checkbox"/>	7. Log out of Migrate Client and close the application.	You should not attempt to manage workloads and migrations during the upgrade.
<input type="checkbox"/>	8. Log out of the Web Interface and close the browser.	You should not attempt to manage workloads and migrations during the upgrade.
<input type="checkbox"/>	9. Ensure that your PlateSpin Server host meets the requirements for the upgrade version.	See Table 1-1, "Host Requirements for PlateSpin Server," on page 7. NOTE: If you are running PlateSpin Migrate on a Windows Server 2008 R2 operating system, use the upgrade path for " Upgrading to a New Host Platform " on page 39.
<input type="checkbox"/>	10. Install any newly required prerequisite software, such as Microsoft .NET Framework 4.7.1.	See " Prerequisite Software " on page 9. See .NET Framework 4.7.1
<input type="checkbox"/>	11. Disable the User Account Control (UAC) on the PlateSpin Server host.	See UAC guidelines .
<input type="checkbox"/>	12. Ensure that the person performing the upgrade has sufficient administrative rights for the PlateSpin Server host and the database server in order to update the software and the database schema.	See Credentials guidelines . NOTE <ul style="list-style-type: none">◆ When you upgrade or update PlateSpin Migrate running on a domain computer, you must log in to the PlateSpin Server as a domain user who is a member of the Domain Admin group and the local Admin group.◆ If you use Windows Authentication for your database server, when you perform the PlateSpin Migrate Server upgrade, you must log in to the PlateSpin Server as the domain user with SQL Admin rights in order to perform the software upgrade and update the database schema. This user must have local administrator rights. In addition, the Service User you specify for SQL Server credentials must have local administrator rights. <p>When you select Windows Authentication during the upgrade, the credentials of the logged-in user are automatically populated for the Database Administrator.</p>
<input type="checkbox"/>	13. Download the PlateSpin Migrate Setup utility (PlateSpinMigrateSetup-12.2.2.xxx.exe) file and copy it to the PlateSpin Server host.	See " Starting the PlateSpin Migrate Installation Launcher " on page 19.

3.2 Preparing for Upgrade

Before an upgrade, perform the following tasks to ensure that your data is available after upgrade.

- ♦ [Section 3.2.1, “Ensuring Valid Credentials for Target Cloud Containers,” on page 37](#)
- ♦ [Section 3.2.2, “Backing Up Your Database Files Before Upgrade,” on page 37](#)
- ♦ [Section 3.2.3, “Backing Up Your Custom Linux blkwatch Drivers Before Upgrade,” on page 37](#)

3.2.1 Ensuring Valid Credentials for Target Cloud Containers

The credentials in the Migrate database for target Cloud containers must be valid at export and import. Ensure that the password does not change or expire after export and until the import completes after upgrade. If your password is pending expiration, modify the password in the Cloud provider environment and update the credentials in Migrate before you begin an export.

WARNING: If credentials are invalid during import, the Cloud container is not imported and its associated workload configurations are corrupted in the imported database. To use the same Migrate server for migrations to the target Cloud container, you must re-install PlateSpin Server, which resets the database. You must re-configure all target containers and workloads.

3.2.2 Backing Up Your Database Files Before Upgrade

During the upgrade, the PlateSpin Migrate installation program transparently exports data from your existing database and re-imports it into a new database instance as required. However, as an additional measure of precaution, consider backing up your database files on the PlateSpin Server prior to the upgrade.

- 1 Log in to the PlateSpin Migrate Server host machine as the Administrator user.
- 2 On your server host, stop MS SQL services:
 - 2a On the Start menu, click **Run**, type `services.msc`, then click **OK**.
 - 2b In the Services window, right-click the **SQL Server** items, then select **Stop**.
- 3 Copy all `*.mdf` and `*.ldf` files to a location outside the product installation directory. The default location of these files is:

```
\Program Files\PlateSpin Migrate Server\Database
```
- 4 Restart MS SQL services that you stopped in [Step 2](#).

Continue with [“Backing Up Your Custom Linux blkwatch Drivers Before Upgrade”](#), or proceed with the upgrade as detailed in [“Upgrading Migrate” on page 38](#).

3.2.3 Backing Up Your Custom Linux blkwatch Drivers Before Upgrade

During the upgrade, the PlateSpin Migrate installation program will overwrite custom Linux blkwatch drivers that you previously added to PlateSpin Migrate. Consider saving a copy of your custom Linux blkwatch drivers prior to the upgrade.

- 1 Log in to the PlateSpin Migrate Server host machine as the Administrator user.
- 2 Navigate to the PlateSpin application's installation directory, such as `C:\Program Files\PlateSpin Migrate Server\`.

- 3 Open the `.\Packages\9D470BFF-E30F-4015-83D8-4D308A8C8B1B\` folder and copy the `1.package` file out of this folder to a temporary directory.
- 4 Rename `1.package` with the `.zip` file extension (`1.zip`), then extract the contents of the file to this temporary directory.
- 5 Save your `CustomKernel*` content to another temporary location.

Proceed with the upgrade, as detailed in “[Upgrading Migrate](#)” on page 38.

After the upgrade, you should upload again any custom Linux blkwatch drivers you need for future migrations. See [KB Article 7005873](https://www.netiq.com/support/kb/doc.php?id=7005873) (<https://www.netiq.com/support/kb/doc.php?id=7005873>).

3.3 Upgrading Migrate

- 1 Before you attempt the upgrade, ensure that you meet prerequisites and have performed the preparatory tasks:
 - ♦ “[Prerequisites for Upgrade](#)” on page 35
 - ♦ “[Preparing for Upgrade](#)” on page 37
- 2 Log in to the PlateSpin Migrate Server host as an administrative user.

If the server is in a domain, you must log in as a domain user who is a member of the Domain Admin group and the local Admin group.

If you use Windows Authentication for the database server, you must log in as the domain user with SQL Admin rights. This user must have local administrator rights to the PlateSpin Server.
- 3 (Conditional) If PlateSpin Migrate Client is installed on the PlateSpin Server host, use the Windows Control Panel to uninstall your client application.
- 4 On your server host, start the Installation Launcher.

See “[Starting the PlateSpin Migrate Installation Launcher](#)” on page 19.
- 5 Click **Install Migrate Server** and follow the on-screen instructions.
- 6 When you are prompted to specify a database instance, point the installation program to your existing database instance and provide the appropriate authentication type and credentials.
 - ♦ For Windows Authentication to the database server, ensure that the logged in user has local administrator rights and has system administrator rights in the database server in order to upgrade the schema of the database. The user you specify as the Service User must also have local administrator rights.
 - ♦ For SQL Authentication to the SQL Server Express Edition database server, the SQL system administrator (`sa`) user and the default generated password (created when you installed SQL Server Express) is automatically completed for database administrator Login ID and Password. If you previously set a custom password for the `sa` user, type the custom password before you click **Validate Credentials**.
- 7 (Optional) Install the current version of the PlateSpin Migrate Client on the PlateSpin Server host.

See “[Installing the PlateSpin Migrate Client](#)” on page 27.
- 8 (Optional) After the upgrade, you should upload again any custom Linux blkwatch drivers you need for future migrations. See [KB Article 7005873](https://www.netiq.com/support/kb/doc.php?id=7005873) (<https://www.netiq.com/support/kb/doc.php?id=7005873>).

See also “[Backing Up Your Custom Linux blkwatch Drivers Before Upgrade](#)” on page 37.

3.4 Upgrading to a New Host Platform

You can upgrade your existing PlateSpin Server to a new host platform in the following scenarios:

- ◆ Upgrading a PlateSpin Migrate 12.2.1 server running on Windows Server 2008 R2, which is no longer supported, to a supported Windows Server platform.
- ◆ Upgrading a PlateSpin Migrate 12.2.1 server to a newly supported Windows Server 2016 platform.

Use the information in this section to prepare the replacement PlateSpin Server host and re-install PlateSpin Migrate. You will export the database prior to the upgrade, and import it to a new database instance afterwards.

- ◆ [Section 3.4.1, “Preparing for Upgrade to a New Platform,” on page 39](#)
- ◆ [Section 3.4.2, “Exporting Your Database,” on page 39](#)
- ◆ [Section 3.4.3, “Upgrading the Platform on Your Current PlateSpin Server Host,” on page 40](#)
- ◆ [Section 3.4.4, “Upgrading to a Replacement PlateSpin Server Host,” on page 41](#)
- ◆ [Section 3.4.5, “Importing Your Database,” on page 42](#)

3.4.1 Preparing for Upgrade to a New Platform

Before you upgrade, ensure that you meet the prerequisites for upgrade to a new platform:

- ◆ Contact Micro Focus Support to reset your activation code and licenses for your current PlateSpin Migrate server in preparation for moving them to the replacement server. Ensure that you are ready to move to the new platform when the licenses are reset.
- ◆ Use Run Diagnostics to generate detailed diagnostic reports on jobs executed before the upgrade. Post upgrading, the diagnostics reports are not available for jobs that you executed prior to the upgrade. See [“Generating Diagnostic Reports”](#) in the *PlateSpin Migrate 12.2.2 User Guide*.
- ◆ Back up your custom blkwatch drivers that you will need for future migrations. See [“Backing Up Your Custom Linux blkwatch Drivers Before Upgrade”](#) on page 37.
- ◆ Export your database. See [Section 3.4.2, “Exporting Your Database,” on page 39](#).

Ensure that you copy the exported XML files to a location where they can be available for import after you have upgraded PlateSpin Server on a new platform.

3.4.2 Exporting Your Database

Before you disable your old server, export the workload migration database.

- 1 Prepare for exporting the database:
 - 1a Use the Migrate Client and Migrate Web Interface to ensure that all replication schedules are paused and that no replications are running. Wait for any replications that are underway to complete, or abort the running operations.
 - 1b Log out of Migrate Client and close the application.
 - 1c Log out of Migrate Web Interface and close the browser.
- 2 Export the database:
 - 2a Log in to the PlateSpin Server host as an administrative user.

If the server is in a domain, you must log in as a domain user who is a member of the Domain Admin group and the local Admin group.

2b Open a Command Prompt.

The process that runs the `ImportExportAll.bat` utility must have elevated privileges. This is most easily accomplished by starting a command window using the **Run as administrator** context menu option.

2c Navigate to the directory that contains the Import/Export utility (`ImportExportAll.bat`):

```
C:\Program Files\PlateSpin Migrate Server\PlateSpin Forge\bin\ImportExport
```

2d Export the data to specified directory. Enter

```
ImportExportAll.bat /export /dir "C:\temp"
```

If the export fails due to running jobs, and there are no running jobs because you stopped jobs and paused schedules as required in [Step 1a](#), reissue the command using the `/force` switch to force the export. Enter

```
ImportExportAll.bat /export /dir "C:\temp" /force
```

- 3** Copy the exported XML files to a location where they can be available for import after you have set up PlateSpin Server on a new platform.
- 4** Continue with either of the following paths to upgrade to a new replacement platform:
 - ◆ [“Upgrading the Platform on Your Current PlateSpin Server Host” on page 40](#)
 - ◆ [“Upgrading to a Replacement PlateSpin Server Host” on page 41](#)

3.4.3 Upgrading the Platform on Your Current PlateSpin Server Host

In this upgrade path, you upgrade the platform of the current PlateSpin Server host. It requires that you remove the installed PlateSpin components while you install and configure the upgraded prerequisite OS and software. After you [export your database](#), you are ready to upgrade the prerequisite software and operating system for the current PlateSpin Server host.

1 Log in to the current PlateSpin Server host as an administrative user.

If the server is in a domain, you must log in as a domain user who is a member of the Domain Admin group and the local Admin group.

2 Remove the installed PlateSpin Migrate components:

2a Use Windows Control Panel to uninstall PlateSpin Migrate Client.

2b Use Windows Control Panel to uninstall PlateSpin Migrate.

2c (Conditional) If SQL Server Express Edition is installed on the PlateSpin Server host, use Windows Control Panel to uninstall it.

3 On your PlateSpin Server host, upgrade to a supported Windows Server operating system and configure the required features and settings for that platform.

See [Operating System](#) and [Installing Prerequisite Software](#).

4 Ensure that you install and reconfigure all prerequisite software for the PlateSpin Server host.

See [Prerequisite Software](#) and [Installing Prerequisite Software](#).

5 Prepare your database server to work with the reconfigured PlateSpin Server host.

See [Installing the Database Server](#).

If you are using SQL Server Express Edition, install the current version. After the upgrade is complete and the product license is re-activated, you should set a secure custom password for the re-installed SQL Server Express database server. See [“Modifying the Password for the SQL Server Express System Administrator User” on page 30](#).

If you are using your Microsoft SQL Server Standard Edition or Enterprise Edition, ensure that you create a new database instance and configure the settings to work with the upgraded platform. You will import the database to this new database instance after the upgrade is complete.

- 6 Log in to the PlateSpin Server host as a user with administrative rights.

If the server is a domain computer, you must log in as a domain user who is a member of the Domain Admin group and the local Admin group.

If you use Windows Authentication for your SQL Server Standard Edition or Enterprise Edition database server, you must log in as the domain user with SQL Admin rights. This user must also have local administrator rights. In addition, the Service User you specify for SQL Server credentials must have local administrator rights.

- 7 Install the current version of PlateSpin Migrate Server. See [Installing PlateSpin Server](#).

- 8 (Optional) Install the current version of PlateSpin Migrate Client. See [Installing the PlateSpin Migrate Client](#).

- 9 Activate the license for the PlateSpin Server host by using the reset activation code that you retrieved from Micro Focus Support before the upgrade.

See [“Activating Your Product License”](#) in the *PlateSpin Migrate 12.2.2 User Guide*.

- 10 Import the exported database to the new database instance. See [“Importing Your Database” on page 42](#).

- 11 (Optional) Add other reset or re-activated licenses on the replacement server. See [“Managing License Keys for Workload Migrations”](#) in the *PlateSpin Migrate 12.2.2 User Guide*.

- 12 (Optional) After the upgrade, you should upload again any custom Linux blkwatch drivers you need for future migrations. See [KB Article 7005873 \(https://www.netiq.com/support/kb/doc.php?id=7005873\)](https://www.netiq.com/support/kb/doc.php?id=7005873).

See also [“Backing Up Your Custom Linux blkwatch Drivers Before Upgrade” on page 37](#).

- 13 (Conditional) If you used a Microsoft SQL Server Standard Edition or Enterprise Edition database server with the old PlateSpin Server host, remove the now unused database instance that was associated with the former PlateSpin Server host.

3.4.4 Upgrading to a Replacement PlateSpin Server Host

In this upgrade path, you set up a replacement PlateSpin Server host, then decommission the current PlateSpin Server host. It requires that you stop all migration services on the old host while you install and configure the upgraded prerequisite OS and software on a new machine. After you [export your database](#), you are ready to prepare a replacement PlateSpin Server host with the prerequisite software and operating system.

- 1 On the new intended PlateSpin Server host, install a supported Windows Server operating system and configure the required features and settings for that platform.

See [Operating System](#) and [Installing Prerequisite Software](#).

- 2 Ensure that you install and configure all prerequisite software. See [“Prerequisite Software” on page 9](#).

- 3 Prepare your database server to work with the new PlateSpin Server host. See [Installing the Database Server](#).

If you are using SQL Server Express Edition, install the current version. After the upgrade is complete and the product license is re-activated, you should set a secure custom password for the re-installed SQL Server Express database server. See [Section 1.6, “Modifying the Password for the SQL Server Express System Administrator User,” on page 30.](#)

If you are using your Microsoft SQL Server Standard Edition or Enterprise Edition, ensure that you create a new database instance. You will import the database to this new database instance after the upgrade is complete.

- 4 Log in to the replacement PlateSpin Server host as a user with administrative rights.
If the server is a domain computer, you must log in as a domain user who is a member of the Domain Admin group and the local Admin group.
If you use Windows Authentication for your SQL Server Standard Edition or Enterprise Edition database server, you must log in as the domain user with SQL Admin rights. This user must also have local administrator rights. In addition, the Service User you specify for SQL Server credentials must have local administrator rights.
- 5 Install the current version of PlateSpin Migrate Server. See [Installing PlateSpin Server](#).
- 6 (Optional) Install the current version of PlateSpin Migrate Client. See [Installing the PlateSpin Migrate Client](#).
- 7 Activate the license for the replacement PlateSpin Server host by using the reset activation code that you retrieved from Micro Focus Support before the upgrade.
See [“Activating Your Product License”](#) in the *PlateSpin Migrate 12.2.2 User Guide*.
- 8 Import the exported database to the new database instance. See [Section 3.4.5, “Importing Your Database,” on page 42.](#)
- 9 (Optional) Add other reset or re-activated licenses on the replacement server. See [“Managing License Keys for Workload Migrations”](#) in the *PlateSpin Migrate 12.2.2 User Guide*.
- 10 (Optional) After the upgrade, you should upload again any custom Linux blkwatch drivers you need for future migrations. See [KB Article 7005873 \(https://www.netiq.com/support/kb/doc.php?id=7005873\)](#).
See also [“Backing Up Your Custom Linux blkwatch Drivers Before Upgrade” on page 37.](#)
- 11 Remove PlateSpin Migrate components from the former PlateSpin Server host to decommission it as a PlateSpin server:
 - 11a Log in to the former PlateSpin Server host as an administrative user.
If the server is in a domain, you must log in as a domain user who is a member of the Domain Admin group and the local Admin group.
 - 11b Use Windows Control Panel to uninstall PlateSpin Migrate Client.
 - 11c Use Windows Control Panel to uninstall PlateSpin Migrate.
 - 11d (Conditional) If SQL Server Express Edition is installed on the old PlateSpin Server host, use Windows Control Panel to uninstall it.
- 12 (Conditional) If you used a Microsoft SQL Server Standard Edition or Enterprise Edition database server with the old PlateSpin Server host, remove the now unused database instance that was associated with the former PlateSpin Server host.

3.4.5 Importing Your Database

After your upgraded PlateSpin Server host is ready, import the data to the new database instance that works with your upgraded PlateSpin Server.

- 1 Log in as an Administrator user to the PlateSpin Server host.

If the server is in a domain, you must log in as a domain user who is a member of the Domain Admin group and the local Admin group.

- 2 Copy the exported XML files to `C:\temp` on the PlateSpin Server host.
- 3 Open a Command Prompt.

The process that runs the `ImportExportAll.bat` utility must have elevated privileges. This is most easily accomplished by starting a command window using the **Run as administrator** context menu option.

- 4 Navigate to the directory that contains the Import/Export utility (`ImportExportAll.bat`):

```
C:\Program Files\PlateSpin Migrate Server\PlateSpin Forge\bin\ImportExport
```

- 5 Import the data from the specified directory. Enter

```
ImportExportAll.bat /import /dir "C:\temp"
```

- 6 After the import is complete, connect to the Migrate Web Interface and Migrate Client to confirm that the data is intact.
- 7 Resume the replications.

3.5 Post-Upgrade Tasks

After you upgrade the PlateSpin Migrate software, you must perform the following tasks to resume normal operations of the PlateSpin Server:

- 1 Reapply the required configuration settings in PlateSpin Configuration at https://Your_PlateSpin_Server/platespinconfiguration/

- 2 Verify that the upgraded PlateSpin Server has a pre-compiled `blkwatch` driver for your workloads. See “[Linux Distributions Supported by Migrate](#)” in your *User Guide*.

You should upload again any custom Linux `blkwatch` drivers you need for future migrations that you backed up before the upgrade in “[Backing Up Your Custom Linux blkwatch Drivers Before Upgrade](#)” on page 37.

If a pre-compiled driver is not available, you can create a custom `blkwatch` driver by following the steps found in the [Knowledgebase Article 7005873](https://www.netiq.com/support/kb/doc.php?id=7005873) (<https://www.netiq.com/support/kb/doc.php?id=7005873>).

- 3 Resume all scheduled or paused replications and migration jobs.
- 4 Verify that your PlateSpin Server and replications are working properly.
- 5 (Optional, recommended) If you have not previously set a custom password for the SQL system administrator user (`sa`), consider setting a secure password at this time.

See “[Modifying the Password for the SQL Server Express System Administrator User](#)” on page 30.

A

Documentation Updates

This section contains information on documentation content changes that were made in the English translation of the *PlateSpin Migrate Installation and Upgrade Guide* since the General Availability of PlateSpin Migrate 12.2.2.

- ♦ [Section A.1, “October 2018,” on page 45](#)
- ♦ [Section A.2, “June 2018,” on page 45](#)
- ♦ [Section A.3, “May 2018,” on page 45](#)

A.1 October 2018

Location	Update
“TLS Protocol” in Table 1-1, “Host Requirements for PlateSpin Server,” on page 7	Added the following information: For remote databases, TLS 1.0 is required for the SQL Server host operating system during the installation. After the installation is complete, you can use TLS 1.2 for communications between Migrate server and the SQL Server if the SQL Server supports it.

A.2 June 2018

Location	Update
“Exporting Your Database” on page 39	Corrected the <code>ImportExportAll.bat</code> command for exporting the data.
“Importing Your Database” on page 42	Corrected the <code>ImportExportAll.bat</code> command for importing the data.

A.3 May 2018

Location	Update
“TLS Protocol” in Table 1-1, “Host Requirements for PlateSpin Server,” on page 7	PlateSpin Migrate requires Transport Layer Security (TLS) 1.0 and higher to be enabled on the intended PlateSpin Server host.
“TLS Protocol” in Table 1-2, “Host Requirements for PlateSpin Migrate Client,” on page 10	PlateSpin Migrate Client requires Transport Layer Security (TLS) 1.0 and higher to be enabled on the intended PlateSpin Client host.

Location	Update
Section 1.2, "Installing Prerequisite Software," on page 12	Updated the procedure for using the PowerShell script to install prerequisite software. NOTE: The installation of prerequisite software might require a reboot of the intended PlateSpin Migrate host server. Depending on what prerequisite software needs to be installed, Internet access might be required.