

PlateSpin® Migrate Connector Quick Start

May 2017

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About this Book and the Library

The *PlateSpin Migrate Connector Quick Start* provides information about installing and configuring the Connector to integrate workload information, migration settings, and migration status between your PlateSpin Transformation Manager server and one or more PlateSpin Migrate servers. It provides information about installing and configuring Migrate Connector instances.

- ♦ [Chapter 1, “Connector Overview,” on page 7](#)
- ♦ [Chapter 2, “Installing the Connector,” on page 13](#)
- ♦ [Chapter 3, “Configuring PlateSpin Migrate Connector,” on page 15](#)
- ♦ [Appendix A, “Documentation Updates,” on page 31](#)

Intended Audience

This document is intended for IT staff, such as data center administrators and operators, who use PlateSpin Transformation Manager to plan, execute, and monitor their large-scale data center transformation projects and workload migration projects.

Information in the Library

The documentation library for this product is available in HTML and PDF formats on the [PlateSpin Transformation Manager Documentation website \(https://www.netiq.com/documentation/platespin-transformation-manager-1-1/\)](https://www.netiq.com/documentation/platespin-transformation-manager-1-1/).

Additional Resources

We encourage you to use the following additional resources online:

- ♦ [Micro Focus Workload Migration and Disaster Recovery channel on YouTube.com \(https://www.youtube.com/channel/UChuzpo3HbYpPI93icqeOzJQ\)](https://www.youtube.com/channel/UChuzpo3HbYpPI93icqeOzJQ): A channel that offers product webcasts, demos, and training.
- ♦ [PlateSpin Transformation Manager Product Resources \(https://www.netiq.com/products/platespin-transformation-manager/resources/\)](https://www.netiq.com/products/platespin-transformation-manager/resources/): A product website that offers white papers and other technical information.
- ♦ [User Community \(https://www.netiq.com/communities/\)](https://www.netiq.com/communities/): A web-based community with a variety of discussion topics.
- ♦ [Support Knowledgebase \(https://www.netiq.com/support/kb/\)](https://www.netiq.com/support/kb/): A collection of in-depth technical articles.

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1 Connector Overview

The PlateSpin Migrate Connector for PlateSpin Transformation Manager integrates a single PlateSpin Transformation Manager server and one or more PlateSpin Migrate servers to automate the execution of large-scale data center transformation projects. You configure transformation plans for workloads in Transformation Manager and submit them for execution. On its scheduled start date, Transformation Manager creates migration tasks for the workload on its assigned PlateSpin Migrate server. The Connector monitors migration events across all Migrate servers, and reports the migration workflow status to Transformation Manager.

- ♦ [“PlateSpin Migration Environment” on page 7](#)
- ♦ [“PlateSpin Discovery Environment” on page 10](#)
- ♦ [“Key Features” on page 10](#)

PlateSpin Migration Environment

The PlateSpin Migration Environment allows you to automate many tasks for workload migration by combining PlateSpin Transformation Manager with PlateSpin Migrate Connector and one or more PlateSpin Migrate servers. You can plan and execute migrations of physical and virtual workloads to target VMs on VMware Cluster hosts. The transformation workflow and schedule determine when migration tasks are executed. Transformation Manager can pause automation to allow the Migration Specialist to manually perform some tasks. Migration Specialists can monitor the workload migration and respond to exceptions, freeing them to handle more migrations in less time.

PlateSpin Migrate Connector integrates activities between Transformation Manager and Migrate servers. It load-balances the migration jobs across large farms of PlateSpin Migrate servers in the project. Migrate Connector listens for migration events from Transformation Manager and delivers commands to the appropriate Migrate servers. Migrate Connector listens for migration status events from the various PlateSpin Migrate servers and delivers events only to the appropriate project and workload transformation plans.

Figure 1-1 illustrates the deployment environment for automated PlateSpin migration. See Table 1-1 for a description of how automated migration works in a PlateSpin Migration Environment.

Figure 1-1 PlateSpin Migration Environment

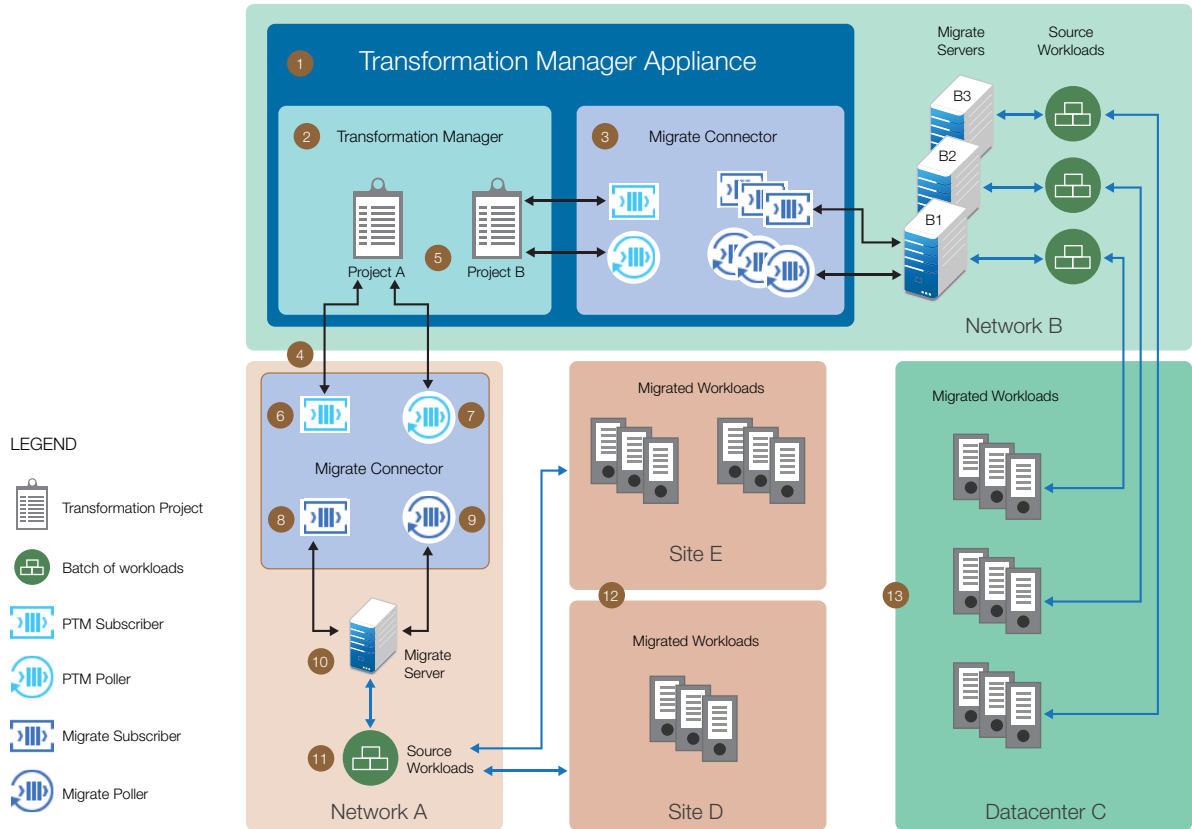


Table 1-1 How Automated Migration Works in a PlateSpin Migration Environment

PlateSpin Migration Environment	Description
1. PlateSpin Transformation Manager Appliance	The appliance VM hosts the PTM Server and an instance of the Migrate Connector.
2. PlateSpin Transformation Manager Server (PTM Server)	A single PTM Server manages one or more Migrate Connector instances.
3. PlateSpin Migrate Connector on the appliance	The Migrate Connector instance on the Appliance is preconfigured to work with the PTM Server. This instance can integrate events for one or more Migrate servers in the same network as the Appliance.
4. PlateSpin Migrate Connector deployed in other networks	You need a Migrate Connector instance in the same network as the PlateSpin Migrate servers and the source workloads to be migrated. Install the Connector on your own servers running SUSE Linux Enterprise Server (SLES) 11 SP4.
5. Transformation projects	A Migrate Connector works with all projects unless you configure it for a single project. A project-based connector ensures the privacy and security of an organization's data in a multi-tenant environment.

PlateSpin Migration Environment	Description
6. PlateSpin Transformation Manager Subscriber	Each Connector has one PTM Subscriber. The subscriber listens for events pushed dynamically from its assigned PTM Server. If you assign the Connector to a project, the subscriber listens only for events from its project.
7. PlateSpin Transformation Manager Poller	Each Connector has one PTM Poller. The poller periodically polls its assigned PTM Server to check that it has received all events since the last poll. If you assign the Connector to a project, the poller checks only for events from its project.
8. PlateSpin Migrate Subscriber	Each Connector has a separate Migrate Subscriber for each connected Migrate server. Each subscriber listens for events pushed dynamically from its assigned Migrate server. If you assign the Connector to a project, the subscriber listens only for events for its project.
9. PlateSpin Migrate Poller	Each Connector has a separate Migrate Poller for each connected Migrate server. Each poller periodically polls its assigned Migrate server to check that it has received all events since the last poll. If you assign the Connector to a project, the poller checks only for events for its project.
10. PlateSpin Migrate servers	For a project, you create a Migration Server resource for each PlateSpin Migrate server that you will use to execute workload migrations. When migration jobs begin, the Connector initiates a subscriber and poller for the specified Migrate server and starts listening and polling for migration state events.
11. Source workloads	<p>For a project, you import basic information about the source workloads that you plan to migrate, then an automatic discovery process adds the details.</p> <p>You can manually assign a Migration Server resource to a source workload, or you can allow the Connector to auto-assign a Migration Server resource. Auto-assignment ensures that workload migrations are load-balanced across a server farm of Migrate servers.</p> <p>After you submit a workload, the migration workflow progresses according to the workload's transformation plan through the Migrate server.</p>
12. Workloads migrated to hosts in different sites	<p>Each workload's transformation plan defines the proposed workload and its target VMware cluster and network. You organize the workload migrations into waves and batches, and schedule them according to your business needs.</p> <p>In this example, you plan to migrate workloads to multiple sites in the same or different network. Workloads in a batch have the same destination site. The Migration Specialist at each site manages the migrations to the site.</p>

PlateSpin Migration Environment	Description
13. Workloads migrated to different hosts in the same site	In this example, you plan to migrate workloads to different VMware clusters in a data center. Workloads in a batch have the same destination VMware cluster. The Migration Specialist responsible for the target VMware cluster manages the migrations to that cluster.

For deployment information, see [“Deployment Requirements” on page 15](#).”

PlateSpin Discovery Environment

In a PlateSpin Discovery Environment, PlateSpin Transformation Manager works with the PlateSpin Migrate Connector to provide automated discovery on import. You can discover source physical machines, source VMware virtual machines, and target VMware Cluster hosts in a project.

NOTE: PlateSpin Migrate servers are not required for discovery. They can be set up later in your VMware migration projects.

Import with automatic discovery simplifies and standardizes the setup of workloads and target hosts for planning. You provide minimal connection information and logon credentials for the machines. The discovery process retrieves details about each machine, populates properties for the related object in the planning database, and creates a proposed workload based on those settings.

- ♦ **Source workload discovery:** Transformation Manager provides three methods of import and automatic discovery of workloads:
 - ♦ Spreadsheet
 - ♦ Range of IPv4 addresses (0 to 255)
 - ♦ Single IPv4 address
- ♦ **Target host discovery:** Transformation Manager provides automatic discovery for target VMware Cluster hosts. Discovery adds the Host resource and adds resources for its discovered networks, datastores, and resource pools.

Key Features

PlateSpin Migrate Connector supports automated Windows and Linux workload migration for the following transformation types:

- ♦ Physical to virtual (VMware)
- ♦ Virtual (VMware) to virtual (VMware)

PlateSpin Migrate Connector supports automated discovery and migration by integrating Transformation Manager with the PlateSpin Migrate servers in a project. It provides several advantages for planning, managing, and executing workload transformation projects:

- ♦ **Integrates PlateSpin Transformation Manager and PlateSpin Migrate servers.** Migrate Connector integrates Transformation Manager and your PlateSpin Migrate servers by using event messaging and secure REST API communications.
- ♦ **Allows multiple Connector instances.** You can have multiple Connector instances for a single Transformation Manager server, where each instance is associated with a separate project.

- ♦ **Configure global settings for Migrate Connectors.** Global configuration settings on the Migrate Connector page in PlateSpin Transformation Manager apply to all Connector instances across all projects.
- ♦ **Provides automated discovery of source workloads and target hosts.** Migrate Connector works with import options in Transformation Manager to automate discovery of source Windows and Linux workloads and target VMware Cluster hosts for your project.
- ♦ **Load-balances migration jobs across available Migrate servers.** Migrate Connector uses round-robin load-balancing to distribute workload migration jobs evenly across large server farms of the PlateSpin Migrate servers in your project.
- ♦ **Drives the automated migration on Migrate Servers.** In Automated Mode, Migrate Connector drives the automated execution of workload migrations for your VMware migration projects in a PlateSpin Migration Environment based on each workload's transformation plan. Global settings control when submitted migration jobs are set up before migration and when the jobs are removed after cutover.
- ♦ **Coordinates communications in the PlateSpin Migration Environment.** Migrate Connector supports polling and eventing types of communications in a PlateSpin Migration Environment.
 - ♦ Migrate Connector listens for migration events from Transformation Manager and delivers commands to the appropriate Migrate servers.
 - ♦ Migrate Connector listens for migration status events from the PlateSpin Migrate servers and delivers them only to the appropriate project and workloads.
- ♦ **Supports user-provided callouts.** Migrate Connector supports user-provided callouts during the transformation workflow that integrate Transformation Manager with your internal systems.

2 Installing the Connector

Use the information in this section to deploy instances of the PlateSpin Migrate Connector in the same networks as the source workloads you want to migrate.

- ♦ “Installation Requirements” on page 13
- ♦ “Downloading PlateSpin Migrate Connector” on page 13
- ♦ “Installing PlateSpin Migrate Connector” on page 13

Installation Requirements

PlateSpin Transformation Manager Appliance includes an instance of the PlateSpin Migrate Connector that is pre-configured to work with the Transformation Manager server. You can use this Connector to migrate source workloads in the same network where you deploy the appliance.

You can also deploy Migrate Connector separately on your own servers running SUSE Linux Enterprise Server (SLES) Service Pack 4 (SP4). You can deploy a Connector instance in each project's network.

Downloading PlateSpin Migrate Connector

An instance of PlateSpin Migrate Connector 1.1 is pre-installed on the PlateSpin Transformation Manager 1.1 Appliance. The Connector is configured to work with the Transformation Manager server. You can use this instance to automate workload migrations using the PlateSpin Migrate 12.2 servers that reside in the same network where you install the appliance.

PlateSpin Migrate Connector 1.1 is available for download on the PlateSpin Transformation Manager 1.1 Download page on the [NetIQ Downloads \(https://dl.netiq.com/\)](https://dl.netiq.com/) website. Download the `platespin-migrate-connector-1.1.0-xxx.noarch.rpm` file, where `xxx` represents the build number.

To install the RPM without warnings, you must also download and import the `ptm_public-key.key` file to your keyring before you install the RPM.

Installing PlateSpin Migrate Connector

Complete the following steps to install PlateSpin Migrate Connector.

- 1 Log in to the SLES 11 SP4 server as the `root` user.
- 2 Copy the RPM and KEY files that you downloaded to a location on the server.
- 3 Import the public key to your keyring.
- 4 Open a terminal console, then install the RPM:

```
rpm -ih platespin-migrate-connector-1.0.0-xxx.noarch.rpm
```

- 5 Configure the instance for the PlateSpin Transformation Manager server. Continue with “Configuring the Transformation Manager Settings for a Connector Instance” on page 18.

3 Configuring PlateSpin Migrate Connector

The PlateSpin Transformation Manager server works with one or more instances of PlateSpin Migrate Connector that are deployed in the networks where you have source workloads. If you associate a Connector with the PTM Server, the Connector is available to all projects that have source workloads in that network. You can also configure a separate Connector instance for each project.

NOTE: Only users assigned to the Transformation Manager System Administrator role can modify the global settings for PlateSpin Migrate Connector. If you need to modify the default workflow settings, contact the System Administrator.

- ♦ [“Deployment Requirements” on page 15](#)
- ♦ [“Configuring the Transformation Manager Settings for a Connector Instance” on page 18](#)
- ♦ [“Configuring Global Settings for Connectors” on page 20](#)
- ♦ [“Configuring Connection Information for PlateSpin Migrate Servers” on page 23](#)
- ♦ [“Starting, Restarting, or Stopping the PlateSpin Migrate Connector Service” on page 23](#)
- ♦ [“Setting the Connector Startup as Automatic or Manual” on page 24](#)
- ♦ [“Troubleshooting Transformation Workflow Errors” on page 25](#)
- ♦ [“Viewing Connector Logs” on page 25](#)
- ♦ [“Downloading Connector Log Files on the Appliance” on page 25](#)
- ♦ [“Configuring Proxy Client Settings” on page 26](#)

Deployment Requirements

PlateSpin Migrate Connector requires the following hardware, software, and network settings in your migration environment.

- ♦ [“PlateSpin Products” on page 15](#)
- ♦ [“Network Connectivity and Access Requirements” on page 16](#)

PlateSpin Products

PlateSpin Migrate Connector integrates and orchestrates migration activities between the following PlateSpin products that you deploy in your environment:

- ♦ **PlateSpin Transformation Manager 1.1**

Configure PlateSpin Transformation Manager and set up a transformation project. You can assign the Migrate Connector to the PlateSpin Transformation Server or to a specific project on the server. Transformation Manager is required for automated discovery and automated migration execution. See [“Configuring the Transformation Manager Settings for a Connector Instance” on page 18](#).

- ♦ **PlateSpin Migrate 12.2**

In a PlateSpin Migration Environment, PlateSpin Migrate Connector can connect to one or more PlateSpin Migrate 12.2 servers for your project. See “[Configuring Connection Information for PlateSpin Migrate Servers](#)” on page 23.

IMPORTANT: If the Role service WebDAV Publishing is installed on the PlateSpin Migrate server, uninstall it from **Server Manager > Roles > Web Server (IIS) > Role Service > Common HTTP features > WebDAV Publishing**.

For information about how to buy this product, see [PlateSpin Migrate \(https://www.netiq.com/products/migrate/\)](https://www.netiq.com/products/migrate/).

For information about installing and using this product, see the [PlateSpin Migrate Documentation website \(https://www.netiq.com/documentation/platespin-migrate-12-2/\)](https://www.netiq.com/documentation/platespin-migrate-12-2/).

Network Connectivity and Access Requirements

PlateSpin Migrate Connector requires network connectivity to the following resources, based on its assignment to the PlateSpin Transformation Manager server or to a specific project:

- ♦ Its assigned PlateSpin Transformation Manager server
- ♦ Source workloads
- ♦ Target VMware cluster hosts
- ♦ PlateSpin Migrate servers

Your environment must meet the following requirements for network connectivity and access:

- ♦ “[Event Messaging](#)” on page 17
- ♦ “[PlateSpin Discovery Environment](#)” on page 17
- ♦ “[PlateSpin Migration Environment](#)” on page 18
- ♦ “[Secure HTTPS Setup for PlateSpin Transformation Manager](#)” on page 18

Event Messaging

PlateSpin Transformation Manager publishes workload workflow state change messages for its registered listeners. Each Migrate Connector instance registers with its assigned Transformation Manager server or project and listens for events and performs the appropriate actions for them on Migrate servers in a project.

In a PlateSpin Migration Environment, each PlateSpin Migrate server publishes workload migration state change messages for its registered listeners. A Migrate Connector instance registers with the Migrate servers in a project, then listens for messages and delivers them to the appropriate project and workload in Transformation Manager.

These message queues are pre-configured and start automatically when you start the PlateSpin service for a PlateSpin Transformation Manager server and a PlateSpin Migrate server. They do nothing unless you open the necessary port to allow registration and a PlateSpin Migrate Connector registers for the messages. The messaging function starts, stops, and restarts automatically with its parent service. Do not modify the default settings.

[Table 3-1](#) shows the protocol and port required for messaging for discovery and automated migration. These messages reflect events and state changes and do not contain sensitive information.

Table 3-1 Event Messaging Requirements for Network Protocols and Ports

Traffic	Network Protocol and Port	Other Requirements
Event Messaging	61613 TCP, incoming (not secure)	This port is open by default on the Transformation Manager Appliance. For automated migration, open this port on the PlateSpin Migrate servers assigned to the project.

PlateSpin Discovery Environment

Workload discovery requires that you enable incoming ping (ICMP echo reply and ICMPv4-In echo request) traffic for source workloads and firewalls. PlateSpin supports only IPv4. For information about required software, network, and port settings for workload discovery, see [Table 3-2](#).

Table 3-2 Workload Discovery Requirements for Network Access and Communications

Discovery Target	Network Protocols and Ports	Other Requirements
Windows workloads	<ul style="list-style-type: none">♦ ICMP, incoming♦ SMB (TCP 445 or 139)	<ul style="list-style-type: none">♦ Microsoft .NET Framework 2.0 SP2, 3.5 SP1 or 4.0♦ Credentials with Domain Admin or built-in Administrator privileges
Linux workloads	<ul style="list-style-type: none">♦ ICMP, incoming♦ SSH (TCP 22, incoming)	Root-level access. For information on using an account other than root, see KB Article 7920711 (https://www.netiq.com/support/kb/doc.php?id=7920711).

Host discovery requires that you enable incoming ping (ICMP echo reply and ICMPv4-In echo request) traffic for target VMware hosts and firewalls. PlateSpin supports only IPv4. For information about required software, network, and port settings for host discovery, see [Table 3-3](#).

Table 3-3 Host Discovery Requirements for Network Access and Communications

Discovery Target	Network Protocols and Ports	Other Requirements
VMware Cluster hosts	<ul style="list-style-type: none">♦ ICMP, incoming♦ SMB (TCP 445 or 139, incoming)	VMware account with an Administrator role

Ensure that you open the port required for event messaging on the PlateSpin Transformation Manager server and on each PlateSpin Migrate Connector. See [“Event Messaging” on page 17](#).

PlateSpin Migration Environment

[Table 3-4](#) provides the ports to open in the firewall and on each of the Migrate servers in order for PlateSpin Transformation Manager to use the Migrate REST APIs for automated migration. In addition, the Migration Server resource for Migrate server must provide a valid Credentials resource for the Migrate Administrator user.

Table 3-4 REST API Requirements for Network Access and Communications

REST API Traffic	Network Protocol and Port	Access
HTTPS (secure)	Port 443, TCP, incoming and outgoing	Administrator login credentials for the Migrate server
HTTP (non-secure)	Port 80, TCP, incoming and outgoing	Administrator login credentials for the Migrate server

Ensure that you open the port required for event messaging on the PlateSpin Transformation Manager server and on each PlateSpin Migrate server. See [“Event Messaging” on page 17](#).

PlateSpin Transformation Manager requires that your migration environment meets the PlateSpin Migrate requirements for network communications. See [“Requirements for Migration”](#) in the [PlateSpin Migrate 12.2 User Guide](#).

Secure HTTPS Setup for PlateSpin Transformation Manager

For secure HTTPS connections between PlateSpin Migrate Connector and PlateSpin Transformation Manager, the Jetty SSL settings on the PlateSpin Transformation Manager Appliance VM are configured with the latest recommended security settings.

Configuring the Transformation Manager Settings for a Connector Instance

The PlateSpin Transformation Manager Appliance includes an instance of the PlateSpin Migrate Connector that is automatically installed and configured to work with the Transformation Manager server on the Appliance. It works with all projects by default. After you set up projects in

Transformation Manager, you can add a `ptm_project_id` to the `/opt/microfocus/migrate_connector/config/settings.cfg` file on the Appliance to assign the Connector instance to a specific project.

You must manually configure each PlateSpin Migrate Connector instance that you deploy on your own SUSE Linux Enterprise Server 11. SP4 server.

To configure the Connector instance for a PTM server or for a specific project:

- 1 Log in to the SLES 11 SP4 server with a `root` user account.
- 2 In a text editor, open the `/opt/microfocus/migrate_connector/config/settings.cfg` file.
- 3 Configure the values in the top section called `[PlateSpin Transformation Manager Server]`.

Option	Description
<code>ptm_host</code>	<p>Specify the hostname or IP address of the Transformation Manager server. For example, the Migrate Connector instance on the Appliance is <code>localhost</code>.</p> <p><code>ptm_host=localhost</code></p>
<code>ptm_port</code>	<p>Specify the port used for the Transformation Manager server. The default port for HTTPS is 8183. The default port for HTTP is 8182.</p> <p><code>ptm_port=8183</code></p>
<code>ptm_ssl</code>	<p>Specify a value of <code>true</code> to use SSL to connect to the Transformation Manager server. Valid values are <code>true</code> and <code>false</code>.</p> <p><code>ptm_ssl=true</code></p>
<code>verify_ptm_ssl_cert</code>	<p>Specify whether you want to require the certificate to be validated for connections to the PlateSpin Transformation Manager server. Valid values are <code>false</code> or <code>true</code>. The default is to disable validation (<code>false</code>).</p> <p><code>verify_ptm_ssl_cert=false</code></p>
<code>ptm_username</code>	<p>Specify the email address of a valid user account on your PlateSpin Transformation Manager server that has been assigned a System Administrator role.</p> <p><code>ptm_username=john.doe@example.com</code></p> <p>NOTE: We recommend that you create a dedicated user account in PlateSpin Transformation Manager for the connector to use. We recommend System Administrator privileges for the account in order to allow Migrate Connector to execute on any project. The user account must have at least Project Architect level privileges for the projects on which the Connector should execute.</p> <p>See “Roles” and “Creating a User” in the <i>PlateSpin Transformation Manager User Guide</i>.</p>
<code>ptm_password</code>	<p>Specify the password for the user account.</p> <p><code>ptm_password=yourpassword</code></p>

Option	Description
ptm_project_id	<p>(Optional) Specify the numeric project ID for the project in Transformation Manager to restrict the Connector to a single project instead of making it available for all projects. The Connector processes only events and actions within the assigned project.</p> <pre>ptm_project_id=1234</pre> <p>To discover the numeric ID associated with a project in PlateSpin Transformation Manager:</p> <ol style="list-style-type: none"> 1. In the Web Interface, go to Planning > Projects. 2. Select the project, then click Edit. 3. In the Edit Project dialog, mouse over the project name in the dialog title area. A tooltip displays the numeric ID of the project.

4 Save the file, then exit the text editor.

5 Start or restart PlateSpin Migrate Connector. In the terminal console, enter

```
rcps_migrate_connector restart
```

You can also restart the Connector from the Appliance Management UI.

Configuring Global Settings for Connectors

If your migration environment involves different networks, you deploy a PlateSpin Migrate Connector server in each network. You assign each connector to your PlateSpin Transformation Manager server as described in [“Configuring the Transformation Manager Settings for a Connector Instance” on page 18](#).

The connectors inherit their default behavior from the settings you provide in **System Configuration > Migrate Connector** in the Transformation Manager Web Interface.

- ♦ [“About Global Options for Connectors” on page 20](#)
- ♦ [“Viewing Global Migrate Connector Settings” on page 22](#)
- ♦ [“Editing Global Migrate Connector Settings” on page 23](#)

About Global Options for Connectors

On the **System Configuration > Migrate Connector** page in PlateSpin Transformation Manager, a System Administrator can customize the default workflow of migration projects that leverage one or more PlateSpin Migrate servers to execute workload migrations.

NOTE: You must restart PlateSpin Migrate Connector after you modify settings in order to apply the changes.

- ♦ [“General Settings” on page 21](#)
- ♦ [“Migrate Server Settings” on page 21](#)
- ♦ [“Customer-Provided Scripts” on page 22](#)

General Settings

Missed Event Poll Interval

Specify the number of seconds between polls for workload migration events.

The default value is 300 seconds (5 minutes). A lower value puts more stress on your PTM server and Migrate servers.

Reconnect Retry Interval

Specify the number of seconds to wait after a connection failure before PTM tries to reconnect to a PlateSpin Migrate server .

The default value is 1500 seconds (25 minutes).

Pause for Migrate Configuration

Specify whether to pause the Transformation Workflow until a Migrate user manually configures the workload migration on a Migrate server.

The default is to disable manual migrate configuration.

Pause for Manual Pre-Cutover Testing

Specify whether to pause the Transformation Workflow in a Transforming / Incremental Replication state until the Migrate user manually triggers Pre-Cutover Testing.

The default is to disable manual pre-cutover testing.

Migrate Server Settings

Add Workload to Migrate

Specify the number of days before the start date to add the workload migration job to an auto-assigned PlateSpin Migrate server.

This option is disabled by default with a value of 0 (zero). When you submit a transformation plan, the Migrate Connector immediately auto-assigns a Migrate server, adds a workload migration job, then waits until the start date to execute the migration. The job consumes capacity and a Migrate license while it waits for start date. Consuming capacity before it is needed might block migration of workloads with earlier start dates.

Set a value of 1 or greater to enable automation control to wait until the specified pre-start-date interval to begin the preparation for migration. You can submit the workload transformation plans as they are ready without immediately consuming capacity or a license on a Migrate server.

Maximum Workloads

Specify the maximum number of workloads to allow for a PlateSpin Migrate server at a time.

The default value is 100. To determine an appropriate value for your PlateSpin Migration Environment, see “[Performance](#)” in the *PlateSpin Migrate 12.2 User Guide*.

NOTE: Capacity to add more workloads can be regained by doing the following:

- ♦ Wait until a pre-start-date interval before the start date to add the workload to a Migrate server. See [Add Workload to Migrate](#).
 - ♦ Remove the workload information after a successful cutover. See [Remove Workload After Cutover](#).
-

Maximum Targets

Specify the maximum number of discovered targets for a PlateSpin Migrate server.

The default value is 27.

Verify SSL Certificate

Specify whether to enable the validation of SSL certificates for connections to the PlateSpin Migrate servers.

The default is to disable certificate validation. Select the check box to enable it.

Remove Workload After Cutover

Specify whether to clean up the workload information from the PlateSpin Migrate servers after a cutover completes.

The default is enabled. Deselect the check box to disable it.

Remove after (days)

Specify the number of days after a workload is cut over to clean up the workload information from the PlateSpin Migrate server.

The default value is 3 days.

Customer-Provided Scripts

Run Custom Import Script

Specify whether to automatically execute the Custom Import callout script after initial workload discovery.

The default is disabled.

Run Submit Validation Script

Specify whether to automatically execute the Submit Validation callout script before adding the workload to Migrate.

The default is disabled.

Run Pre-Cutover Testing Script

Specify whether to automatically execute the Pre-Cutover Testing callout script after workload replication.

The default is disabled.

Run Post-Cutover Testing Script

Specify whether to automatically execute the Post-Cutover Testing callout script after workload cutover.

The default is disabled.

Viewing Global Migrate Connector Settings

The System Administrator, Project Manager, and Project Architect can view the global settings for the PlateSpin Migrate Connector instance associated with the PTM Server.

To view the connector settings:

- 1 In the Web Interface toolbar, select **Configuration**.
- 2 In the System Configuration dialog, select **Migrate Connector**.

- 3 Scroll to view the settings:
 - ♦ [General Settings](#)
 - ♦ [Migrate Server Settings](#)
 - ♦ [Customer-Provided Scripts](#)
- 4 When you are done, click **Close** to exit the System Configuration dialog.

Editing Global Migrate Connector Settings

The System Administrator can modify any of the global settings for the PlateSpin Migrate Connector instances that are assigned to the PTM Server. The changes apply throughout the product for all transformation projects.

To edit connector settings:

- 1 In the Web Interface toolbar, select **Configuration**.
- 2 In the System Configuration dialog, select **Migrate Connector**.
- 3 Click **Edit**.
- 4 In the Edit Connector Settings dialog, specify appropriate option settings for the following:
 - ♦ [General Settings](#)
 - ♦ [Migrate Server Settings](#)
 - ♦ [Customer-Provided Scripts](#)
- 5 Click **Save**.
- 6 Click **Close** to exit the System Configuration dialog.
- 7 For each PlateSpin Migrate Connector server that is connected to your PTM Server, log in to the Connector server as the `root` user and restart the Connector service.

Configuring Connection Information for PlateSpin Migrate Servers

PlateSpin Migrate Connector recognizes only the Migration Server resources in a Transformation Manager project that are of type PlateSpin Migrate. You provide connection information about the PlateSpin Migrate servers as you create Migration Server resources in a project. To create Migration Server resources, go to the **Resources > Migration Servers** tab in the PlateSpin Transformation Manager Web Interface, then click **Create**. See “[Managing Migration Server Resources](#)” in the *PlateSpin Transformation Manager User Guide*.

For network and access requirements, see “[PlateSpin Migration Environment](#)” in the *PlateSpin Transformation Manager User Guide*.

Starting, Restarting, or Stopping the PlateSpin Migrate Connector Service

The PlateSpin Migrate Connector service starts automatically when you power on the Transformation Manager Appliance. You can start, restart, or stop the PlateSpin Migrate Connector service using the `rcps_migrate_connector` command on any Connector host server.

On the Appliance or on your Connector host server:

- 1 Log in to the Connector host server with a local `root` user account.
On the Appliance, ensure that SSH is enabled. See “[Enabling or Disabling the SSH Service](#)” in the *PlateSpin Transformation Manager Appliance Guide*.
- 2 Launch a terminal console.
- 3 Enter the appropriate command to start, stop, or restart the process:

```
rcps_migrate_connector [start | stop | restart]
```
- 4 (Optional) View the log file at `/var/opt/microfocus/migrate_connector/logs/migrate-connector.log`.

The Appliance Management Console supports these functions for the Connector service instance on the PlateSpin Transformation Manager Appliance.

On the PlateSpin Transformation Manager Appliance:

- 1 Log in to the PlateSpin Transformation Manager Appliance Management Console as the `vaadmin` user.
- 2 Click **System Services**.
- 3 In the list of Available System Services, select **PlateSpin Migrate Connector for PTM**.
- 4 Click **Action**, then select **Stop**, **Start**, or **Restart** as appropriate.
- 5 (Optional) To make the startup of the Connector service Automatic or Manual, click **Options**, then select either **Set as Automatic** or **Set as Manual**.
- 6 (Optional) In the Log Files column, click the **download** link for the Connector service, and download the files to your management machine.
- 7 Click **Close** to exit System Services.
- 8 Exit the Appliance Management Console.


Setting the Connector Startup as Automatic or Manual

On the PlateSpin Transformation Manager Appliance, PlateSpin Migrate Connector service is set to automatically start up on system restart. You can set the service startup as Automatic or Manual.

- 1 In a web browser, specify the DNS name or the IP address for the appliance with the port number 9443. For example:

```
https://10.10.10.1:9443
```


or

```
https://ptm.example.com:9443
```
- 2 Specify the administrative username and password for the appliance, then click **Sign in**. The default users are `vaadmin` or `root`.
- 3 Click **System Services** .
- 4 Select the Migrate Connector service.
- 5 Click **Options**, then select either **Set as Automatic** (the default) or **Set as Manual**.
- 6 Click **Close** to exit System Services.

Troubleshooting Transformation Workflow Errors

If a failure occurs at any step during the workload discovery workflow or migration workflow, an error message appears at the top of the workload's Transformation Plan dialog in PlateSpin Transformation Manager. Mouse over the error message to view a tooltip with additional troubleshooting details.

For more information, see the troubleshooting tips in the [PlateSpin Transformation Manager User Guide](#):

- ♦ [“Troubleshooting Discovery Failures”](#)
- ♦ [“Troubleshooting Automated Migration Failures”](#)

Viewing Connector Logs

You can access logs for the PlateSpin Migrate Connector service on the Appliance or on your Connector host. Log in as the `root` user, then navigate to the following locations.

Migrate Connector Log File

```
/var/opt/microfocus/migrate_connector/logs/migrate_connector.log
```

PlateSpin Migrate Connector Out File

```
/var/opt/microfocus/migrate_connector/logs/platespin-migrate_connector.out
```

Downloading Connector Log Files on the Appliance

If you experience an issue with the PlateSpin Migrate Connector instance on the PlateSpin Transformation Manager Appliance, you might need to download the log files to send them to Technical Support.

- 1 In a web browser, specify the DNS name or the IP address for the Appliance with the port number 9443. For example:

```
https://10.10.10.1:9443
```

or

```
https://ptm.example.com:9443
```

- 2 Specify the administrative username and password for the appliance, then click **Sign in**. The default users are `vaadmin` or `root`.

- 3 Click **System Services** .

- 4 In the **Log Files** column, click the **download** link for the appropriate service to download the log files to your management workstation:

PlateSpin Transformation Manager: Collects, zips, and downloads the following log files:

- ♦ `tm_server.log`
- ♦ `platespin-transformmgr.out`
- ♦ `platespin_transformmgr_config.log`

PlateSpin Migrate Connector for PTM: Collects, zips, and downloads the following log files:

- ♦ `migrate_connector.log`
- ♦ `platespin-migrate-connector.out`

5 Click **Close** to exit System Services.

Configuring Proxy Client Settings


If you have a Proxy Server in your environment, you can enable PlateSpin Transformation Manager to use that server for Internet communications by configuring the Proxy client settings on the PlateSpin Transformation Manager Appliance and host servers of PlateSpin Migrate Connector instances. The Proxy client informs applications of the Proxy Server URL and credentials to use (if you specify them). It does not affect how the applications communicate with the server.

- ♦ “Configuring Proxy Client Settings for the PTM Appliance” on page 26
- ♦ “Configuring Proxy Client Settings for Migrate Connector Hosts” on page 28

Configuring Proxy Client Settings for the PTM Appliance

You can enable the PlateSpin Transformation Manager Appliance to work with the Proxy Server in your environment. Log in to the Appliance via SSH, then use YaST to configure the Internet proxy client settings that the Appliance, Web Interface, and PlateSpin Migrate Connector instance will use for HTTP and HTTPS communications.

To configure Proxy client settings on the Appliance:

- 1 Enable the SSH protocol on the Appliance.
 - 1a In a web browser, log in to the Appliance Management Console as the `vaadmin` user.
`https://<ptm-ipaddr-or-dns-name>:9443`
 - 1b Click **System Services** .
 - 1c Select the SSH service.
 - 1d Select **Action > Start**.
 - 1e Click **Close** to exit System Services.
 - 1f Log out of the Appliance Management Console, then close your web browser.
- 2 Configure the Proxy client settings needed to access your Proxy Server:
 - 2a From your computer, start an SSH session for `ptm-ipaddr-or-dns-name` on port 22, then log in as the `root` user to the Appliance.
You can use any SSH tool, such as [Putty \(http://www.putty.org/\)](http://www.putty.org/).
 - 2b At the terminal prompt, enter

`yast`

```
login as: root
Using keyboard-interactive authentication.
Password:
Last login: Wed May 10 20:23:23 2017
bgarrett9:~ # yast
bgarrett9:~ #
```

2c In YaST, navigate to **Network Services**, select **Proxy**, then press Enter.

[illegible]

2d On the Proxy Configuration page, on **Enable Proxy**, press the Space bar to select the check box.

```

YaST2 - proxy @ bgarrett9

Proxy Configuration
[x] Enable Proxy
lProxy Settingsq
x HTTP Proxy URL x
x http://aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaa x
x HTTPS Proxy URL x
x http://aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaa x
x FTP Proxy URL x
x http://aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaa x
x [ ] Use the Same Proxy for All Protocols x
x No Proxy Domains x
x localhost, 127.0.0.1aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaa x
mqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqj
lProxy Authenticationqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqk
x Proxy User Name Proxy Password x
x aaaaaaaaaaaaaaaaaaaaaaaaaaaaaa aaaaaaaaaaaaaaaaaaaaaa x
mqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqj
[Test Proxy Settings]

[Help] [Cancel] [ OK ]

F1 Help F9 Cancel F10 OK

```

2e Tab to navigate to the fields and configure the Proxy settings by using the information for your Proxy Server. Provide the URL for the Proxy Server for HTTP or HTTPS (or both) communications, depending on what protocols you enabled for the Appliance.

HTTP Proxy URL: The URL (with hostname and port number) of the Proxy Server used for non-secure access to the Internet. For example: `http://proxy1.example.com:3126/`


HTTPS Proxy URL: The URL (with hostname and port number) of the Proxy Server used for secure access to the Internet. For example: `https://proxy2.example.com:3128/`

FTP Proxy URL: The URL (with hostname and port number) of the Proxy Server used for access to the file transfer services (FTP). For example: `https://ftp.proxy.example.com:2121/`

Use the Same Proxy for All Protocols: Enable this option and provide a single URL in **HTTP Proxy URL** that will be used as the Proxy Server for HTTP, HTTPS, and FTP communications.

No Proxy Domains: Specify a comma-separated list of domains for which requests should be made directly without caching. The default is `localhost`.

Proxy User Name and Proxy Password: Provide the credentials for your Proxy Server if it requires authorization.

- 2f (Optional) Tab to **Test Proxy Settings**, then press Enter.
- 2g Tab to **OK**, then press Enter to save and apply the settings.
- 2h Tab to **Quit**, then press Enter to exit YaST.
- 2i At the terminal prompt, enter `exit` to close the SSH session.
- 3 Disable the SSH protocol on the Appliance.
 - 3a In a web browser, log in to the Appliance Management Console as the `vaadmin` user.
`https://<ptm-ipaddr-or-dns-name>:9443`
 - 3b Click **System Services** .
 - 3c Select the SSH service.
 - 3d Select **Action > Stop**.
 - 3e Click **Close** to exit System Services.
 - 3f Log out of the Appliance Management Console, then close your web browser.

Configuring Proxy Client Settings for Migrate Connector Hosts

You can enable the PlateSpin Migrate Connector host servers to work with the Proxy Server in your environment. On SUSE Linux Enterprise Server (SLES) servers that host an instance of Migrate Connector, log in to the desktop and use YaST2 to configure the Internet proxy client settings that the Connector instance will use for HTTP and HTTPS communications.

To configure Proxy client settings on SLES servers that host a Migrate Connector instance:

- 1 Log in as the `root` user to the desktop on the SLES server.
- 2 Start the YaST Control Center from the main menu. Provide the `root` user password if you are prompted for it.
To start the YaST Control Center from the command line, open a terminal, then enter `yast2`.
- 3 Select **Network Services**, then select **Proxy**.
- 4 Configure the Proxy settings by using the information for your Proxy Server. Provide the URL for the Proxy Server for HTTP and HTTPS communications.

HTTP Proxy URL: The URL (with hostname and port number) of the Proxy Server used for non-secure access to the Internet. For example: `http://proxy1.example.com:3126/`

HTTPS Proxy URL: The URL (with hostname and port number) of the Proxy Server used for secure access to the Internet. For example: `https://proxy2.example.com:3128/`

FTP Proxy URL: The URL (with hostname and port number) of the Proxy Server used for access to the file transfer services (FTP). For example: `https://ftp.proxy3.example.com:2121/`

Use the Same Proxy for All Protocols: Enable this option and provide a single URL in **HTTP Proxy URL** that will be used as the Proxy Server for HTTP, HTTPS, and FTP communications.

No Proxy Domains: Specify a comma-separated list of domains for which requests should be made directly without caching. The default is `localhost`.

Proxy User Name and Proxy Password: Provide the credentials for your Proxy Server if it requires authorization.

- 5 Click **Test Proxy Settings**.
- 6 Click **Finish** to save and apply the settings.
- 7 Exit YaST.
- 8 Log out of the server.

A Documentation Updates

This section contains information on documentation content changes that were made in this *Quick Start* after the initial release of PlateSpin Migrate Connector 1.1.

May 2017

Location	Update
“Configuring Proxy Client Settings” on page 26	This section is new.

