

PlateSpin Forge® 11.3

Upgrade Guide

July 2018

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About This Book and the Library

The *Upgrade Guide* provides information about upgrading the PlateSpin Forge software.

Intended Audiences

This document is intended for IT administrators who are responsible for maintaining the PlateSpin Forge Appliance and software.

Additional Documentation

For the most recent version of this guide and other PlateSpin Forge documentation resources for this release, visit the [PlateSpin Forge Documentation website \(https://www.netiq.com/documentation/platespin-forge-11-3/\)](https://www.netiq.com/documentation/platespin-forge-11-3/).

In addition to English, online documentation is available in these national languages: Chinese Simplified, Chinese Traditional, French, German, Japanese, and Spanish.

Contacting Micro Focus

Our goal is to provide documentation that meets your needs. If you have suggestions for documentation improvements, you can use the [comment on this topic](#) link at the bottom of any HTML page of the online English documentation, or send an email to Documentation-Feedback@microfocus.com.

For specific product issues, contact Micro Focus Customer Care at <https://www.microfocus.com/support-and-services/>.

Additional technical information or advice is available from several sources:

- ♦ Product documentation, Knowledge Base articles, and videos: <https://www.microfocus.com/support-and-services/>
- ♦ The [Micro Focus Communities](#) pages for High Availability and Disaster Recovery: <https://forums.novell.com/forumdisplay.php/1870-HIGH-AVAILABILITY-DISASTER-RECOVERY>

1 Upgrading PlateSpin Forge Server from Version 11.2 to Version 11.3

This *Upgrade Guide* explains how to upgrade PlateSpin Forge Server software from PlateSpin Forge 11.2 to PlateSpin Forge 11.3 on your existing PlateSpin Forge 11.2 Appliance Version 3 system.

- [Section 1.1, “Upgrade Options,” on page 7](#)
- [Section 1.2, “Upgrade Requirements,” on page 8](#)
- [Section 1.3, “Before You Upgrade PlateSpin Forge,” on page 9](#)
- [Section 1.4, “Upgrade Procedure,” on page 11](#)
- [Section 1.5, “Post-Upgrade Tasks,” on page 12](#)

1.1 Upgrade Options

PlateSpin Forge 11.3 provides two upgrade paths from PlateSpin Forge 11.2 Appliance Version 3. This section explains the upgrade options.

- [Section 1.1.1, “Appliance Version 3,” on page 7](#)
- [Section 1.1.2, “Appliance Version 4,” on page 8](#)

1.1.1 Appliance Version 3

You can use the PlateSpin Forge 11.3 installation file to update PlateSpin Forge Server on your existing PlateSpin Forge 11.2 Appliance Version 3. This upgrade method will update only the PlateSpin Forge Server software. No upgrade occurs for the other components. All licenses for your existing system will carry over to the upgraded system.

Table 1-1 Licenses for PlateSpin Forge Appliance Version 3

Component	Licenses for Appliance Version 3
Product	PlateSpin Forge
PlateSpin Forge Management VM host	VMware ESXi 5.5
PlateSpin Forge Management VM operating system	Microsoft Windows Server 2012 R2 Standard Edition
PlateSpin database	Microsoft SQL Server 2014 Standard Edition

This upgrade method provides all enhancements for PlateSpin Forge Server. However, you are not able to protect workloads running Microsoft Windows Server 2016 because the VMware host is running VMware ESXi 5.5. If you need to protect Windows Server 2016 workloads, consider the [Appliance Version 4](#) upgrade path.

NOTE: VMware requires VMware ESXi 6.0 or later for VMs running Microsoft Windows Server 2016.

1.1.2 Appliance Version 4

PlateSpin Forge 11.3 Appliance Version 4 ships with VMware ESXi 6.5 Update 1 as the virtualization host. Appliance Version 4 includes a license for VMware ESXi 6.5. This solution provides all enhancements for PlateSpin Forge Server and enables you to protect Windows Server 2016 workloads.

NOTE: VMware requires VMware ESXi 6.0 or later for VMs running Microsoft Windows Server 2016.

You can upgrade supported Forge models to PlateSpin Forge 11.3 Appliance Version 4 by using the *PlateSpin Forge 11.3 Appliance Rebuild Kit*. You must update both the PlateSpin Forge Server software and the VMware host. You will need a replacement license for the VMware host. Contact [Micro Focus Customer Care](#) to obtain a VMware ESXi 6.5 license. For a list of supported Forge models and rebuild instructions, see the *PlateSpin Forge 11.3 Field Rebuild Guide*.

Table 1-2 Licenses for PlateSpin Forge Appliance Version 4

Component	Licenses for Appliance Version 4
Product	PlateSpin Forge
PlateSpin Forge Management VM host	VMware ESXi 6.5
PlateSpin Forge Management VM operating system	Microsoft Windows Server 2012 R2 Standard Edition
PlateSpin database	Microsoft SQL Server 2014 Standard Edition

1.2 Upgrade Requirements

To upgrade the PlateSpin Forge Server software to PlateSpin Forge 11.3 on Appliance Version 3, you must have an existing installation of PlateSpin Forge 11.2 Appliance Version 3, with or without hotfixes or field patches applied. No other direct upgrade path is supported.

NOTE: For information about upgrading from PlateSpin Forge 11.1 Appliance Version 3 to version PlateSpin Forge 11.2 Appliance Version 3, see the *PlateSpin Forge 11.2 Upgrade Guide* (https://www.netiq.com/documentation/platespin-forge-11-2/forged_upgrade/).

If you currently use PlateSpin Forge 4 Appliance Version 2 or earlier, you must first upgrade your system to PlateSpin Forge 11.0 Appliance Version 3, and then apply software updates for the incremental upgrades. See the following:

- ◆ *PlateSpin Forge 11.0 Upgrade Guide* (https://www.netiq.com/documentation/platespin-forge-11/forged_upgrade/)

Depending on the version of Forge you currently use, you might need to follow an incremental upgrade path. See “The Upgrade Paths” (https://www.netiq.com/documentation/platespin-forge-11/forged_upgrade/data/b1agcbcd.html), and then follow the upgrade instructions as needed.

- ◆ *PlateSpin Forge 11.1 Upgrade Guide* (<https://www.netiq.com/documentation/platespin-forge-11/>)
 - ◆ *PlateSpin Forge 11.2 Upgrade Guide* (https://www.netiq.com/documentation/platespin-forge-11-2/forged_upgrade/)
-

1.3 Before You Upgrade PlateSpin Forge

Before you upgrade the PlateSpin Forge Server software, ensure that you prepare your PlateSpin Forge environment by performing the prerequisite tasks in [Table 1-3](#).

Table 1-3 Checklist for Preparing to Upgrade PlateSpin Forge Server

Status	Prerequisite Task	Notes
<input type="checkbox"/>	1. Download the PlateSpinForgeSetup-11.3.0.xxx.exe file and copy it to the Forge Management VM.	See Section 1.3.1, “Downloading the Setup Utility,” on page 9.
<input type="checkbox"/>	2. Pause the replication schedules for all protected workloads, and ensure that no replications are running.	See Section 1.3.2, “Pausing the Replication Schedule,” on page 10.
<input type="checkbox"/>	3. Make a record of any customized PlateSpin Configuration parameters that control the server’s default behavior. You will need to restore these settings after the upgrade.	
<input type="checkbox"/>	4. Back up the Forge Management VM by taking a virtual machine snapshot as a restore point.	See Section 1.3.3, “Backing Up the Forge Management VM,” on page 10.
<input type="checkbox"/>	5. Back up your custom Linux blkwatch drivers. You will need to upload these drivers again after the upgrade.	See Section 1.3.4, “Backing Up Your Custom Linux blkwatch Drivers Before Upgrade,” on page 11.
<input type="checkbox"/>	6. Ensure that .NET Framework 4.5.2 is installed.	See Microsoft .NET Framework 4.5.2 (Offline Installer) (https://support.microsoft.com/en-us/help/2901907/microsoft-net-framework-4-5-2-offline-installer-for-windows-server-201).

1.3.1 Downloading the Setup Utility

To perform the upgrade, you must use the PlateSpin Forge Setup utility (PlateSpinForgeSetup-11.3.0.xxx.exe). The upgrade will export and import data from your previous installation. This utility is available in the *PlateSpin Forge 11.3 Appliance Rebuild Kit* found on the [Micro Focus Patch Finder website](#) (<https://download.microfocus.com/patch/finder/#bu=netiq&familyId=28603>).

- 1 Go to the [Micro Focus Patch Finder website](#) (<https://download.microfocus.com/patch/finder/#bu=netiq&familyId=28603>).
- 2 (Conditional) If PlateSpin Forge is not pre-selected, select the **PlateSpin Forge** product and version, then click **Search**.
- 3 In the search results, locate and expand **PlateSpin Forge 11.3**, then click **PlateSpin Forge 11.3 Appliance Upgrade Kit**.
- 4 On the Download Description page, click **proceed to download**.
- 5 When you are prompted for your Customer Care user identity, log in with the Customer Care user account that has the email address associated with the product purchase.

- 6 In the component list, find the `PlateSpinForgeSetup-11.3.0.xxx.exe` utility, then click **download** next to the file name.
- 7 Save the file to your computer.
- 8 Copy this file to the Forge VM when you are ready to begin the upgrade.

1.3.2 Pausing the Replication Schedule

Before you create a snapshot or start the PlateSpin Forge upgrade software, use the following procedure to pause the replication schedules for the workloads protected by the PlateSpin Server and ensure that there are no running replications. You can wait for the in-progress replications to complete gracefully, or abort them.

- 1 Log in to the PlateSpin Forge Web Interface.
- 2 Click **Workloads**, click **Select All**, click **Pause Schedule**, and then click **Execute** to initiate a pause for all scheduled replications.
- 3 On the Workloads page, ensure that the Schedule state of protected workloads is **Paused**.
- 4 On the Workloads page, ensure that the Replication Status of each of the protected workloads is **Idle**. Wait for any replications that are underway to complete, or abort the running operations.

If you do not perform this task before the upgrade, the upgrade software will automatically detect the running jobs before it executes the software upgrade, and will prompt you to perform the task before you continue. You can proceed with the upgrade process only when each workload's Replication Status is **Idle**.

1.3.3 Backing Up the Forge Management VM

We recommend that you take a virtual machine snapshot of your Forge Management VM prior the upgrade in order to preserve its data in the event of a power failure or other problems. Use the VMware client to take the snapshot. See [“Managing Snapshots of the Forge VM on the Appliance Host”](#) in the *PlateSpin Forge User Guide*.

- 1 From the Workloads page of PlateSpin Forge Web Interface, pause your replication schedules and ensure that there are no running replications. See [Section 1.3.2, “Pausing the Replication Schedule,”](#) on page 10.

This ensures there are no incomplete replications saved with the snapshot.

- 2 Use the vSphere Client to access the appliance host.
- 3 Use the standard Windows procedure to shut down the VM (**Start > Shut Down**).
Allow the server to shut down gracefully.
- 4 In the inventory panel at the left, right-click the **PlateSpin Forge Management VM** item and select **Snapshot > Take Snapshot**.
- 5 Type a name and a description for the snapshot, then click **OK**.
- 6 After the snapshot is complete, power on the Forge Management VM.

The snapshot of the Forge Management VM preserves your Forge management data as well as the Microsoft SQL Server database file that resides on the PlateSpin Forge Server. You can use the snapshot if you need to roll back.

1.3.4 Backing Up Your Custom Linux blkwatch Drivers Before Upgrade

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

- 1 Log in to the PlateSpin Server host machine as the Administrator user.
- 2 Navigate to the PlateSpin application's installation directory, such as `C:\Program Files\PlateSpin Protect 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 [“Upgrade Procedure” on page 11](#).

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).

1.4 Upgrade Procedure

During the upgrade process, the installation program automatically exports and then re-imports data from your previous installation.

To upgrade your PlateSpin Forge product:

- 1 Prepare for the software upgrade by performing the tasks in [Section 1.3, “Before You Upgrade PlateSpin Forge,” on page 9](#).
- 2 On the PlateSpin Forge Management VM, run `PlateSpinForgeSetup-11.3.0.xxx.exe` setup utility as the Administrator user, then follow the on-screen instructions.
 - ♦ Ensure that you select the **Save data** option when you are prompted during the server installation.
 - ♦ Valid credentials are required for the SQL Server system administrator user (`sa`) in order to upgrade the schema for the PLATESPINDB database instance. By default, the installer sets the Authentication Type to SQL Authentication and specifies the default password (obscured). If you have previously set a custom password for this user, ensure that you set the appropriate authentication type (Windows or SQL) and specify your custom password.

NOTE: If replication jobs are still running, the validation might launch the Running Jobs Detected dialog. This prompt might also occur if some jobs were aborted and the condition is not correctly detected. You must wait for all operations to complete, or abort the running operations. After all replication jobs are idle, in the installation dialog, select **Yes - Proceed with installation**, then click **Next**.

- 3 Verify that the PlateSpin Forge software was upgraded to version 11.3:
 - 3a Log in to the PlateSpin Forge Web Interface.

If you cannot access the log in, the upgrade might have failed. Verify that the Forge Management VM is powered on, the PlateSpin Server running, and the network connections are working, then try again to log in. If you still cannot access the login, the upgrade process failed. Jump to [Step 5](#).

- 3b** Click **About** to view the version number. On the About page, the **Software Version** should be 11.3.0.xxx, where xxx represents the build number of the installed version.

If the version number displays the earlier version, it could be a browser cache issue. Clear the browser cache, close and restart the browser, then try again. If the version is still old, the upgrade failed. Jump to [Step 5](#).

- 4** Verify that the protected workload data was re-imported successfully after the upgrade. In the PlateSpin Forge Web Interface, click **Workloads**, then visually confirm that the expected workloads are present.

If the protected workloads are not present, part or all of the upgrade process failed.

- 5** If the software upgrade failed according to the tests in [Step 3](#), or if you were unable to re-import the data in [Step 4](#), return to your backup snapshot of the Forge Management VM, then try the upgrade again.
- 6** After a successful software upgrade, continue with [Section 1.5, “Post-Upgrade Tasks,” on page 12](#).

1.5 Post-Upgrade Tasks

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

- 1** Log in to the PlateSpin Forge Web Interface.
- 2** Click **Workloads**, then check the Workloads page for any paused replication schedules. In particular, look for *Tasks* (special workload protection events with optional commands) generated for automatically upgrading protection contracts that were using a legacy block-based component from earlier versions of the product. This requires a reboot of the protected workload.
- 3** Reapply the required configuration settings in PlateSpin Configuration at https://Your_PlateSpin_Server/platespinconfiguration/
- 4** Verify that the upgraded PlateSpin Server has a pre-compiled blkwatch [Linux Distributions Supported by Forge](#) drivers for your workloads. See “[Linux Distributions Supported by Forge](#)” 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 11](#).

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>).

- 5** From the PlateSpin Forge Web Interface, click **Select All**, click **Resume Schedule**, then click **Execute** to resume all scheduled replications.
- 6** Verify that your PlateSpin Server and replications are working properly.

- 7 (Optional) Use the VMware client program to remove the snapshot that represents the recovery point for the PlateSpin Forge 11.3. This is the snapshot that you created in [Section 1.3.3, “Backing Up the Forge Management VM,”](#) on page 10.
 - 7a In the inventory panel at the left, right-click the **PlateSpin Forge Management VM** item and select **Snapshot > Snapshot Manager**.
 - 7b In the tree representation of the VM states, select a snapshot, then click **Remove**.
- 8 (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 System Administrator User](#)” in the *PlateSpin Forge User Guide*.

A

Documentation Updates

This section contains information on documentation content changes that were made in this *Upgrade Guide* after the initial release of PlateSpin Forge 11.3.

NOTE: This updated information does not appear in localized versions of the *Upgrade Guide*.

- ♦ [Section A.1, “July 2018,” on page 15](#)

A.1 July 2018

Location	Update
Section 1.3.1, “Downloading the Setup Utility,” on page 9	Updated the link to the Micro Focus Patch Finder website (https://download.microfocus.com/patchfinder/#bu=netiq&familyId=28603) where you will find the <i>PlateSpin Forge 11.3 Appliance Rebuild Kit</i> .

