DefendX Software

Upgrade Guide

Upgrade Guide
DefendX Mobility

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Before Upgrading VFM to version 7.5

DefendX Mobility (VFM) has 5 major areas of influence.

1. Primary storage
2. “Agent Services”
3. Web Server
4. Database (SQL) Server
5. Secondary storage

The upgrade process is executed primarily on:

1. the server(s) where the IIS components are installed hereafter referred to as “Web Server”

Note: When upgrading the IIS components of Mobility (VFM) all IIS components MUST be upgraded to 7.5.

2. the server(s) where the “agents” are installed, hereafter referred to as “Agent Server”

Note: The Mobility (VFM) administration web page is backwards compatible with Mobility (VFM) task service and core tiering engine versions 7.x/6.x/5.x. If necessary, task service/core tiering engine servers may be updated at a later date. When updating either the task service or core tiering engine both must be updated to 7.5.

Pre-requisites

In order to successfully complete the upgrade, the following Pre-requisites will be required:

1. The upgrades must be run with an account that is a local administrator account on every one of the Windows agent servers as well as the Web Server(s). This account(s) must exist in the relevant domain(s).

2. As there will be a need to upgrade database tables, the upgrade will require an account that has DBO rights within the SQL Server on the relevant databases. To document the names and locations, do the following:
    a. Within (each of)the VFM Administration web page(s), navigate to the **Database Configuration** tab, select the **Database Config Settings**, and in the Configuration Database Settings document a screen capture of the settings
    b. Within (each of)the VFM Administration web page(s), navigate to the **Database Configuration** tab, select the **Database Stores Settings**, and in the Stores Database Settings document a screen capture of the settings
    c. While the database names may be unique at each implementation, the default names are ***NTPSoftwareVFM*** and ***NTPSoftwareVFMStores.*** In many instances, this will require assistance from the DBA team to provide access with these needed credentials.

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3. Each Task Service operates with a "run as" account that has the required permissions ***on the designated primary storage*** (whether it's NetApp, VNX, Unity, Isilon, Windows File Server, etc.) Before executing the upgrade, it's imperative that each "run as" account information (username and password) is available. Before any upgrades, **every task service and** (if applicable) **proxy service** should be inspected and the appropriate "run as" accounts documented before the upgrade.

4. Mobility (VFM) 7.5 has a great new feature that allows for the automated push out of core tiering engines and task services (new or upgrades) To take advantage of this feature, it is necessary to have a share available where the software can be saved into so that the automation can execute. This share must be able to be accessible via a URL string (\\server\Sharename) This share must be created and accessible from the Web Server in advance of the upgrade

5. Health Check: As each task service is to be upgraded, it will need to be stopped to upgrade. As a precaution, it is strongly recommended that each agent server be inspected (task service, core tiering engine and proxy server {if applicable} logs reviewed and Windows Event and application logs reviewed) to look for any existing issues. This can prevent issues with upgrade if permissions have been altered or other (network, AV, or server) issues are potentially going to impact successful upgrades.

6. While the upgrade ought not to have any impact on secondary storage, it's important (again as a precaution) that screenshots of **each** the secondary storage configurations be taken, and usernames and passwords for the access to the secondary storage (local, cloud, object) be documented.

7. Mobility (VFM) 7.5 has a new module for Domain Servers. Unless this is a previously installed version of 7.5, there is no Domain Server module installed. To add this new piece of important functionality, will require a domain account that can connect to and read from Active Directory Forests.

8. Software and Keys: Before initiating the upgrade, please assure that the upgrade software, as well as all of the provided keys, has been downloaded, unzipped, and will be accessible from the Web Server(s) and each Task Server

Primary Components

Upgrading your VFM/Mobility environment to the latest build requires 3 primary components to be updated. Upgrade them in the order listed:

- VFM/Mobility Admin (Web Server)
- VFM/Mobility Core Tiering Engine (agent server)

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- VFM/Mobility Proxy Server (this will be installed on each Agent server that attaches to VNX, Unity, or HNAS. It is not required for NetApp, Windows File Servers, or the Generic Task Service)
- VFM/Mobility Task Service (agent server)

Optional Components

All other optional components must also be upgraded, but only if they're installed. These include:

- VFM/Mobility Domain Agent (new to 7.5) (Web Server)
- VFM Mobility File Intranet (required if customer uses HTM or URL stubs (Web Server)
- VFM/Mobility Recovery Portal (Web Server)
- VFM/Mobility Access Portal (Web Server)
- Right Click Tiering

Components with mismatched version numbers may not function properly and may cause issues.

The components must be upgraded in order to prevent any issues with the installation. All component services must be stopped prior to the upgrade.

Steps for Upgrade

VFM Admin

1. Start off by upgrading the Mobility (VFM) Admin. While logged in with the appropriate domain account, From the Web Server, right-click the "setup.exe" and select "run as administrator" within the folder called **Admin**.

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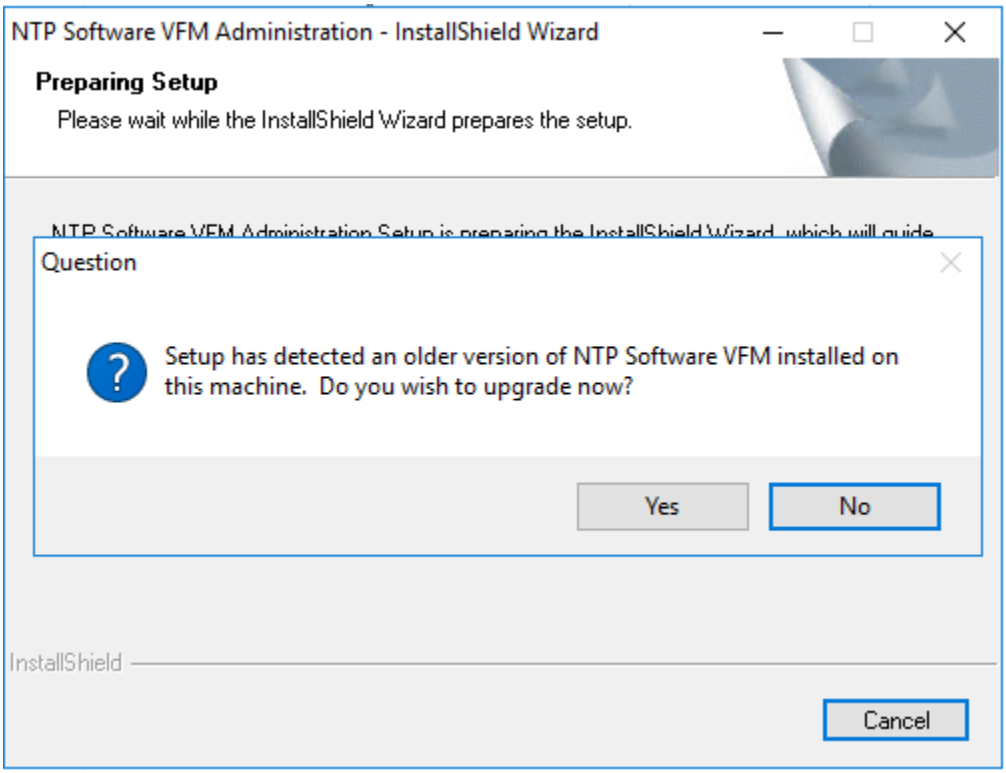
The installer will automatically detect the prior installation and will prompt for an upgrade. Select “Yes” to continue.



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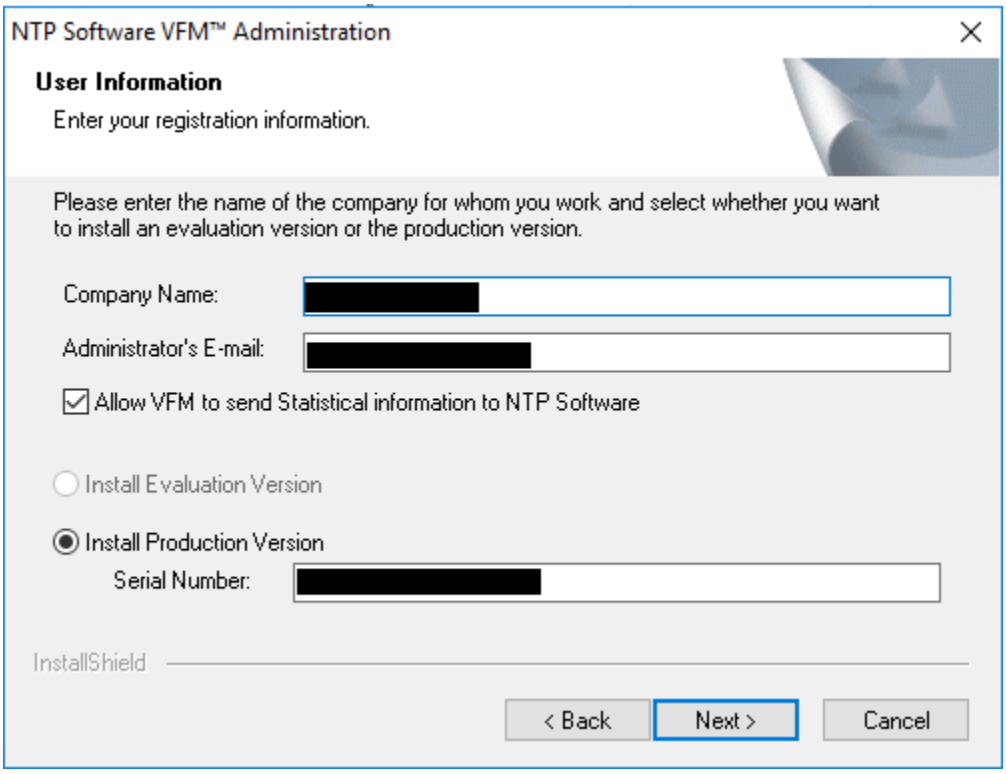
2. Enter in your company and licensing info and hit next.



3. Your SQL server and database information should pre-populate based on the current configuration. Confirm these details for all databases and click “next”.

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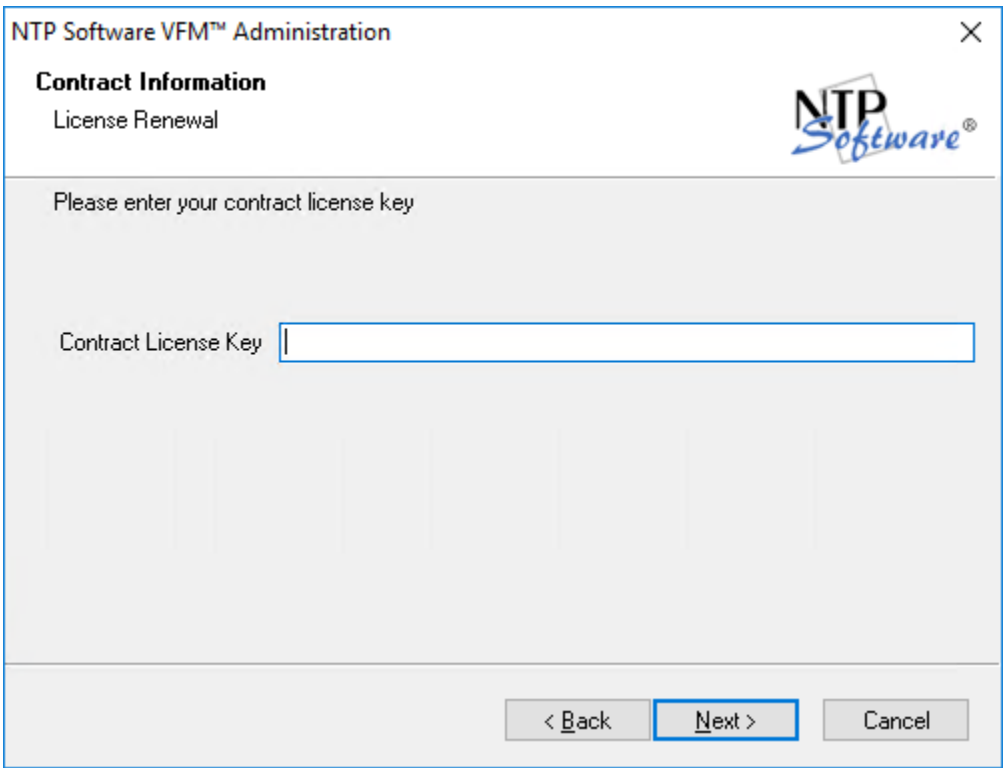
4. Enter in your contract key.



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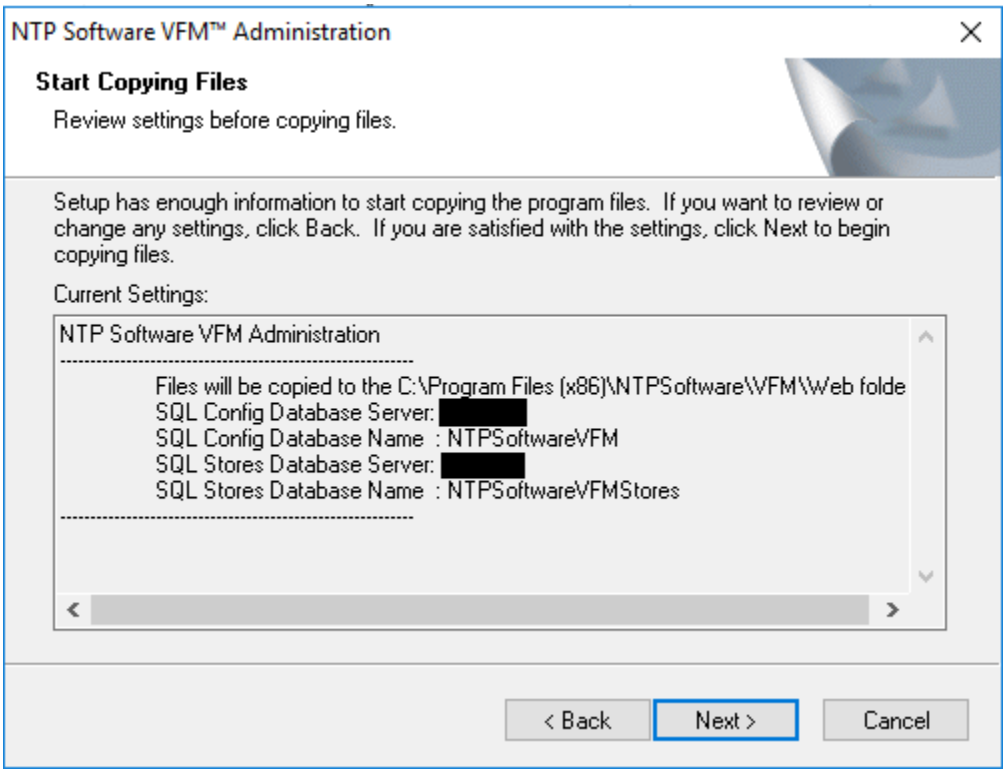
5. Hit next to complete the installation of the VFM/Mobility Admin. The IIS Application pool will automatically be stopped during the upgrade and should restart automatically.



6. Next, we upgrade the VFM/Mobility Core Tiering Engine, Proxy Service (if applicable) and Task Services for each server. The installer will detect the previous install of each component and will prompt to upgrade- choose “Yes”.

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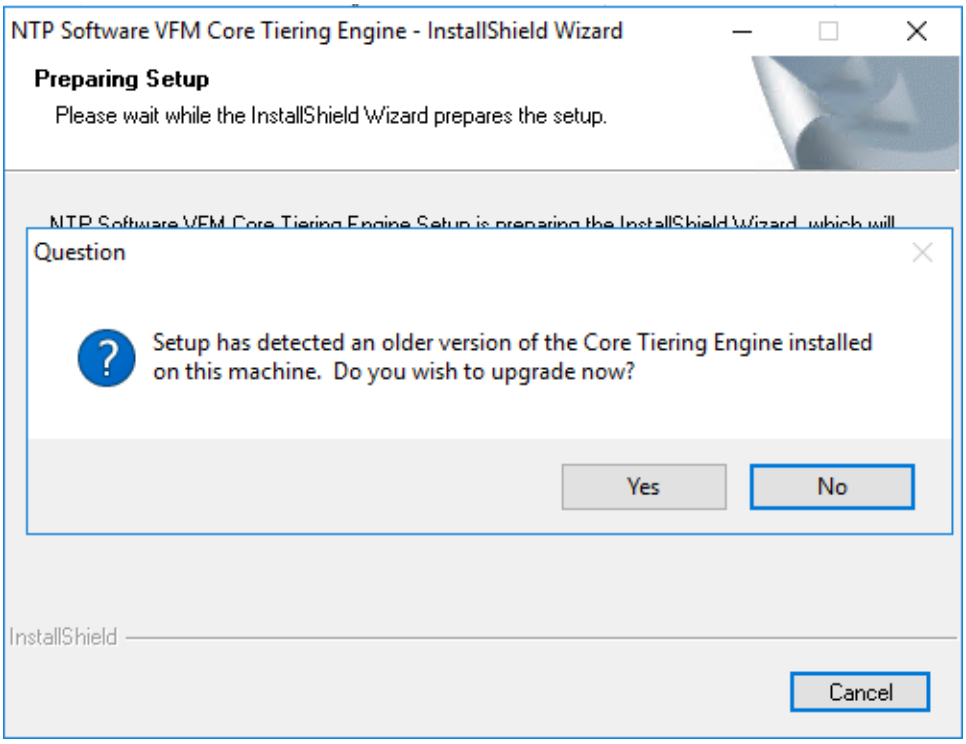
VFM/Mobility Core Tiering Engine

1. While logged in with the appropriate domain account, from the appropriate agent server, right-click the “setup.exe” and select “run as administrator” within the folder called **CoreTieringEngine**.



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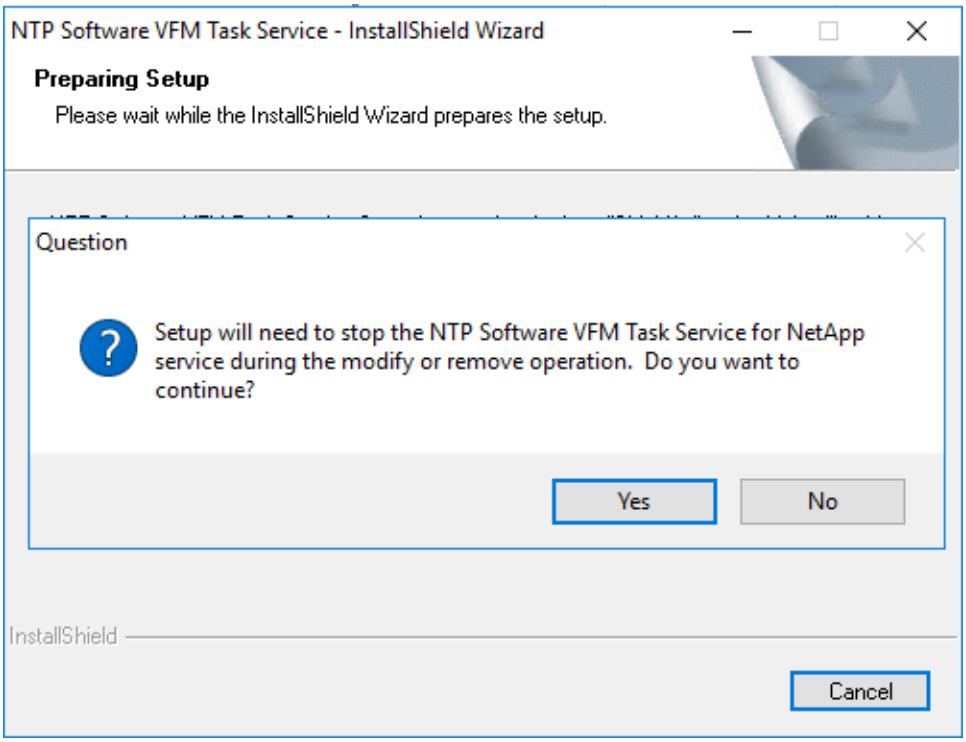

2. Click through the installer and the upgrade will commence. You may be prompted to stop the Task Service if the installer detects that the service is still running. There is no information that needs to be entered during the upgrade of these components.

> *NOTE: If this is an install for Windows File Servers, Generic, or NetApp, please proceed to the section labeled* **VFM Task Service**. *If this is Unity, VNX, or HNAS, please first proceed to the section:* **Proxy Service**

Proxy Service

1. While logged in with the appropriate domain account, from the appropriate agent server, right-click the "setup.exe" and select "run as administrator" within the folder called **ProxyService**.

VFM Task Service

1. While logged in with the appropriate domain account, from the appropriate agent server, right-click the "setup.exe" and select "run as administrator" within the folder called **TaskService**.

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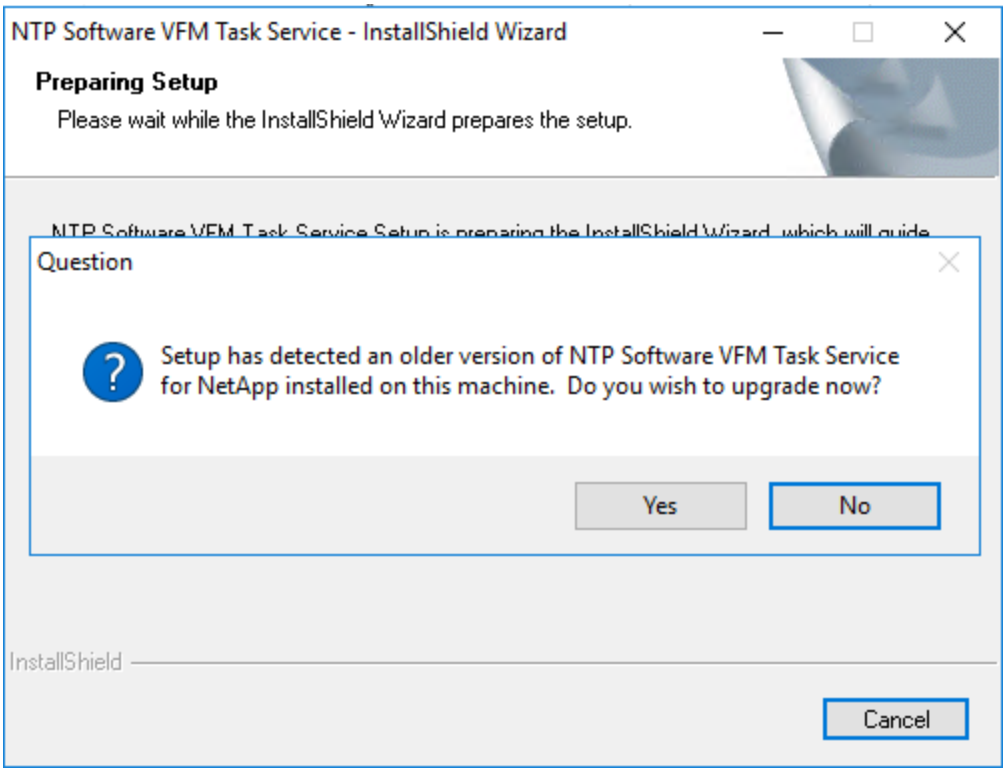

2. You may be prompted to reboot the agent server once the install is complete. Though this is not required, it is recommended.

3. Once the install is complete, log into your VFM/Mobility admin and confirm the functionality of all components and the retention of previous settings and policies.

4. Proceed to upgrade the additional components: File Intranet, Recovery Portal, Access Portal, by following similar steps.

Updating the License Keys

A new license key will be issued if you increase your license capacity for your DefendX Mobility product. Updating your license key is very straightforward. The “VFM License Key Utility” is provided during the install of Mobility and will allow you to manage your license keys. Simply input your new key in the license key field and press the “Activate” button. When you are done, press the “Commit” button and close the utility. Confirm your license capacity within the Mobility Administration page.

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About DefendX Software

DefendX Software helps organizations secure their critical business files and maximize the value of their enterprise file storage resources. From comprehensive intelligence, modeling, costing and chargeback to seamless file movement, protection and archiving, DefendX provides industry-leading capabilities to eliminate waste and align the value of files with the storage resources they consume. With DefendX, important file locations and the users who access them can be monitored to provide governance, protect against theft and enforce compliance policies. For more than 20 years, DefendX Software has been helping public and private sector customers around the world save money and eliminate risk every day.

DefendX Software Professional Services

DefendX Software's Professional Services offers consulting, training, and design services to help customers with their storage management challenges. We have helped hundreds of customers to implement cost-effective solutions for managing their storage environments. Our services range from a simple assessment to in-depth financial analyses.

For further assistance in creating the most cost-effective Storage Management Infrastructure, please contact your DefendX Software Representative at 800-390-6937.

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