



Hewlett Packard
Enterprise

HP Storage Optimizer

Software Version: 5.2

Upgrade Technical Note

Document Release Date: March 2016
Software Release Date: March 2016

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Upgrade Note

This document describes how to upgrade from a previous version of Storage Optimizer to version 5.2.

Visit the HP Software Support Online web site at: <https://softwaresupport.hp.com>

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Before You Begin

Storage Optimizer 5.2 includes a utility that scans your existing deployment and verifies suitability for upgrade. To run the utility follow these steps:

1. Copy the HP Storage Optimizer Pre Upgrade Checker folder to your existing Storage Optimizer IDOL server.
2. Run the utility `PreUpgradeVerifier.exe`.

If any fields are identified by the utility, contact your Storage Optimizer support team before you proceed with your upgrade. Also, refer to the Prerequisites section in the Storage Optimizer 5.2 *Installation Guide* before starting the upgrade process.

Prepare Storage Optimizer for Upgrade

To prepare for the upgrade process, follow these steps:

1. Allow any executing policy phases to complete.
2. Disable the Assign Policies and Execute Policies tasks using the Scheduled Tasks in the Storage Optimizer Administration dashboard to prevent new policies from being assigned to documents. Be sure to disable all the tasks: Normal, Low, Medium, and High priority.
3. Check the Distributed Connector queue by issuing the following command.

```
http://  
distributedconnectorhost:port/a=queueinfo&queueName=fetch&queueAction=getstatus
```

The default port number is 7000. All actions should be Finished.

4. When all connector actions and executing policy phases are complete, stop the following services.
 - a. Storage Optimizer Engines
 - b. Distributed Connector
 - c. Individual connectors and Connector Framework Services.

5. Uninstall the Storage Optimizer software using the Windows Add/Remove Programs option.
6. Remove the Storage Optimizer Web sites. Identify all applications in the Storage OptimizerAppPool40 application pool running on your Internet Information Services (IIS) and delete them. These may include some or all of the following:
 - Storage Optimizer
 - Classifier
 - CPWS
 - Callback Handler
 - Category
 - Data Analysis Service
 - Delete ControlPointAppPool40

Upgrade to Storage Optimizer 5.2

The upgrade process consists of several steps.

The installers for the Storage Optimizer database and Storage Optimizer software are in the installation package.

Upgrade the Storage Optimizer Database

To upgrade the Storage Optimizer database

Start the **Storage Optimizer Database Installer**, and then follow the instructions in the wizard.

Note: An SQL connection string is required while configuring your new IDOL deployment package. You can find a link to an appropriate connection string in the last screen of the Storage Optimizer database installer.

Install the Storage Optimizer Software

To install the Storage Optimizer software

- Run the Storage Optimizer **Setup** file, and then follow the instructions in the installer.
- Run Configuration Manager and deploy Storage Optimizer while the old IDOL software is still running.

Upgrade IDOL Data and Software

Before upgrading the IDOL software, issue a **GETSTATUS** command (<http://IDOLServerName:9000/a=getstatus>) and make a note of the databases present in IDOL, so that you can verify them after the upgrade.

To upgrade IDOL data and software

1. Back up any manually modified IDOL and connector configuration files, so that you can reapply the changes after the upgrade completes. Ensure that you copy all *.cfg files from your installation directory to another location. All IDOL files are already modified when new databases are added.
2. Run the Storage Optimizer IDOL Upgrade program, which is available at C:\Program Files\Hewlett Packard Enterprise\HPE Storage Optimizer\engine\Scheduler, and follow the instructions in the wizard.

Depending on the version you are upgrading from, the upgrade may include one or more of the following steps.

- a. IDOL Backup. If you have an existing backup strategy, you can skip this step.
- b. Upgrade IDOL content (Storage Optimizer required fields).
- c. Upgrade IDOL software.

You can cancel the upgrade at any time. After you start the upgrade process, you can save progress so you can resume the process from the same step in the future.

The program automates much of the upgrade process, but you must update the IDOL software manually when prompted.

Upgrade the IDOL Software Manually

When prompted, you must update the IDOL MetaStore software manually. This step also deploys an additional service, Storage Optimizer MetaStore.

To manually update the IDOL and MetaStore software:

1. Ensure that you have a backup of all IDOL content and categories.
If you are creating a new installation directory, then you need to backup the category folder from the previously installed version of Storage Optimizer (category, cluster, imex and taxonomy folders).

The files are located here:

Storage Optimizer 5.0 - Program Files\Hewlett-Packard\HP Storage Optimizer\Indexer\IDOL\category

Storage Optimizer 5.1 - Program Files\Hewlett Packard Enterprise\Storage Optimizer\Indexer\IDOL\category

2. Stop the IDOL services using the `_stop_service.bat` file generated by the IDOL deploy tool. This batch file is available at C:\temp\HPE Storage Optimizer\host_servername.
You may have to run it from the command line with administrator permissions.
3. Uninstall existing services using `_uninstall_services.bat`. Executing the file that was built for your current deployment will ensure spurious errors are not reported.
4. Prepare a new IDOL deployment using the **Storage Optimizer IDOL Deploy Tool** from the release media.

Use the same Host Installation Directory as your current deployment. You must specify the same deployment location to ensure that your IDOL data migrates correctly.

For example, if you upgrade from a version of Storage Optimizer 5.0 or earlier and did not use a custom location, the Host Installation Directory is C:\Program Files\Hewlett-Packard\Storage Optimizer. However, for Storage Optimizer 5.1 or later, the Host Installation Directory is C:\Program Files\Hewlett Packard Enterprise\HPE Storage Optimizer.

5. When the deployment is prepared, run the **_deploy_services.bat** file and choose to overwrite all files.
6. Run the **_install_services.bat** file using the As Administrator option even if you are an Administrator.

Note: Storage Optimizer 5.2 installation requires Microsoft Visual C++ 2013 Runtime. This is provided with your HP Storage Optimizer software in the `vc_redist` folder of your IDOL deployment package. Install it before running the **_install_services.bat** file if you have not already done so.

The new services install to the Service Control Manager (SCM).

7. Ensure that you update the Connector and Connector framework configuration files, so that they match the configurations used in the previous deployment. You need to perform the following key changes to the new configuration files post deployment:

- **Each connector:** Copy over every task section, for example:

```
[TaskFS]
DirectoryRecursive=True
ExtractOwner=True
PathRegex=. *
DirectoryFileAttributeFilter=-1
IngestActions=META:ENFORCESECURITY=false,META:CPREPOSITORYTYPEID=3,LUA:lua\ExtractFileData.lua,META:AUTN_CATEGORIZE=false,META:AUTN_EDUCTION=false
DirectoryPathCSVs=\\v-cptrim\Fs
ScheduleStartTime=now
ScheduleCycles=1
ScheduleRepeatSecs=3600
IndexDatabase=FS
```

For some connector types (such as SharePoint), additionally copy over all Groups task sections, for example:

```
[Groups_TaskSPS]
FetchMode=0
IncludeEmptyFields=True
ExtractSubfiles=True
MappedWebApplicationPolicies=True
IgnorePublishingPagesAspx=True
SecurityType=SharePointSecurity
IngestActions=META:CPREPOSITORYTYPEID=2,META:AUTN_NO_FILTER=true
StartURL=http://v-cptrim:8081
```



```
ScheduleStartTime=now  
ScheduleCycles=1  
ScheduleRepeatSecs=3600  
IndexDatabase=SPS
```

By default, Storage Optimizer 5.2 takes care of index synchronization. Therefore, you do not need to include entries for each task section in the [FetchTasks] section:

```
[FetchTasks]  
Number=0
```

8. Connector Framework. Copy over any custom LUA (added after installation), along with any corresponding [ImportTasks] section entry.
If you have installed a new version of Storage Optimizer in an installation directory, which is different from the previous installation directory, then ensure to place the backed up categories folder in the new path.
9. Start the following non-connector services (in the specified order):
 - Storage Optimizer License Server
 - Storage Optimizer Content Engine(s)
 - Storage Optimizer DataAnalysis Store
 - Storage Optimizer OGS
 - Storage Optimizer IDOL
 - Storage Optimizer MetaStore
10. If you are installing Storage Optimizer 5.2 in a different folder than your previous installation folder, copy all `connector_repositoryname_datastore.db` files to the new installation directory.
11. When IDOL successfully starts, issue a **GETSTATUS** command (`http://IDOLServerName:9000/a=getstatus`) to verify that all services are running and that all IDOL databases (which were available before the upgrade) are present.
If one or more expected IDOL databases are not present, do not proceed to the next step.
12. When MetaStore successfully starts, issue a **GETSTATUS** command (`http://MetaStoreServerName:4500/a=getstatus`) to verify that all services are running and that all MetaStore databases (which were available before the upgrade) are present. If one or more expected MetaStore databases are not present, do not proceed to the next step.
13. Return to the upgrade program and continue to follow the instructions.
The utility prompts you to start your connectors when the process completes.
14. Start the connectors in the following order.
 - a. Distributed Connector
 - b. Connector Framework Services
 - c. Connectors

Caution: Do not start the Storage Optimizer Engine until the full upgrade process completes.

Note: Ensure to run the configuration manager post upgrade to re-deploy the configuration.

File System Agent Upgrade

Complete the following steps to upgrade the File System Agent.

1. Backup the File System Agent config and .db files.
2. Uninstall the File System Agent and then the archive service:
 - a. For Windows: uninstall the connector from the Windows **Add/Remove** Programs option.
 - b. For Linux: change the directory to the `SORHELInstall` directory and run the following command: `sudo sh ssetup.sh remove`
3. Restart the system.
4. Install the new version of the File System Agent and archive service, then restart the system. See, [Install File System Agent](#).
5. After restarting the system, stop the File System Agent and copy the task section and any other manual modifications from the backed up *config* file to the new version of the *config* file. Also copy the .db files into the connector directory.
6. Start the File System Agent.

Install HP Storage Optimizer File System Agent

To run archive policies, you need to install the HP Storage Optimizer File System Agent.

To install the HPStorage Optimizer File System Agent on Windows

1. Run the HP Storage Optimizer File System Agent installer, `HP Storage Optimizer File System Agent Installer.exe`. You can find the installer at `Storage Optimizer x64\HP Storage Optimizer Utilities\HP Storage Optimizer File System Agent\Windows`. The Welcome screen of the setup wizard appears.
2. Click **Next**. The Log Directory screen appears.
3. Select a directory for the installation setup log files, and click **Next**. The Installation Location screen appears.
4. Specify a location to install the agent. The default installation location is `C:\Program Files\Hewlett Packard Enterprise\Storage Optimizer\Edge`.
5. Click **Next**. The Server screen appears.
6. Specify the name of the HP Storage Optimizer server. The HP Storage Optimizer File System Agent service needs to connect to this HP Storage Optimizer server to execute the archive policies.
7. Click **Next**. The Service User screen appears.
8. Specify the credentials that will be used to run the HP Storage Optimizer File System Agent services and to connect to the HP Storage Optimizer server.
9. Click **Next**. The Installation Confirmation screen appears.

10. Click **Install**. After the connector is installed, you are prompted to restart the system to complete the installation.

To install the HP Storage Optimizer File System Agent on Linux

1. Open the File System Agent ports: 7210 and 7212.
2. Run the HP Storage Optimizer File System Agent installer, `SORHELInstall.tar.gz`. You can find the installer at `Storage Optimizer x64\HP Storage Optimizer Utilities\HP Storage Optimizer File System Agent\Red Hat Linux` or `Storage Optimizerx64\HP Storage Optimizer Utilities\HP Storage Optimizer File System Agent\SUSE Linux`.
3. Extract and install the tarball as follows:
 - a. `tar -xvzf SORHELInstall.tar.gz`
 - b. `cd SORHELInstall`
 - c. `sudo sh sosetup.sh install`
4. Create a mount directory using the following command:
`sudo mkdir /opt/mount`
5. Run the configuration scripts that configure and start the services as follows:
 - a. `sudo sh /opt/Hewlett Packard Enterprise/Edge/Agent/resources/deployLoggedFS.sh`
When prompted, enter the mount location created in Step 3.
 - b. `sudo sh /opt/Hewlett Packard Enterprise/Edge/EdgeFSConnector/deployFSConnector.sh`
When prompted, enter the HP Storage Optimizer server, domain, username, and password.

Note: If you uninstall this agent on Linux, ensure that you stop the `EdgeConnectorFramework.exe` process or reboot the system after uninstalling the agent.

Upgrading from Storage Optimizer to ControlPoint

The upgrade process consists of several steps. However, the steps to upgrade are exactly the same as when you upgrade from an earlier version of Storage Optimizer to Storage Optimizer 5.2. Follow the steps provided in the [Upgrade to Storage Optimizer](#) section and use the ControlPoint installers.

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Feedback on Upgrade Technical Note (Storage Optimizer 5.2)

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