



# Service Instance Upgrade

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# Introduction

HPE Cloud Service Automation (CSA) provides the unique ability to upgrade service instances. CSA service instances can be upgraded in order to provide additional functional capability and additional operational control beyond what is possible based on the current definition of the underlying design. To a *certain extent*, this functionality can also be used to fix any implementation problems present in service instances. In the current version of CSA, the ability to upgrade a service instance is only possible for service instances which are based on sequenced service designs. Service instances can be upgraded to accomplish a variety of use cases. A few examples are discussed below.

Take an example of a sequenced design that is capable of deploying one or more virtual machines based on the VMWare vCenter resource provider. In the service design, virtual machine settings (such as number of CPUs, amount of memory and disk size) are configured as properties on the server component. This service design can also have subscriber options related to compute size (such as small, medium or large) which can be used for ordering virtual machines and for modifying service subscriptions so that virtual machines can be of a different compute size. Subscriber option model properties (such as number of CPU, amount of memory and disk size) are bound to the respective server properties. Once subscriptions are created based on this service design, possible operations only include modification of a subscription by choosing a different option and executing public actions on server components to start/stop/restart/suspend virtual machines.

After creation of subscriptions based on this service design, there might be additional needs such as adding capability to monitor virtual machines deployed through subscriptions, deploying additional firewall rules on top of existing firewall rules on virtual machines, deploying applications on top of the virtual machines deployed through the service subscriptions, or introducing additional public actions on server components in order to provide more operational control. Examples of these actions could be an action to take snapshots of virtual machines or creating ovf templates out of the virtual machines. All such needs are beyond the definition of the original service design underlying the service instances. Needs such as the ones discussed above can be accomplished through the service instance upgrade functionality available in CSA.

Take another example of a business setting where a sequenced service design is being utilized for deploying multi-tiered applications. Newer business requirements would result in the need to move to newer versions of databases and newer versions of applications. They would also result in a change of application deployment architecture. Service instance upgrade functionality will also enable upgrading service instances representing multi-tiered applications to account for changes in database versions, application versions and application deployment architecture.

CSA ships with sample designs which enable upgrading service instances for some of the use cases discussed above. A different section of this white paper discusses implementation aspects of upgrading service instances using these sample designs.

**Note:** Throughout this document, we will be talking about upgrading service instances and service subscriptions interchangeably. Both of them are one and the same.

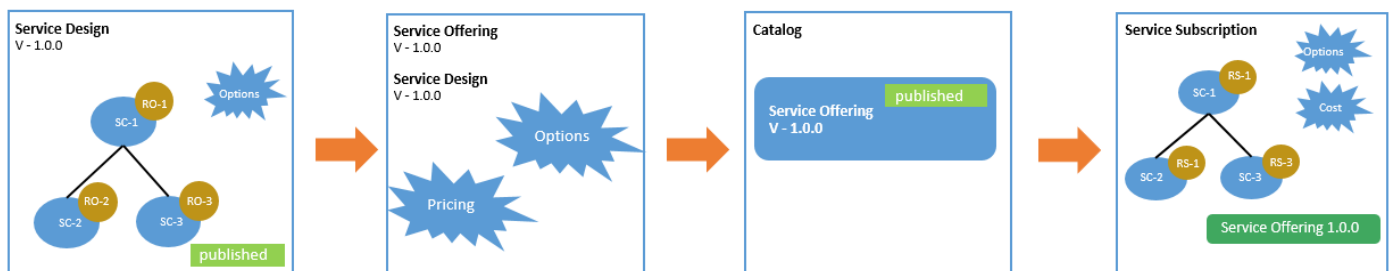
## Service instance upgrade process

This section talks about the overall process involved in upgrading service instances: creating a service subscription and upgrading a service subscription. Each of the individual steps involved in *upgrading* service subscriptions are covered at a greater depth later in this document.

The steps to *create* service subscriptions in CSA are as follows:

1. The Service Designer creates a service design that can orchestrate the deployment of a cloud service. All service design components and resource offerings have a unique identifier invisible to end users. When a service design is published, it cannot be edited and service offerings can be created from it.
2. The Service Business Manager creates a service offering from the service design. A service offering can be associated with a price, can have customized subscriber options, and can be associated with SLA documents.
3. The Service Business Manager publishes the service offering to a catalog. Approval policies may be added to the service offering in the catalog.
4. A subscriber orders a service offering from the Marketplace Portal which results in the creation of a service subscription. During the service subscription creation process, service instance components and resource subscriptions (the run-time representation of resource offerings) inherit the unique identifier from the service design's components and resource offerings respectively (that is, service component and resource offering identifiers match between the service design and service instance). A service instance associated with the service subscription represents the deployed topology of a cloud service.

Figure 1. Service subscription creation



Once service subscriptions have been created, the steps to upgrade service subscriptions are as follows:

1. After analyzing additional capabilities and operational control that needs to be provided to service instances on top of what is available, the Service Designer creates a new version of a service design *cloned* from the original version of the service design. The cloning process will ensure that the service component's unique identifiers are copied over to the service components of the new version of the service design. These unique identifiers will play a major role in the service instance upgrade process.

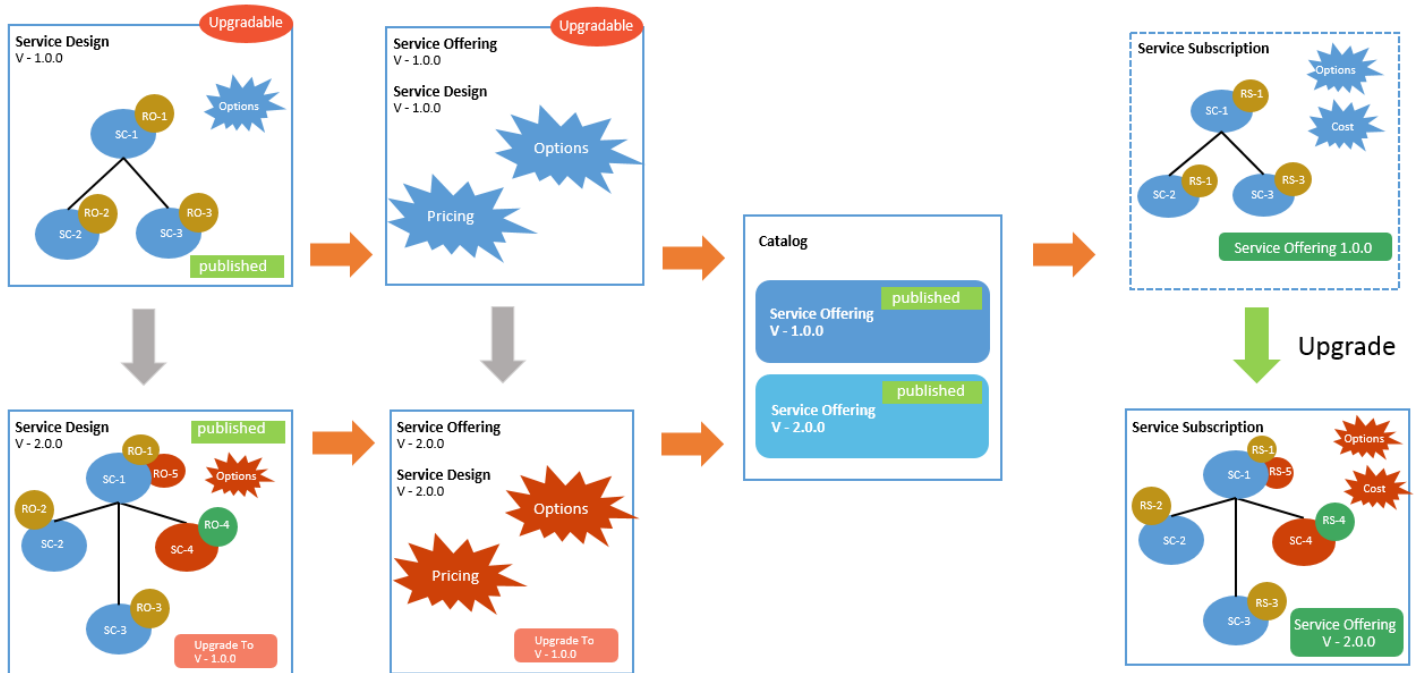
The new version of the service design is called an upgrade service design while the original version of the service design is called an upgradable service design. The changes necessary for providing additional capability or operational control are added to the new version of the service design. While the upgrade service design can be modified in a variety of ways based on the use case of service instance upgrade, not all changes are permitted. Changes that can be made for different use cases and changes that are not allowed on upgrade versions will be discussed in a later section of this document. When an upgrade service design is published, it cannot be edited and service offerings can be created from this service design.

2. The Service Business Manager creates a new version of a service offering *cloned* from the original version of the service offering based on the upgrade version of the service design. The new version of the service offering is called an upgrade service offering while the original version of the service offering is called an upgradable offering. Subscriber options, pricing and SLA documents can be customized in the new version of the service offering.
3. The upgrade service offering is published into the same catalog as the upgradable the service offering.

**Note:** This step is required. If the upgrade service offering is not published, the service subscription cannot be upgraded.

4. The Operations area of the Cloud Service Management Console indicates that service subscriptions originating from the original version of service offering are upgradable. The Service Operations Manager can upgrade service subscriptions based on the new version of the service offering from the Operations area or through REST APIs. During the service instance upgrade process, the unique identifiers from service instance components will be utilized for detecting changes that need to be merged from the upgradable design.

Figure 2. Service instance upgrade process



# Concepts

## Upgrade service design

An upgrade service design is a new version (clone) of a service design created from and *based on* an existing version of a service design for the purpose of creating new service subscriptions or upgrading service subscriptions originating from the existing version of the service design.

In the Sequenced Design Version Overview area of the Cloud Service Management Console, upgrade service designs have an **Upgradable From** field populated with the version of the existing service design on which it is based, indicating that service instances originating from that existing service design version can be upgraded to this new version.

Figure 3. The **Upgradable From** field of service design version 2.0.0 has been populated with version 1.0.0 indicating version 2.0.0 is going to act as an upgrade design for service subscriptions originating from service design version 1.0.0

The screenshot displays the Cloud Service Automation console interface. At the top, the header reads 'CLOUD SERVICE AUTOMATION' with user 'admin' and 'Help' options. The breadcrumb path is 'Sequenced Designs'. The main content area is for 'Simple Compute Linux (2.0.0)'. A yellow warning banner states: 'This design is part of an upgrade path and has restricted editability and actions.' The details section on the left lists the following information:

- Display Name:** Simple Compute Linux
- Description:** CSA Service Instance Upgrade feature demo content to deploy VM on vCenter environment.
- Version:** 2.0.0
- URL:**
- Published:** No
- Upgradable From:** 1.0.0
- Upgradable To:** No upgrade path defined

The 'Preview' window on the right shows a vertical flow diagram with the following steps:

- vCenter Simple Compute
- Infra Service
- Server Group
- Simple Compute Server

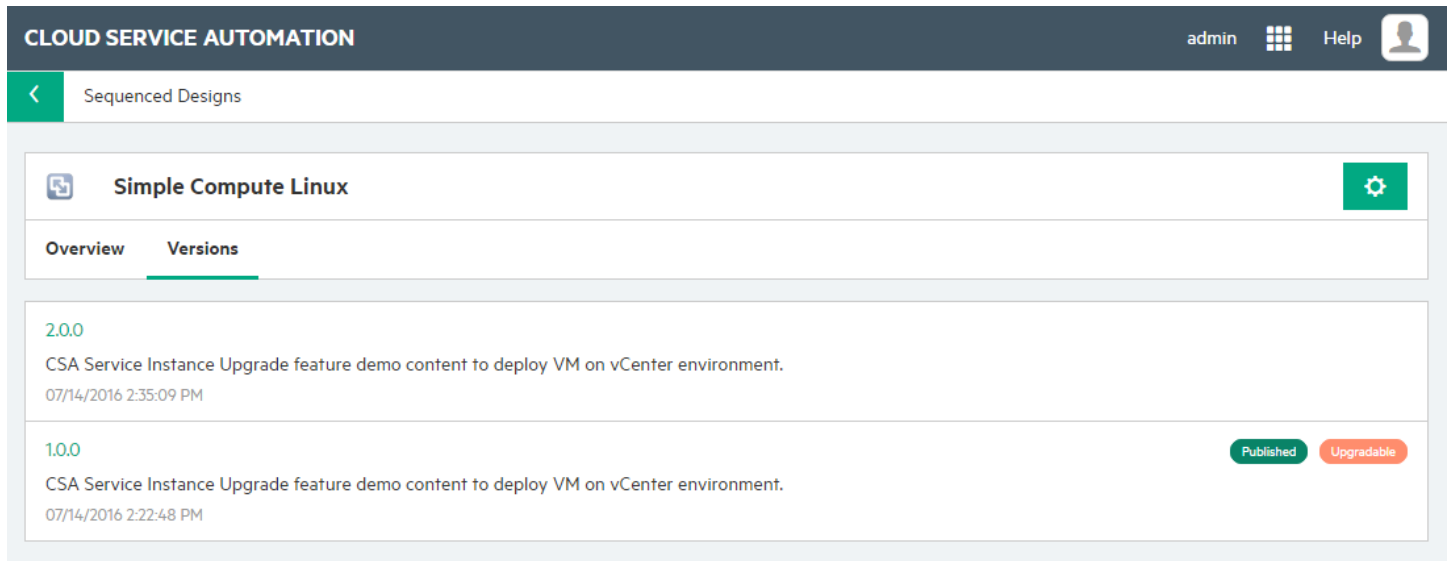
An 'Open Preview' button is located at the bottom of the preview window.

## Upgradable service design

An upgradable service design is an existing version of a service design where service subscriptions originating from the existing design can be upgraded to a different version of the existing service design. A service design is upgradable only in the presence of an upgrade service design (a new version of the existing service design).

In the service design page of the Cloud Service Management Console, upgradable service designs have an **Upgradable** label in the right corner.

Figure 4. The **Upgradable** label in the service design page



In the service design version page of the Cloud Service Management Console, upgradable service designs have an **Upgradable To** field populated with the versions of the service design which can be used for upgrading service subscriptions originating from it. Upgradable service designs also have an **Upgradable** label in the top right corner.

Figure 5. The **Upgradable To** field of service design version 1.0.0 has been populated with version 2.0.0 indicating service subscriptions originating from version 1.0.0 are upgradable to version 2.0.0; An **Upgradable** label is also displayed in the top right corner

The screenshot displays the 'Simple Compute Linux (1.0.0)' service design page in the Cloud Service Automation console. The page features a dark header with the title 'CLOUD SERVICE AUTOMATION', the user 'admin', and a 'Help' link. Below the header is a breadcrumb 'Sequenced Designs'. The main content area shows the service design details for 'Simple Compute Linux (1.0.0)'. The 'Upgradable To' field is populated with '2.0.0'. A red 'Upgradable' label is visible in the top right corner. The 'Preview' section shows a flow diagram with components: vCenter Simple Compute, Intra Service, Server Group, and Simple Compute Server. An 'Open Preview' button is at the bottom of the preview area.

## Upgrade service offering

An upgrade service offering is a new version of a service offering created from an existing version of service offering that is based on an upgrade service design. The upgrade service offering is used to create new subscriptions or upgrade service subscriptions originating from the existing version of the service offering.



In the **Overview** tab of the Offerings area of Cloud Service Management Console, upgrade service offerings have **Upgradable From** field populated with the version of the service offering that they are based on and are going to be used for upgrading service subscriptions originating from that service offering version.

Figure 6. The **Upgradable From** field of service offering version 2.0.0 has been populated with version 1.0.0 indicating version 2.0.0 is going to act as an upgrade offering for service subscriptions originating from service offering version 1.0.0

The screenshot shows the 'Simple Compute Linux (2.0.0)' offering page in the Cloud Service Automation console. The 'Overview' tab is selected, and the 'Upgradable From' field is populated with '1.0.0'. The 'Upgradable To' field is set to 'None'. The 'Image' field contains a placeholder icon, and the 'Tags' field is empty.

Field	Value
Display Name	Simple Compute Linux
Version	2.0.0
Description	
Selected Service Design	Simple Compute Linux 2.0.0
Upgradable From	1.0.0
Upgradable To	None
Image	[Placeholder Icon]
Tags	No tags associated with this offering

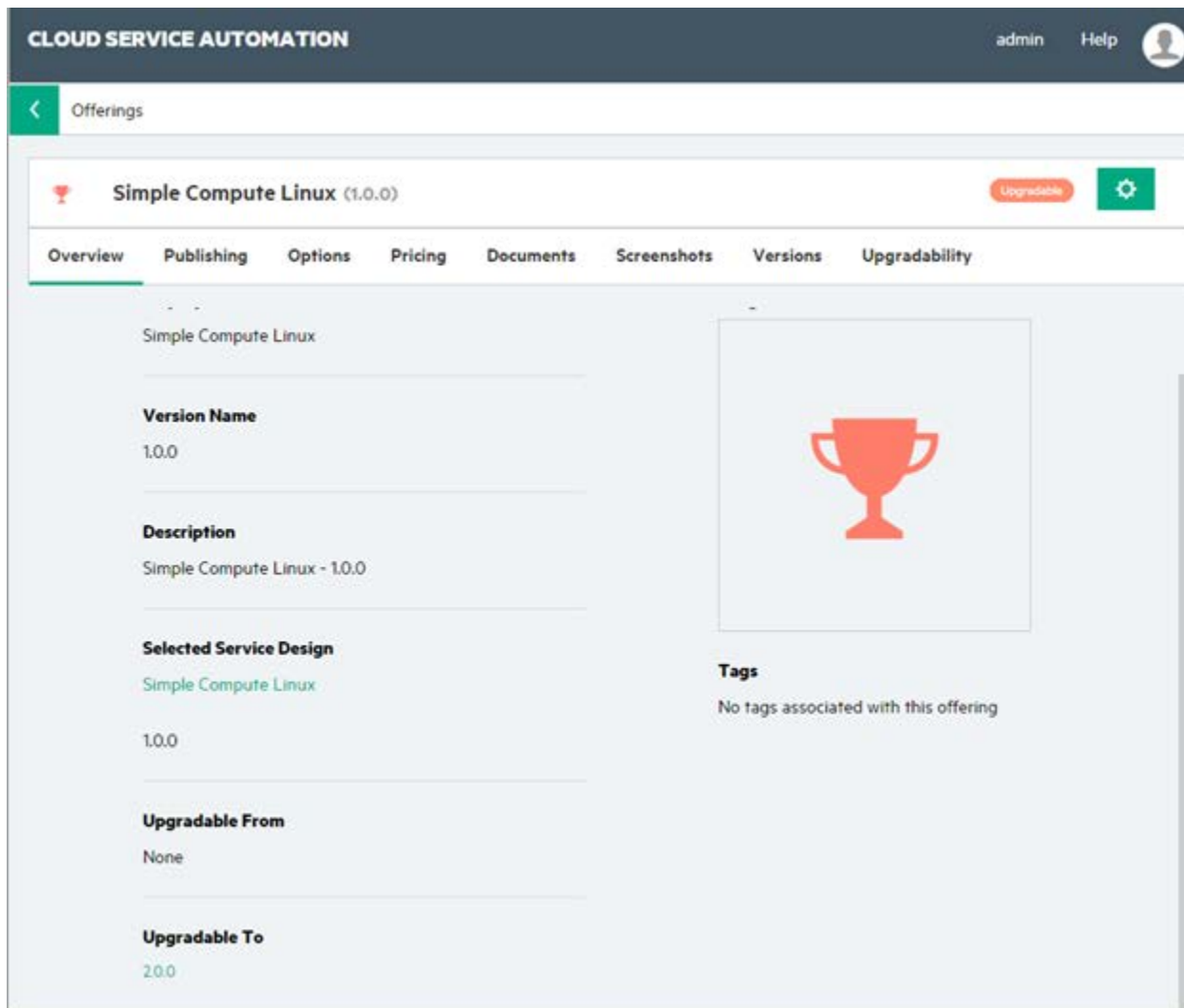
## Upgradable service offering

An upgradable service offering is a version of a service offering where service subscriptions originating from it have to be upgraded to a different version of the service offering. A service offering version is upgradable only in the presence of upgrade service offerings.

In the **Overview** tab of the Offerings area of Cloud Service Management Console, upgradable service offerings have an **Upgradable To** field populated with the versions of service offerings which are going to be used for upgrading service subscriptions originating from the current version of the service offering. Upgradable service offerings also have an **Upgradable** label in the top right corner. Upgradable service offerings also have an **Update Available** label indicating the presence of upgrade service designs on which upgrade service offerings are based.

**Note:** Service subscriptions originating from an upgradable service offering can be upgraded to many version of upgrade service offerings if there are multiple versions of upgrade service offerings.

Figure 7. The **Upgradable To** field of service offering version 1.0.0 has been populated with version 2.0.0 indicating service subscriptions originating from version 1.0.0 are upgradable to version 2.0.0; An **Upgradable** label is also populated in the top right corner



The screenshot displays the 'Simple Compute Linux (1.0.0)' service offering page in the Cloud Service Automation console. The page features a navigation bar with 'Overview', 'Publishing', 'Options', 'Pricing', 'Documents', 'Screenshots', 'Versions', and 'Upgradability' tabs. The 'Overview' tab is active. The main content area shows the following details:

- Version Name:** 1.0.0
- Description:** Simple Compute Linux - 1.0.0
- Selected Service Design:** Simple Compute Linux
- Upgradable From:** None
- Upgradable To:** 2.0.0

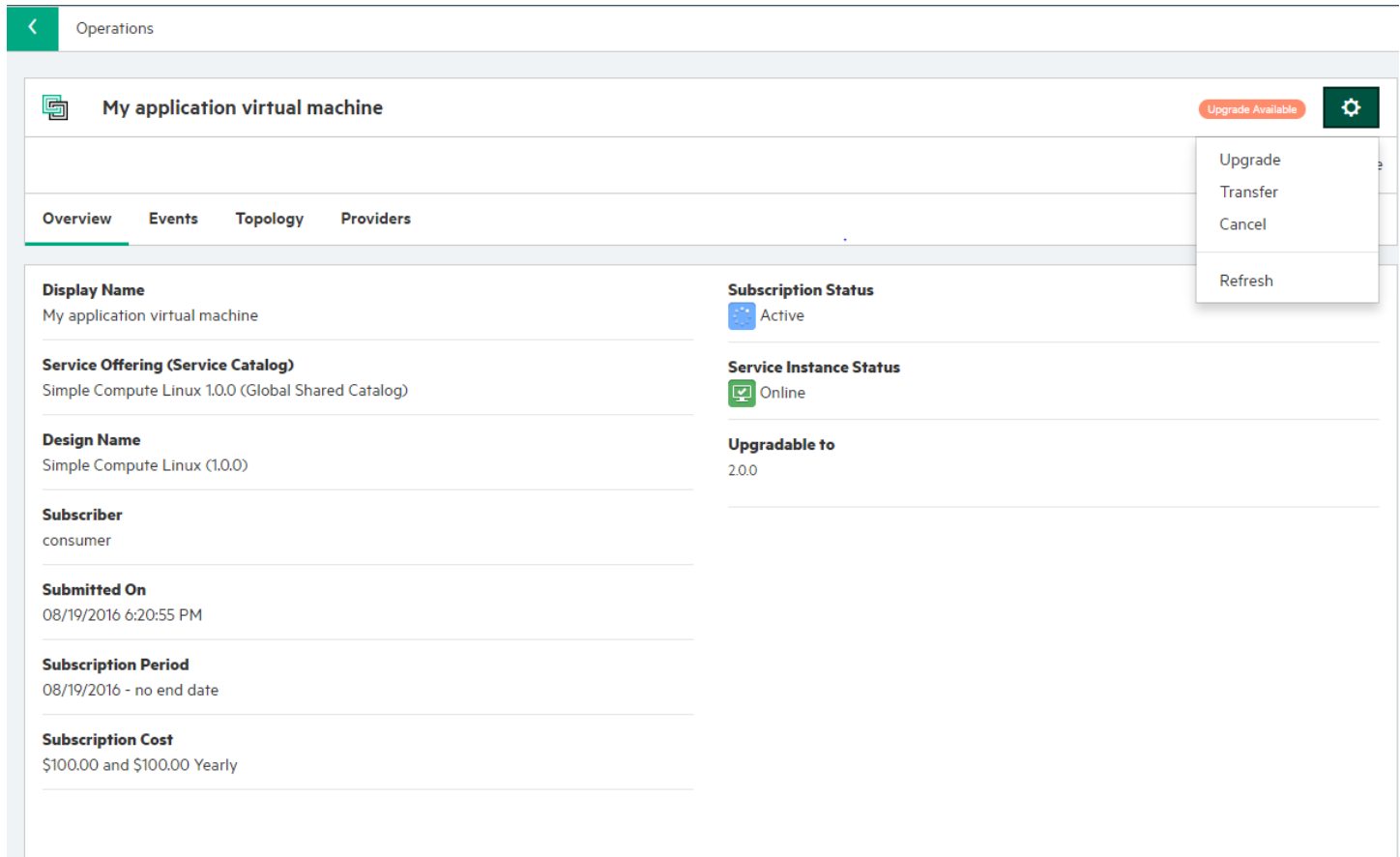
On the right side, there is a large red trophy icon and a 'Tags' section stating 'No tags associated with this offering'. In the top right corner of the offering card, there is an 'Upgradable' label and a green gear icon.

## Upgradable service subscription

A service subscription is upgradable if the service subscription is in an Active state and there are upgrade service offerings published into the same catalog as the service offering from which service subscription originated.

In the subscription overview in the Operations area of Cloud Service Management Console, an **Upgrade Available** label indicates that the service subscription is upgradable. The subscription overview indicates that upgrades are available through the **Upgradable to** field. Click the gear icon and select **Upgrade** to upgrade the service subscription.

Figure 8. An upgradable service subscription



The screenshot displays the 'My application virtual machine' subscription overview in the Cloud Service Management Console. The interface includes a navigation bar with 'Operations' and a 'Back' arrow. The main content area shows the subscription details for 'My application virtual machine'. A red 'Upgrade Available' badge is visible in the top right corner, along with a gear icon for settings. A dropdown menu is open, showing options: 'Upgrade', 'Transfer', 'Cancel', and 'Refresh'. The subscription details are organized into two columns:

Field	Value
Display Name	My application virtual machine
Service Offering (Service Catalog)	Simple Compute Linux 1.0.0 (Global Shared Catalog)
Design Name	Simple Compute Linux (1.0.0)
Subscriber	consumer
Submitted On	08/19/2016 6:20:55 PM
Subscription Period	08/19/2016 - no end date
Subscription Cost	\$100.00 and \$100.00 Yearly
Subscription Status	Active
Service Instance Status	Online
Upgradable to	2.0.0

## Upgrading lifecycle state

A new *Upgrading* lifecycle state is used to facilitate the service instance upgrade process. The Upgrading lifecycle state can be utilized for adding lifecycle actions to service components and resource offerings common to the upgrade and upgradable service designs. These lifecycle actions make changes to an existing service component or resource offering in a service instance during the upgrade process.

## Lifecycle transition during upgrade of service instances

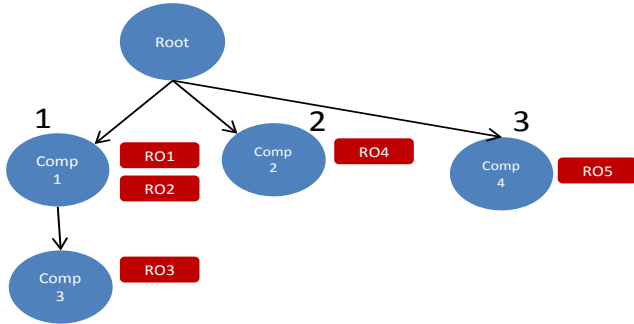
Just like ordering a subscription or modifying a subscription, the service instance undergoes a lifecycle transition by executing various actions configured on components and resource offerings during the process of upgrading subscriptions. Service instance lifecycle transition rules during an upgrade are different from those of ordering or modifying a subscription. They can be summarized as follows:

- Actions configured in the Upgrading lifecycle state are executed for:
  - existing service components in the service instance and
  - existing and new resource offerings added to the existing service component.
- Actions configured in the Initializing, Reserving and Deploying lifecycle states are executed for service components (and resource offerings associated with service components) which are new to the service instance.

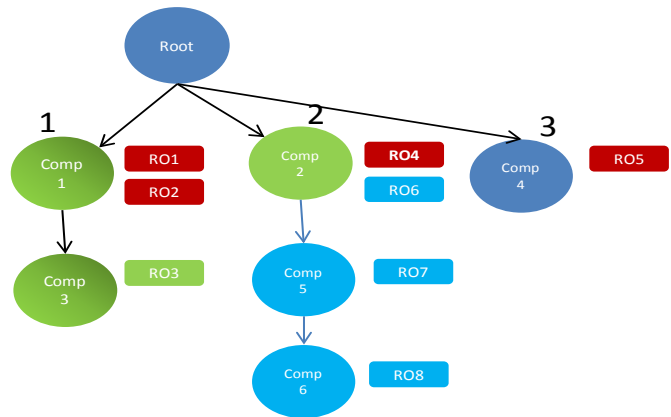
The following figures depict changes made between upgradable and upgrade service designs followed by the lifecycle transition in the service instance during the upgrade process.

Figure 9. Service design version 2.0.0 is an upgrade for service design version 1.0.0

### Service Design Version 1.0.0



### Service Design Version 2.0.0

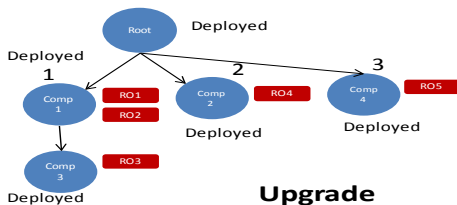


### Changes in Service Design Version 2.0.0

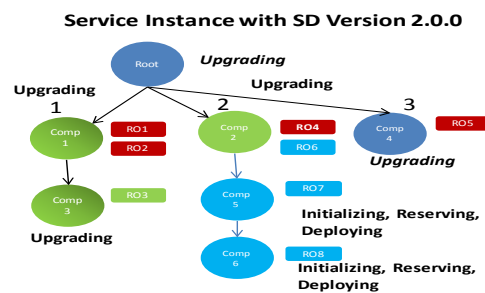
- New property has been added to Comp 1
- New property has been added to Comp 3
- RO 3 in Comp 3 has a new OO flow in Upgrading lifecycle state
- New RO 6 has been added to Comp 2
- Comp 5 and Comp 6 are new components

Figure 10. During an upgrade to design version 2.0.0, actions present in the Upgrading lifecycle state are executed for existing service components (and existing or new resource offerings associated with them) while actions present in the Initializing, Reserving and Deploying lifecycle states are executed for only new service components (and resource offerings associated with them).

### Service Instance with SD Version 1.0.0



### Upgrade to version 2.0.0



## Configure a service design

The first step to upgrade a service instance is to configure an upgrade service design:

1. [Create an upgrade service design.](#)
2. [Edit an upgrade service design.](#)

Additional tasks for service design upgrades include the following:

- [View upgrade paths.](#)
- [Delete an upgrade path.](#)
- [View differences between design versions.](#)

## Create an upgrade service design

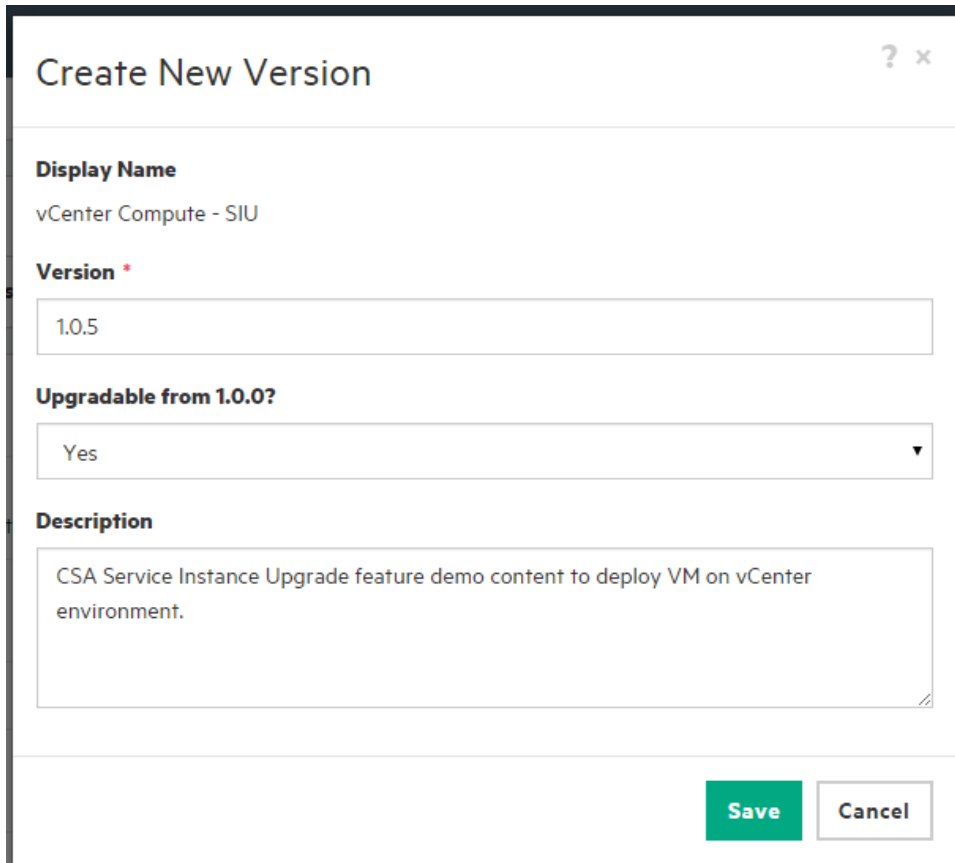
There are two ways to create an upgrade service design for upgrading service instances:

- [Create a new service design version from an existing published design version.](#)
- [Establish an upgrade relationship between two design versions using the Upgradability tab.](#)

### Create a new service design version

To create a new service design version from an existing published version:

1. Open the existing design, the design for which you wish to create an upgrade design. This design must be in a published state.
2. Click the gear icon and select **Create New Version**.
3. Enter a new version (required) and select **Yes** for **Upgradable from <base design version>?**.



**Create New Version** ? x

**Display Name**  
vCenter Compute - SIU

**Version \***  
1.0.5

**Upgradable from 1.0.0?**  
Yes

**Description**  
CSA Service Instance Upgrade feature demo content to deploy VM on vCenter environment.

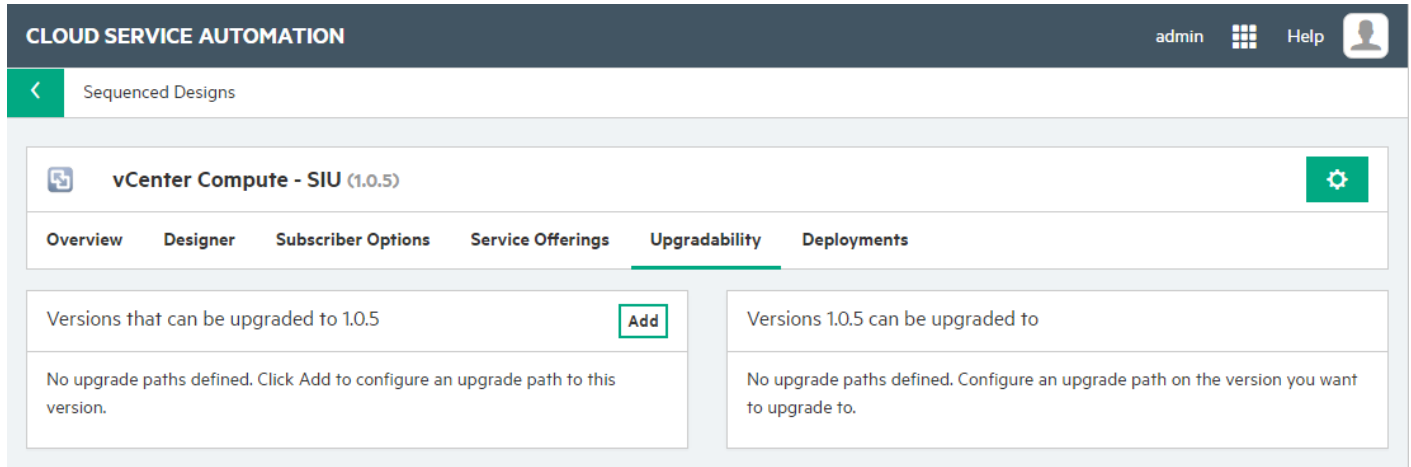
**Save** **Cancel**

4. Click **Save**. This creates an upgrade design and establishes an upgrade path or relationship between the two designs.

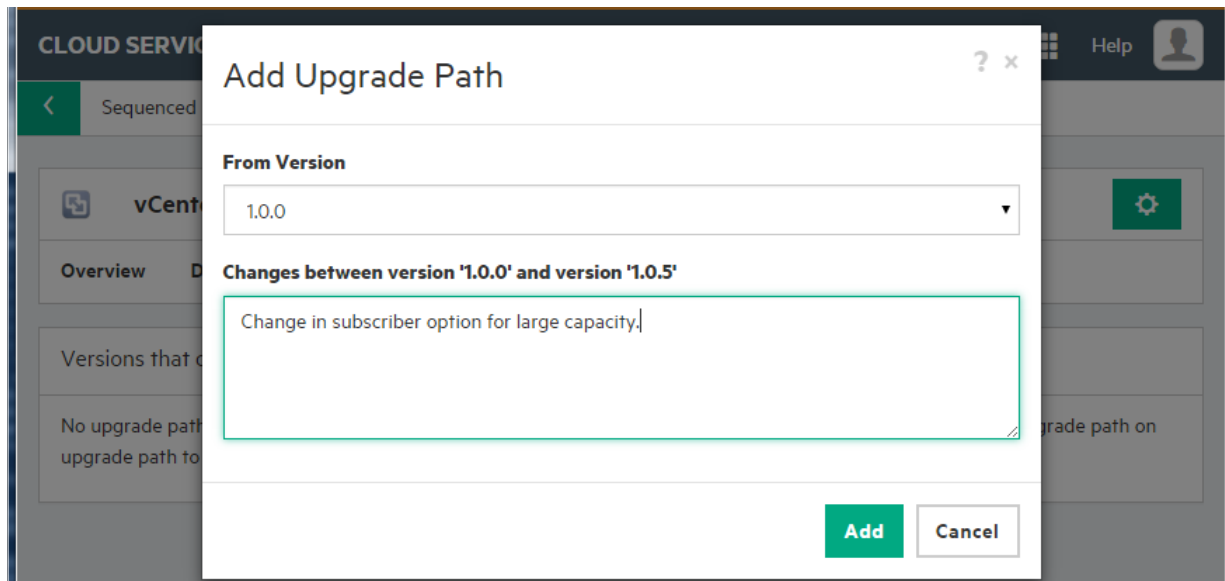
## Establish an upgrade path between two design versions

The second way to create an upgrade service design is to establish an upgrade path or relationship between two versions of a service design:

1. Open the design that is to be the upgrade service design. The selected version of the service design *must* be cloned from the existing design from which the upgrade path will be established.
2. Select the **Upgradability** tab and click **Add**. This is only possible if an upgrade is not available from the selected version of the service design to a different version of the service design.



3. Select a design version and add a description of the changes between the two designs. Only design versions which are in a published state will be selectable in the dialog.



4. Click **Add**. This establishes an upgrade relationship between the two designs. If the current version of a service design violates upgradability rules, an upgrade relation will not be established between the designs. An error message is displayed and additional details of the error are found in the CSA logs.

## Edit an upgrade service design

After the upgrade service design is created, changes can be made to it and its subscriber options. However, an upgrade service design has restricted editability and actions, and a message with this restriction is displayed in its service design version page. The sequenced designer and subscriber options interfaces automatically restrict changes that are not allowed. Changes which are not allowed on

upgrade service designs are described in the next section. The upgrade service design must be published before an upgrade service offering can be created.

Figure 11. Upgrade version of service design has editability restrictions

**CLOUD SERVICE AUTOMATION** admin Help

Sequenced Designs

**vCenter Compute - SIU (1.0.5)**

Overview Designer Subscriber Options Service Offerings Upgradability Deployments

This design is part of an upgrade path and has restricted editability and actions.

**Display Name**  
vCenter Compute - SIU

**Description**  
CSA Service Instance Upgrade feature demo content to deploy VM on vCenter environment.

**Version**  
1.0.5

**URL**

**Published**  
No

**Upgradable From**  
1.0.0

**Upgradable To**  
No upgrade path defined

**Preview**

vCenter Simple Compute  
Intra Service  
Server Group  
Simple Compute Server

Open Preview

## Restrictions on editing upgrade service designs

The following is a list of items and descriptions of functions that are restricted:

- Resource Offering Properties
  - *Deleting resource offering properties* - The properties of a resource offering cannot be deleted if the resource offering is linked to a service component that is part of a design in an upgrade path.
- Service Components and Properties
  - *Deleting a service component* - A service component cannot be deleted if the design is in an upgrade path, is upgradable from a previous version of the design, and the service component existed in that prior version. Service components that are newly added to the current version of the design can be deleted.
  - *Editing service component attributes: Component Order and Pattern* - The Component Order and Pattern attributes of a service component cannot be edited if the component originated in a design that is in an upgrade path. The Component Order and Pattern attributes of the component are editable if the component originated in the current design.

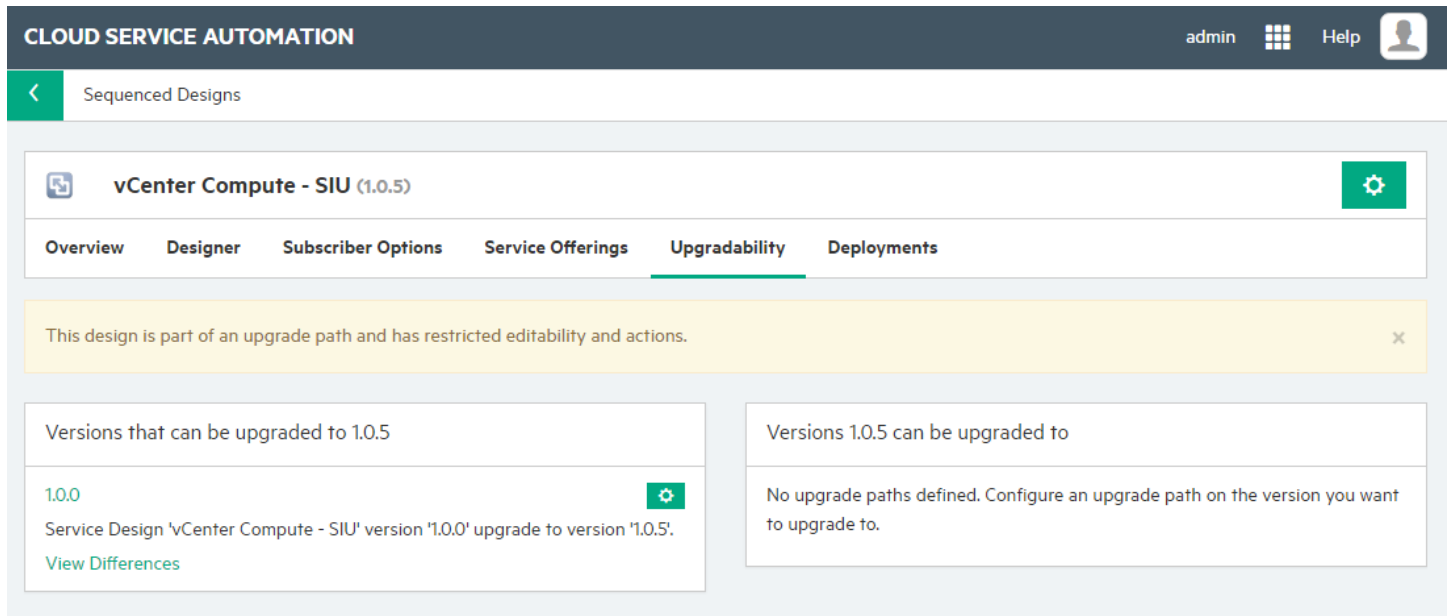
- *Deleting a service component property* - A service component property cannot be deleted if the component property is part of a design in an upgrade path, is upgradable from a previous version of the design, and the service component property existed in that prior version. Service component properties that are newly added to the current version of the design can be deleted.
- *Editing a service component property: Name* - The Name attribute of a component property cannot be edited if the component property is part of a design in an upgrade path, the design is upgradable from a previous version of the design, and the Name attribute existed in that prior version. A Name attribute that is newly added to the current version of the design can be edited.
- Service Component Resource Offering Associations and Properties
  - *Deleting a resource offering association* - A resource offering association in a service component cannot be deleted if the design is in an upgrade path, is upgradable from a previous version of the design, and the resource offering association existed in that prior version. Resource offering associations that are newly added to the current version of the design can be deleted.
  - *Adding or deleting measurable properties* - A measurable property of a resource offering association in a service component cannot be added or deleted if it is part of a design in an upgrade path.
- Subscriber Option Sets
  - *Deleting a subscriber option set* - Subscriber option sets cannot be deleted if the design is in an upgrade path, is upgradable from a previous version of the design, and the subscriber option set existed in that prior version. Subscriber option sets that are newly added to the current version of the design can be deleted.
- Subscriber Options and Properties
  - *Deleting a subscriber option* - Subscriber options cannot be deleted if the design is in an upgrade path, is upgradable from a previous version of the design, and the option existed in that prior version. Options that are newly added to the current version of the design can be deleted.
  - *Deleting a subscriber option property* - Subscriber option properties cannot be deleted if the design is in an upgrade path, is upgradable from a previous version of the design, and the option property existed in that prior version. Option properties that are newly added to the current version of the design can be deleted.
  - *Editing a subscriber option property: name* - The subscriber option property name cannot be edited if the design is in an upgrade path, is upgradable from a previous version of the design, and the option property name existed in that prior version. Options that are newly added to the current version of the design can be edited.
  - *Editing a subscriber option property: target binding* - Target bindings cannot be edited if the design is in an upgrade path, is upgradable from a previous version of the design, and the target bindings existed in that prior version. Target bindings that are newly added to the current version of the design can be deleted.



## View upgrade paths

The **Upgradability** tab displays the versions of service designs that can be upgraded to the current version as well as the versions of service designs to which the current version can upgrade.

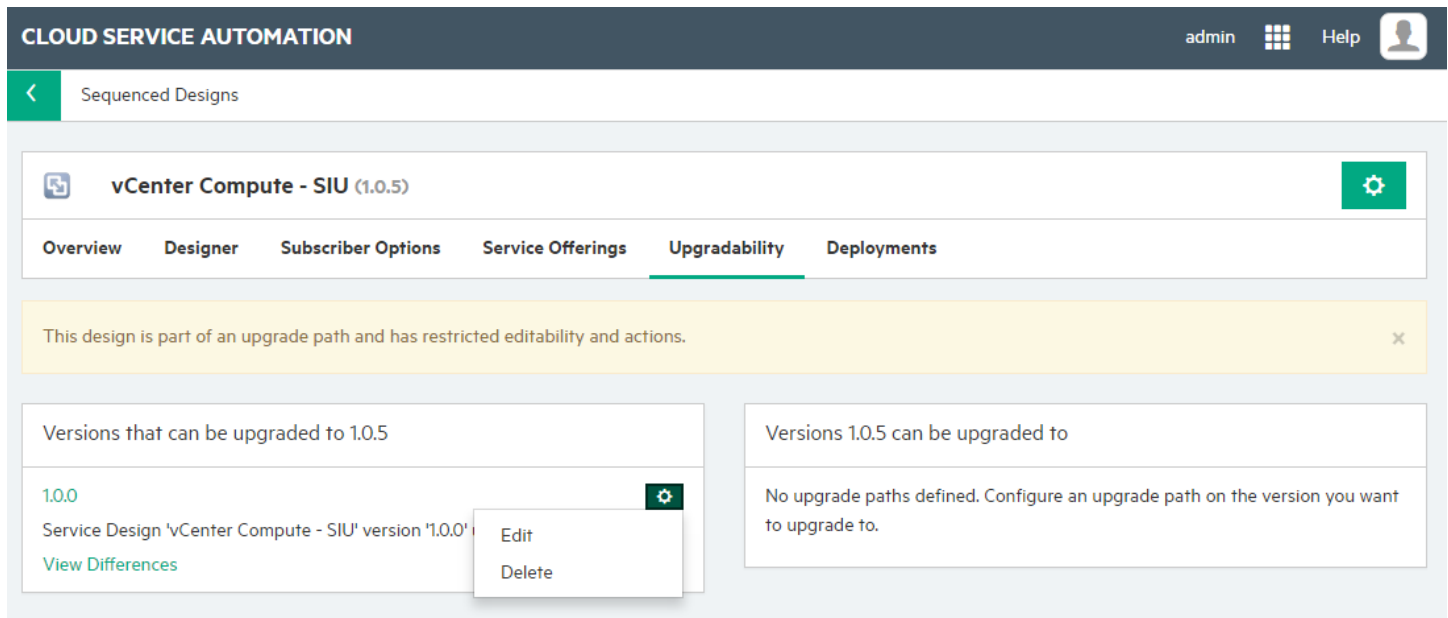
Figure 12. The **Upgradability** tab in the service design version page of the Sequenced Designs area



## Edit upgrade path description or delete an upgrade path

In the **Upgradability** tab of the service design version page, on the left under **Versions that can be upgraded to <current version>**, click the gear icon and select to edit the upgrade path description of what has changed between the two designs or delete the upgrade path.

Figure 13. **Upgradability** tab options to edit the description of an upgrade path or delete an upgrade path

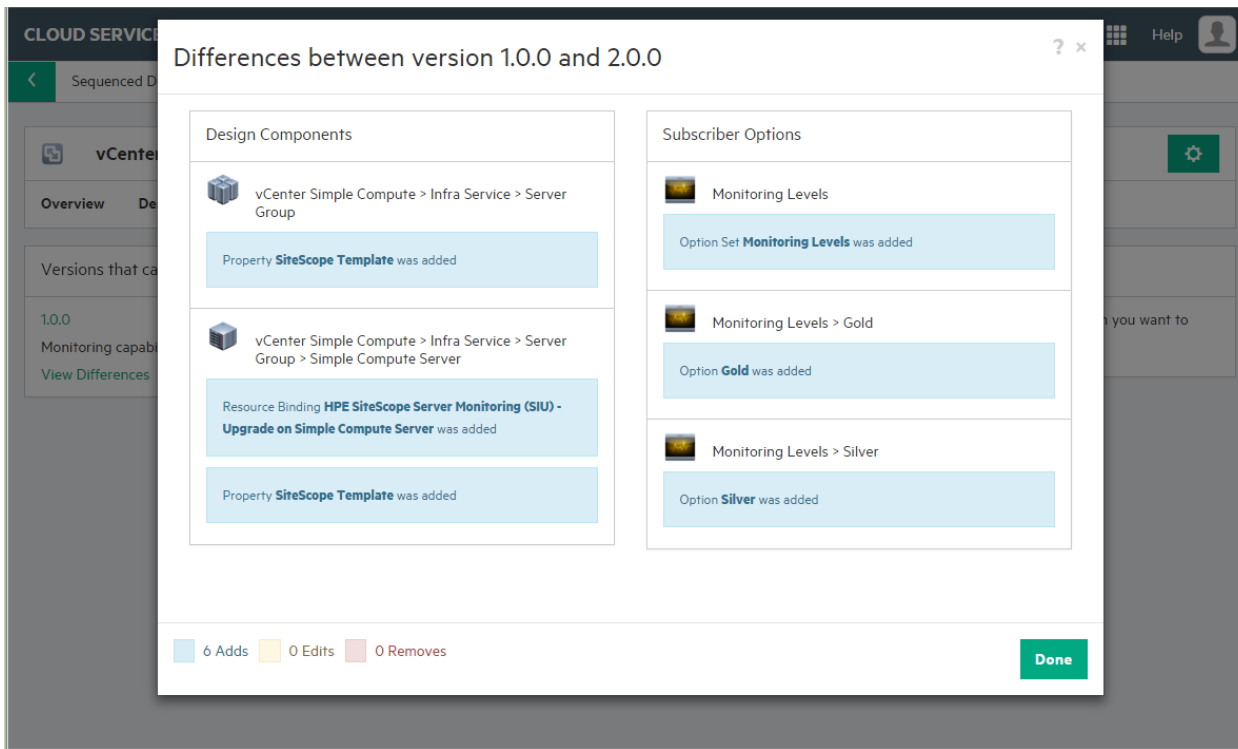


Deleting the upgrade path only removes the upgrade path between the two designs. It does not delete the upgrade service design. An upgrade path may not be deleted if an upgrade service offering that upgrades the prior design version to the current version exists. A warning will appear if such an attempt is made.

## View differences between design versions

Upon establishing an upgrade path between different versions of service designs, changes made to the upgrade service design are viewable. In the **Upgradability** tab of the service design version page, on the left under **Versions that can be upgraded to <current version>**, click **View Differences**.

Figure 14. Changes made to the upgrade service design compared to the upgradable service design



## Configure a service offering

The second step to upgrade a service instance is to configure an upgrade service offering:

1. Create an upgrade service offering.
2. Edit an upgrade service offering.

Additional tasks for service offering upgrades include the following:

- View upgrade paths.
- Edit upgrade path description or delete an upgrade path.

## Create an upgrade service offering

After an upgrade service design has been created and published, service offerings created from the original (upgradable) service design have an **Update Available** label visible in the top right corner for a selected offering. This indicates that an upgrade service offering can be created from the original service offering.

Figure 15. **Update Available** label indicating that an upgrade offering can be created from this service offering

The screenshot displays the 'Simple Compute Linux (1.0.0)' service offering page in the Cloud Service Automation interface. The page features a dark header with the title 'CLOUD SERVICE AUTOMATION', the user 'admin', and a 'Help' link. Below the header, a breadcrumb trail shows 'Offerings'. The main content area is divided into two columns. The left column contains the following details: **Display Name**: Simple Compute Linux; **Version**: 1.0.0; **Description**: (empty); **Selected Service Design**: Simple Compute Linux 1.0.0; **Upgradable From**: None; **Upgradable To**: 2.0.0. The right column contains: **Image**: A blue icon representing a service image; **Tags**: No tags associated with this offering. In the top right corner of the offering card, there is a blue 'Update Available' label and a green settings gear icon. The page also includes a navigation menu with 'Overview', 'Publishing', 'Options', 'Pricing', 'Documents', 'Screenshots', and 'Upgradability'.

There are two ways to create an upgrade service offering for upgrading service instances:

1. Create a new service offering version
2. Establish an upgrade path between two offering versions

Once a service offering has an upgrade path established to a new upgrade version, an **Upgradable** label appears.

Figure 16. Service offering version that has an available upgrade

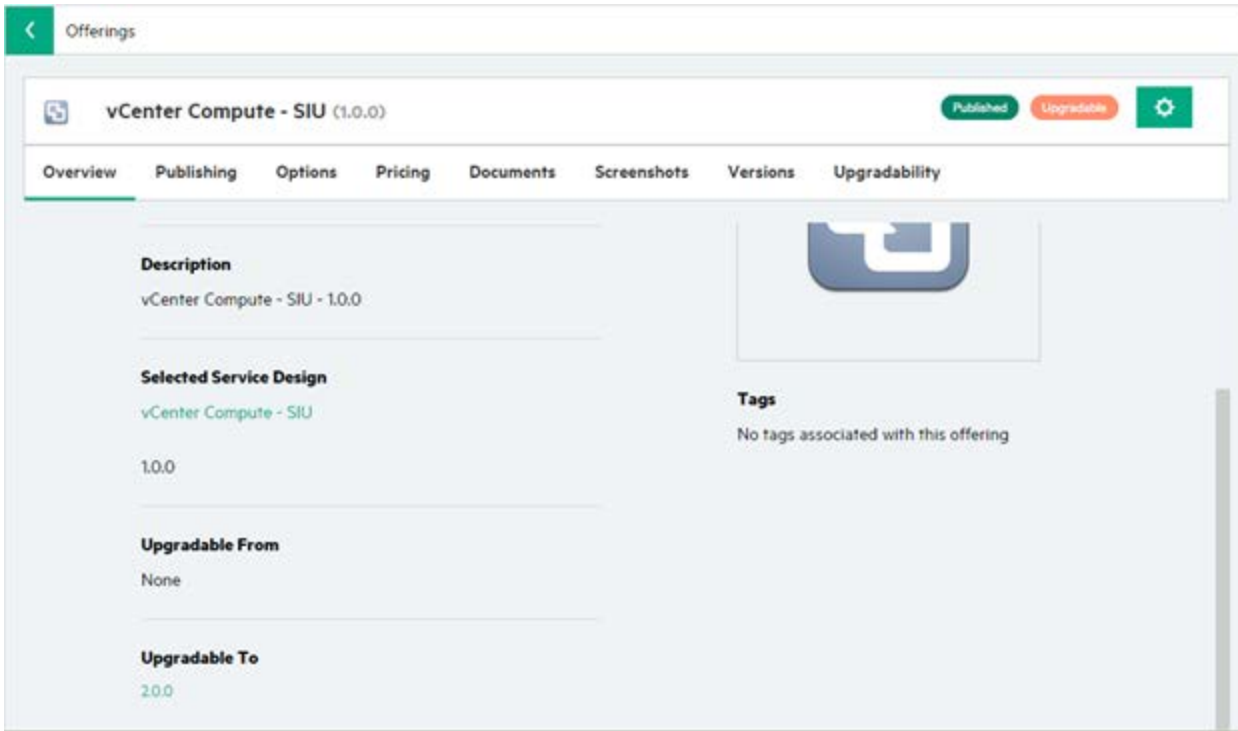


Figure 17. Service offering version list that shows an available upgrade

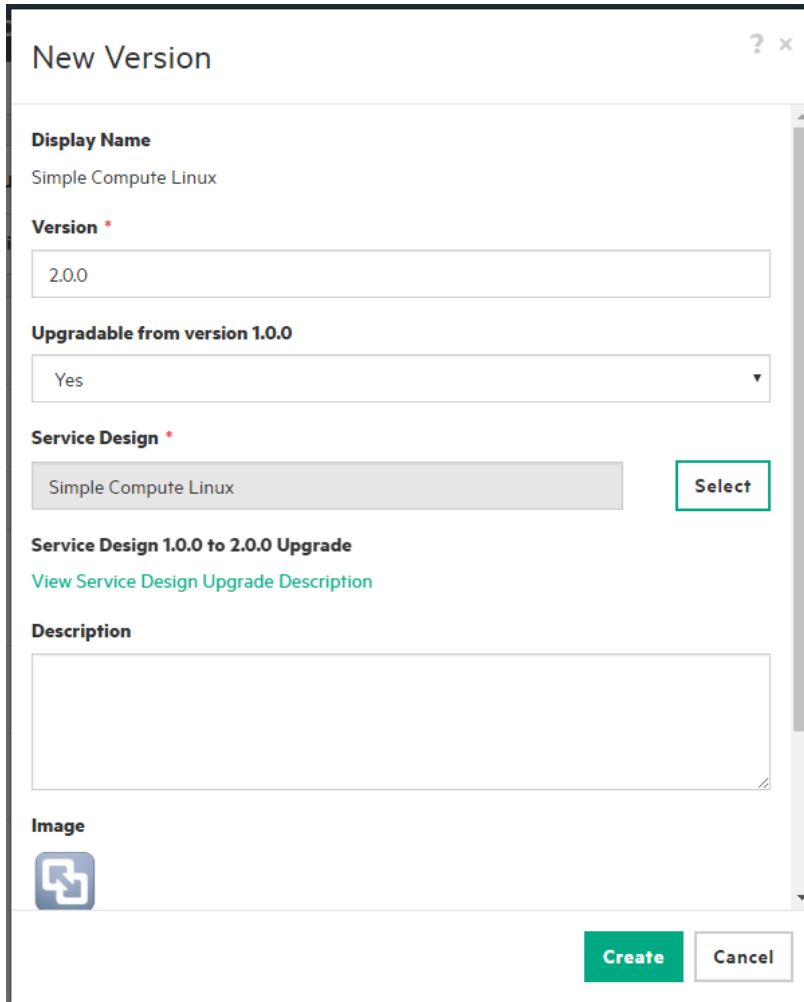
**Offering Versions**  
All versions of Offering.

Offering (Version)	Description	Design (Version)	
vCenter Compute - SIU 2.0.0	vCenter Compute - SIU	vCenter Compute - SIU 2.0.0	
vCenter Compute - SIU 1.0.0	vCenter Compute - SIU - 1.0.0	vCenter Compute - SIU 1.0.0	<b>Published</b> <b>Upgradable</b>

## Create a new service offering version

To create a new service offering version from an existing version:

1. Open the existing offering, the offering for which you wish to create an upgrade offering. This offering displays the **Update Available** label.
2. Click the gear icon and select **Create New Version**.
3. Enter a new version (required), select **Yes** for **Upgradable from <selected version>**, and select the upgrade service design. Click **View Service Design Upgrade Description** to display the description of the upgrade path. This link displays only if the upgrade description is already defined in the designer.



The screenshot shows a 'New Version' dialog box with the following fields and options:

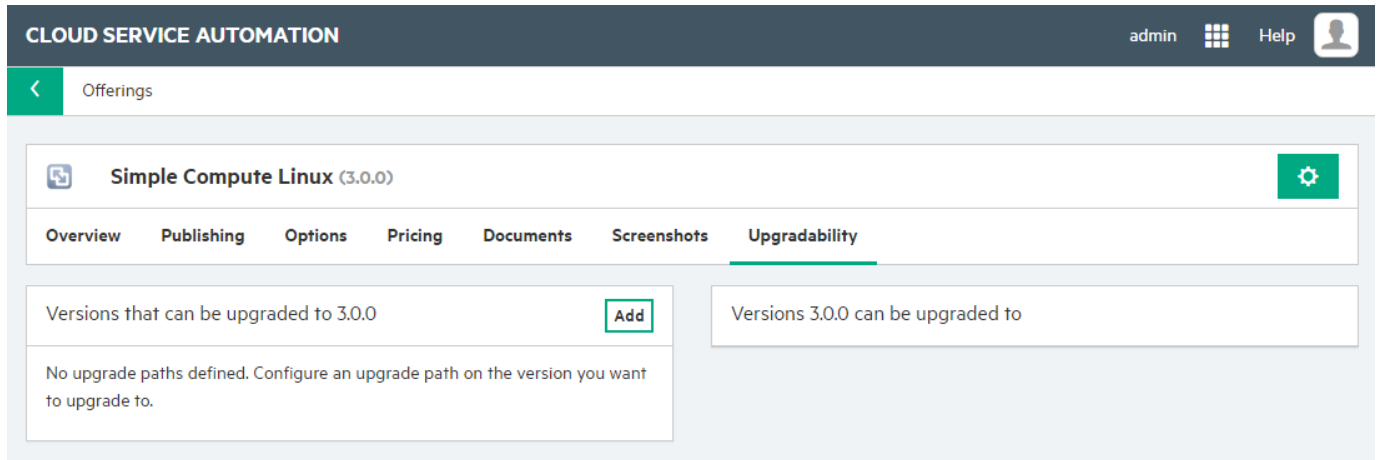
- Display Name:** Simple Compute Linux
- Version:** 2.0.0
- Upgradable from version 1.0.0:** Yes
- Service Design:** Simple Compute Linux (with a 'Select' button)
- Service Design 1.0.0 to 2.0.0 Upgrade:** View Service Design Upgrade Description
- Description:** (Empty text area)
- Image:** (Icon)
- Buttons:** Create, Cancel

4. Click **Create**. This creates an upgrade offering and establishes an upgrade path or relationship between the two offerings.

## Establish an upgrade path between two offering versions

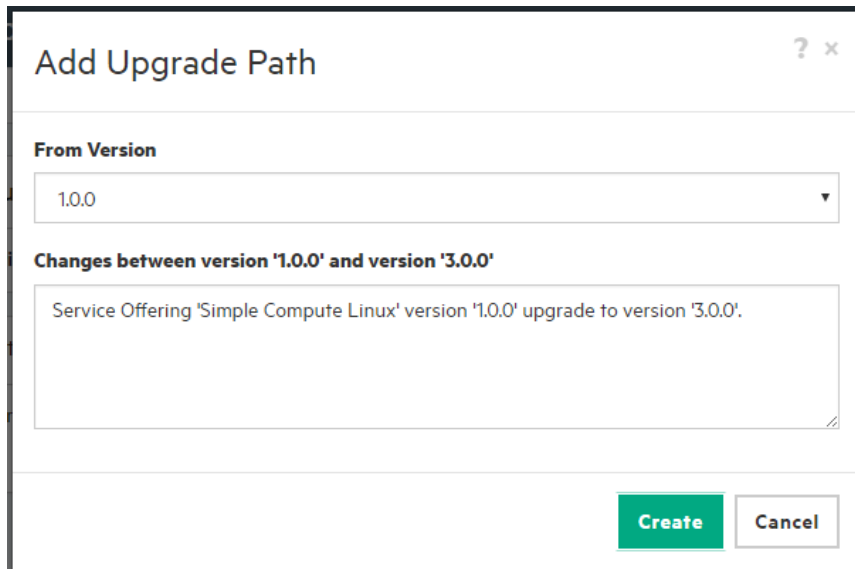
The second way to create an upgrade service offering is to establish an upgrade path or relationship between two versions of a service offering:

1. Open the offering that is to be the upgrade service offering. The selected version of the service offering must be cloned from the existing offering from which the upgrade path will be established.
2. Select the upgradability tab and click **Add**.



Offering versions which can act as upgradable offerings can be selected in the dialog.

3. Select an offering version and add a description of the changes between the two offerings.



4. Click **Create**. This establishes an upgrade path between the two offerings.

**Note:** Establishing an upgrade path between offering versions using these steps does not restore subscriber options and pricing changes made to the upgradable offering.

## Edit an upgrade service offering

An upgrade service offering created from an existing version of a service offering has pricing changes and option model changes preserved from the previous version of service offering. New prices must be added and option model customizations must be completed for any new option sets, options or option properties added to the upgrade service design.

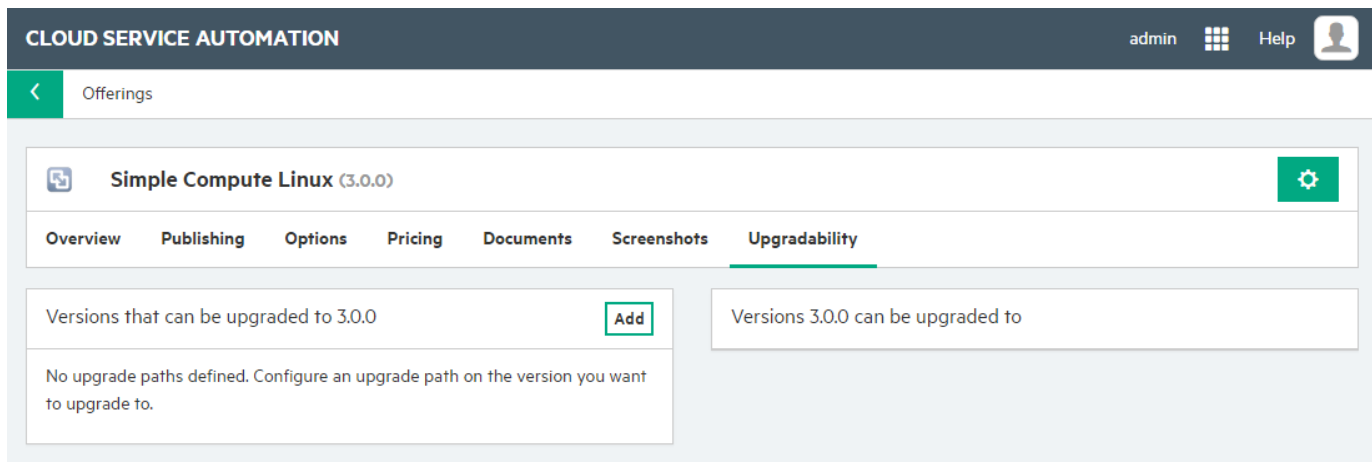
**Note:** If the original service offering has a customized display name, a change in the display name of an option set, option or option property of an upgrade service design is not reflected in the upgrade service offering. Service offering subscriber option customizations are given precedence over service design subscriber option changes.

**Note:** Creating an upgrade service offering from an existing service offering preserves pricing from the original service offering. Additional pricing changes, such as modifying existing prices and adding new prices to newly added options or option properties, can be made after creating the upgrade service offering. Only the Service Operations Manager can upgrade service subscriptions, therefore a subscriber will be unaware of any cost change until after the upgrade process has started.

## View upgrade paths

The **Upgradability** tab displays the versions of service offerings that can be upgraded to the current version as well as the versions of service offerings to which the current version can upgrade.

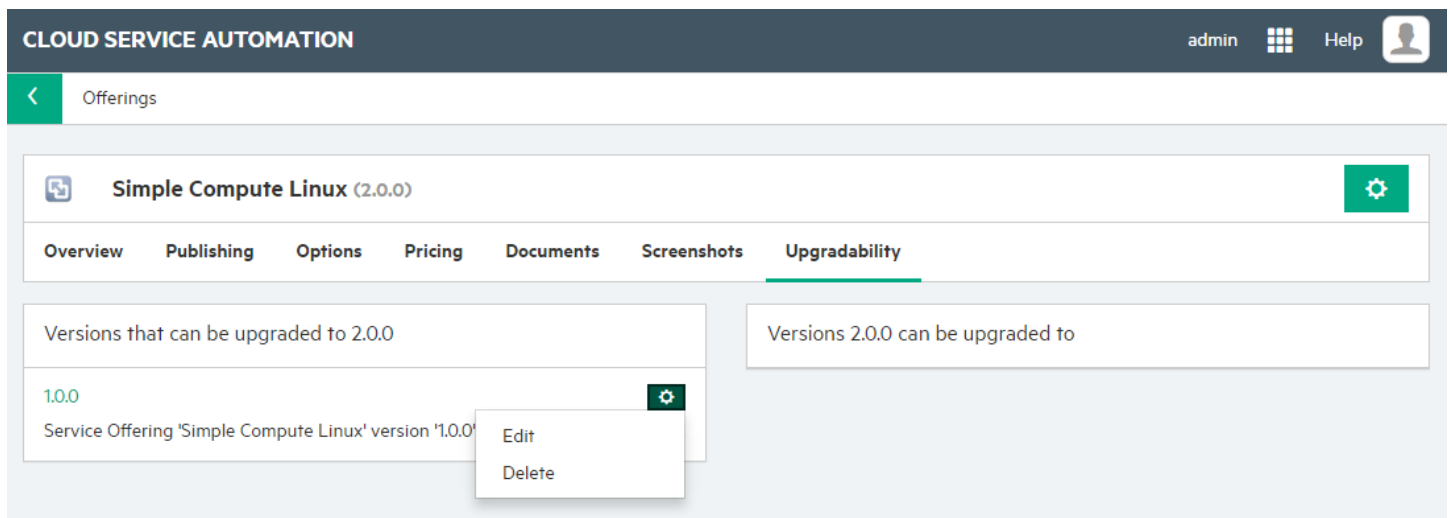
Figure 18. The **Upgradability** tab in the service offerings version page of the Offerings area



## Edit upgrade path description or delete an upgrade path

In the **Upgradability** tab of the service offering version page, on the left under **Versions that can be upgrade to <current version>**, click the gear icon and select to edit the upgrade path description of what has changed between the two offerings or to delete the upgrade path. The Service Operations Manager uses the description to understand what has changed in the upgrade offering before upgrading service instances.

Figure 19. **Upgradability** tab options to edit the description of an upgrade path or delete an upgrade path



Deleting the upgrade path only removes the upgrade path between the two offerings. It does not delete the upgrade service offering.

# Publish an upgrade service offering

The third step to upgrade a service instance is to publish the upgrade service offering. The upgrade service offering must be published into the same catalog as the upgradable service offering from which the service subscriptions were created.

**Note:** If the upgrade service offering is not published, the service subscription cannot be upgraded.













## Upgrade a subscription

The Operations area of the Cloud Service Management Console displays service subscriptions by organization and, depending on the tab selected, subscriptions by users or service offerings.

Select a user or offering to view a list of service subscriptions. A service subscription that has an upgrade available is clearly indicated through an **Upgrade Available** label.

Figure 20. Subscription list displaying that upgrades are available for service subscriptions

The screenshot shows the 'Operations' section of the Cloud Service Management Console. At the top, there is a navigation bar with a back arrow and the text 'Operations'. Below this, a user profile for 'consumer' is shown with a settings gear icon. A summary bar displays various status icons and counts: 4 active subscriptions, 0 paused, 0 suspended, 0 failed, 0 canceled, and 0 deleted. The main content area is titled 'Subscriptions' and features a search bar and a dropdown menu set to 'Submitted On'. Below this is a table with the following data:

Subscription Details	Submitted On	Subscription Period	Subscription Status	Service Instance Status
 My application virtual machine Simple Compute Linux (Global Shared Catalog) <span>Upgrade Available</span>	08/19/2016 6:20:55 PM	08/19/2016 - no end date	 Active	 Online
 My server farm Simple Compute Linux (Global Shared Catalog) <span>Upgrade Available</span>	08/19/2016 6:20:35 PM	08/19/2016 - no end date	 Active	 Online
 My simple server Simple Compute Linux (Global Shared Catalog) <span>Upgrade Available</span>	08/19/2016 5:47:45 PM	08/19/2016 - no end date	 Active	 Online
 Simple Compute Linux (1.0.0) Simple Compute Linux (Global Shared Catalog)	08/19/2016 5:47:22 PM	08/19/2016 - no end date	 Active	 Online



Selecting a service subscription that has an upgrade available displays additional information, such as available upgrade versions.

Figure 21. Service subscription view displaying available upgrade versions

The screenshot shows a user interface for managing cloud services. At the top, there is a navigation bar with a back arrow and the word "Operations". Below this, the main header area displays "My application virtual machine" with a settings gear icon and a red "Upgrade Available" badge. On the right side of the header, there are status indicators: "Active" with a blue star icon and "Online" with a green checkmark icon. Below the header is a tabbed interface with "Overview", "Events", "Topology", and "Providers". The "Overview" tab is selected, showing a list of subscription details in two columns. The left column includes: Display Name (My application virtual machine), Service Offering (Simple Compute Linux 1.0.0 (Global Shared Catalog)), Design Name (Simple Compute Linux (1.0.0)), Subscriber (consumer), Submitted On (08/19/2016 6:20:55 PM), Subscription Period (08/19/2016 - no end date), and Subscription Cost (\$100.00 and \$100.00 Yearly). The right column includes: Subscription Status (Active), Service Instance Status (Online), and Upgradable to (2.0.0).

Field	Value
Display Name	My application virtual machine
Service Offering (Service Catalog)	Simple Compute Linux 1.0.0 (Global Shared Catalog)
Design Name	Simple Compute Linux (1.0.0)
Subscriber	consumer
Submitted On	08/19/2016 6:20:55 PM
Subscription Period	08/19/2016 - no end date
Subscription Cost	\$100.00 and \$100.00 Yearly
Subscription Status	Active
Service Instance Status	Online
Upgradable to	2.0.0

To upgrade a subscription:

1. Click the gear icon and select **Upgrade**.

The screenshot shows the Azure portal interface for a subscription named "My application virtual machine". The page is titled "Operations" and includes a navigation bar with "Overview", "Events", "Topology", and "Providers". A red "Upgrade Available" button and a gear icon are visible in the top right corner. A dropdown menu is open over the gear icon, showing options: "Upgrade", "Transfer", "Cancel", and "Refresh". The main content area displays subscription details in two columns:

<b>Display Name</b> My application virtual machine	<b>Subscription Status</b> Active
<b>Service Offering (Service Catalog)</b> Simple Compute Linux 1.0.0 (Global Shared Catalog)	<b>Service Instance Status</b> Online
<b>Design Name</b> Simple Compute Linux (1.0.0)	<b>Upgradable to</b> 2.0.0
<b>Subscriber</b> consumer	
<b>Submitted On</b> 08/19/2016 6:20:55 PM	
<b>Subscription Period</b> 08/19/2016 - no end date	
<b>Subscription Cost</b> \$100.00 and \$100.00 Yearly	

2. Select the version of the service offering to which to upgrade. The Upgrade Subscriptions dialog displays the cost of the service subscription after upgrade and a description of the upgrade service offering.

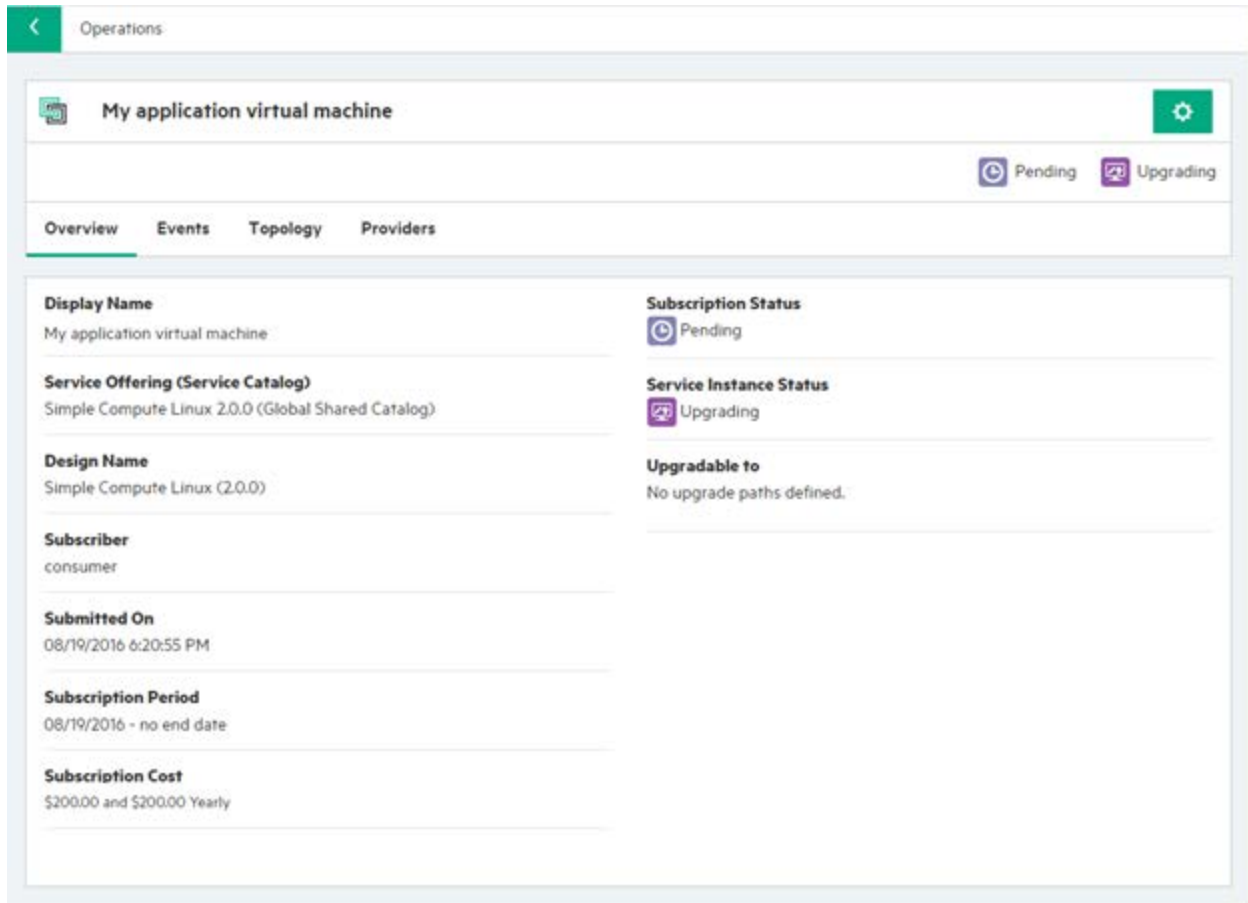
The screenshot shows the 'Upgrade Subscription' dialog box in the Cloud Service Automation interface. The dialog is titled 'Upgrade Subscription' and contains the following information:

- Upgrade To Version:** A dropdown menu showing '2.0.0'.
- Cost before Subscription Upgrade:** \$100.00 and \$100.00 Yearly
- Cost after Subscription Upgrade:** \$200.00 and \$200.00 Yearly
- Service Offering Upgrade Description:** This service offering provides the ability to monitor virtual machines deployed from service subscriptions created through version 1.0.0 of the service offering.

At the bottom of the dialog, there are two buttons: 'Upgrade' (highlighted in green) and 'Cancel'.

The background interface shows the 'My application virtual machine' page with various tabs (Overview, Events, Topology, Properties) and details such as 'Display Name', 'Service Offering (Service Catalog)', 'Design Name', 'Subscriber', 'Submitted On', 'Subscription Period', and 'Subscription Cost'.

3. Click **Upgrade**. The service subscription status changes from Active to Pending and then the service instance state changes from Online to Upgrading. During this process, the service subscription displays the new service offering selected for upgrade as the offering from which the selected service offering originated.



## About the service subscription upgrade process

- When a service subscription upgrade is attempted, the following validations are performed prior to submitting the service request that initiates the upgrade:
  - Subscription status is Active
  - Service Instance state is Online or Public Action Failed
  - Subscription does not have pending requests (such as cancel, modify or upgrade subscriptions)
  - Service offerings (upgradable, upgrade) are published, from the same catalog, and an upgrade path exists between them
  - Service designs (upgradable, upgrade) are published and an upgrade path exists between them
- The subscriber is notified about various events of the subscription upgrade process such as the start of the upgrade process, completion of the upgrade, failure during the upgrade and subscription cost change during the upgrade.
- The subscription reflects the selected upgrade service offering version as the service offering underlying the subscription. If the subscription upgrade results in a new cost for the subscription, the new cost is reflected for the service subscription.
- If the subscriber selected certain options during the creation or modification of the subscription, these selections are always preserved. New options or changes in the default option selection in the upgrade service offering do not affect the selected options.
- If the subscriber entered values for subscriber option properties during subscription creation or modification, these values are preserved in the service instance component properties after subscription creation or modification. Such values are always preserved after the subscription upgrade process, both in subscription option properties and also in the service instance component properties.

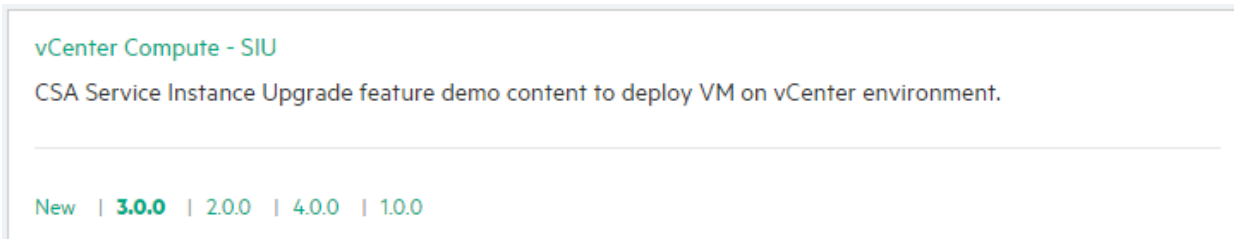
- During the creation of an upgrade service design, values of subscriber option properties that are not user editable could have changed. Such changes in subscription option property values are reflected in the service instance component properties after the service instance has been upgraded.

## Use cases for constructing upgrade service designs

CSA ships with sample designs to demonstrate use cases for upgrading service instances. This section discusses upgrade use cases which include changes added to new versions of service designs. We will also discuss how to incrementally add features to service instances by upgrading them from one version of a service design to another.

The service design we will be using for discussion is named **vCenter Compute – SIU**. This design has four versions: 1.0.0, 2.0.0, 3.0.0 and 4.0.0. Version 2.0.0 is an upgrade from version 1.0.0, version 3.0.0 is an upgrade from version 2.0.0 and version 4.0.0 is an upgrade from version 3.0.0.

Figure 22. Sample service design to demonstrate upgrading service instances



**Note:** These service designs were cloned from one another but do not have an upgradability relationship established. An upgrade relationship needs to be established between the higher version and lower version of the service design from the higher version of service design (see Establish an upgrade path between two design versions for more information). The lower version of the service design should be published before establishing this relationship.

Version 1.0.0 of this service design deploys virtual machines using the VMWare vCenter resource provider. A VMWare vCenter resource offering attached to the server component has Operations Orchestration flows defined to deploy the server. There are three compute options (small, medium and large) and option properties (Number of CPUs and Memory) that are tied to corresponding server component properties. Server components from the service instances deployed through this service design have public actions to execute (Start Server, Stop Server, Restart Server and Suspend Server).

### Use case 1 – add monitoring capability using HPE SiteScope to server components in service instances

To provide additional capability such as monitoring to existing virtual machines during an instance upgrade involves the following changes to the upgrade service design:

- Add a new resource offering to existing server components that includes provider selection actions in the 'Upgrading Pre-Transition' state. Then add actions to deploy monitors in the 'Upgrading Transition' lifecycle states.

For deployment of virtual machines through the new version of the service design and through a new subscription, provider selection actions must be added to the provider selection area of a component to resource offering association. Actions to deploy monitors must be added to the Deploying lifecycle state of the resource offering.

- Add a new component property that specifies the monitor to be applied to the virtual machines.
- Add an option set with one or more options where the options have a property with a default value bound to the component property that specifies the monitor to be applied. One of the options needs to be the default option that is applied for upgrading service instances.

Version 2.0.0 of the **vCenter Compute – SIU** service design provided with CSA is an upgrade from version 1.0.0. It provides monitoring capability (using HPE SiteScope) to virtual machines either deployed from version 1.0.0 of the service design through an upgrade process or to virtual machines deployed through service instances originating from version 2.0.0.

A new resource offering association to the HPE SiteScope (SiteScope) resource offering has been added to the **Simple Compute Server** component in version 2.0.0 of the service design. This provides monitoring capability to virtual machines. As you will see from

the resource offering association, there are **Build Resource Provider List** and **Select Resource Provider** actions configured in two different locations. The first is located under the **Provider Selection** area of the resource offering association and the second is located under the **Upgrading Pre-Transition** lifecycle state of the resource offering. The first location is used for SiteScope provider selection when deploying new service instances from version 2.0.0 of the service design. Actions configured in the **Upgrading Pre-Transition** lifecycle state are used for SiteScope provider selection when upgrading service instances from version 1.0.0 of the service design. Similarly, you will also observe that a **Simple Compute Monitor – Deploy** action is configured in the **Deploying Transition** and **Upgrading Transition** lifecycle states. The action in the **Deploying Transition** lifecycle state deploys the SiteScope monitor to virtual machines based on virtual machines deployed directly from version 2.0.0 of the service design. The action in the **Upgrading Transition** lifecycle state deploys the SiteScope monitor to virtual machines when upgrading service instances from version 1.0.0 of the service design.

Other changes you will observe in version 2.0.0 of the service design include a new **sitescopeTemplate** property on the **Simple Compute Server** component which is utilized for passing an appropriate SiteScope template value to an OO flow deploying the template. This service design also has a new Monitoring Levels option set with two options (Gold and Silver) where the **Sitescope Template Name** option property is bound to the **sitescopeTemplate** component property. Since Silver is the default option selected, at the end of upgrading service instances, the virtual machines have a Silver template applied for monitoring purposes. After the upgrade process, subscribers can modify their subscriptions to have the ability to select the Gold option for applying the Gold template for monitoring virtual machines using SiteScope.

## Use case 2 – deploy applications using HPE Server Automation to server components in existing service instances

To add applications to existing virtual machines during an instance upgrade involves the following changes to the upgrade service design:

- Add one or more new service components that represent applications to upgrade a service design under existing service components.
- Add resource offering associations to application-based resource offerings for deploying applications.
- Add option sets where option properties from underlying options are bound to the new application component properties in the design.

Version 3.0.0 of the **vCenter Compute – SIU** service design provided with CSA is an upgrade from version 2.0.0. It deploys applications using HPE Server Automation (SA) to virtual machines deployed from version 2.0.0 of the service design through the upgrade process. This design version can also be used for provisioning applications by creating subscriptions using this design.

**Note:** Since service instances from version 1.0.0 of the service design can be upgraded to version 2.0.0 of service design and service instances from version 2.0.0 of the service design can be upgraded to version 3.0.0 of the service design, the service instance upgrade process can be utilized for rolling out services in an incremental manner.

**Note:** In version 3.0.0 of the service design, the existing resource offering association to the SiteScope resource offering does not have any actions in the Upgrading lifecycle state as compared to version 2.0.0. Since service instances representing design version 2.0.0 already have SiteScope monitoring deployed, on upgrade from 2.0.0 to 3.0.0, it is not intended to run the SiteScope-based OO flows again. Since deletion of resource offering associations is not allowed on upgrade service designs, resource offering replacement functionality has been utilized to replace an existing resource offering with another resource offering that does not have actions in the Upgrading lifecycle state.

In version 3.0.0 of the service design, a new resource offering association to an SA resource offering has been added to the **Simple Compute Server** component for installing an SA agent to deployed virtual machines. This resource offering association creates instances from this design or by upgrading instances from version 2.0.0 of the service design. Actions have been added to the Upgrading and Deploying lifecycle states to support SA agent installation when upgrading service instances from version 2.0.0 and also to support direct deployment.

Additionally a new service component, **Software (chef solo)**, has been added to the **Simple Compute Server** component that represents the application component. A resource offering association to a different SA resource offering has been added to this service component for deploying applications. Since **Software (chef solo)** is a new component and since actions in the Initializing, Reserving and Deploying lifecycle states are executed for this component, all the actions for the SA resource offering have been added to these lifecycle states.

A new option set with an option that has properties related to application deployment has been added to this service design and these option properties are bound to component properties. Also note that the option properties have default values so that they are used as the default for upgrading instances.

After upgrading service instances from version 2.0.0 of a service design, applications are deployed to the service instances based on the upgrade design version 3.0.0.

### Use case 3 – provide additional public actions to service instance components

This is a very simple use case and the steps to create the upgrade service design is to add additional public actions to existing service components or resource offerings associated with the service components in the Deployed lifecycle state.

Version 4.0.0 of the **vCenter Compute – SIU** service design provided with CSA is an upgrade from version 3.0.0. It provides additional public actions to the server-based components. A VMWare vCenter resource offering associated with the **Simple Compute Server** component has an additional public action named **Refresh Server Info** configured at the Deployed lifecycle state.

After the service instance upgrade, the server components display an additional public action to update server information.

**Note:** In version 4.0.0 of the service design, resource offerings associated with service components do not have actions in the Upgrading lifecycle state. Resource offerings with actions in the Upgrading lifecycle state (of service design version 3.0.0) were replaced with resource offerings without actions in the Upgrading lifecycle state. This was done so that during upgrade, actions present in the Upgrading lifecycle state in version 3.0.0 are not executed again. Actions configured in the Upgrading lifecycle state can also be re-runnable (meaning that after upgrade, running these actions do not have any effect on the service instance) instead of replacing resource offerings.

### Use case 4 – upgrade an application deployed through a sequenced design

CSA does not provide a sample for this use case. However, it can be achieved by adding actions to upgrade applications in the Upgrading lifecycle state. Inputs, such as application version, can be made available through an option model property bound to application components.

### Use case 5 – configure additional firewall rules or apply patches to virtual machines deployed through a sequenced design.

Similar to use case 4, this use case can be achieved by configuring additional options and actions related to adding firewall rules or applying patches to the Upgrading lifecycle state. Inputs such as firewall ports or list of patches can be made available through an option model property bound to server components. Subscribers can also apply firewall rules or patches to virtual machines by themselves if additional actions related to adding new firewall rules or applying patches are added to Modifying lifecycle state.

### Use case 6 – fix problems with modifying or cancelling an existing subscription

This use case fixes problems in an existing subscription by correcting, adding or removing actions from the Modifying, Un-deploying, Un-reserving or Un-initializing lifecycle states of components or resource offerings associated with the components.

## Failure handling when upgrading a service instance

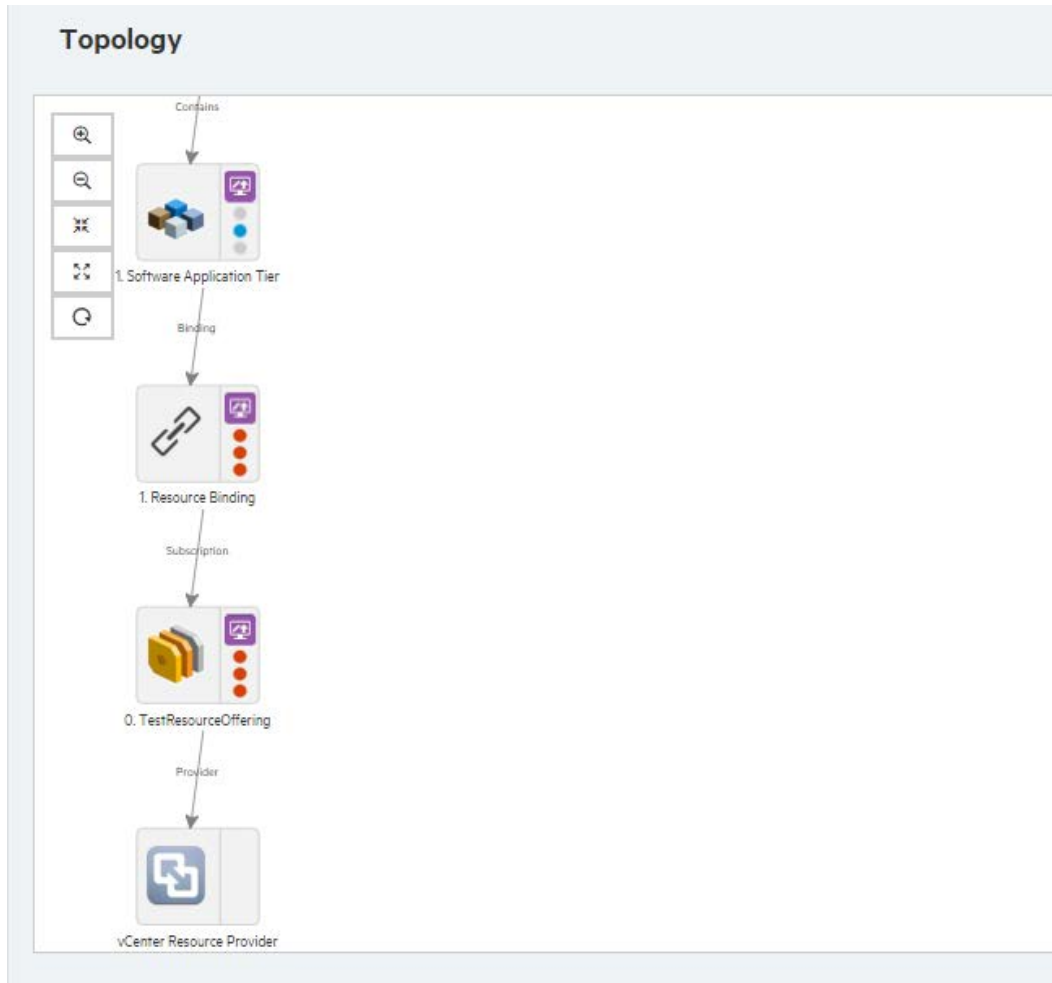
A service subscription upgrade can fail when an error occurs during the upgrade process. For example, an error could occur during the execution of an OO flow that is part of the Upgrading lifecycle state. When an error occurs during the upgrade process, the service subscription state remains Active, and the service instance state is set to Upgrade Failed.

Figure 23. When a subscription upgrade fails, the subscription status is Active and the instance status is Upgrade Failed

Subscriptions		Submitted On	Search	
Subscription Details	Submitted On	Subscription Period	Subscription Status	Service Instance Status
ServiceInstanceUpgradeSample (1.0.0) ServiceInstanceUpgradeSample (Global Shared Catalog)	01/06/2016 3:01:30 PM	01/06/2016 - no end date	Active	Upgrade Failed

In the service subscription view of the Operations area in the Cloud Service Management Console, select the Topology tab to view the service instance topology and identify the node within the topology hierarchy that is the root cause of the error. In the following example, there is an error upgrading the resource offering.

Figure 24. Service instance topology view of an upgrade failure during the upgrade of a resource offering



When an upgrade failure occurs, the Service Operations Manager can work to correct the error condition. For example, the Service Operations Manager can correct the OO flow, and re-attempt the service subscription upgrade from the Operations area of the Cloud Service Management Console. The service subscription that failed to upgrade can also be cancelled either by the subscriber or the Service Operations Manager.

**Note:** When an upgrade failure occurs, the lifecycle transition stops at the action that failed during the upgrade process. When the subscription upgrade process is re-attempted, the lifecycle transition of the service instance continues where it stopped during the original upgrade process and the action that failed during the original upgrade process is re-executed.

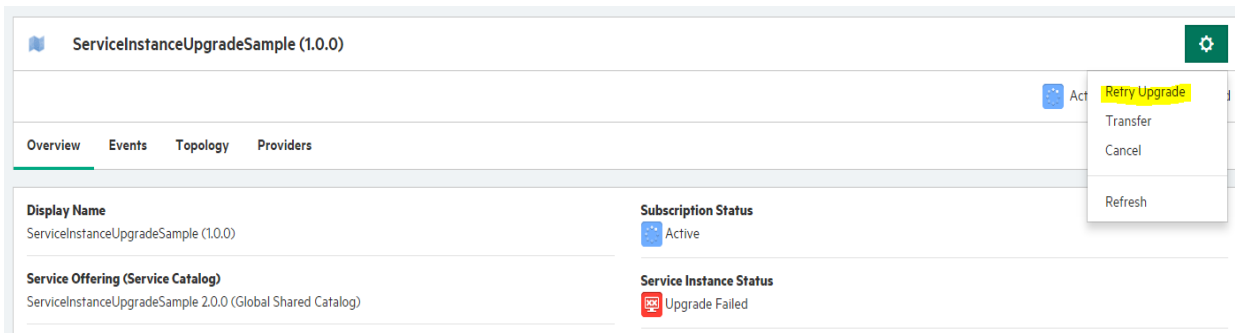
## Token to indicate upgrade retry

There is a token that can be passed as a parameter to the OO flow called `ACTION_EXECUTION_RETRY`. If the OO flow supports that input parameter, then the parameter's input value will be set to true or false, depending upon if the action is being executed for the first time (`ACTION_EXECUTION_RETRY = false`), or if the action is being re-tried (`ACTION_EXECUTION_RETRY = true`). This allows the



OO flow to be written such that step(s) can be re-executed. There is no limit to the number of times a failed service subscription upgrade can be re-attempted. Once the failure is corrected, the subsequent service subscription upgrade should be successful.

Figure 25. Click the gear icon and select **Retry Upgrade** to retry the upgrade



## REST API to upgrade a service subscription

The REST API for performing a single service subscription upgrade is an HTTP POST request:

```
https://<FQDN or IP address of CSA host>:<CSA port>/csa/api/service/subscription/<service subscription id>/upgrade/<upgrade service offering id>
```

For example:

```
https://mycsasystem.mydomain.com:8444/csa/api/service/subscription/90cefa215212e353015214027a9b1c15/upgrade/90cefa215212e35301521401da251ba4
```

The JSON response contains the service request id:

```
{
  "id" : "90cefa215212e3530152140316f91c5a"
}
```

## Upgrading multiple subscriptions originating from the same service offering

The REST API mentioned in the previous section can be used with other CSA REST API(s) to upgrade multiple or all service subscriptions from the same service offering (sometimes referred to as bulk upgrading).

In the Operations area of the Cloud Service Management Console, subscriptions can be filtered by organization. Within a selected organization, the subscriptions can be filtered by users or by the service offering on which the subscriptions are based. REST APIs can also be used to filter subscriptions in this manner. For example, if you wanted to upgrade a service offering for a specific upgradable version for which multiple outstanding active subscriptions exist across multiple users, do the following:

1. Retrieve the subscription(s) that are based on an upgradable service offering using an HTTP GET request:

```
https://<FQDN or IP address of CSA host>:<CSA port>/csa/api/service/subscription/organization/<organization id>/offering/<upgradable service offering id>
```

For each subscription that is based on the specified upgradable service offering within the specified organization, the JSON response contains the service subscription id, service subscription status, and if an upgrade is available. For example:

```
{
  ...
  "@self" : "/csa/api/service/subscription/90cefa215218184601521856d2c10089",
  ...
  "csa_subscription_status" : "ACTIVE",
  ...
  "csa_upgrade_available" : true,
  ...
}
```

2. Retrieve the upgrade service offering id for each service subscription using an HTTP GET request:

```
https://<FQDN or IP address of CSA host>:<CSA port>/csa/api/service/subscription/<service
subscription id>/upgrade-offerings
```

For example:

```
https://mycsasystem.mydomain.com:8444/csa/api/service/subscription/90cefa215218184601521856d2c10089/
upgrade-offerings
```

The JSON response contains the upgrade service offering id and version:

```
{
  ...
  "upgrades_from" : [ {
    "upgrade_id" : "90cefa215218184601521850b8560038",
    ...
    "upgrade_version" : "2.0.0"
  } ]}
  ...
}
```

3. Upgrade multiple service subscriptions based on an upgradable service offering to an upgrade service offering using the REST API mentioned in the previous section (an HTTP POST request) in a loop. An example of the REST API:

```
https://mycsasystem.mydomain.com:8444/csa/api/service/subscription/90cefa215218184601521856d2c10089/
upgrade/90cefa215218184601521850b8560038
```

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