

Installation and Upgrade Guide

PlateSpin® Protect 10.3

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Novell.

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About This Guide

This guide provides information about installing and upgrading your PlateSpin Protect product.

- ♦ [Chapter 1, “Installing PlateSpin Protect,” on page 7](#)
- ♦ [Chapter 2, “Upgrading PlateSpin Protect,” on page 15](#)

Audience

This guide is intended for IT staff, such as data center administrators, who use PlateSpin Protect in their ongoing workload protection and disaster recovery projects.

Feedback

We want to hear your comments and suggestions about this manual and the other documentation included with this product. Please use the User Comments feature at the bottom of each page of the online documentation, or submit your comments through the [Novell Documentation Feedback site \(http://www.novell.com/documentation/feedback.html\)](http://www.novell.com/documentation/feedback.html).

Additional Documentation

This guide is part of the PlateSpin Protect documentation set. For a complete list of publications supporting this release, visit the product’s Online Documentation Web Site:

[PlateSpin Protect 10 online documentation \(http://www.novell.com/documentation/platespin_protect_10\)](http://www.novell.com/documentation/platespin_protect_10)

Documentation Updates

The most recent version of in this guide can be found at the [PlateSpin Protect 10 Online Documentation Web Site \(http://www.novell.com/documentation/platespin_protect_10/\)](http://www.novell.com/documentation/platespin_protect_10/):

Additional Resources

We encourage you to use the following additional resources on the Web:

- ♦ [Novell User Forum \(http://forums.novell.com/\)](http://forums.novell.com/)
- ♦ [Novell Knowledgebase \(http://www.novell.com/support/\)](http://www.novell.com/support/)

Technical Support

- ♦ Telephone (North America): +1-877-528-3774 (1 87 PlateSpin)
- ♦ Telephone (global): +1-416-203-4799
- ♦ E-mail: support@platespin.com

You can also request support through the online [Service Request Web page \(http://support.novell.com/contact/getsupport.html\)](http://support.novell.com/contact/getsupport.html).

1 Installing PlateSpin Protect

This section provides information about installing PlateSpin Protect 10.3. For information about upgrading PlateSpin protect from previous versions, see [Chapter 2, “Upgrading PlateSpin Protect,” on page 15](#).

- ♦ [Section 1.1, “PlateSpin Protect Software Components,” on page 7](#)
- ♦ [Section 1.2, “System Requirements,” on page 7](#)
- ♦ [Section 1.3, “Installation Prerequisites for PlateSpin Protect Server Hosts,” on page 9](#)
- ♦ [Section 1.4, “Installing PlateSpin Protect Software Components,” on page 11](#)

1.1 PlateSpin Protect Software Components

A typical installation of PlateSpin Protect requires the following software components:

- ♦ **A database server:** PlateSpin Protect works with Microsoft SQL Server 2005 and SQL Server 2008 R2. If you do not have a Microsoft SQL Server 2005 or 2008 R2 database server, you can use the Microsoft SQL Server 2005 Express Edition database server included with your PlateSpin Protect distribution.
- ♦ **PlateSpin Protect Server:** The actual workload protection software.

You can install both components by using the PlateSpin Protect installation program (PlateSpinProtectSetup-10.3.0.x.x.x.exe).

The two components can be either collocated on a single host or installed on separate hosts.

1.2 System Requirements

- ♦ [Section 1.2.1, “System Requirements for PlateSpin Protect Server Hosts,” on page 7](#)
- ♦ [Section 1.2.2, “Enabling Support for FIPS-Compliant Data Encryption Algorithms \(Optional\),” on page 9](#)

1.2.1 System Requirements for PlateSpin Protect Server Hosts

For trouble-free operation of the PlateSpin Protect Server, you should install it on a dedicated physical or virtual machine. Specifically, do not install the PlateSpin Protect Server on a machine that is:

- ♦ Your domain controller host
- ♦ A workload that you might need to protect by using the product
- ♦ Your PlateSpin Protect Server host

It is generally a good practice to install PlateSpin Protect on a host with a static IP address. If you change the host's IP address after installing the product, restart the PlateSpin Protect Server. See ["Restarting the PlateSpin Protect Server to Apply System Changes"](#) in your *User Guide*.

PlateSpin Protect Server hosts must meet the following system requirements

Table 1-1 *PlateSpin Protect Server Host Requirements*

Requirement	Details
Operating System	Any of the following, running on dedicated hardware or in a virtual machine: <ul style="list-style-type: none"> ♦ Windows Server 2008, Windows Server 2008 R2 ♦ Windows Server 2003, Windows Server 2003 R2 <p>NOTE: You must activate your Windows operating system prior to installing PlateSpin Protect.</p>
Processor	Minimum 1 GHz Recommended: multi-core, 2 GHz or higher
Memory	Minimum 2 GB RAM Recommended: 4 GB
Disk Space	Minimum 15 GB NOTE: Over time, space consumption will increase.
Database Server	One of the following: <ul style="list-style-type: none"> ♦ Existing local or remote Microsoft SQL Server 2008 R2 database server ♦ Existing local or remote Microsoft SQL Server 2005 database server ♦ Microsoft SQL Server 2005 Express Edition (included in your software distribution)
Windows Software Prerequisites	<input type="checkbox"/> All Windows hosts (recommended) <ul style="list-style-type: none"> ♦ The latest applicable OS updates (service packs, cumulative security updates, device drivers, etc.) <input type="checkbox"/> Windows Server 2003 systems <ul style="list-style-type: none"> ♦ Microsoft IIS 6.0 and later (with ASP.NET) ♦ Microsoft .NET Framework version 3.5 SP1. <p>For more details, see "Prerequisites for Windows Server 2003 Systems" on page 9.</p> <input type="checkbox"/> Windows Server 2008 systems <ul style="list-style-type: none"> ♦ (Windows Server 2008 R2 only) User Account Control (UAC) disabled ♦ Microsoft .NET Framework 3.5 SP1. ♦ Web Server (IIS 7.0) <p>For more details, see "Prerequisites for Windows Server 2008 Systems" on page 10.</p>

1.2.2 Enabling Support for FIPS-Compliant Data Encryption Algorithms (Optional)

PlateSpin Protect supports data encryption algorithms that are compliant with FIPS (Federal Information Processing Standards, Publication 140-2).

If compliance with FIPS is required, it must be enabled on the intended PlateSpin Protect Server host prior to the installation of the PlateSpin Protect Server. This is because PlateSpin Protect runs in FIPS-compliant mode only if it detects that its host operating system is running in FIPS-compliant mode.

NOTE: FIPS-compliant mode has a performance impact and might slow down the data transfer rate up to 30%.

To enable FIPS-compliant algorithms:

- 1 Enable FIPS-compliant algorithms in the security options of your PlateSpin Protect Server host's local security policies:
 - 1a Run `secpol.msc` and browse to *Local Policies > Security Options*.
 - 1b Enable the *System cryptography: Use FIPS compliant algorithms for encryption* security option.
- 2 Configure ASP.NET for FIPS support:
 - 2a Access the `machine.config` file located in the following directory of your PlateSpin Protect Server host:

```
..Windows\Microsoft.Net\Framework\vX.X.XXXXX\Config
```
 - 2b Add the following under the `<system.web>` element:

```
<machineKey validationKey="AutoGenerate,IsolateApps"
decryptionKey="AutoGenerate,IsolateApps" validation="3DES"
decryption="3DES"/>
```
- 3 Save the `machine.config` file.

1.3 Installation Prerequisites for PlateSpin Protect Server Hosts

- ♦ [Section 1.3.1, "Prerequisites for Windows Server 2003 Systems," on page 9](#)
- ♦ [Section 1.3.2, "Prerequisites for Windows Server 2008 Systems," on page 10](#)

1.3.1 Prerequisites for Windows Server 2003 Systems

Before starting the installation of the PlateSpin Protect Server on a Windows Server 2003 system, ensure that the following prerequisite software components are installed on the intended PlateSpin Protect Server host, in the specified order:

1. Microsoft IIS 6.0 and later (with ASP.NET)
2. Microsoft .NET Framework 3.5 SP1. You can download a copy from Microsoft:
 - ♦ [.NET Framework 3.5 SP1 \(http://www.microsoft.com/downloads/details.aspx?FamilyId=AB99342F-5D1A-413D-8319-81DA479AB0D7\)](http://www.microsoft.com/downloads/details.aspx?FamilyId=AB99342F-5D1A-413D-8319-81DA479AB0D7)

NOTE: If you are installing the PlateSpin Protect Server on a 64-bit Windows Server 2003 system, you must configure IIS to run in 32-bit mode. For details, see [Knowledgebase Article 20915 \(http://www.novell.com/support/php/search.do?cmd=displayKC&docType=kc&externalId=7920915\)](http://www.novell.com/support/php/search.do?cmd=displayKC&docType=kc&externalId=7920915).

1.3.2 Prerequisites for Windows Server 2008 Systems

Before starting the installation of the PlateSpin Protect Server on a Windows Server 2008 system, ensure that the prerequisite software components are installed on the intended PlateSpin Protect Server host:

1. Web Server (IIS 7.0) along with the required features, roles, and services (see [“Installing Web Server \(IIS 7.0\) and the Required Role Services” on page 10](#)).
2. .NET Framework 3.5 SP1. You can download a copy from Microsoft:
 - ♦ [.NET Framework 3.5 SP1 \(http://www.microsoft.com/downloads/details.aspx?FamilyId=AB99342F-5D1A-413D-8319-81DA479AB0D7\)](http://www.microsoft.com/downloads/details.aspx?FamilyId=AB99342F-5D1A-413D-8319-81DA479AB0D7)

The following procedures assume that you are installing the required items for the first time following the installation of the operating system. For detailed information, see your Windows documentation.

- ♦ [“Installing Web Server \(IIS 7.0\) and the Required Role Services” on page 10](#)
- ♦ [“Installing .NET Framework Features” on page 11](#)

NOTE: If you are installing the PlateSpin Protect Server on a 64-bit Windows Server 2008 system, including Windows Server 2008 R2, you must configure the Web Server (IIS) to run in 32-bit mode. For details, see [KB Article 7920915 \(http://www.novell.com/support/viewContent.do?externalId=7920915\)](http://www.novell.com/support/viewContent.do?externalId=7920915).

Installing Web Server (IIS 7.0) and the Required Role Services

- 1 Log in to your intended PlateSpin Protect Server host by using the built-in Administrator account, also known as Local User Administrator (LUA), and launch the Server Manager (*Start > Administrative Tools > Server Manager*).
- 2 Use the Server Manager’s Add Roles Wizard to install the *Web Server (IIS 7.0)* role (in the *Server Manager (hostname)* tree in the left pane, right-click *Roles* and select *Add Roles*).
- 3 At the wizard’s prompt, select to install the required Web Server dependencies (*Windows Process Activation Service* along with the *Process Model* and *Configuration APIs* items).
- 4 On the wizard’s Role Services page, select to install the following services:
 - ♦ In the *Web Server* group:
 - ♦ Items under the *Common HTTP Features* node: *Static Content*, *Default Document*, *Directory Browsing*, *HTTP Errors*, and *HTTP Redirection*.
 - ♦ Items under the *Application Development* node: *ASP.NET*, *.NET Extensibility*, *ISAPI Extensions*, and *ISAPI Filters*.
 - ♦ Items under the *Security* node: *Basic Authentication*, *Windows Authentication*, *Digest Authentication*, *Client Certificate Mapping Authentication*, *IIS Client Certificate Mapping Authentication*, *URL Authorization*, *Request Filtering*, and *IP and Domain Restrictions*.
 - ♦ In the *Management Tools* group:
 - ♦ *IIS Management Console*
 - ♦ *IIS Management Scripts and Tools*

- ♦ *Management Service*
 - ♦ Items under the *IIS 6 Management Compatibility* node: *IIS 6 Metabase Compatibility*, *IIS 6 WMI Compatibility*, *IIS 6 Scripting Tools*, *IIS 6 Management Console*
- 5 Review your selections and complete the installation.

Installing .NET Framework Features

- 1 Log in to your intended PlateSpin Protect Server host by using the built-in Administrator account, also known as Local User Administrator (LUA), and launch the Server Manager (*Start > Administrative Tools > Server Manager*).
- 2 Use the Server Manager's Add Features Wizard to install the required .NET Framework features (in the *Server Manager (hostname)* tree in the left pane, right-click *Features* and select *Add Features*).
- 3 On the wizard's Select Features page, select the *.NET Framework Features* item.
This automatically selects all items in that group: *.NET Framework*, *XPS Viewer*, and *WCF Activation* (along with the *HTTP Activation* and *Non-HTTP Activation* subitems).
- 4 Review your selections and complete the installation.

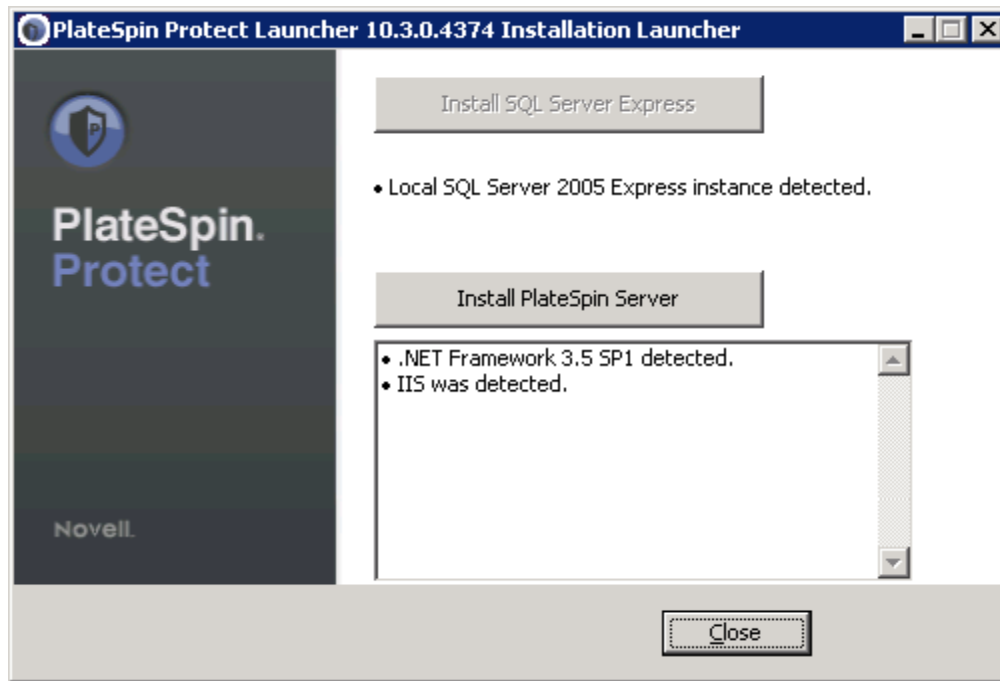
1.4 Installing PlateSpin Protect Software Components

- ♦ [Section 1.4.1, "Starting the PlateSpin Protect Installation Launcher," on page 11](#)
- ♦ [Section 1.4.2, "Installing the Database Server," on page 12](#)
- ♦ [Section 1.4.3, "Installing the PlateSpin Protect Server," on page 12](#)
- ♦ [Section 1.4.4, "Post-Installation Tasks," on page 14](#)

1.4.1 Starting the PlateSpin Protect Installation Launcher

This section provides information about installing PlateSpin Protect software after ensuring that the intended host has been prepared with the required prerequisites.

- 1 Download the `PlateSpinProtectSetup-10.3.x.x.x.x.exe` installation program and save it on your intended PlateSpin Protect Server host.
- 2 Run the installation program, specify a location for the temporary setup files, then click *Next*.
The installation program extracts the required files and opens the Installation Launcher window (if the installation program detects a local installation of Microsoft SQL Server 2005 or SQL Server 2008 R2, it disables the corresponding *Install SQL Server Express* option):



If you intend to use the Microsoft SQL Server 2005 Express Edition distributed with PlateSpin Protect, install it first. If you intend to use an existing SQL Server 2005 or SQL Server 2008 R2 database, skip the database installation and install the PlateSpin Protect Server.

1.4.2 Installing the Database Server

If you do not have a Microsoft SQL Server 2005 or SQL Server 2008 R2 database engine, you can install Microsoft SQL Server 2005 Express Edition included in your PlateSpin Protect software distribution.

- 1 On your intended database server host, start the Installation Launcher.

See [“Starting the PlateSpin Protect Installation Launcher” on page 11.](#)

- 2 Click *Install SQL Server Express* and follow the on-screen instructions.

The program installs a database server and the database instances required for the operation of PlateSpin Protect.

1.4.3 Installing the PlateSpin Protect Server

- 1 Make sure that your intended PlateSpin Protect Server host meets the minimum system requirements.

See [“System Requirements for PlateSpin Protect Server Hosts” on page 7.](#)

- 2 Make sure that your intended PlateSpin Protect Server host has the necessary prerequisite software installed.

See [“Installation Prerequisites for PlateSpin Protect Server Hosts” on page 9.](#)

- 3 On your intended PlateSpin Protect Server host, start the Installation Launcher.

See [“Starting the PlateSpin Protect Installation Launcher” on page 11.](#)

- 4 Click *Install PlateSpin Server* and following the on-screen instructions.

The installation program starts the installation process and prompts you to accept the Novell PlateSpin Protect software license agreement. You must accept the software license agreement before installing the product.

- 5 Accept the license agreement by selecting the corresponding option, then click *Next*.

The program continues with the installation and prompts you to specify a database server and instance:

The screenshot shows the 'Database Server' step of the 'PlateSpin Protect™ - InstallShield Wizard'. The window has a title bar with the product name and a close button. Below the title bar, the text 'Database Server' is displayed. The main area contains instructions: 'Select database server' and 'Select the database server to use. Click Browse to select from a list of available database servers in the network.' There is a 'Database Server:' label followed by a dropdown menu showing '(local)\PLATESPINDB' and a 'Browse...' button. Below this, it says 'Provide valid credentials for database server authentication. Windows authentication is not supported.' There are two input fields: 'Login ID:' with 'sa' entered, and 'Password:' with a masked password '*****'. To the right of these fields is a 'Validate Server' button. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'InstallShield' logo is visible in the bottom left corner.

- 6 Do one of the following:

- ♦ If you are using the database server included in your PlateSpin Protect software distribution installed locally (the default option), leave the default selection (local) \PLATESPINDB in the drop-down list and leave the default sa credentials. If you subsequently move your PlateSpin Protect database instance or change your SQL Server password, you must reset the PlateSpin Protect database connection settings.

See [Knowledgebase article Q21119 \(http://www.novell.com/support/viewContent.do?externalId=7970523\)](http://www.novell.com/support/viewContent.do?externalId=7970523).

- ♦ If you are using a remote database server, click *Browse* to select from a list of available database servers in the network. Specify the database in the following format:
 - ♦ **Single-instance SQL Server installations:** *database_server*
 - ♦ **Multiple-instance SQL Server installations:** *database_server\database_instance* (specify the instance name)

- 7 Click *Validate Server* to validate your database credentials for the selected database server.

- 8 Click *Next* and follow the on-screen instructions.

The installation program installs and prepares the PlateSpin Server software to run.

This process might take several minutes to complete.

1.4.4 Post-Installation Tasks

After completing the installation of the PlateSpin Protect Server:

- ♦ Start the PlateSpin Protect Web Interface and familiarize yourself with its interface and the workload protection features.

See [“Launching the PlateSpin Protect Web Interface”](#) in your *User Guide*.

- ♦ (International versions) Set up PlateSpin Protect and your browser for use in a specific supported language.

See [“Language Setup for International Versions of PlateSpin Protect”](#) in your *User Guide*.

- ♦ License your product and configure your environment in preparation for workload protection.

See [“Application Configuration”](#) in your *User Guide*.

2 Upgrading PlateSpin Protect

You can use your PlateSpin Protect 10.3 installation program to upgrade the following product versions:

- ♦ PlateSpin Protect 10.0
- ♦ PlateSpin Protect 10.1
- ♦ PlateSpin Protect 10.2

Upgrading is no longer supported from 8.x (Portability Suite) versions of PlateSpin Protect. If you need to upgrade from an 8.x installation, first upgrade to one of the listed 10.x versions, then immediately upgrade to 10.3.

The following topics provide further information on the upgrade procedure:

- ♦ [Section 2.1, “Before Upgrading PlateSpin Protect,” on page 15](#)
- ♦ [Section 2.2, “Upgrade Procedure,” on page 16](#)

2.1 Before Upgrading PlateSpin Protect

Before upgrading your PlateSpin Protect software to version 10.3:

- ♦ (Conditional) If you have a pre-10.2 version of PlateSpin Protect, remove workloads that are under image protection (support for workload image protection was discontinued in the previous release, version 10.2). If the installation program detects such workloads, it disallows the upgrade. If you require the image protection functionality, continue using it in version 10 or 10.1, which continue to be supported, and consider the following options for 10.3:
 - ♦ Keep your image protection contracts in your current installation and do not upgrade to version 10.3. Move any VM container-based protection contracts from your current installation to a new 10.3 installation. To do this, export the data from your current version of the product, install version 10.3 on another host, then import the data into version 10.3. For help with the Import/Export utility, see [KB Article 7970601 \(http://www.novell.com/support/kb/doc.php?id=7970601\)](http://www.novell.com/support/kb/doc.php?id=7970601).
 - OR -
 - ♦ Move your image protection contracts to a different instance of PlateSpin Protect 10.0 or 10.1 (by exporting the data from your current installation and importing it into 10.0 or 10.1). Then, on the current host, remove workloads that are under image protection before upgrading to version 10.3.
- ♦ (Conditional) If any of your containers are VMware ESX/ESXi 3.5 or 4.0, upgrade them to version 4.1, 5.0, or 5.1 (support for versions 3.5 and 4.0 was discontinued in version 10.2).
- ♦ Pause your replication schedules.
- ♦ Make a record of any customized `.config` parameters controlling the server’s default behavior.
- ♦ Back up your database files.

Use this procedure to manually back up your database files, which you can use if you need to roll back.

- 1 On your server host, stop MS SQL services:
 - 1a On the *Start* menu, click *Run*, type `services.msc`, then click *OK*.
 - 1b In the Services window, right-click the SQL Server items, then select *Stop*.
- 2 Copy all *.mdf and *.ldf files to a location outside the product installation directory. The default location of these files is:
`\Program Files\PlateSpin Protect Server\Database`
- 3 Restart MS SQL services that you stopped in [Step 1](#).

2.2 Upgrade Procedure

During the upgrade process, the installation program automatically imports data from your previous installation.

- ♦ [Section 2.2.1, “Upgrade Procedure,” on page 16](#)
- ♦ [Section 2.2.2, “Post-Upgrade Tasks,” on page 16](#)

2.2.1 Upgrade Procedure

Use this procedure to upgrade your PlateSpin Protect product.

- 1 Back up your data.
See [“Before Upgrading PlateSpin Protect” on page 15](#).
- 2 Run the PlateSpin Protect setup executable and follow the on-screen instructions.
Make sure that you select the *Save data* option when prompted during the server installation.

NOTE: In some situations the installation program might fail to automatically re-import data that it exports during the upgrade process. If this happens, use the `PlateSpin.ImportExport.bat` utility to recover this data from the following directory on your server host:

- ♦ **Windows Server 2003 Systems:** `\Documents and Settings\All Users\Application Data\PlateSpin`
- ♦ **Windows Server 2008 Systems:** `\ProgramData\PlateSpin` (this is a hidden folder by default)

See [KB Article 7921084](http://www.novell.com/support/viewContent.do?externalId=7921084) (<http://www.novell.com/support/viewContent.do?externalId=7921084>).

2.2.2 Post-Upgrade Tasks

- 1 (Optional, for International versions) Set up PlateSpin Protect and your browser for use in a specific supported language.
See [“Language Setup for International Versions of PlateSpin Protect”](#) in your *User Guide*.
- 2 Check the Workloads page for any paused replication schedules. In particular, look for *Tasks* (special workload protection events with optional commands) generated for automatically upgrading protection contracts that were using a legacy block-based component from earlier versions of the product. This requires a reboot of the protected workload.

- 3 Reapply the required `.config` parameters in the new `.config` files.

See “[Configuring the Product Behavior through XML Configuration Parameters](#)” in your *User Guide*.

