PlateSpin® Migrate 12.2

Installation and Upgrade Guide

February 2018

NetIQ

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About This Guide

This guide provides information to help you install your PlateSpin Migrate product.

- Chapter 1, “Installing PlateSpin Migrate,” on page 9
- Chapter 2, “Troubleshooting Installation Problems,” on page 27
- Chapter 3, “Upgrading PlateSpin Migrate,” on page 31
- Appendix A, “Documentation Updates,” on page 33

Audience

This guide is intended for IT staff, such as data center administrators and operators, who use PlateSpin Migrate in their ongoing workload migration 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.

Additional Documentation

This guide is part of the PlateSpin Migrate documentation set. For a complete list of publications supporting this release, visit the PlateSpin Migrate Online Documentation Web Site (http://www.netiq.com/documentation/platespin-migrate-12-2).

Documentation Updates

The most recent version of this guide can be found at the PlateSpin Migrate 12.2 Online Documentation Web Site (https://www.netiq.com/documentation/platespin-migrate-12-2/).

1 Installing PlateSpin Migrate

PlateSpin Migrate is a Windows application that runs on server operating systems. Its functionality depends on several software components, including the Microsoft Internet Information Services (IIS) Web server software along with its feature extension modules, the ASP.NET Web application framework, the Microsoft .NET Framework library and runtime, as well as a dedicated Microsoft SQL Server database instance.

For trouble-free installation and operation of PlateSpin Migrate, you should review the system requirements and plan your installation.

PlateSpin Migrate provides a Web Interface that you can use to plan and execute automated migrations for a large number of workloads. The PlateSpin Migrate Web Interface is automatically installed when you install the PlateSpin Migrate Server. For more information about working with the PlateSpin Migrate Web Interface, see the *PlateSpin Migrate User Guide* on the Documentation Website (https://www.netiq.com/documentation/platespin-migrate-12-2/).

NOTE: In addition to the English version of PlateSpin Migrate, the product has been localized for installation and use on machines configured for the Chinese Simplified, Chinese Traditional, French, German, and Japanese languages.

This section provides information about installing PlateSpin Migrate:

- Section 1.1, “Preparing to Install PlateSpin Migrate,” on page 9
- Section 1.2, “Installing Prerequisite Software,” on page 13
- Section 1.3, “Installing PlateSpin Migrate Software Components,” on page 19
- Section 1.4, “Installing the PlateSpin Migrate Software Components Using a Batch File,” on page 23
- Section 1.5, “Checking for Software Updates,” on page 24
- Section 1.6, “Modifying the Password for the SQL Server Express System Administrator User,” on page 24

1.1 Preparing to Install PlateSpin Migrate

- Section 1.1.1, “System Requirements for PlateSpin Server,” on page 9
- Section 1.1.2, “System Requirements for PlateSpin Migrate Client,” on page 11
- Section 1.1.3, “General Guidelines for Server Installation,” on page 12

1.1.1 System Requirements for PlateSpin Server

PlateSpin Server hosts must meet the following system requirements:

Requirement	Details
Dedicated host	Physical or virtual server

Requirement	Details
Operating System	Any of the following Windows Server versions: ◆ Windows Server 2012 R2 ◆ Windows Server 2012 ◆ Windows Server 2008 R2 Use Windows 2008 R2 SP1 or higher version if you want to install Microsoft SQL Server 2014 Express Edition locally on the Migrate server. **NOTE** ◆ You must activate the Microsoft license for your Windows operating system prior to installing PlateSpin Migrate. ◆ For installing PlateSpin Migrate server on a Windows Server 2012 R2 domain computer, you must have administrator privileges.
Processor	Recommended (physical): multi-core, 2 GHz or higher Recommended (VM): 2 or more Virtual CPUs
Memory	Recommended: 8 GB RAM
Disk Space	Minimum 50 GB Additional space might be necessary if you plan to use the same system as a PlateSpin Image Server. The amount of additional space depends on the number and size of workload images that you intend to store on a given image server. See "Designating a PlateSpin Image Server" in the *PlateSpin Migrate 12.2 User Guide*.
Database Server	A dedicated Microsoft SQL Server database instance (local or remote), running on one of the following: ◆ Microsoft SQL Server 2014 Express Edition. A copy of this database software is included in your PlateSpin Migrate software distribution. ◆ Microsoft SQL Server 2014 ◆ Microsoft SQL Server 2008 R2

Requirement	Details
Software Prerequisites	❒ All Windows hosts (recommended) ◆ Ensure that a licensed version of the OS is installed. ◆ Apply the latest applicable OS updates (service packs, cumulative security updates, drivers, etc.). ❒ For Windows Server 2012 R2 and Windows Server 2012 systems ◆ Disable User Account Control (UAC). ◆ Install Microsoft .NET Framework 3.5 SP1 and 4.5.2. You can download .NET software from Microsoft: ◆ .NET Framework 3.5 SP1 (http://www.microsoft.com/downloads/details.aspx?FamilyId=AB99342F-5D1A-413D-8319-81DA479AB0D7) ◆ .NET Framework 4.5.2 (https://www.microsoft.com/en-in/download/details.aspx?id=42642) ◆ Install Microsoft IIS 8.0 For more details, see Installing Prerequisite Software on Windows Server 2012 R2 Systems (page 13). ❒ For Windows Server 2008 R2 ◆ Disable User Account Control (UAC). ◆ Install Microsoft .NET Framework 3.5 SP1 and 4.5.2. You can download .NET software from Microsoft: ◆ .NET Framework 3.5 SP1 (http://www.microsoft.com/downloads/details.aspx?FamilyId=AB99342F-5D1A-413D-8319-81DA479AB0D7) ◆ .NET Framework 4.5.2 (https://www.microsoft.com/en-in/download/details.aspx?id=42642) ◆ Install Microsoft IIS 7.0 For more details, see Installing Prerequisite Software on Windows Server 2008 R2 Systems (page 16).

1.1.2 System Requirements for PlateSpin Migrate Client

You can install the PlateSpin Migrate Client on the PlateSpin Server host or on a separate computer.

Standalone PlateSpin Migrate Client hosts must meet the following system requirements:

Requirement	Details
Operating System	Any of the following, running on dedicated hardware or in a virtual machine: ◆ Windows 8.1, 8 ◆ Windows Server 2012 and 2012 R2 ◆ Windows 7 ◆ Windows Server 2008, Windows Server 2008 R2 **NOTE:** You must activate the Microsoft license for your Windows operating system prior to installing PlateSpin Migrate Client.

Requirement	Details
Disk Space	Minimum 3 GB
Windows Software Components	Microsoft .NET Framework 2 SP2, 3.5 SP1, 4.5. You can download .NET software from Microsoft: ◆ .NET Framework 2 SP2 (http://www.microsoft.com/download/en/details.aspx?id=1639) ◆ .NET Framework 3.5 SP1 (http://www.microsoft.com/downloads/details.aspx?FamilyId=AB99342F-5D1A-413D-8319-81DA479AB0D7) ◆ .NET Framework 4.5 (https://www.microsoft.com/en-in/download/details.aspx?id=30653)

1.1.3 General Guidelines for Server Installation

Follow these installation guidelines for trouble-free installation and operation of PlateSpin Migrate.

Table 1-1 *Pre-Installation Checklist*

	Guideline	Remarks
❒	Dedicated Host	Install the PlateSpin Server on a dedicated physical or virtual machine. See also Co-location.
❒	Credentials	Perform all installation procedures using an account with administrative privileges. For Windows Server 2008 R2 systems, use the built-in Administrator account.
❒	IP Address	Assign the PlateSpin Server host a static IP address.
❒	Co-location	Do not co-locate the PlateSpin Server with: ◆ Your domain controller ◆ Existing web servers with IIS applications ◆ A workload that you intend to migrate by using the product ◆ Other PlateSpin software (PlateSpin Protect and PlateSpin Recon)
❒	Database	If you intend to use your own Microsoft SQL Server database (instead of the Microsoft SQL Server 2014 Express Edition included in your software distribution), ensure that it is supported and conforms to the product's database requirements. See Knowledgebase Article 7009809.
❒	UAC	Disable the User Account Control (UAC).
❒	Installation Workflow	Install the prerequisite software in the indicated order. Below is a high-level workflow for a typical PlateSpin Migrate installation: 1. Supported operating system, followed by corresponding Windows Updates 2. ASP.NET/IIS, followed by corresponding Windows Updates. 3. (Optional) Enable FIPS-Compliant Data Encryption 4. SQL Server database, followed by applicable Microsoft updates. 5. PlateSpin Server

1.2 Installing Prerequisite Software

This section provides information on installing the required ASP.NET, IIS, and .NET Framework software components. Because the packaging and distribution of these software components varies among different versions of the supported Windows Server platforms, procedures vary slightly. Use the indicated order of installation and setup.

- Section 1.2.1, “Installing Prerequisite Software on Windows Server 2012 R2 Systems,” on page 13
- Section 1.2.2, “Installing Prerequisite Software on Windows Server 2008 R2 Systems,” on page 16
- Section 1.2.3, “Enabling Support for FIPS-Compliant Data Encryption Algorithms (Optional),” on page 18

1.2.1 Installing Prerequisite Software on Windows Server 2012 R2 Systems

Use the following procedure to install prerequisite software on the Microsoft Windows Server 2012 R2 servers where you plan to install PlateSpin Migrate Server. Before you begin, ensure that you are familiar with the “System Requirements for PlateSpin Server” on page 9 and “General Guidelines for Server Installation” on page 12.

To install required Microsoft software components:

1. Use the Local User Administrator (LUA) account to log in to your intended PlateSpin Server host.
2. Use Server Manager to install Web Server (IIS) and other software required by PlateSpin Server:
   - **2a** Open Server Manager. Select **Start > All Programs > Administrative Tools > Server Manager**.
   - **2b** In the Server Manager toolbar, select **Manage** > **Add Roles and Features**.
   - **2c** In the Add Roles and Features wizard, proceed to the Installation Type tab, then continue through the wizard:

Add Roles and Features Wizard	Action
1. Installation Type	Select **Role-based or feature-based installation**, then click **Next**.
2. Server Selection	Select your intended PlateSpin Server host, then click **Next**.
3. Server Roles	Select **Web Server (IIS)**, then click **Next**.
4. Pop-up prompt to **Add features that are required for Web Server (IIS)**	Select **Include management tools**, then click **Add Features.**

Add Roles and Features Wizard	Action
5. Features	Keep the default set of features for the Web Server and add other required features along with their sub-features as shown, then click **Next**. ❒ .NET Framework 3.5 Features (all installed) ◆ .NET Framework 3.5 (includes .NET 2.0 and 3.0) ◆ HTTP Activation ◆ Non-HTTP Activation ❒ .NET Framework 4.5 Features (all installed) ◆ .NET Framework 4.5 ◆ ASP.NET 4.5 ◆ WCF Services (5 of 5 installed) — HTTP Activation — Message Queuing (MSMQ) Activation — Named Pipe Activation — TCP Activation — TCP Port Sharing ❒ Windows Process Activation Service (all installed) ◆ Process Model ◆ .NET Environment ◆ Configuration APIs ❒ XPS Viewer
6. Web Server (IIS)	Read the information, then click **Next**.

Add Roles and Features Wizard	Action
7. Role Services	Keep the default set of role services for the Web Server and add other required role services along with their sub-role services as shown, then click **Next**. **Web Server (IIS) > Role Services (25 of 43 installed):** ❒ Web Server (19 of 34 installed) ◆ Common HTTP Features (4 of 6 installed) — Default Document — Directory Browsing — HTTP Errors — Static Content ◆ Health and Diagnostics (2 of 6 installed) — HTTP Logging — Request Monitor ◆ Performance (1 of 2 installed) — Static Content Compression ◆ Security (5 of 9 installed) — Requesting Filtering — Basic Authentication — IP and Domain Restrictions — URL Authorization — Windows Authentication ◆ Application Development (7 of 11 installed) — .NET Extensibility 3.5 — .NET Extensibility 4.5 — Application Initialization — ASP.NET 3.5 — ASP.NET 4.5 — ISAPI Extensions — ISAPI Filters ❒ Management Tools (6 of 7 installed) ◆ IIS Management Console ◆ IIS 6 Management Compatibility (4 of 4 installed) — IIS 6 Metabase Compatibility — IIS 6 Management Console — IIS 6 Scripting Tools — IIS 6 WMI Compatibility ◆ IIS Management Scripts and Tools
8. Confirmation	Review the roles, role services, and features to be installed, then click **Install**.

2d Wait for the installation to complete, then close the Add Roles and Features wizard.

2e Exit Server Manager.

1.2.2 Installing Prerequisite Software on Windows Server 2008 R2 Systems

Use the following procedure to install prerequisite software on the Microsoft Windows Server 2008 R2 servers where you plan to install PlateSpin Migrate Server. Before you begin, ensure that you are familiar with the "System Requirements for PlateSpin Server" on page 9 and "General Guidelines for Server Installation" on page 12.

To install required Microsoft software components:

1. Use the Local User Administrator (LUA) account to log in to your intended PlateSpin Server host.
2. Open Server Manager. Select **Start > All Programs > Administrative Tools > Server Manager**.

3 Use Server Manager to install Web Server (IIS) with components required by PlateSpin Server:

3a In Server Manager, select **Roles** in the left pane, then click **Add Roles** in the Roles pane.

3b In the Add Roles wizard, proceed to the Server Roles tab, then continue through the wizard:

Add Roles Wizard	Action
1. Server Roles	Select **Web Server (IIS)**, then click **Next**.
2. Web Server (IIS)	Read the information, then click **Next**.
3. Role Services	Keep the default set of role services for the Web Server and add other required role services along with their sub-role services as shown, then click **Next**. **Web Server (IIS) > Role Services:** ❒ Web Server ◆ Common HTTP Features (all installed) — Static Content — Default Document — Directory Browsing — HTTP Errors — HTTP Redirection — WebDAV Publishing ◆ Application Development (4 of 7 installed) — ASP .NET — .NET Extensibility — ISAPI Extensions — ISAPI Filters ◆ Health and Diagnostics (2 of 6 installed) — HTTP Logging — Request Monitor ◆ Security (all installed) — Basic Authentication — Windows Authentication — Digest Authentication — Client Certificate Mapping — IIS Client Certificate Mapping — URL Authorization — Requesting Filtering — IP and Domain Restrictions ◆ Performance (1 of 2 installed) — Static Content Compression ❒ Management Tools (all installed) ◆ IIS Management Console ◆ IIS Management Script and Tools ◆ Management Service ◆ IIS 6 Management Compatibility (all installed) — IIS 6 Metabase Compatibility — IIS 6 WMI Compatibility — IIS 6 Scripting Tools — IIS 6 Management Console

Add Roles Wizard	Action
4. Confirmation	Review the roles and role services to be installed, then click **Install**.

3c Wait for the installation to complete, then close the Add Roles wizard.

4 Use Server Manager to install additional software required by PlateSpin Server:

4a In Server Manager, select **Features** in the left pane, then click **Add Features** in the Features pane.

4b In the Add Features wizard, proceed to the Features tab, then continue through the wizard:

Add Features Wizard	Action
1. Features	Select the following required features and their sub-features as shown, then click **Next**. ❒ .NET Framework (all installed) ◆ .NET Framework 3.5.1 ◆ WCF Activation — HTTP Activation — Non-HTTP Activation ❒ Windows Process Activation Service (all installed) ◆ Process Model ◆ .NET Environment ◆ Configuration APIs ❒ XPS Viewer
2. Confirmation	Review the features to be installed, then click **Install**.

4c Wait for the installation to complete, then close the Add Features wizard.

5 Exit Server Manager.

6 Download and install Microsoft .NET Framework 4.5.2 (https://www.microsoft.com/en-us/download/details.aspx?id=42642) on your intended PlateSpin Server host.

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

PlateSpin Migrate 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 Server host prior to the installation of the PlateSpin Server. This is because PlateSpin Migrate runs in FIPS-compliant mode only if it detects that a workload's 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 Migrate 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 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. Access the `web.config` file in each of the below listed directories of your PlateSpin Server host and add the following under the `<system.web>` element of each of the `web.config` file:

   ```
   <machineKey validationKey="AutoGenerate,IsolateApps"
   decryptionKey="AutoGenerate,IsolateApps" validation="3DES" decryption="3DES"/>
   ```

   - *PlateSpin Migrate Install Directory*\PlateSpin Forge\web\
   - *PlateSpin Migrate Install Directory*\Web\
   - *PlateSpin Migrate Install Directory*\ConfigurationEditor.Web\
   - *PlateSpin Migrate Install Directory*\Protection.WebServices\
   - *PlateSpin Migrate Install Directory*\OfxWeb\

1.3 Installing PlateSpin Migrate Software Components

- Section 1.3.1, "Starting the PlateSpin Migrate Installation Launcher," on page 19
- Section 1.3.2, "Installing the Database Server," on page 20
- Section 1.3.3, "Installing the PlateSpin Server," on page 20
- Section 1.3.4, "Installing the PlateSpin Migrate Client," on page 22

1.3.1 Starting the PlateSpin Migrate Installation Launcher

1. From NetIQ Downloads (https://dl.netiq.com/), download the `PlateSpinMigrateSetup-12.X.X.X.exe` installation program and save it on your intended PlateSpin Server host.
2. Run the installation program and click **Next** to launch the prerequisites check utility.

   The prerequisites check queries the host where you intend to install the PlateSpin Server. It verifies that all of the required software is installed or enabled. If you see any cautions or omissions, you need to either enable or install the prerequisite software before you proceed with the installation.
3. Click **Next** to launch the installation program.

The installation program extracts the required files and opens the Installation Launcher window (if the installation program detects a local installation of SQL Server 2008 R2 or Microsoft SQL Server 2014, it disables the corresponding **Install SQL Server Express** option):

If you intend to use the Microsoft SQL Server 2014 Express Edition distributed with PlateSpin Migrate, install it first.

If you intend to use an existing SQL Server database, skip the database installation, start installing the PlateSpin Server, and point to your existing database when prompted.

IMPORTANT: When you browse to and select an existing database, the default value for the server name is displayed, for example:

<database_server>\<Database_instance_name>

You need not specify the DB instance name explicitly in this field. Specify the database server name only, and delete the instance name default. Specifying the database instance name results in a failure to validate the server.

1.3.2 Installing the Database Server

If you do not have a SQL Server 2008 R2 database engine or SQL Server 2014, you can install Microsoft SQL Server 2014 Express Edition included in your PlateSpin Migrate software distribution.

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

   See "Starting the PlateSpin Migrate Installation Launcher" on page 19.

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 Migrate.

NOTE: The SQL administrator password is generated during the installation of Microsoft SQL Server Express Edition. Keep the default `sa` credentials throughout the PlateSpin Migrate Server installation. After the installation is complete, you should modify the SQL administrator password. See Section 1.6, "Modifying the Password for the SQL Server Express System Administrator User," on page 24.

1.3.3 Installing the PlateSpin Server

1. Before you install the PlateSpin Server host, you must ensure the following requirements are met:
   - The PlateSpin Server host meets the minimum system requirements. See "System Requirements for PlateSpin Server" on page 9.
   - The PlateSpin Server host has the necessary prerequisite software installed. See "Installing Prerequisite Software" on page 13.
2. On the PlateSpin Server host, launch the Installation Launcher. See "Starting the PlateSpin Migrate Installation Launcher" on page 19.
3. Click **Install PlateSpin Server** and follow the on-screen instructions. Select the license agreement option and click **Next**.
4. On the Database Connection Information screen, click **Browse** to select the database server and select the authentication type.

5 (Conditional) If you select the **Authentication Type** as **Windows Authentication**, do the following:

5a On the Database Administrative Credentials screen, specify the credentials for the database administrator.

NOTE: If you choose to connect to a remote database, then you must specify the domain administrator credentials or the credentials of a domain user having sufficient administrator and database rights.

5b Click **Validate Credentials** to validate the credentials and click **Next**.

5c On the Database User Credentials screen, specify the credentials for the database user. However, to use the same credentials as the database administrator, select **Same as the Database Administrator**.

5d Click **Validate Credentials** to validate the credentials and click **Next**.

5e On the Confirm SQL Connection screen, review the information. Click **Back** to edit the SQL connection information or click **Next** to continue.

6 (Conditional) If you select the **Authentication Type** as **SQL Authentication**, do the following:

6a Specify a database server and instance:

- If you intend to install and use the local database server included in your PlateSpin Migrate software distribution (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 Migrate database instance or change your SQL Server password, you must reset the PlateSpin Migrate database connection settings. See KB Article 7970523 (https://www.netiq.com/support/kb/doc.php?id=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:

  `database_server\database_instance_name`
- If the database server is running on a custom port, specify the database in the following format:

  `database_server\database_instance_name,port_number`

6b Specify the database credentials for the selected database server and click **Validate Credentials** to validate the credentials.

6c Click **Next** and review the SQL connection information. Click **Back** to edit the SQL connection information or click **Next** to continue.

7 On the IIS Configuration screen, specify whether you want to allow HTTP or HTTPS connections. To allow unsecured connections (HTTP), select the **Allow unsecured connections (HTTP)** option.

If your IIS server has a signed SSL certificate, the communication protocol is HTTPS by default. Your browser might display a `untrusted connection` warning message. For information on how to proceed, see your browser-specific documentation.

8 Click **Next** and verify the installation settings, then click **Install** and follow the on-screen prompts.

NOTE: This process of installing the PlateSpin Migrate server might take several minutes to complete.

---

9 (Optional) Select **Start the Migrate web client** to launch the PlateSpin Migrate Web Client immediately after the installation is complete.

1.3.4 Installing the PlateSpin Migrate Client

You have two installation options for the PlateSpin Migrate Client:

- “Installing the Client from within the Installation Launcher” on page 22
- “Downloading the Client from your PlateSpin Server” on page 22
- “Starting the Client and Activating the License” on page 22

Installing the Client from within the Installation Launcher

Use this option to install the Client on the same host with your PlateSpin Server immediately after the completion of the Server installation.

1. Complete the Server installation.

   See “Installing the PlateSpin Server” on page 20.
2. In the Installation Launcher window, click **Install PlateSpin Client** and follow the on-screen instructions.

   The installation program installs and configures the PlateSpin Migrate Client, preparing it to run.

Downloading the Client from your PlateSpin Server

Use this option to install the Client on a remote host by using a Web browser at any time after the completion of the Server installation.

1. Complete the PlateSpin Server installation.

   See “Installing the PlateSpin Server” on page 20.
2. Make sure your intended PlateSpin Migrate Client host meets the minimum system requirements.

   See “System Requirements for PlateSpin Migrate Client” on page 11.
3. On your intended PlateSpin Migrate Client host, open a Web browser and navigate to the following URL:

   `http://server_host/platespinmigrate`

   Replace *server_host* with the actual name or IP address of your PlateSpin Server host. If the PlateSpin Server is installed on the local computer, replace *server_host* with `localhost`. If SSL is enabled, use the `https` protocol in the URL.

   The browser loads the PlateSpin Server’s home page.
4. Click the PlateSpin Migrate Client download link, download the PlateSpin Migrate Client software, and install it by following the on-screen instructions.

Starting the Client and Activating the License

To start the client, click **Start** > **Programs** > **PlateSpin Migrate** > **PlateSpin Migrate Client**. When you install and launch the PlateSpin Migrate Client for the first time, the License Wizard opens and prompts you to activate your copy of the software. For help with product licensing, see “PlateSpin Migrate Product Licensing ” in the *PlateSpin Migrate 12.2 User Guide*.

You can also use the PlateSpin Migrate Web Interface to activate the license. For more information, see the *PlateSpin Migrate User Guide* on the Documentation Website (https://www.netiq.com/documentation/platespin-migrate-12-2/).

1.4 Installing the PlateSpin Migrate Software Components Using a Batch File

To silently install the PlateSpin Migrate Software Components:

1. From NetIQ Downloads (https://dl.netiq.com/), download the `PlateSpinMigrateSetup-12.X.X.X.exe` installation program and save it on your intended PlateSpin Server host where you have installed and configured the prerequisite operating system and applications. See Section 1.2, “Installing Prerequisite Software,” on page 13.
2. Double-click the PlateSpinMigrateSetup-12.*x.x.x*.exe and extract the contents to a folder of your preference, such as `C:\Install\`.

   IMPORTANT: Do not extract the contents of the `.exe` file to the default folder.
3. After the files are extracted, click **Cancel** to exit the installation wizard.
4. Depending on your desired installation type, copy and paste one of the following scripts to a batch file and execute the batch file after modifying the installation path as applicable.

   - **For a local Microsoft SQL Server Express Edition database:**

     ```
     C:\Migrate-12.2.0.X\PlateSpinImage\ServerInstall\setup.exe /s /v/qn /v"/
     l*v c:\install.log" ^
     /v"DBINSTALLTYPE=customerinstall" ^
     /v"IS_SQLSERVER_SERVER=(local)\PLATESPINDB" ^
     /v"IS_SQLSERVER_AUTHENTICATION=1" ^
     /v"IS_SQLSERVER_PASSWORD=pwd"
     ```

   - **For a remote Microsoft SQL Server Express database:**

     ```
     C:\Migrate-12.2.0.X\PlateSpinImage\ServerInstall\setup.exe /s /v/qn /v"/
     l*v c:\install.log" ^
     /v"INSTALLDIR=c:\Migrate" ^
     /v"DBINSTALLTYPE=remotedb" ^
     /v"IS_SQLSERVER_SERVER=BM7W2K12SQL\BM8INSTANCE,59977" ^
     /v"IS_SQLSERVER_AUTHENTICATION=0" ^
     /v"IS_SQLSERVER_USERNAME= domain\sqladminUser " ^
     /v"IS_SQLSERVER_USER_USERNAME= domain\sqlServiceUser " ^
     /v"IS_SQLSERVER_USER_PASSWORD=pwd"
     ```

Property	Definition
DBINSTALLTYPE	Specifies the database install type: • **For an embedded database:** customerInstall • **For a remote database:** remotedb
INSTALLDIR	Specifies the installation directory. For example: `C:\Program Files\PlateSpin Migrate Server`
IS_SQLSERVER_AUTHENTICATION	Specifies the authentication method to be used: • **For Windows authentication:** 0 • **For SQL authentication:** 1

Property	Definition
IS_SQLSERVER_SERVER	Specifies the database server: ◆ **For a local database:** (local)\PLATESPINDB ◆ **For a remote database:** DatabaseServerName\databaseInstance
IS_SQLSERVER_PASSWORD	Specifies the password for the database administrator.
IS_SQLSERVER_USER_PASSWORD	Specifies the password for the database service user.
IS_SQLSERVER_USERNAME	Specifies the database administrator user name in the format `domain\sqladminUser`.
IS_SQLSERVER_USER_USERNAME	Specifies the database service user name in the format `domain\sqlServiceUser`.

1.5 Checking for Software Updates

When the PlateSpin Migrate Client starts, it automatically checks the current version of the product and displays any available updates in the Update Availability dialog box.

To prevent the system from automatically checking for updates every time:

1. In the Update Availability dialog box, select the **Do not check for update at startup** option.
2. Click **OK**.

To re-enable automatic software update checks:

1. In the PlateSpin Migrate Client, click **Tools > Options.**
2. In the **General** tab, select **Restore Defaults**.
3. Click **OK**.

To manually check for version updates:

1. In the PlateSpin Migrate Client, click **Help > Check for Update**.

   The system checks the current version of the product and shows updates if they are available. To download a specific software update or hotfix, follow the provided URL.

1.6 Modifying the Password for the SQL Server Express System Administrator User

If you installed Microsoft SQL Server Express Edition, the installation automatically generated a password for the SQL system administrator user (`sa`). For improved security, we strongly recommend that you modify the password for the `sa` credentials after the PlateSpin Server installation is complete. You can use your Windows Administrator credentials and SQL management tools to modify the password without needing to know the generated password.

The Microsoft OSQL (`osql`) utility is included in the SQL Server Express software. You can use this tool to modify the SQL system administrator password for your SQL Server Express database engine. After you change the password, you must update the information for PlateSpin Server and restart the Platespin Server service.

To change the SQL Server Express sa user password:

1. Log in to the PlateSpin Server host as the local Administrator user.
2. Launch the Administrator Command Prompt.
3. Modify the SQL system administrator password. Enter

   ```
   osql -S .\PlateSpinDB -E -Q "ALTER LOGIN sa WITH PASSWORD = '${NewPassword}'"
   ```

   This OSQL syntax executes the query that follows the -Q option, and then exits the OSQL utility.

   This command uses the `ALTER LOGIN` syntax rather than the `sp_password` stored procedure as recommended by Microsoft in the sp_password (Transact-SQL documentation.

   For information about syntax and commands for OSQL, see *OSQL Utility* on the Microsoft website.
4. Update PlateSpin with the new password for the SQL system administrator user. Enter

   ```
   %PROGRAM FILES%\"PlateSpin Migrate
   Server"\bin\PlateSpin.UpdateConnectionString.exe /instance=.\PlateSpinDB /
   username=sa /password=${NewPassword}
   ```
5. Restart the PlateSpin Server service. Enter

   ```
   %PROGRAM FILES%\PlateSpin Migrate
   Server\bin\RestartPlateSpinServer\RestartPlateSpinServer.exe
   ```

2 Troubleshooting Installation Problems

- Section 2.1, “Common Installation Issues and Solutions,” on page 27
- Section 2.2, “Knowledgebase Articles about Installation Troubleshooting,” on page 28
- Section 2.3, “Removing PlateSpin Software,” on page 28

2.1 Common Installation Issues and Solutions

Problems or Messages	Solutions
An unexpected error occurs when trying to install the PlateSpin Server to a non-default location	When you install the PlateSpin Server in a non-default directory, you must also grant the ASP.NET user account full access to that directory. For example, if you want to install the server in `D:\PM_9`, you must make sure that the ASP.NET user account has full access to `D:\PM_9`.
HTTP 403 Error	PlateSpin Migrate uses ASP.NET for its Web services. If ASP.NET is not installed on the server, the Web services do not function correctly, and the installation fails with this error. ASP.NET is included as part of the .NET Framework. When you install the .NET Framework, IIS must already be installed on the server for ASP.NET to be configured. If the .NET Framework was installed prior to IIS, simply uninstall and reinstall the .NET Framework.
Cannot connect to IIS with http or https...	During installation, an error message appears indicating that PlateSpin Migrate cannot connect to IIS with HTTP or HTTPS, when Setup attempted to connect with the existing IIS Server. The cause of this error generally indicates a problem with the IIS Server. ◆ Ensure that IIS and ASP.NET are installed properly. See KB Article 7920595 (https://www.netiq.com/support/kb/doc.php?id=7920595). ◆ To ensure that ASP.NET is properly registered with IIS, run the following command: `"C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis.exe" -i` If the above steps do not resolve the issue, refer to the detailed instructions for reinstalling IIS and configuring IIS for isolation mode in KB Article 7920710 (https://www.netiq.com/support/kb/doc.php?id=7920710).

Problems or Messages	Solutions
Installing PlateSpin Migrate on a computer that has other applications running on IIS	This can cause problems during and after installation. If possible, avoid installing the product on a computer that has other applications running on IIS.

2.2 Knowledgebase Articles about Installation Troubleshooting

ID	Description
7920710 (https://www.netiq.com/support/kb/doc.php?id=7920710)	ERRMSG: Install Error: Cannot connect to IIS with http or https...
7920718 (https://www.netiq.com/support/kb/doc.php?id=7920718)	INFO: IIS and NTFS Permissions requirements for PlateSpin Migrate
7920595 (https://www.netiq.com/support/kb/doc.php?id=7920595)	INFO: Installing IIS and ASP.NET v2.0

2.3 Removing PlateSpin Software

The procedure below outlines the required steps for uninstalling the software components of PlateSpin Migrate and performing an optional manual cleanup. This might be necessary when upgrading or recovering from problems with a previous installation.

For information on a post-migration cleanup of source workloads, see “Post-migration Cleanup of Source Workloads” in the *PlateSpin Migrate 12.2 User Guide*.

NOTE: This procedure does not remove license information from the server.

1. Use the Windows Control Panel to uninstall the PlateSpin Migrate Client.
2. Use the Windows Control Panel to uninstall the PlateSpin Server.
3. (Optional) If you opted to install the local database server from within the PlateSpin Migrate installation program and if you no longer need it, use the Windows Control Panel to uninstall Microsoft SQL Server 2014 Express Edition.
4. Ensure that the program directories of PlateSpin Migrate components were removed:
   - **4a** Make sure the PlateSpin Server home directory was removed:

     ```
     ..\PlateSpin Migrate Server
     ```

   - **4b** Make sure the PlateSpin Migrate Client home directory was removed:

     ```
     ..\PlateSpin Migrate Client
     ```

   - **4c** (Optional) If you installed a local Microsoft SQL Server 2014 Express Edition database server and if you chose to uninstall it, remove the directory:

     ```
     ..\Program Files\Microsoft SQL Server
     ```

     WARNING: Do not delete the SQL directory if you have another SQL server installed on the PlateSpin Migrate server host.

5 Open IIS Manager and ensure that the `ofxweb` and `PlateSpinMigrate` virtual directories are deleted.

6 Reboot the host.

3 Upgrading PlateSpin Migrate

To upgrade your PlateSpin Server to PlateSpin Migrate 12.2, you must have an existing installation of PlateSpin Migrate 12.1 or PlateSpin Migrate 12.1 Patch Update 1 (P1). Other direct upgrades are not supported.

IMPORTANT: Before upgrading:

- Run Diagnostics to generate detailed diagnostic reports on jobs executed before upgrade. Post upgrading, the diagnostics reports are not available for jobs that you executed before upgrading.
- Close the Migrate Client.

- Section 3.1, “Prerequisites for Upgrade,” on page 31
- Section 3.2, “Upgrading Migrate,” on page 32

3.1 Prerequisites for Upgrade

Before an upgrade, prepare your environment for the backup and import of data.

- Section 3.1.1, “Backing Up Your Database Files Before Upgrade,” on page 31
- Section 3.1.2, “Backing Up Your Custom Linux blkwatch Drivers Before Upgrade,” on page 32

3.1.1 Backing Up Your Database Files Before Upgrade

During the upgrade, the PlateSpin Migrate installation program transparently exports data from your existing database and re-imports it into a new database instance as required. However, as an additional measure of precaution, consider backing up your data prior to the upgrade.

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 Migrate Server\Database
   ```
3. Restart MS SQL services that you stopped in Step 1.

Proceed with the upgrade, as detailed in “Upgrading Migrate” on page 32.

3.1.2 Backing Up Your Custom Linux blkwatch Drivers Before Upgrade

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

1. Log in to the PlateSpin Migrate Server host machine as the Administrator user.
2. Navigate to the PlateSpin application's installation directory, such as `C:\Program Files\PlateSpin Migrate Server\`.
3. Open the `.\Packages\9D470BFF-E30F-4015-83D8-4D308A8C8B1B\` folder and copy the `1.package` file out of this folder to a temporary directory.
4. Rename `1.package` with the `.zip` file extension (`1.zip`), then extract the contents of the file to this temporary directory.
5. Save your `CustomKernel*` content to another temporary location.

Proceed with the upgrade, as detailed in “Upgrading Migrate” on page 32.

After the upgrade, you should upload again any custom Linux blkwatch drivers you need for future migrations. See KB Article 7005873 (https://www.netiq.com/support/kb/doc.php?id=7005873).

3.2 Upgrading Migrate

1. Back up your data.

   See “Backing Up Your Database Files Before Upgrade” on page 31.
2. Use the Windows Control Panel to uninstall your client application, the PlateSpin Migrate Client.
3. On your server host, start the `PlateSpinMigrateSetup-12.X.X.X.exe` installation program.
4. Click **Install Server** and follow the on-screen instructions. When you are prompted to specify a database instance, point the installation program to your existing database instance.
5. Install the current version of the PlateSpin Migrate Client.

   See “Installing the PlateSpin Migrate Client” on page 22.
6. (Optional) After the upgrade, you should upload again any custom Linux blkwatch drivers you need for future migrations. See KB Article 7005873 (https://www.netiq.com/support/kb/doc.php?id=7005873).

   See also “Backing Up Your Custom Linux blkwatch Drivers Before Upgrade” on page 32.

A Documentation Updates

This section contains information on documentation content changes that were made in the English version of the *PlateSpin Migrate Installation and Upgrade Guide* since the General Availability of PlateSpin Migrate 12.2.

- Section A.1, “February 2018,” on page 33

A.1 February 2018

Location	Update
Section 1.3.2, “Installing the Database Server,” on page 20	**NOTE:** The SQL administrator password is generated during the installation of Microsoft SQL Server Express Edition. Keep the default sa credentials throughout the PlateSpin Migrate Server and PlateSpin Migrate Client installation. After the PlateSpin installation is complete, you can modify the SQL administrator password. For information about how to change the password, contact Micro Focus Technical Support.
Section 1.6, “Modifying the Password for the SQL Server Express System Administrator User,” on page 24	This section is new.
Section 3.1.2, “Backing Up Your Custom Linux blkwatch Drivers Before Upgrade,” on page 32	This section is new.
Section 3.2, “Upgrading Migrate,” on page 32	Added a step to optionally upload the custom Linux blkwatch drivers that you backed up for the Migrate server.
Section 3.2, “Upgrading Migrate,” on page 32	Removed an optional step to manually update any remote hosts running PlateSpin Image Server software. This step is not needed for PlateSpin Migrate 12. and later.