Upgrade from CloudPortal Services Manager 10

CloudPortal Services Manager 11.0 supports in-place upgrading from CloudPortal Services Manager 10.

Important: Review all the information in this topic and in the Upgrade deprecated services section which contains information about services that are not supported in Services Manager 11. If your Services Manager 10 deployment includes any deprecated services, you must prepare your deployment accordingly prior to upgrading any web components.

Prepare for upgrading your deployment

Upgrading your Services Manager 10 deployment to Services Manager 11 involves several steps that you perform in sequence. To prepare your deployment for upgrading, perform the following tasks:

- Disable all locations in your deployment by stopping the Directory Web Service, Provisioning Engine, and Web platform components.
- Back up all Services Manager databases (OLM, OLMReports, OLMReporting).

Perform the upgrade

After you have completed the preparation steps, you can perform the upgrade. The following table lists the required steps and the instructions for performing them. Perform these steps in the order shown.

Step #	To perform this task...	...refer to this topic.
1.	Upgrade the system databases	Upgrade System Databases
2.	Upgrade and reconfigure platform server roles	Upgrade platform server roles
3.	Upgrade and reconfigure web services in use	Upgrade web components
4.	If required, upgrade or remove deprecated services	Upgrade deprecated services
5.	Upgrade the Reporting service and migrate the data warehouse	Upgrade the Reporting Service and data warehouse

Complete the upgrade

After you have finished all the upgrade steps, re-enable all locations in your deployment by starting the Directory Web Service, Provisioning Engine, and Web platform components.

Upgrade web components

This topic describes the upgrade process of web components from Services Manager 10 to Services Manager 11. For upgrades, the term web components refers to the control panel web site, the API service, and all supported web services.

> **Important:** In addition to this section, review the topic Upgrade deprecated services, which contains information about services that are not supported in Services Manager 11. If your Services Manager 10 deployment includes any deprecated services, you must prepare your deployment accordingly prior to upgrading any web components.

Prepare for the upgrade

During the upgrade process, the Services Manager Setup Tool updates all sites to run from the backup and puts all associated sites and application pools in a stopped state. Therefore, if the names of any of the sites or application pools in your deployment have been changed from the default, you must specify those changes in an XML file before you initiate the upgrade. To create this file, use the following format:

```
<Configuration>
  <Property Name="<service-id>.ApplicationPool" Value="MyAppPool" />
  <Property Name="<service-id>.Application" Value="MyAppName" />
  <Property Name="<service-id>.Site" Value="MySite" />
</Configuration>
```

The **service-id** property is the web service's deployment identifier used in the Configuration Tool.

After creating the XML file, you can initiate the upgrade using the following command:

```
CortexSetup.exe /ConfigFile:path-to-XML-file /Upgrade
```

What happens during the upgrade

When you upgrade the web components, the Configuration Tool performs the following tasks:

1. Stop the site and applicable web services in IIS.
2. Back up the site. The default file path for this backup is %ProgramData%\Citrix\CloudPortal Services Manager Setup\Backups\Legacy*component-name*.
3. Update physical paths in IIS to point to the site backup.
4. Update the site files in the %ProgramFiles% directory.
5. Copy updated site files from %ProgramFiles% to C:\Inetpub*site-name*.
6. Restore customer content from site backup (for example, downloads, images, stylesheets, or scripts).
7. Restore web.config file from site backup and apply updates.
8. Update physical paths in IIS.
9. Restart site in IIS.

Troubleshooting conflicts

In the event a conflict arises during the upgrade, the sites remain in a stopped state and reference the backup created earlier in the process. Site files in the %ProgramFiles% directory are updated and site content in C:\Inetpub*component-name* are reverted to the previous version. You can then review the configuration update file located in %ProgramFiles% and make any necessary changes to the deployed web.config file.

Upgrade web services using the graphical interface or command line

Use this task to upgrade Services Manager web services from Services Manager 10 to Services Manager 11. Perform this task on the servers hosting the following services:

- Citrix
- Hosted Exchange
- Lync
- Lync Hosted
- MySQL
- SharePoint 2010

- Virtual Machine
- Windows Web Hosting

Important: Services Manager 11 does not support several services that were supported by Services Manager 10. Before upgrading any web services, refer to the “Upgrade deprecated services” section for a list of deprecated services and additional upgrade information.

The upgrade process involves the following tasks:

- Upgrade the web services installed on each server in your deployment
- Reconfigure the web services to finalize the upgrade

To upgrade web services using the graphical interface

1. From the installation media, double-click **setup.exe** and click **Get Started**.
2. On the **Select Deployment Task** page, select **Upgrade Existing Deployment**.
3. On the **Upgrade Existing Deployment** page, select **Upgrade Roles and Services**. The Setup Tool verifies the database version. If the correct database version is not detected, the Setup Tool prompts you to manually verify that the system databases have been upgraded and click **Next**.
4. When prompted, accept the End User Licensing Agreement and then click **Next**.
5. On the **Select Components** page, select the components you want to upgrade.
6. On the **Ready to upgrade** page, click **Upgrade**. The Setup Tool installs the Configuration Tool, upgrades the selected roles or services, and displays progress.
7. On the **Upgrade Complete** page, click **Finish**.
8. From the **Upgrade Existing Deployment** page, select **Re-configure Upgraded Roles and Services**.
9. On the **Summary** page, review the settings that will be reconfigured and click **Next**. The Configuration Tool restores and upgrades the IIS site for the web service, and displays progress.
10. When the reconfiguration is complete, click **Finish** and then click **Exit**.

To upgrade web services using the command line

When running the Setup and Configuration Tools, use the following information to specify the web service you want to upgrade and the location of its configuration console:

Web service name	Configuration console location
Citrix	*install-location*\Services\CitrixWS\Configuration\ CitrixServiceConfigConsole.exe
Exchange	*install-location*\Services\ExchangeWS\Configuration\ ExchangeConfigConsole.exe
LyncEnterprise	*install-location*\Services\LyncWS\Configuration\LyncConfigConsole.exe
LyncHosted	*install-location*\Services\LyncHostedWS\Configuration\ LyncHostedConfigConsole.exe
MySQL	*install-location*\Services\MySQLWS\Configuration\ MySQLConfigConsole.exe
SharePoint2010	*install-location*\Services\SharePoint2010WS\Configuration\ SharePointConfigConsole.exe
VirtualMachine	*install-location*\Services\CitrixWS\Configuration\VMConfigConsole.exe
WinWebHosting	*install-location*\Services\CitrixWS\Configuration\IISConfigConsole.exe

Install-location denotes the web service installation directory on the local computer. The default directory is C:\Program Files (x86)\Citrix\Cortex.

1. On the server hosting the web service, log on as an administrator.
2. Open a command line window and navigate to the **CortexSetup** directory on the Services Manager installation media.
3. At the command prompt, enter `CortexSetupConsole.exe /upgrade:`*`web-service-name`* `/Legacy`. The Setup Tool upgrades the service and returns the command prompt.
4. At the command prompt, enter *`path-to-service-configuration-console`* `/Upgrade /Legacy`. The Configuration Tool reconfigures the web service and returns the command prompt.

Examples

The following command upgrades the Citrix web service.

```
CortexSetupConsole.exe /Upgrade:Citrix /Legacy
```

The following command reconfigures the Citrix web service.

```
install-location\Services\CitrixWS\Configuration\
CitrixServiceConfigConsole.exe /Upgrade /Legacy
```

After upgrading all web services, continue the upgrade process by upgrading the Reporting service and data warehouse. For more information, refer to the topic Upgrade the Reporting service and data warehouse.

Upgrade deprecated services

In-place upgrade of services that come with Services Manager 11 is supported by default. However, some services that were supported in CloudPortal Services Manager 10.0 have been deprecated or support for specific product versions has been removed in Version 11. The following table describes the affected services:

Service name	Supported in Version 11.0	Upgrade path
• BlackBerry 4 • Broadworks • CRM 4 • SharePoint 3 (WSS 3.0)	Not supported	None. See the section "Upgrade overview."
Hosted Exchange Multi-tenanted (for Exchange 2010 SP1 in /hosting mode)	Not supported	See the section "Upgrade process for Hosted Exchange Multi-tenanted."
Hosted Exchange	Exchange 2003 not supported	See the section "Upgrade process for Hosted Exchange."
Windows Web Hosting	IIS 6 not supported	See the section "Upgrade process for Windows Web Hosting."

Upgrade overview

The upgrade process for a Services Manager 10 deployment that includes deprecated services is similar to the overview described in Upgrade from CloudPortal Services Manager 10. However, when upgrading web components, the Configuration Tool detects whether or not a deprecated service is present in the deployment. If a deprecated service is detected, the Configuration Tool performs one of the following actions:

- Informs you of any additional actions that are required before the upgrade process can be completed. This action applies to Hosted Exchange, Hosted Exchange Multi-tenanted, and Windows Web Hosting. Refer to the sections in this topic for information about upgrading these services.
- Notifies you that the service and all service-related data will be removed from the Services Manager deployment. No Active Directory data is modified or removed. This action applies to BlackBerry 4, BroadWorks, CRM 4, Hosted Exchange Multi-tenanted, and SharePoint 3. Removing all service-related data can take time, depending on the size of the deployment. During upgrading, the Configuration Tool displays the progress of data removal. Do not close the Configuration Tool during this process.

After all web components are upgraded successfully, you can upgrade the Reporting service and migrate the data warehouse, as described in Upgrade the Reporting service and data warehouse. Historic billing data is retained and no new billing data is processed for services that have been removed.

Upgrade process for Hosted Exchange

When upgrading the Hosted Exchange service, the Configuration Tool checks the version of Exchange deployed for the service. If Exchange 2003 is detected, the Configuration Tool checks for any existing server connections and user plans. If these items are detected, the Configuration Tool halts upgrading and advises you to remove these items.

If your Services Manager deployment uses Exchange 2003 with the Hosted Exchange service, you need to migrate the Exchange 2003 users to a version of Exchange that Services Manager 11 supports, prior to upgrading. You can do this using the service migration tool in Services Manager 10.

Afterward, you can run the Configuration Tool to upgrade web components, as described in Upgrade web components.

Upgrade process for Hosted Exchange Multi-tenanted

In Services Manager 10, the Hosted Exchange Multi-tenanted service supports installations of Exchange 2010 SP1 in /hosting mode. Services Manager 11 does not include this service due to changes in Microsoft's recommendations for achieving multi-tenancy with Exchange 2010.

For more information about these changes, see the article "Multi-Tenant Support" on the Microsoft TechNet web site.

When upgrading the web components in a Services Manager 10 deployment, the Configuration Tool checks for any deprecated services. If the Hosted Exchange Multi-tenanted service is detected, the Configuration Tool halts upgrading and advises you to migrate your users to a supported version of Exchange.

Because the Active Directory structure supporting the Hosted Exchange Multi-tenanted service is incompatible with Services Manager 11 (which supports only the Hosted Exchange service), the Active Directory structure must be transitioned to one that supports the Hosted Exchange service prior to upgrading. If your Services Manager deployment uses the Hosted Exchange Multi-tenanted service, Citrix recommends you contact Microsoft Support for assistance with this transition.

After the transition, you can run the Configuration Tool to upgrade the service. When launched, the Configuration Tool detects the presence of the Hosted Exchange Multi-tenanted service and removes it, along with all service-related data. However, no Active Directory data is modified or removed.

Upgrade process for Windows Web Hosting

When upgrading the Windows Web Hosting service, the Configuration Tool checks the version IIS deployed for the service. If IIS 6 is detected, the Configuration Tool checks for existing server connections and customer plans. If these items are detected, the Configuration Tool halts upgrading and advises you to migrate your customers.

If your Services Manager deployment uses IIS 6 with the Windows Web Hosting service, Citrix recommends you contact Citrix Support for assistance with migrating your customers to Windows Web Hosting using IIS 7.