Deciding which procedure to use

ONTAP MetroCluster

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You must understand the differences between a MetroCluster upgrade, expansion, or transition and choose the procedure that matches your goal.

- **Upgrade**

  In an upgrade procedure, you are replacing the controller modules with a new model of controller module.

  - The old controller modules are retired.
  - The storage is not upgraded.
  - The storage switch infrastructure technology is not changed.

    It remains as a MetroCluster IP, fabric-attached MetroCluster or stretch MetroCluster configuration.

    Choosing an upgrade or refresh method

- **Refresh**

  In a refresh procedure, you are replacing the controller modules with a new model of controller module and also replacing the storage shelves.

  - The old controller modules and storage shelves are retired.
  - The storage switch infrastructure technology is not changed, unless new switches are required to accommodate the new platform models.

    The configuration remains as its original type:

    - MetroCluster IP
    - Fabric-attached MetroCluster
    - Stretch MetroCluster configuration + Choosing an upgrade or refresh method

- **Transition**

  In a transition procedure, the backend switch infrastructure is changed from FC switches or connections to IP switches, and the platform models are replaced.

  - New controller modules are added to the configuration.
  - The original controller modules are retired after the procedure.
  - If the original configuration used cluster interconnect switches, they can be reused, depending on the switch and platform models.
  - The storage can be reused or replaced, depending on the platform models.

    If the storage shelves are not reused, data is moved from the old shelves to the new shelves.

    xref:./transition/../transition/index.html

- **Expansion**

  In an expansion procedure, additional nodes and storage are added to the MetroCluster FC configuration.

- Expanding a two-node MetroCluster FC configuration to a four-node configuration
- Expanding a four-node MetroCluster FC configuration to an eight-node configuration

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