Veritas Discovery Accelerator™ 12.3 Upgrade Instructions

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This document describes how to upgrade an existing installation of Discovery Accelerator to the 12.3 version.

See the *ReadMeFirst* file and *Installation Guide* for information on the following:

- New features and changes in Discovery Accelerator 12.3

- Prerequisite software

- Guidelines on how to perform a first-time installation

- Known issues and limitations

Both documents are in the Discovery Accelerator media.

For the latest information on supported devices and versions of software, see the Enterprise Vault Compatibility Charts.

Contents

Supported upgrade paths

You can upgrade to Discovery Accelerator 12.3 from the following versions only:

- Discovery Accelerator 11.0 Original Release or 11.0.1

- Discovery Accelerator 12 Original Release, 12.1, or 12.2

For the latest information on supported upgrade paths, see the technical note called *Supported upgrade paths for Enterprise Vault, Compliance Accelerator, and Discovery Accelerator* (https://www.veritas.com/docs/100023744).

Supported versions of Enterprise Vault in Discovery Accelerator environments

As a minimum, you must install an 11.0.1 or later version of one of the following on the Discovery Accelerator server:

- Enterprise Vault Services

- Enterprise Vault API Runtime

Note the following important points:

- All Enterprise Vault servers in all Enterprise Vault sites in a Discovery Accelerator environment must run the same version of Enterprise Vault. For example, when using Discovery Accelerator with two Enterprise Vault installations, you cannot have one site that runs Enterprise Vault 11.0.1 and another that runs Enterprise Vault 12.3.

- The major version of Discovery Accelerator must be the same as, or one later than, the major version of Enterprise Vault. For example, you can run Discovery Accelerator 12.3 with Enterprise Vault 11.0.1 servers, but you cannot run Discovery Accelerator 11.0.1 with Enterprise Vault 12.3 servers.

- If the major version of Discovery Accelerator is the same as the major version of Enterprise Vault, the minor version (Service Pack) of Discovery Accelerator must be the same as, or later than, the minor version of Enterprise Vault. For example, you can run Discovery Accelerator 12.3 with Enterprise Vault 12.2 servers, but you cannot run Discovery Accelerator 12.2 with Enterprise Vault 12.3 servers.

- When upgrading both Discovery Accelerator and Enterprise Vault, you must first upgrade Discovery Accelerator itself, then Enterprise Vault on all Enterprise Vault servers, and finally Enterprise Vault on all Discovery Accelerator servers.

See the Enterprise Vault Compatibility Charts for more information about supported versions.

Before you begin

Before you upgrade to Discovery Accelerator 12.3, we recommend that you do the following:

- Ensure that you are running a suitable version of SQL Server on your SQL Server computer. Discovery Accelerator 12.3 works only with the following:

  - SQL Server 2012 x64 Edition, Original Release or later

  - SQL Server 2014 x64 Edition, Original Release or later

  - SQL Server 2016 x64 Edition, Original Release or later

  - SQL Server 2017 x64 Edition, Original Release

Ask all users of the Discovery Accelerator client to exit the program.

- If you have used the facility to revoke the Vault Service account's ownership of the Discovery Accelerator databases, temporarily assign the database role of EVUpgradeRole to the Vault Service account. The following article on the Veritas Support website describes how to do this:

  https://www.veritas.com/content/support/en_US/doc/82102216-120586061-0/

  You can revoke the assignment after you have completed the upgrade.

- Check for and stop any active searches, export runs, and production runs. The following article on the Veritas Support website provides SQL scripts with which you can check for these operations:

  https://www.veritas.com/docs/100019120

- Check for searches that have a status of either "Pending Acceptance" or "Pending Acceptance (with errors)", and accept or reject them. The above article on the Veritas Support website provides a SQL script with which you can check for these searches. By accepting or rejecting the searches, you can reduce the amount of data that the upgrade procedure must process.

- Check the tblSearchResults table of the Discovery Accelerator customer database for rows that have been left over by searches that you have already accepted or rejected. To do this, run the following SQL query against the customer database:

  `SELECT COUNT(*) FROM tblSearchResults`

  If the query returns any result other than 0, and no searches are currently running, then you must clear the table of invalid data before you proceed. Contact the Veritas Support team for assistance.

- Reapply legal holds to any items that Discovery Accelerator has failed to place on hold. The following article on the Veritas Support website describes how to do this:

  https://www.veritas.com/docs/100019828

- Use the facilities in SQL Server Management Studio to do the following:

  - Make a backup copy of your Discovery Accelerator database and transaction log.

  - Truncate the transaction log.

  - Enable autogrowth for the database and transaction log in fixed increments of 250 megabytes.

  Consult the documentation that accompanies SQL Server Management Studio for instructions on how to perform these activities.

- If you use Microsoft SQL Server database mirroring with your Discovery Accelerator databases, remove it before you upgrade the Discovery Accelerator server software. Discovery Accelerator fails to upgrade its databases if mirroring is configured. For more information, see the following article on the Veritas Support website:

  http://www.veritas.com/docs/100019439

Note also that, in an environment where you have implemented SQL Server log shipping as a disaster-recovery solution, the process of upgrading the Discovery Accelerator databases can disrupt the log shipping operations in some circumstances. After you have completed the upgrade, it is important to check that these operations continue as scheduled.

- Ensure that the drive hosting the transaction log has available space that is equal to or greater than four times the size of the database.

- Disable the following features on the Discovery Accelerator server, Enterprise Vault servers, and all SQL Servers that host an Enterprise Vault database or Discovery Accelerator database:

  - Receive-Side Scaling

  - TCP Chimney

  - TCP/IP Offload Engine

  - TCP Segmentation Offloading

  The following article on the Veritas Support website provides instructions on how to disable these features:

  https://www.veritas.com/docs/100019120

- Disable any Network Interface Card (NIC) Teaming that may be present on the Enterprise Vault and Discovery Accelerator servers. For guidelines on how to do this, consult the documentation that your hardware vendor provides.

Steps to upgrade your Discovery Accelerator system

Upgrading a Discovery Accelerator database that contains millions of items can take several hours to complete. During the upgrade process, there are several pauses that may give you the impression that it has stopped prematurely. We recommend that you perform the upgrade at a quiet time and allow it to run through to completion. Ideally, seek the assistance of Veritas Consulting Services when upgrading.

See the *Installation Guide* for more information on how to perform the following steps.

To upgrade your system to Discovery Accelerator 12.3:

1. Log on to the Discovery Accelerator server as the Vault Service account.

2. Use the Services snap-in to Microsoft Management Console to do the following:

   - Stop the Enterprise Vault Accelerator Manager service and any Enterprise Vault services that are running on the server. These services can interfere with the upgrade process if you leave them running.

   - Ensure that the Windows Server service is running. When you run the installation program for the Discovery Accelerator server software, it tries to assign a number of user rights to the Vault Service

account, such as "Log on as a service". The installation program uses the Windows Server service to assign these rights.

3. Start the Discovery Accelerator server installation program (`..\Veritas Enterprise Vault Discovery Accelerator\Server\setup.exe`).

   The `setup.exe` program launches the Windows Installer (`.msi`) package that is in the same folder with elevated privileges. This is necessary to enable the installation to complete all its processes.

4. Follow the on-screen instructions.

5. When the installation process has completed, open the Accelerator Manager website (typically, http://*server_name*/EVBAAdmin).

6. Click **Update** to update the configuration database.

7. Follow the on-screen instructions to restart the Enterprise Vault Accelerator Manager service. You can use the Services snap-in to Microsoft Management Console to do this.

   Note: Restarting the service causes Discovery Accelerator to check the security of various temporary folders that the application uses. If this security check fails, an error event with an ID of 585 is recorded in the Veritas Enterprise Vault event log, and the service does not start. For more information and guidelines on how to resolve this issue, see the *Installation Guide*.

8. In the Accelerator Manager website, click **OK**.

9. Click **Upload License** to import your license key file for Discovery Accelerator 12.3.

10. To upgrade each customer database and the Custodian Manager database, follow these steps:

    a. In the left pane of the Accelerator Manager website, right-click the name of the required database and then click **Properties**.

    b. In the Customer dialog box, click **Update**.

    c. Monitor the upgrade progress until it has completed and the customer status is Running.

    If you have multiple customer databases, upgrade them one at a time rather than concurrently.

11. If you have implemented SQL Server log shipping as a disaster-recovery solution in your Discovery Accelerator environment, check that the log shipping operations continue as scheduled. The process of upgrading the databases can disrupt these operations in some circumstances. After you have upgraded the databases, you may need to take a manual backup to recover the log shipping functionality.

12. Use the Accelerator Manager website to upload the Discovery Accelerator report templates to your SQL reporting server.

    Discovery Accelerator 12.3 includes some updates to existing report templates. To make the updated templates available, you must upload them to your reporting server.

13. Install the Discovery Accelerator client software on the computer of each user who will be running the client.

Note the following:

- By default, the Windows Installer package performs a *per-user* installation of the Discovery Accelerator client software. This allows the user account under which the Discovery Accelerator client was installed to run the software, but it does not allow other users of the computer to do so. If you have administrator privileges on the computer and want to permit all users to run the application, you can perform a *per-machine* installation. See the *Installation Guide* for instructions on how to do this.

- For the best results, install the client software as a user with administrator privileges on the computer.

- The version of the client software on your users' computers must exactly match that of the Discovery Accelerator server software on the Discovery Accelerator server.

14. If necessary, upgrade Enterprise Vault on each Enterprise Vault server and then upgrade the Enterprise Vault components on the Discovery Accelerator server. See the documentation that accompanies Enterprise Vault for guidelines on how to upgrade it.

    Do not uninstall the existing Enterprise Vault components before you install the new ones; simply run the installation program for the required components and follow the on-screen instructions. Uninstalling the Enterprise Vault components can lead to the removal of the Enterprise Vault registry entries, which requires you to reinstall not only Enterprise Vault but also Discovery Accelerator. If you experience this issue, contact Veritas Support for help.

    There is no need to configure Enterprise Vault after you have installed it on your Discovery Accelerator server computer; do not run the Enterprise Vault configuration wizard.

15. On any Enterprise Vault server, run the PowerShell cmdlet called `Start-EVDatabaseUpgrade` to upgrade the Enterprise Vault Directory database and the Storage databases. See the Enterprise Vault documentation for guidelines.

16. Start the Enterprise Vault services on each Enterprise Vault server.

Legal notice

Veritas Technologies LLC
500 E Middlefield Road
Mountain View, CA 94043

https://www.veritas.com