



# **Upgrading EditShare Server Software to 2020 and Later**

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# Introduction

This guide provides the upgrade procedure used to upgrade EditShare systems running software version 7 to version 2020.

If your EditShare system currently runs EditShare 7, with integrated Flow and/or Ark, you may be eligible for an upgrade to a new major release to EditShare Storage and Flow 2020.

This upgrade is free for customers with qualified hardware less than five years old and with an active Support Agreement. Going forward with EditShare 2020 and beyond, you will be eligible for complimentary updates to any future versions released during the valid period of your Support Agreement, as long as the hardware continues to be eligible and compatible.

## **IMPORTANT - Before you upgrade!**

The procedure for upgrading from EditShare 7 to EditShare 2020 involves several steps:

1. Update all servers to the latest version of EditShare 7.
2. Run the Upgrade Validation tool to collect information about your EditShare system.
3. Upload the system information report to [my.editshare.com](http://my.editshare.com).
4. EditShare staff review the system information report and respond within a few days.
5. EditShare provides a unique dongle license updater file for each of your servers.
6. Each server's dongle is updated with the new license file.
7. Once all dongles have been updated, the EditShare 2020 installation may commence.

# EditShare Software License

Your EditShare USB dongle is programmed with a unique license for your server, enabling the amount of storage and other options you have ordered.

Beginning with EditShare 2020, your system dongles track the expiration date of the support agreement associated with each server at your site. You will be eligible to update to any version released up through the month in which the support agreement expires. For example: a support agreement expires on June 1, access to any version released before the end of June (30th). Likewise, a support contract expiring on June 29th would still have access to versions released before June 30th. Even after the support expiration date has passed, you can still update to any version that was released before expiration. However, you may not be able to upgrade to the latest released version available at that time.

If your support agreement has expired and there are newer versions available which were released after expiration, a message will appear stating that the system is not eligible for further software updates. If you receive such a message, contact EditShare Support or Sales for information on how to renew your support agreement and resume software update eligibility.

In order to add the necessary coding to your dongle that allows your system to be able to upgrade to EditShare 2020, it is necessary to apply dongle updaters to your servers, which will be provided by EditShare after approval of a customer-initiated upgrade request according to the procedure outlined below.

Beginning with the 2020 release, Flow licensing also has changed from previous licensing under Flow 3 and EditShare 7. Flow 2020 licenses have shifted from the USB dongle to an electronic license managed by the EditShare License Service (ELS). After your upgrade request is approved by EditShare, any integrated Flow 3 licenses previously stored on the dongles will be converted to an electronic license provided by ELS at [my.editshare.com](http://my.editshare.com) that can be applied to your servers.

# Associated Documents

The following documents are also available from EditShare:

- EditShare Storage Editor's Guide
- EditShare Storage Administrator's Guide
- EditShare Ark Setup and User's Guide

Reference to the following publications may be useful when operating in conjunction with other EditShare systems and products:

- Flow Administrator's Guide
- Flow Supported Formats User's Reference
- Gevs Administrator's Guide

For the latest information about these products, always refer to the relevant ReadMe documentation.

## Technical Support

For questions not addressed in our documentation, contact EditShare Technical Support. Have the exact version number of your EditShare implementation ready as well as your support agreement number.

EditShare strongly recommends that you purchase a support agreement for your system.

Please contact EditShare Technical Support at the following URL:

<http://www.editshare.com/support>

## Important Considerations Before Updating

Before upgrading your EditShare system, please review all the relevant sections below:

- ["Server Group Software Versions"](#)
- ["HA Storage Systems"](#)
- ["HA Flow"](#)
- ["Active Directory with Single Sign On \(AD SSO\)"](#)

### EFS Native Driver Compatibility

The EFS native driver is compatible with OS X 10.8 and newer Apple operating systems. However, to immediately see changes made by other macOS and Windows machines in Finder, OS X 10.11 or a newer version is required, as these versions contain the change notifications system that EFS requires to update the information in Finder.

### Server Group Software Versions

When adding new servers to a cluster, ensure that all servers are running the same software version.

## HA Storage Systems

When updating an HA EFS server group to 2020.2.x from any version before 7.2.2, the mechanism to replicate EFS metadata across EFS master nodes will be changed. As a result, EFS clients running EditShare Connect 7.2.0.6 or earlier will be disconnected when the second EFS master node is updated. The EFS client will not be able to reconnect until it has been updated to 2020.2.x by the EditShare Connect installer.

If you cannot tolerate this downtime for EFS client connections, contact EditShare Technical Support to obtain the new EditShare Connect installer before attempting a system upgrade.

## HA Flow

If you are upgrading a system with two or more Flow database servers, contact EditShare Technical Support for instructions before attempting a system upgrade.

## Active Directory with Single Sign On (AD SSO)

### Migrating from Password Synchronization



*If you are migrating from Password Synchronization to AD SSO, be aware that this is a complex process. Password Synchronization relies on local user account names matching Active Directory account names, whereas AD SSO relies on the exact opposite. If you wish to migrate from Password Synchronization, please call EditShare Technical Support first.*

*If you are upgrading a system which does not have Password Synchronization enabled, and you plan to configure AD SSO for the first time, you should follow the comprehensive steps laid out in the EditShare Administrator's Guide after installing the software upgrade.*

### EFS Systems Running AD SSO

If you are upgrading a system running versions prior to 7.2.0.3 that has AD SSO enabled you must take the following one-time action:

- After upgrading to 2020.2.x - remove your EditShare system from the Active Directory domain, and then join the domain again.

*NOTE: Failure to follow this step may cause Active Directory authentication to become unreliable.*

If you are already running v7.2.0.3 or later, you do not need to perform this procedure. Refer to the EditShare Storage Administrator's Guide for further details.

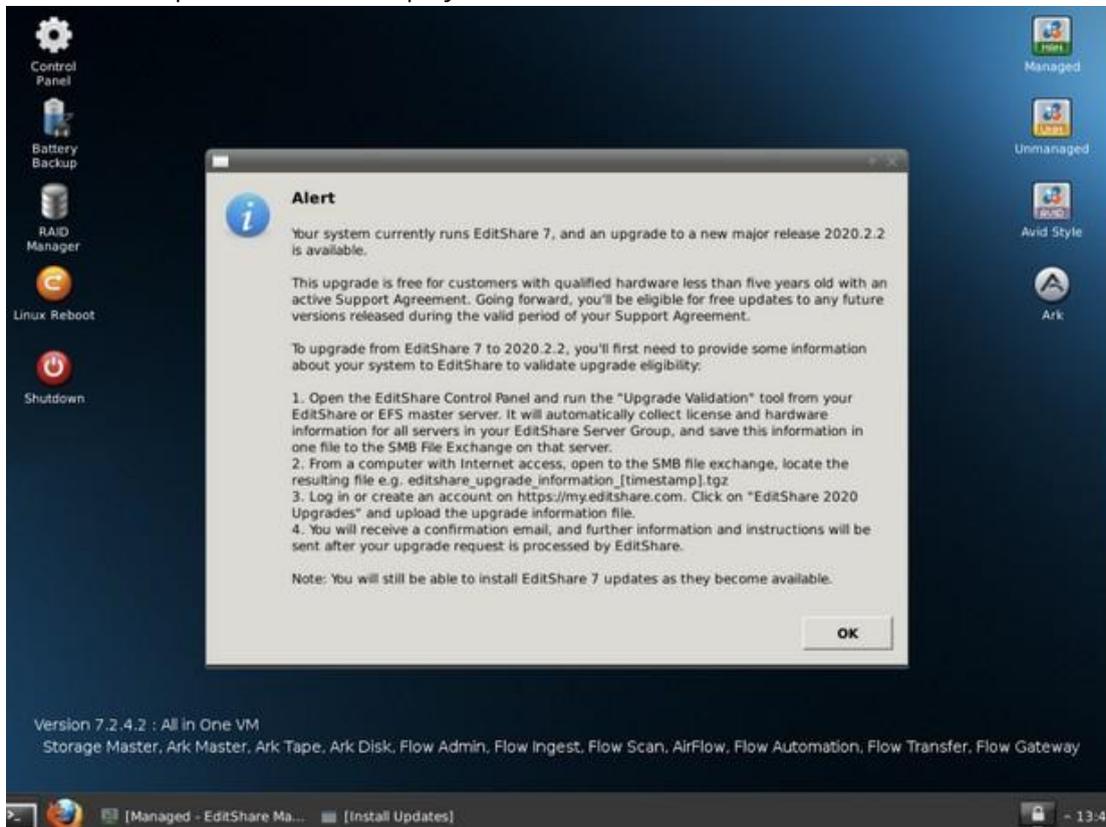
# Obtaining Licenses to Upgrade your Version 7.x EditShare system(s) to Version 2020

To obtain licenses to upgrade your EditShare software from Version 7.x to Version 2020, complete the following:

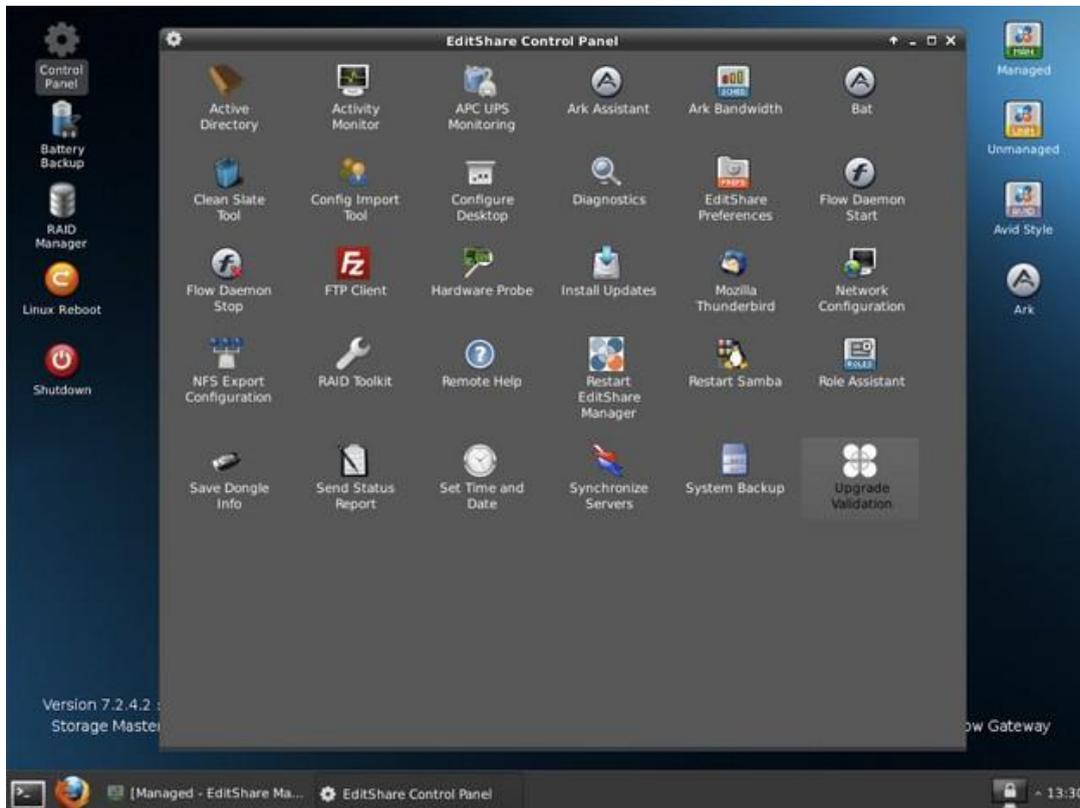
1. Upgrade your Version 7.2.3.5 or earlier software to Version 7.2.4.2 or later. (see section later in this doc: Upgrading the EditShare Software With and Without Internet Access.

*NOTE: Use the online or offline upgrade process as applicable depending on whether servers have an Internet connection or not.*

2. Once the system is running on ES V7.2.4.2 or later, run **Check for Updates** again. The following alert displaying the availability of a major release, and details on how to submit an upgrade request to initiate the process should display.



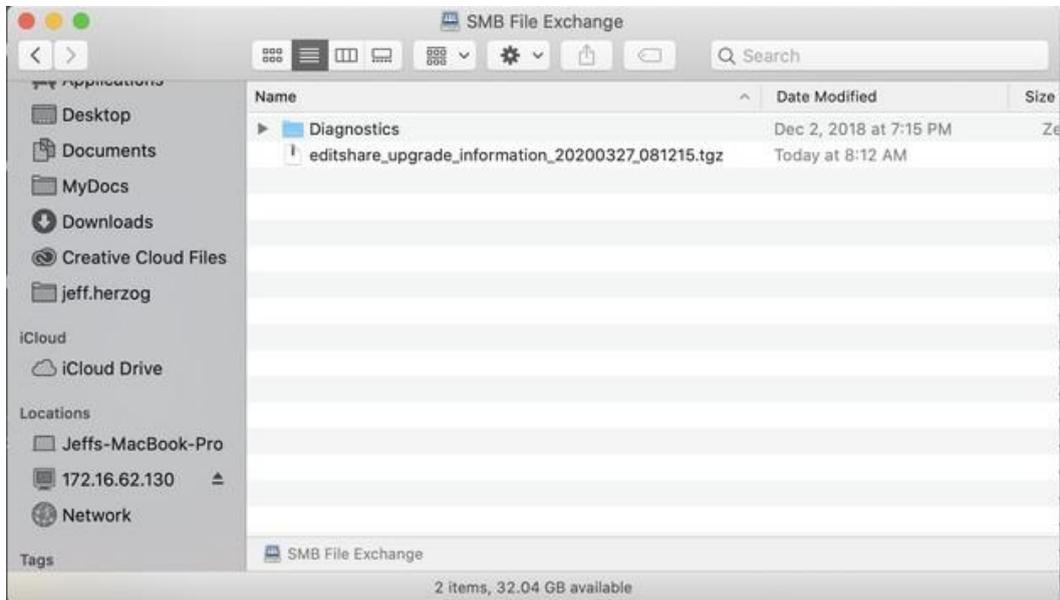
3. Open the Control Panel. The new Upgrade Validation icon should be present.



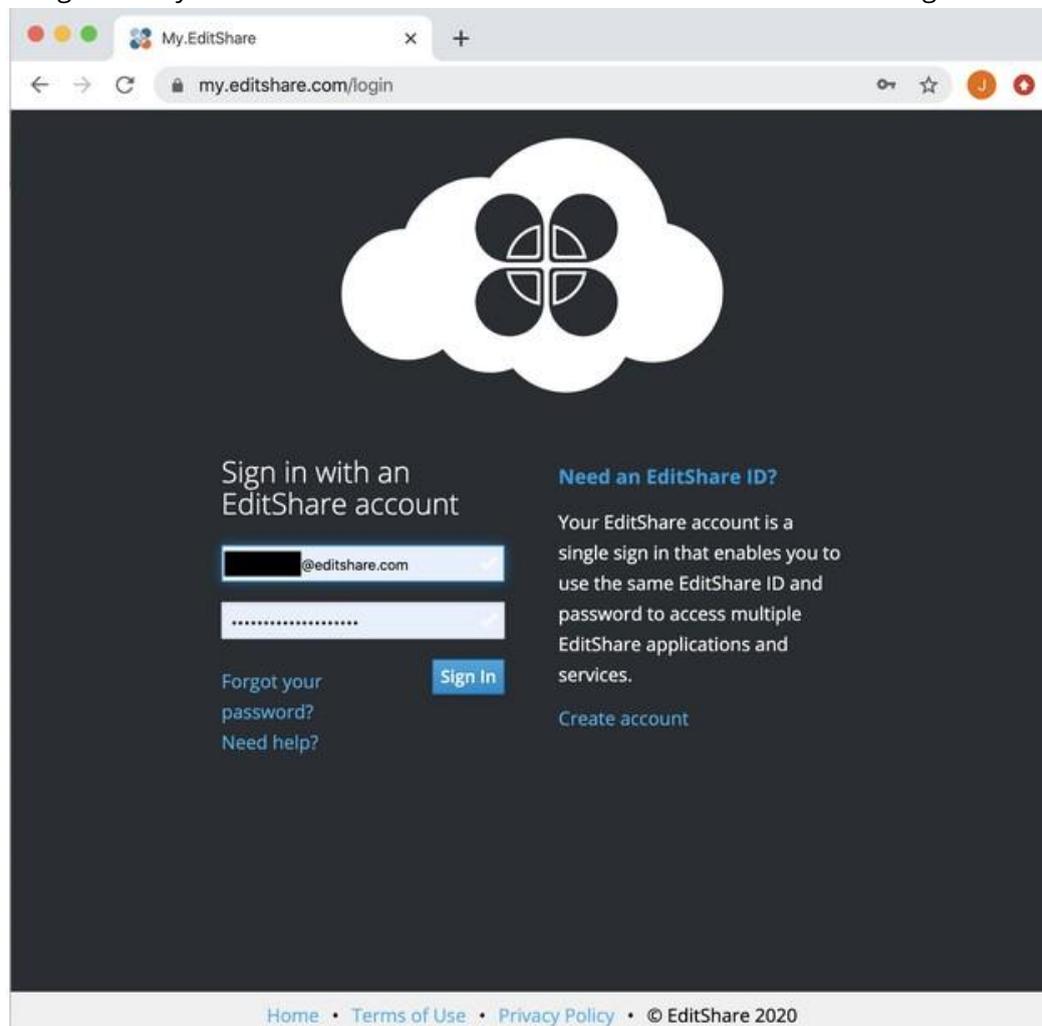
4. Run the Upgrade Validation tool from the EditShare ESA or EFS Master Server. The tool collects hardware and dongle details from all servers in the EditShare Group (cluster).



5. Log into your EditShare server from a client with Internet access, mount the SMB File Exchange, and note the resulting Upgrade Information File created.

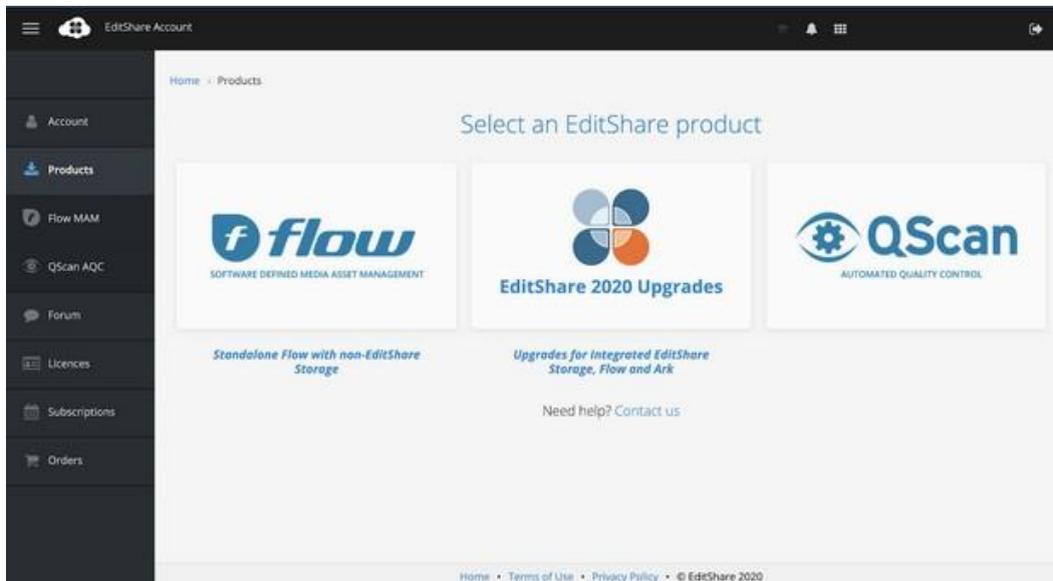


6. Navigate to my.editshare.com and create a new account or use the existing credentials.

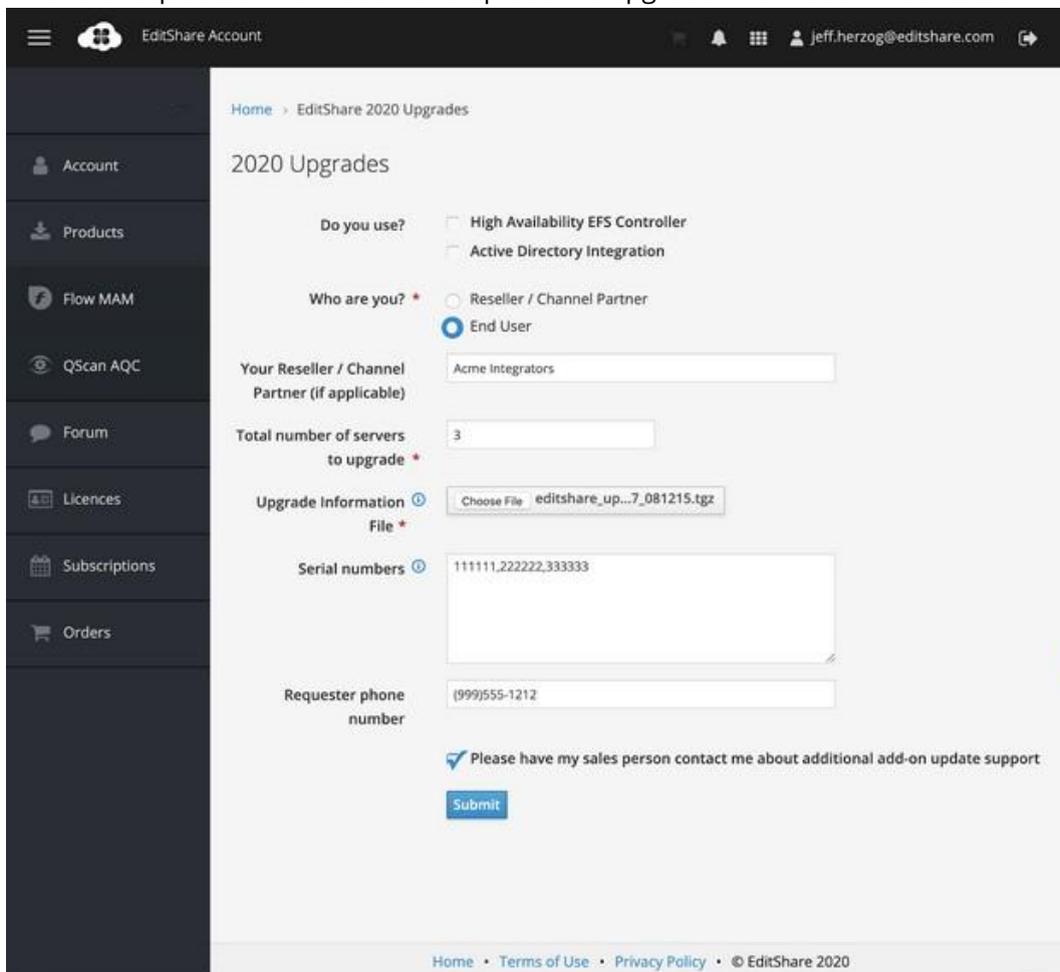


*NOTE: The email address used here is the one used to send you critical upgrade instructions, dongle updaters, and licenses.*

7. Click on the **EditShare 2020 Upgrades** button.



8. Enter the requested information and upload the upgrade information file created in Step 5.



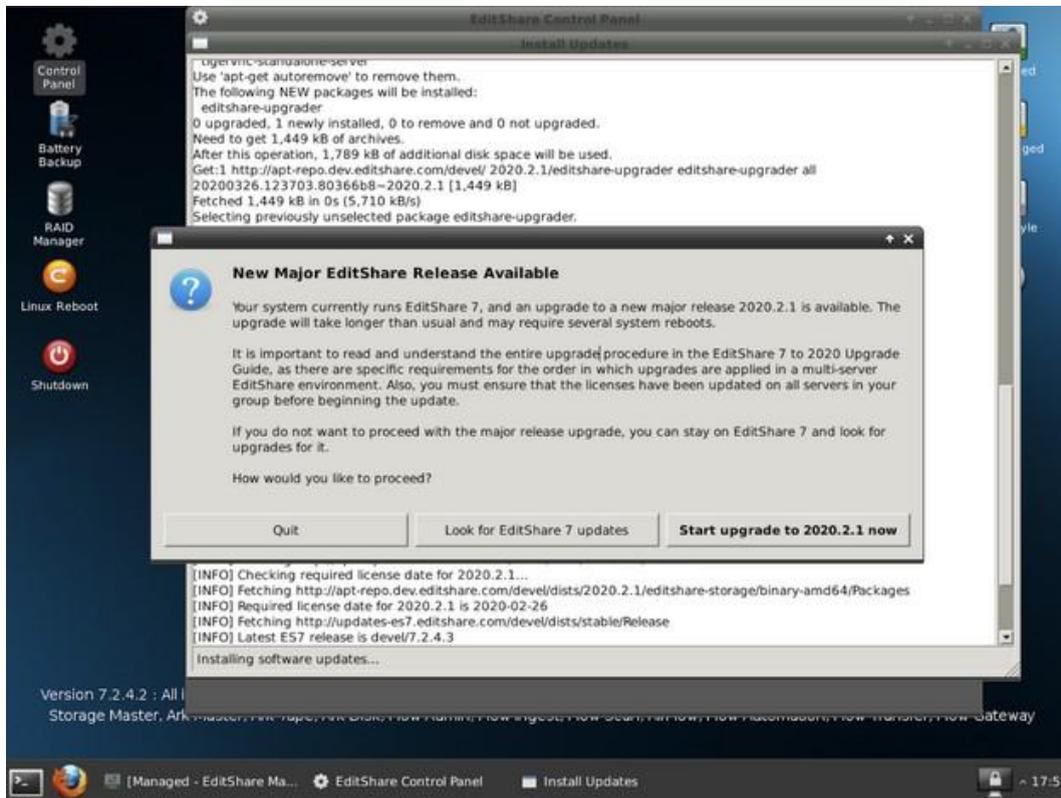
9. Check your email for an automated confirmation of receipt of your upgrade request. This email also contains information with next steps for the upgrade.

*NOTE: EditShare personnel will process your request and typically respond within one business week.*

10. Once you receive your upgrade information email, locate the dongle updater archive files sent to you by EditShare. Open this file up, and locate the correct dongle updater for each server in your group.

Notes:

1. The dongle updaters are named with the dongle ID's for each server, you must use the matching updater for each machine that matches its dongle ID.
  2. If you have Internet access on your servers, it may be easiest to log into your email directly from your browser on the server desktop and download the correct dongle updater for that machine to its SMB File Exchange. If not, you will have to mount the SMB File Exchange of each server in your group manually using the Windows Explorer or OS X Finder "Connect to Server" tool and a valid username and password of any user on the system.
11. On each server in your group, run "Install Updates" again. The servers should detect the dongle updater just placed there and offer to install the updater. Complete the installation of the dongle updaters on all servers in the group and ensure that they all complete successfully. Choose to delete the updaters once they complete successfully.
  12. Run **Install Updates** again. The following message informing you that a major update to 2020.x is available should be displayed. You may choose to start the upgrade or look for further EditShare 7 updates.



*NOTE: Use the online or offline update process as applicable depending on whether servers have Internet access or not.*

13. Optionally, choose to proceed on to Look for EditShare 7 updates, if available. Otherwise, continue on with the 2020 upgrade process. [See "Upgrading the EditShare Software With and Without Internet Access"](#).

# EditShare Upgrade Procedure

The following procedure is generally applicable for both minor or major upgrades of EditShare systems. Because it includes a major OS update, the EditShare 7 to 2020 upgrade will take longer than minor upgrades (up to one hour per server) and require several reboots during the process. Please make sure to plan accordingly.

The upgrade process is described in the following sections:

- ["Preparation"](#)
- ["Obtaining the Software Upgrade Package"](#)
- ["Recommended Order for Upgrading an EditShare System"](#)
- ["Upgrading the EditShare Software With and Without Internet Access"](#)

## Preparation

Before starting the Upgrade, make sure you:

1. Have a monitor, mouse, keyboard and network connection (optional) available.
2. It is recommended that the upgrade only be performed during a small maintenance window.
3. If your system includes Ark Disk or Ark Tape, verify that all backup and restore jobs have completed.
4. If your system includes Flow and Flow-related applications, verify that all Flow jobs have completed.
5. Verify that all servers are running the same version of software prior to attempting a system upgrade.
6. Determine if your system includes one or more server groups and which servers are in which groups.

## Obtaining the Software Upgrade Package

EditShare automatically pushes software updates to all Internet-connected EditShare servers, and a notification appears in the daily status report emails when updates are available.

If your EditShare servers have Internet access, updates are performed using the software pushed to each of your servers - see ["Recommended Order for Upgrading an EditShare System"](#).

If your EditShare server lacks Internet access, you can download and install an offline update package. To download the Offline Update Packages:

1. From a workstation with Internet access, go to <http://updates.editshare.com>
2. Enter your email address and password. If you do not have the password to access the Updates portal, contact EditShare Technical Support.
3. From the list of available versions, select EditShare 2020.2.x
4. View the ReadMe for the update you wish to install. Pay particular attention to the [Important Considerations Before Updating](#) section for any special pre-installation steps or potential caveats to the update process.
5. Download the offline updater file for the version you wish to install. Offline Updaters have a es7u file extension.
6. Mount each server's SMB File Exchange and copy the updater file to the Exchange. Do not place it in any folder on the Exchange - simply place it on the top level of the Exchange.

# Recommended Order for Upgrading an EditShare System

The following is the recommended order in which you should perform server update tasks. Depending on your configuration, one physical server might be playing several roles. You select these roles in the EditShare Role Assistant, as described in the Editshare Storage Administrator's Guide.

Make sure you install the same software version on all the servers at your site before using any of them with the new version. Do the following (ignoring steps for applications you did not purchase):

1. Update the Server Group Master server first. Make sure it has completely restarted before restarting other servers.

If an EditShare EFS 200, EFS 300, EFS 450, EFS SSD, EFS 40NL or EFS Field 2, or any combination of these products is present in your system, an EFS Metadata Server is the Server Group Master. Upgrade this server by following the procedure described in "[Upgrading the EditShare Software With and Without Internet Access](#)", before upgrading any other servers.



*The following step disconnects EFS client connections from the storage system. Review the 'HA Storage Considerations' if you cannot tolerate downtime for your EFS client connections.*

If your EFS system is configured for High Availability, it has two or more EFS Metadata Servers. Each must be upgraded before any other servers are upgraded:

- Choose one of the EFS Metadata Servers to upgrade. Follow the upgrade procedure, as described in the EditShare Administrator's Guide.
- Continue the upgrade process until all EFS Metadata Servers are upgraded.

If no EFS configurations are present, identify the storage server that is configured as the Server Group Master. Upgrade this server before upgrading any other servers.

If Ark backups are running while you update, you could lose data. Allow any running backup jobs to finish, then use the Troubleshooting > Stop Ark services option in Ark Assistant before you upgrade any Ark systems.

If your system is configured for HA Flow, it will contain two or more Flow Database servers. Contact EditShare Technical Support for instructions on how to proceed.

2. Update your ESA Expansion or EFS Storage Node servers, in turn, following the procedure described in "[Upgrading the EditShare Software With and Without Internet Access](#)".
3. Update your Ark Servers. If you have a separate Ark Master server, update it before other servers in your Ark Group.
4. If your system includes only one Flow Database server, update it.
5. Update other Flow-related servers.
6. On client workstations, install the EditShare Connect update and, where required, the Flow client software. These can be found on the Server Status web page.

# Upgrading the EditShare Software With and Without Internet Access

The EditShare software can be upgraded from either the Internet or when offline.

## Online Updates

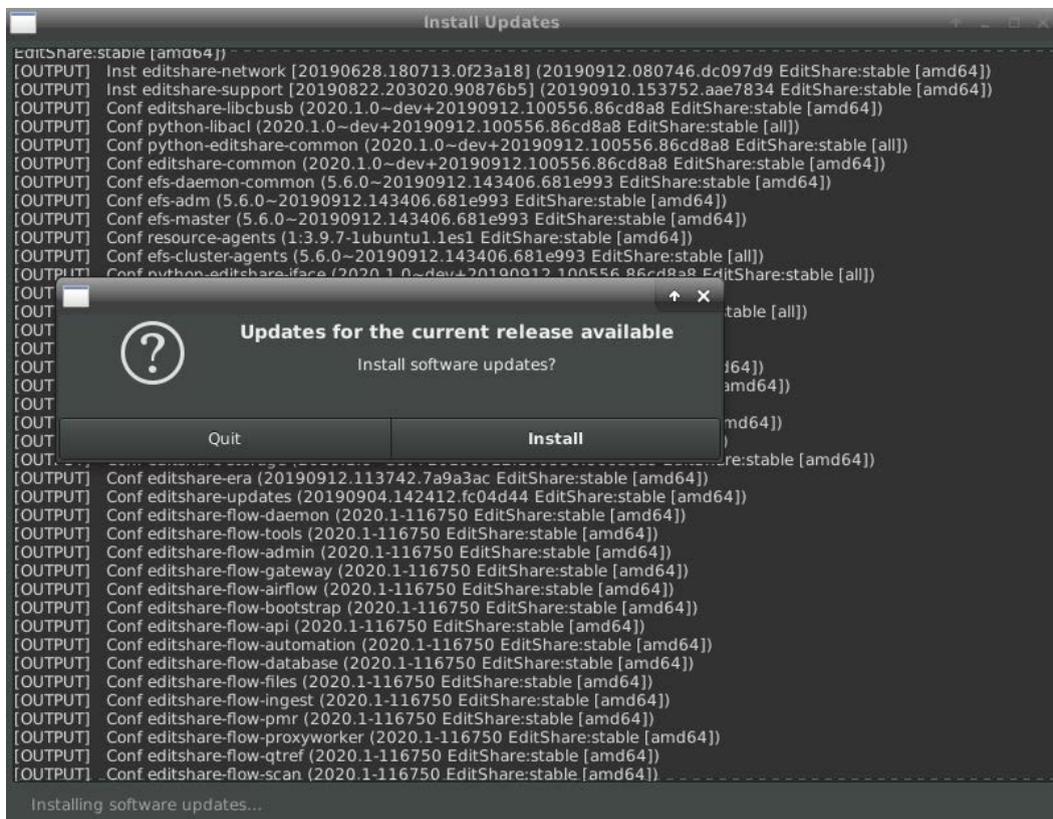
EditShare automatically pushes software updates to Internet-connected servers, and a notification appears in the daily status report emails when updates are available. To update a server with Internet access:

1. Open the Control Panel and double-click **Install Updates**.



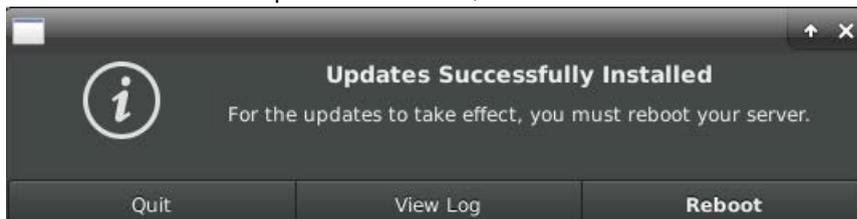
2. Enter the EditShare password.

- The Install Updates window opens, checks for updates, and prompts you to install any updates it finds.



*NOTE: If the server belongs to an EFS Server Group in which at least one node is missing or inaccessible, you cannot update your server. Contact EditShare Technical Support for assistance.*

- Click **Install**. The installation process starts.
- When the installation process finishes, click **Reboot** to restart the server.



*NOTE: You will be prompted for multiple reboots for HA masters, as well as for the quorum nodes. Perform a reboot each time when prompted.*

- When the server restarts, connect to it again and open the Control Panel.



- Double-click the **Role Assistant** icon.

The EditShare Role Assistant opens.

- Proceed through the Role Assistant.

For detailed information about using the Role Assistant, refer to the Configuring Server Host names, Server Groups, and Roles located in the EditShare Administrator's Guide.

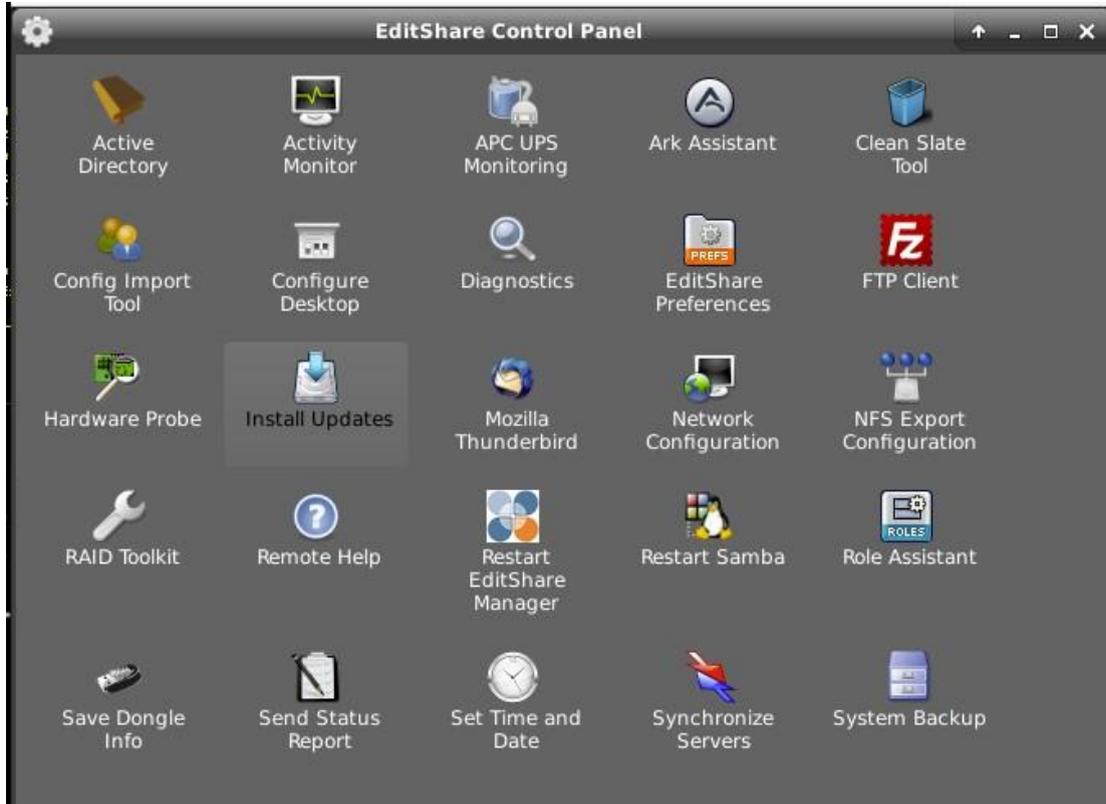
- Log into each ESA Expansion server or EFS Storage Node server (using a keyboard and monitor or a VNC viewer), open the Control Panel, and double-click the Install Updates icon to install the update on that server. Do not update more than one EFS Storage Node at a time.

10. Access the ReadMe file from the Server Status page (refer to the Viewing EditShare Status in a Web Browser section, located in the EditShare Administrator's Guide) for additional information about the update.

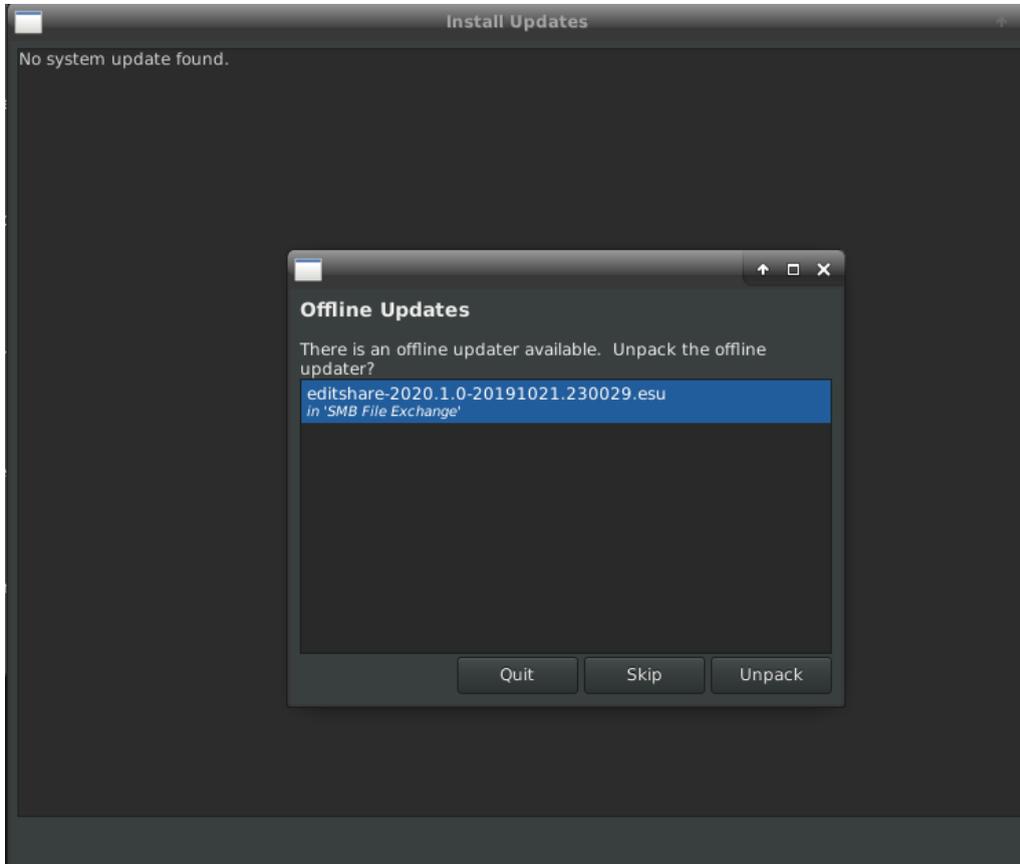
## Upgrading EditShare Servers

To upgrade each server as directed previously:

1. Open the EditShare Control Panel and double-click **Install Updates**.

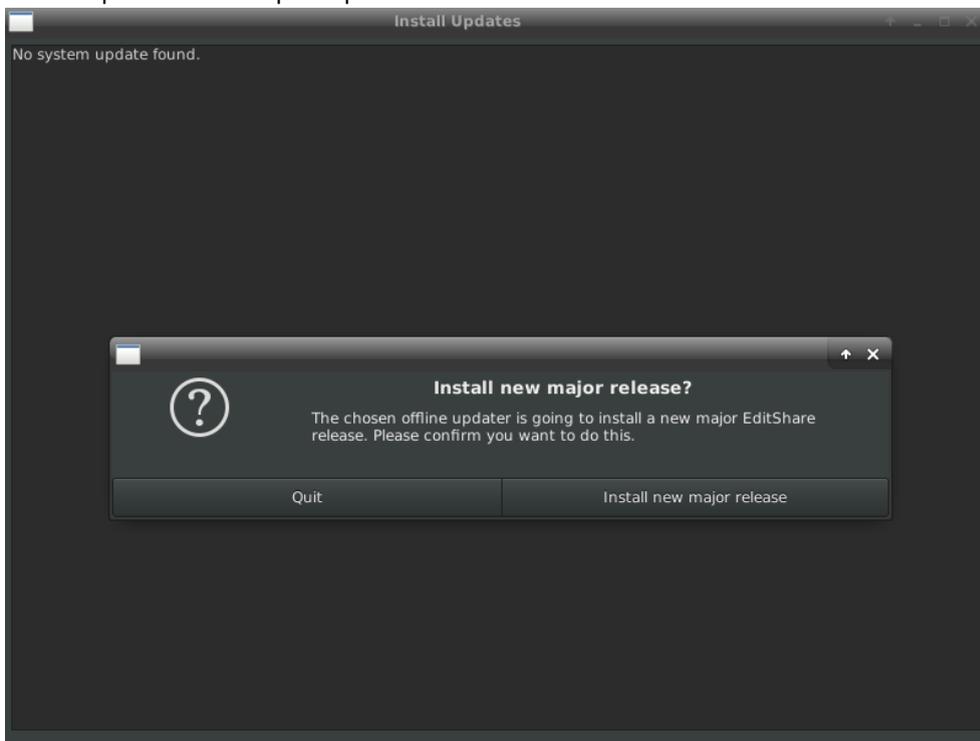


2. Enter the EditShare password. If there is an offline updater available you are prompted to unpack the updater.

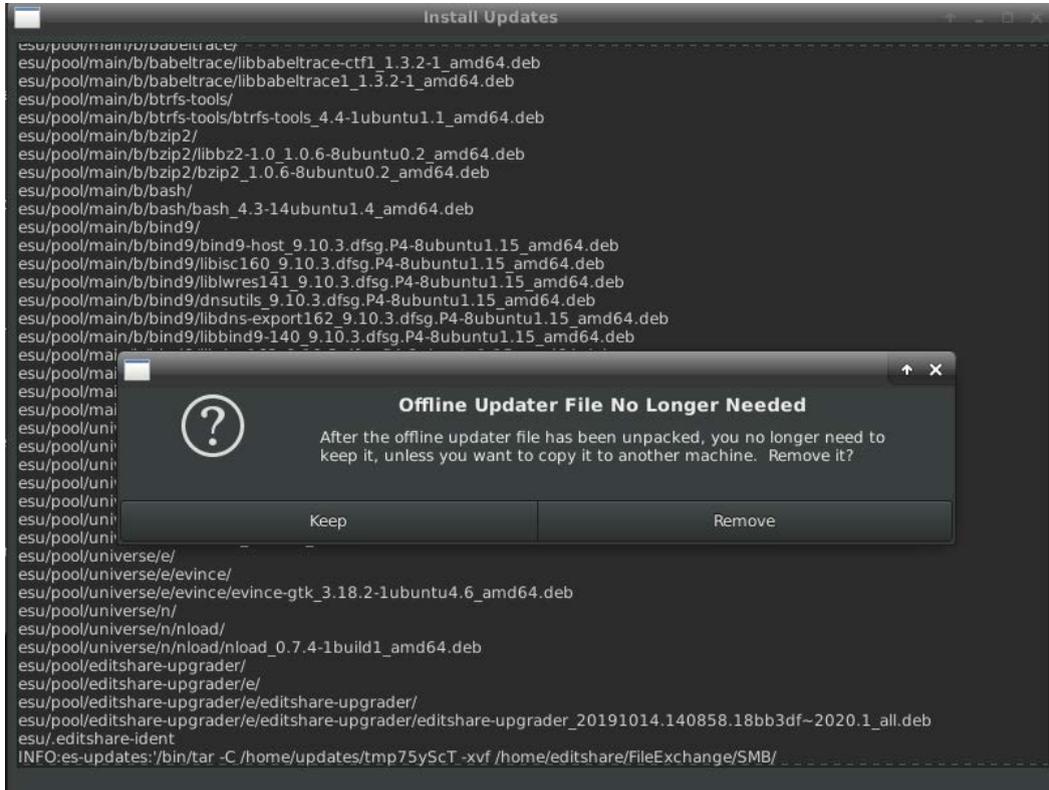


*NOTE: If the server belongs to an EFS Server Group in which at least one node is missing or inaccessible, you cannot update your server. Contact EditShare Technical Support for assistance.*

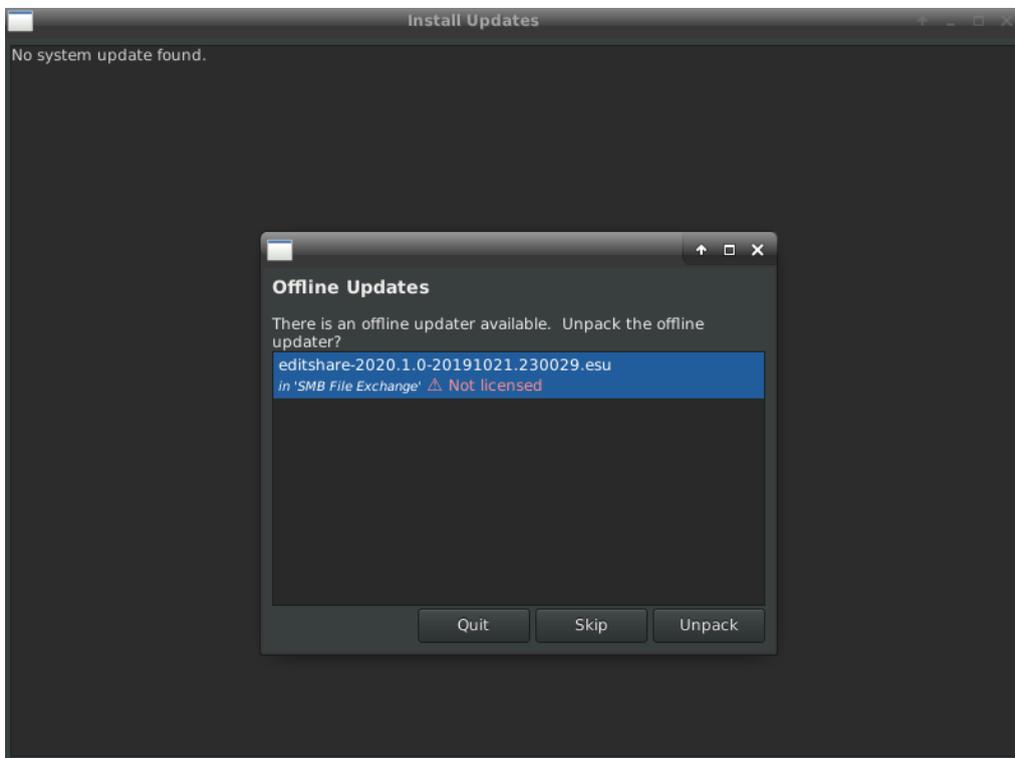
3. Click Unpack. You are prompted to install the new software.



4. Make sure all users have unmounted all spaces and logged out of their workstations, then click **Install new major release**. The installation process begins.
5. Once the Offline Updater File is downloaded, you are prompted to remove the updater.



6. Click **Remove**.
7. **(Optional)** If you are running an unlicensed system, you are prompted as follows.
8. Click **Unpack**. You are reminded that "Offline Updates are not covered by your support agreement".





13. Double-click the **Role Assistant** icon. The EditShare Role Assistant opens.
14. Proceed through the Role Assistant (refer to the Configuring Server Host names, Server Groups, and Roles located in the EditShare Administrator's Guide).
15. Log into each ESA Expansion server or EFS Storage Node server (using a keyboard and monitor or a VNC viewer), open the Control Panel, and double-click the Install Updates icon to install the update on that server.

**DO NOT update more than one EFS Storage Node at a time.**

16. View the ReadMe file from the Server Status page (refer to the Viewing EditShare Status in a Web Browser section, located in the EditShare Administrator's Guide) for additional information.