

opentext™

OpenText Software Delivery Management

Software version: 25.3

Upgrade Guide for Windows

Go to Help Center online

<https://admhelp.microfocus.com/octane/>



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Upgrade highlights

The following sections include specific highlights for upgrading from a given version.

General upgrade notes

Note the following general information when upgrading.

Category	Description
Backups	Make sure to have viable accessible backups of your relational database (either Oracle or SQL Server), Elasticsearch, and the repository folder on your file system.
Cluster	Make sure to stop services for all cluster nodes before upgrading.
STP/LTP Upgrade	<p>You can choose between two upgrade paths:</p> <ul style="list-style-type: none"> • Short-term path (STP). Upgrade to each new service pack (for example, from 25.1 to 25.3). If you choose this path, you need to go through all the interim service packs to upgrade to the following release. • Long-term path (LTP). Upgrade directly from one LTP release to the next (for example, from 16.2.100 directly to 24.3 and then to 25.1, the next LTP release), without having to upgrade to each of the interim service packs. <p>Refer to the release's upgrade path details below.</p>

Upgrade to 25.3

Category	Description
Upgrade path	This version is an STP service pack, meaning that you can only upgrade to 25.3 from 25.1. If you have not yet upgraded to version 25.1, upgrade now.
System requirements	<p>Elasticsearch 8.14 and above is required (up to the latest 8.x release).</p> <p>Recommended: 8.14</p>

Upgrade to 25.1 (LTP release)

Category	Description
Upgrade path	This version is an LTP release. You can upgrade to this version directly from 24.3 (the previous LTP release).
Harden the authentication	You must harden the authentication mechanism by replacing the existing hpssconfig.xml configuration file and storing the encryption key in a keystore file.

Upgrade to 24.3 (LTP release)

Note the following when upgrading to 24.3 (LTP release).

Category	Description
Upgrade path	This version is an LTP release. You can upgrade to this version directly from 16.2.100 (the previous LTP release), or from 24.1.
Java version	JDK 21 is required and must be installed before you upgrade. Before you install JDK 21, make a backup copy of the default Java keystore (cacerts) file from the existing JDK 11 installation. Then, after you install JDK 21, use the backup copy to replace the cacerts file that is provided with JDK 21. This avoids potential issues with the new cacerts file.
Elasticsearch version	For the supported and recommended Elasticsearch versions, refer to the support matrix . The version is validated on startup.
Elasticsearch re-index	The upgrade triggers Elasticsearch re-index. Indexes are re-indexed to version 8. When a space's post-upgrader is running, its Elasticsearch features are not all disabled during the entire process. Instead, features are in downtime only when an index they are dependent on is in the downtime phase of its re-indexing. <div style="border-left: 2px solid green; border-right: 2px solid green; padding: 5px; margin-top: 10px;"> <p>Note: Re-index must be completed successfully, or you cannot upgrade to the next release.</p> </div>
OData version	OData 4.0 is required. OData version 2.0 services will no longer work and will be fully replaced by OData version 4.0. To continue using OData, your connection must be updated to OData version 4.0. The OData 4.0 URI format is: <https://<server>/odata/v4/shared_spaces/<space_ID>/workspaces/<workspace_ID>/

Upgrade to 24.1

Note the following when upgrading to 24.1.

Category	Description
Upgrade path	This version is an STP service pack, meaning that you can only upgrade to 24.1 from 23.4. If you have not yet upgraded to 23.4, upgrade now.
Elasticsearch version	Elasticsearch 8.x is required. This is enforced on startup.

Upgrade to 23.4

Note the following when upgrading to 23.4.

Category	Description
Upgrade path	This version is an STP service pack, meaning that you can only upgrade to 23.4 from 16.2.100. If you have not yet upgraded to 16.2.100, upgrade now.

Upgrade procedure

This document describes how to upgrade an existing installation of an on-premises OpenText™ Software Delivery Management server on Windows.

This section includes:

- ["Prerequisites" on the next page](#)
- ["Upgrade procedure" above](#)
- ["Prepare for upgrade" on page 9](#)
- ["Step 1: Deploy the new version and start the server" on page 10](#)
- ["Step 2: Configure and upgrade cluster nodes" on page 11](#)
- ["Upgrade procedure" above](#)
- ["Step 3: Upgrade spaces" on page 12](#)
- ["Step 4: Verify that spaces upgraded successfully" on page 12](#)

Prerequisites

Before upgrading, note the following:

- **Elasticsearch.** Elasticsearch 8.14 and above is required (up to the latest 8.x release).
The version is validated on startup.

Recommended: 8.14

Prepare for upgrade

Before upgrading, review the following:

1. Check that all spaces are up to date, first in **Settings > Site > Spaces**, and then in **Settings > Site > POST UPGRADE JOBS**. Delete any spaces that you do not want to upgrade to prevent problems in future upgrades.
2. Verify that your server machine, and if relevant, all cluster nodes, meet all prerequisites.
This includes checking the supported versions for all third party tools such as Elasticsearch, and upgrading accordingly.
3. Stop the OpenText Software Delivery Management service on the server, and if relevant, on all cluster nodes.
4. Create backups of:
 - The repository located in **C:\Program Files\Octane\repo** (or in a cluster installation: \\MACHINE_NAME\REPO_NAME)
 - Existing configuration files including **octane.conf**
 - Your database
 - Elasticsearch
5. Take note of any special aspects of your configuration.

Special configuration	Recommendation
Did you install to a location other than C:\Program Files\Octane ?	Refer to the location that you used while upgrading.
Did your organization's DBA make changes to database schemas, such as adding tables or columns?	Define an exception file. The exception file instructs OpenText Software Delivery Management to ignore manual changes to the database schemas during installation. For details, see "Using exception files for manual database changes" in the Installation Guide for Windows .

- Before upgrading, remove all patches or hotfixes at **WEB-INF\lib** and **WEB-INF\classes**.

Example of a full path for Windows environment:

- C:\Octane\webapps\root\WEB-INF\classes
- C:\Octane\webapps\root\WEB-INF\lib

Step 1: Deploy the new version and start the server

- Download the OpenText Software Delivery Management package.
<https://sld.microfocus.com/mysoftware/download/downloadCenter>
- Download and deploy the new version of OpenText Software Delivery Management using:

```
setup.exe
```

- Update the configuration files in the **conf** and **osp-config** folders, as follows.

Item	Details
osp-config folder	<p>Perform the following steps regarding the <repository folder>/conf/osp-config folder:</p> <ol style="list-style-type: none"> If any of the files in the folder were manually modified, copy the changes into the corresponding files in the osp-config.new folder. Rename the osp-config folder to osp-config.old. Rename the osp-config.new folder to osp-config.
.conf files	<p>Perform the following steps regarding files in the <repository folder>/conf/ folder:</p> <ol style="list-style-type: none"> If any of the .conf files were manually modified, merge the changes into the corresponding .conf.new files. Rename all the .conf files to .conf.old. Rename all the .conf.new files to .conf.

- On the server machine, select **Start > OpenText Software Delivery Management > Start OpenText Software Delivery Management**.

5. Check the **C:\Program Files\octane\log\wrapper.log** file. If you do not see the "Server is ready!" message, correct the errors shown in the log.
 - If you encounter a recoverable error in the **wrapper.log** or **upgrade.log** files, fix the problem and restart the server to resume upgrade.
 - The following is required if you configured trust on the OpenText Software Delivery Management server, when connecting to a remote location such as the database server. If your Java trust store (<java_home>/jre/lib/security/cacerts) uses a non-default password, enter this password in **octane.conf** in the **java-default-trust-store-password** parameter.

 **Caution:** Do not use OpenText Software Delivery Management until you have completed "[Step 3: Upgrade spaces](#)" on the next page.

Step 2: Configure and upgrade cluster nodes

After the upgrade on the first node has completed successfully, you can upgrade the remaining nodes in a cluster.

To configure and upgrade cluster nodes:

1. Deploy the new version of OpenText Software Delivery Management to each node.
2. On each node, select **Start > OpenText Software Delivery Management > Start OpenText Software Delivery Management**.
3. Check the **C:\Program Files\octane\log\wrapper.log** file. If you encounter a recoverable error in the **wrapper.log** or **upgrade.log** files, fix the problem and restart the server to resume upgrade.

 **Caution:** Do not use OpenText Software Delivery Management until you have completed "[Step 3: Upgrade spaces](#)" on the next page.

Step 3: Upgrade spaces

After upgrading, log in as the site admin to upgrade each space.

To upgrade spaces:

1. In a browser, go to **<ServerURL>:<port>/ui/?site**.
2. Log in with the user name and password defined in the **octane.conf** file.

To upgrade all spaces at once, log in as the site admin.

3. Click **Site** and then click the **Spaces** tab.
4. Select one or more spaces and click **Upgrade**.

Upgrade is available only if the space needs to be upgraded.

5. Individual workspaces are upgraded in the background.

Note: Some data might be unavailable in trend graphs and other Elasticsearch-related features until all of the post-upgrade jobs have completed.

Step 4: Verify that spaces upgraded successfully

Verify that all spaces were upgraded successfully from the previous version. To verify that a space has been upgraded, check that:

- The space status is **Active** (or Inactive if it was previously deactivated).
- The space version is updated to the current version.

In addition, check that all post-upgrade jobs were completed in **Settings > Site > POST UPGRADE JOBS**.

Rollback

This section describes how to roll back after upgrading an on-premises OpenText Software Delivery Management server. This may be necessary if for some reason the upgrade fails or performance is slow.

Depending on when you want to roll back, there are different steps to perform.

Note: To roll back you need the pre-upgrade backups of all configuration files. This includes `octane.conf` from each node, and the folder in which you stored the repository, such as `C:\Program Files\Octane\repo`, or `<Repository folder>` for cluster configuration.

This section includes:

- ["After the upgrade's setup validation phase" below](#)
- ["After site schema has been upgraded" on the next page](#)
- ["After space schema has been upgraded" on page 15](#)
- ["After upgrade completed" on page 16](#)
- ["After upgrading cluster nodes" on page 16](#)

After the upgrade's setup validation phase

You can roll back after the upgrade's setup validation phase, whether it passed or failed.

If the upgrade reached setup validation, the following have been modified:

- Previously-deployed files
- Configuration files, including `octane.conf`

To roll back the deployed files, including `octane.conf`:

1. Uninstall the new OpenText Software Delivery Management version using Windows **Add/Remove Programs**.
2. Install the previous version, as described in the OpenText Software Delivery Management Help Center > Installation Guide for Windows (for the previous

version).

3. Revert to backups of configuration files, including **octane.conf**.
4. If necessary, copy back the folder in which you stored the repository, such as **C:\Program Files\Octane\repo**.
5. Start the OpenText Software Delivery Management service.

After site schema has been upgraded

You can roll back after the site schema has been upgraded.

If the upgrade upgraded the site schema, the following have been modified:

- Previously-deployed files
- Elasticsearch indexes
- Configuration files, including **octane.conf**
- The site schema

To roll back the site schema:

1. Stop the OpenText Software Delivery Management service.
2. Revert to a backup of the site schema.
3. Revert to a backup of Elasticsearch indexes.
4. Uninstall the new OpenText Software Delivery Management version using Windows **Add/Remove Programs**.
5. Install the previous version, as described in the OpenText Software Delivery Management Help Center > Installation Guide for Windows (for the previous version).
6. If necessary, copy back the repository folder located in **C:\Program Files\Octane\repo**, or <Repository folder> for cluster configuration.
7. Revert to backups of configuration files, including **octane.conf**.
8. Start the OpenText Software Delivery Management service.

After space schema has been upgraded

If the upgrade upgraded the space schema, the following have been modified:

- Previously-deployed files
- Elasticsearch indexes
- Configuration files, including **octane.conf**
- The site schema
- The space schema

Rolling back a single space is relevant after upgrade of a space failed. In this case, fixes are required depending on the cause of the failure, as seen in the logs and in the UI.

Note: This is only relevant if the space upgrade failed with **CORRUPTED** status. If it ended in **SUSPENDED** status, implement the fixes as instructed in the logs and in the UI, and then resume upgrade. No rollback actions are required.

To roll back changes to the space schema:

1. Revert to the backup of the space schema.
2. Revert to the backups of Elasticsearch indexes related to the specific space.
Space-specific indexes can be identified by the space logical name embedded in their name, using the pattern **mqm_{space logical name}_***.

Note: There are multiple Elasticsearch indexes for each space. Make sure to roll back all of them.

3. Revert to the repository backup of this specific space.
4. Fix what caused the upgrade to fail.
5. Run the following API to repair the space:

```
POST {octane server}/admin/shared_spaces/repair?ids={space_id}
```

Tip: To repair multiple spaces, provide the `space_ids` separated by commas.

6. Upgrade again.

After upgrade completed

If the upgrade completed successfully, the following have been modified:

- Previously-deployed files
- Configuration files, including `octane.conf`
- The site schema
- The space schema(s)
- Elasticsearch indexes
- Repository files

To roll back the entire upgrade:

1. Follow the procedure ["To roll back the site schema:" on page 14.](#)
2. Revert to backups of all space schemas.
3. Revert to backups of all Elasticsearch indexes.
4. Revert to backup of the previous repository.

After upgrading cluster nodes

If you upgraded additional cluster nodes, the following have been modified on the cluster nodes:

- Previously-deployed files
- Configuration files, including `octane.conf`

To roll back the previously-deployed files:

1. Uninstall the new OpenText Software Delivery Management version using Windows **Add/Remove Programs**.
2. Install the previous version on a node.

3. Revert to backups of configuration files, including **octane.conf**.
4. Deploy OpenText Software Delivery Management on each cluster node as described in the OpenText Software Delivery Management Help Center > Installation Guide for Windows (for the previous version).
5. Start the OpenText Software Delivery Management service on each cluster node.

Upgrade in Docker

This section describes how to upgrade OpenText Software Delivery Management in Docker.

This section includes:

- ["Get default configuration files from the docker image" below](#)
- ["Upgrade in Docker" on the next page](#)

Get default configuration files from the docker image

Before upgrading, make sure you have default configuration files from the new OpenText Software Delivery Management Docker image.

1. In Docker Desktop, select **Images**.
2. Locate the OpenText Software Delivery Management version you want to upgrade.
Note that only on-premises versions of OpenText Software Delivery Management are supported.
3. Click **Run** and open **Optional Settings**.
4. In **Container name**, enter a name of your choice.
5. In **Ports**, enter 8080 to use HTTP.
6. In **Volumes**, enter the following:

C:\OctaneDockerConfFiles\conf	for	opt/octane/conf
C:\OctaneDockerConfFiles\log	for	opt/octane/log
C:\OctaneDockerConfFiles\repo	for	opt/octane/repo

7. Click **Run** to run the Docker image for the first time.
The first run should fail with errors because OpenText Software Delivery Management has not been configured.
8. Open **C:\OctaneDockerConfFiles\repo**. The **conf-discover** folder contains the default OpenText Software Delivery Management configuration files. Copy them to a backup location.

Upgrade in Docker

This section describes how to start a new OpenText Software Delivery Management container using the configuration from a previous version, and upgrade the data.

1. Stop your OpenText Software Delivery Management container.
2. Back up your Oracle or MSSQL database.
3. Back up Elasticsearch.
4. Back up the conf and log folders (if mapped).
5. Back up the REPO folder, which includes the **conf-discover** and **storage** folders.
6. Download the new OpenText Software Delivery Management Docker image.
7. Overwrite the .xml files in the folder **conf-discover** (in the REPO folder) with the .xml files from the default configuration files for the new version. For details see ["Get default configuration files from the docker image" on the previous page](#).
8. Harden the authentication by storing the encryption key in a keystore file. The authentication mechanism uses a stronger encryption algorithm.

You can provide your own keystore or use the automatically generated keystore.

- If you use your own keystore, only BKS format is supported, and the keystore should contain a 256-bit AES key.

Add the following information to the **octane.conf** file:

```
hp-sso{
    # the entry name inside keystore
    keystore-cipher-alias = "<alias>"
    # password to open the key inside keystore
    keystore-cipher-alias-password = "<alias password>"
    # Absolute path to the keystore
    keystore-location = "<absolute keystore path>"
}
```

```
# password to open the keystore
keystore-password = "<keystore password>"
}
```

- If you do not provide a keystore, a keystore is automatically generated during the first server start up and placed in the configuration folder.

Note:

- You can define a subset of parameters, such as the passwords. The defined parameters are used and any missing parameters are generated.
- If you do not define all the parameters, the keystore path is overridden with the path to the generated keystore.

9. Update the configuration files in the **conf** and **osp-config** folders, as follows.

Item	Details
osp-config folder	<p>Perform the following steps regarding the <repository folder>/conf/osp-config folder:</p> <ol style="list-style-type: none"> If any of the files in the folder were manually modified, copy the changes into the corresponding files in the osp-config.new folder. Rename the osp-config folder to osp-config.old. Rename the osp-config.new folder to osp-config.
.conf files	<p>Perform the following steps regarding files in the <repository folder>/conf/ folder:</p> <ol style="list-style-type: none"> If any of the .conf files were manually modified, merge the changes into the corresponding .conf.new files. Rename all the .conf files to .conf.old. Rename all the .conf.new files to .conf.

10. Click **Run**.
11. Open **Optional Settings**, and define the following:
 - The new container name.
 - The identical container configuration as your current OpenText Software Delivery Management container configuration.

This means that the ports, and the mapping of the conf, log, and repo mount folders should be the same in the new container as your current container.

12. Run the new OpenText Software Delivery Management container configuration.
13. Validate that the container works by checking the container's **Log** tab, or the **wrapper.log** and **octane.log** files in the mapped log folder.
14. Continue with the regular space upgrade procedure, as described in "[Step 3: Upgrade spaces](#)" on page 12.

Note: If you need to roll back the upgrade:

- If the new OpenText Software Delivery Management container failed to run, restore configuration files in the conf-discover folder (in the REPO folder), and run the previous version of the OpenText Software Delivery Management container.
- If the new OpenText Software Delivery Management container successfully upgraded the site, restore backups (database, Elasticsearch, and REPO folder), and run the previous version of the OpenText Software Delivery Management container.

Install a patch

This section describes how to install a hotfix patch, without upgrading OpenText Software Delivery Management.

1. Stop the OpenText Software Delivery Management service.
2. Create backups of:
 - The repository
 - Existing configuration files, including **octane.conf**
 - Your database
 - Elasticsearch
3. Run the installer file containing the fix as you would do for a regular upgrade.
4. Start the OpenText Software Delivery Management service and validate that the issue is fixed.

There is no need to upgrade the spaces.