opentext™

OpenText Software Delivery Management

Software version: 26.1

Upgrade Guide

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	You can choose between two upgrade paths: • **Short-term path (STP)**. Upgrade to each new service pack (for example, from 25.3 to 26.1). 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 25.1 directly to 26.1), without having to upgrade to each of the interim service packs. Refer to the release's upgrade path details below.

Upgrade to 26.1

Category	Description
Upgrade path	This version is an LTP release. You can upgrade to this version directly from 25.1 (the previous LTP release), or from 25.3.

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	Elasticsearch 8.14 and above is required (up to the latest 8.x release). **Recommended:** 8.14

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 **hpssoconfig.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.

Category	Description
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. **Note:** Re-index must be completed successfully, or you cannot upgrade to the next release.
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 section describes how to upgrade an existing installation of an on-premises OpenText™ Software Delivery Management server.

Upgrade paths

You can choose between two upgrade paths:

- **Short-term path (STP)**. Upgrade to each new service pack (for example, from 25.3 to 26.1). 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 25.1 directly to 26.1), without having to upgrade to each of the interim service packs.

This version is an LTP release. You can upgrade to this version directly from 24.3 (the previous LTP release).

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. For details, see the Installation Guide.
3. Stop the **octane** service on the server and on all cluster nodes, if relevant.
4. Create backups of:
   - The repository

OS	Path
Linux	/opt/octane/repo (default)
Windows	C:\Program Files\Octane\repo (default)

   - Existing configuration files, including **octane.conf**
   - Your database
   - Elasticsearch
5. Take note of any special aspects of your configuration.

Special configuration	Recommendation
Linux: Did you use a different user, other than the **octane** user, to install? (Linux)	If you did, the user is set in the **OCTANE_USER** environment variable. Use this user to upgrade.
Did you install to a location other than the default?	**Linux default:** /opt/octane **Windows default:** C:\Program Files\Octane Refer to the actual location that you used while upgrading.

Special configuration	Recommendation
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.
Linux: What sudoer user did you use to install?	Use the same sudoer user that was used for installation to upgrade.

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

   Example of full paths:

OS	Example
Linux	/opt/octane/webapps/root/WEB-INF/classes /opt/octane/webapps/root/WEB-INF/lib
Windows	C:\Program Files\Octane\webapps\root\WEB-INF\classes C:\Octane\webapps\root\WEB-INF\lib

Step 1: Deploy the new version and start the server

1. **Download the OpenText Software Delivery Management package**

   https://sld.microfocus.com/mysoftware/download/downloadCenter

2. **Download and deploy the new version**

OS	Command
Linux	rpm -Uvh --prefix *<install-path><name of new rpm file>* If the rpm command fails on Java version, see https://softwaresupport.softwaregrp.com/doc/KM000023838.
Windows	setup.exe

3. **Update the configuration files**: If any manual changes were made to the configuration files, follow the steps below to ensure that they are preserved during the upgrade process:

Files	Details
osp-config folder	If any of the files in the **<repository folder>/conf/osp-config** folder were manually changed, do the following steps: a. Copy the changes into the corresponding files in the **osp-config.new** folder. b. Rename **osp-config** to **osp-config.old**. c. Rename **osp-config.new** to **osp-config**.
Other configuration files	If any of the configuration files in the **<repository folder>/conf/** folder were manually changed, do the following steps. These include any files with **.conf** extension and also files that have counterparts with the **.new** extension. a. Copy the changes into the corresponding **.conf.new** or **.new** files. b. Rename all configuration files to **.conf.old** or **.old**. c. Remove the **.new** extension from all the configuration files.

4. **Start the server:**

OS	Command
Linux	Run `systemctl start octane`
Windows	On the server machine, go to: **Start > OpenText Software Delivery Management > Start OpenText Software Delivery Management**

5. **Check the log file**

   Verify the **wrapper.log** file:

OS	Path
Linux	/opt/octane/log/wrapper.log
Windows	C:\Program Files\octane\log\wrapper.log

   - If you do not see the message **Server is ready!**, correct the errors shown in the log.
   - If you encounter a recoverable error in **wrapper.log** or **upgrade.log**, fix the problem and restart the server to resume the upgrade.
   - If your Java truststore (**<java_home>/jre/lib/security/cacerts**) uses a non-default

password, enter this password in **octane.conf** under the parameter:

```
java-default-trust-store-password
```

Caution: Do not use OpenText Software Delivery Management until you have completed "Step 3: Upgrade spaces" on the next page.

Step 2: Upgrade cluster nodes

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

To upgrade cluster nodes:

1. Deploy the new version of OpenText Software Delivery Management to each node.
2. On each node, start the server:

OS	Command
Linux	Run `systemctl start octane`
Windows	On the server machine, go to: **Start > OpenText Software Delivery Management > Start OpenText Software Delivery Management**

3. Check the **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.

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 including **octane.conf** from each node.

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. **Revert to the previous version:**

OS	Steps
Linux	Run: `rpm -Uvh --oldpackage <filename>`
Windows	a. Uninstall the new OpenText Software Delivery Management version using Windows **Add/Remove Programs**. b. Install the previous version, as described in the OpenText Software Delivery Management Help Center > Installation Guide for Windows (for the previous version).

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

OS	Command
Linux	Run `systemctl start octane`
Windows	Start the OpenText Software Delivery Management service.

After a 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
- The site schema (database)
- Elasticsearch indexes
- Configuration files, including **octane.conf**

To roll back the site schema:

1. **Stop the server:**

OS	Steps
Linux	Run `systemctl stop octane`
Windows	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. **Revert to the previous version:**

OS	Steps
Linux	Run: `rpm -Uvh --oldpackage <`*filename*`>`
Windows	a. Uninstall the new OpenText Software Delivery Management version using Windows **Add/Remove Programs**. b. Install the previous version, as described in the OpenText Software Delivery Management Help Center > Installation Guide for Windows (for the previous version).

5. If necessary, copy back the folder in which you stored the repository, such as **C:\Program Files\Octane\repo**.
6. Revert to backups of configuration files, including **octane.conf**.
7. **Start the server:**

OS	Command
Linux	Run `systemctl start octane`
Windows	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 15.
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 cluster nodes:

1. **Revert to the previous version on each cluster node**

OS	Steps
Linux	Run: `rpm -Uvh --oldpackage <filename>`
Windows	a. Uninstall the new OpenText Software Delivery Management version using Windows **Add/Remove Programs**. b. Install the previous version on each cluster node as described in the Installation Guide for the previous version.

2. Revert to backups of configuration files, including **octane.conf**, on each cluster node.
3. **Start the server on each cluster node:**

OS	Command
Linux	Run `systemctl start octane`
Windows	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

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

1. Download the new OpenText Software Delivery Management Docker image.
2. Run the Docker image:

Linux

```
docker run -d -p 8080:8080 -v /opt/octane_docker_config_
files/conf:/opt/octane/conf -v /opt/octane_docker_config_
files/log:/opt/octane/log -v /opt/octane_docker_config_
files/repo:/opt/octane/repo --name alm_octane_config_files
lifecyclemanagement/octane:<version_number>
```

Windows

a. In Docker Desktop, select **Images**.

b. Locate the OpenText Software Delivery Management version you want to upgrade.

   Note that only on-premises versions of OpenText Software Delivery Management are supported.

c. Click **Run** and open **Optional Settings**.

d. In **Container name**, enter a name of your choice.

e. In **Ports**, enter 8080 to use HTTP.

f. 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
```

g. Click **Run** to run the Docker image for the fist time.

The first run should fail with errors because OpenText Software Delivery Management has not been configured.

3. Go to the mapped repo folder. The **conf-discover** folder contains the default configuration files. Copy them to a backup location.

OS	Path
Linux	/opt/octane_docker_config_files/repo
Windows	C:\OctaneDockerConfFiles\repo

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.

   Note that only on-premises versions of OpenText Software Delivery Management are supported.
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. When upgrading from OpenText Software Delivery Management 24.1 or earlier, you must perform the following:

Item	Details
osp-config folder	Replace the **../repo/conf/osp-config/** folder with the **../repo/conf/osp-config.new/** folder. To do this: a. Make a back up of the existing **../repo/conf/osp-config** folder. b. Rename the **../repo/conf/osp-config.new** folder to **../repo/conf/osp-config**.
sso.conf file	Merge the existing **sso.conf** file with the **sso.conf.new** file.

10. Run the Docker image with the following command, using the identical container configuration:

Linux

```
docker run -d -p 8080:8080 -p 8443:8443 -v [your-path-to-CONF-
folder]:/opt/octane/conf -v [your-path-to-LOG-
folder]:/opt/octane/log -v [your-path-to-REPO-
folder]:/opt/octane/repo --name alm_octane_<version_number>
lifecyclemanagement/octane:<version_number>
```

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.

Windows

a. Click **Run**.

b. Open **Optional Settings**, and define the following:

   i. The new container name.

   ii. 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.

c. Run the new OpenText Software Delivery Management container configuration.

11. 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.

12. Continue with the regular space upgrade procedure, as described in "Step 3: Upgrade spaces" on page 13.

> **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.

Patch installation

This section describes how to install a patch on an existing installation of an on-premises OpenText™ Software Delivery Management server.

A patch is a minor release that includes fixes for defects and security vulnerabilities. It does not include new features or database schema changes.

Prerequisites

Before installing a patch, review the following:

1. Stop the **octane** service on the server, and if relevant, on all cluster nodes.
2. Create backups of:
   - The repository
   - Existing configuration files, including **octane.conf**
   - Your database
   - Elasticsearch

Install the patch

1. Download the OpenText Software Delivery Management patch package.
2. Deploy the package for the new version of OpenText Software Delivery Management:

OS	Command
Linux	rpm -Uvh --prefix *<install-path><name of new rpm file>*
Windows	setup.exe

3. Start the OpenText Software Delivery Management server:

OS	Command
Linux	Run `systemctl start octane`

Windows	On the server machine, go to: **Start > OpenText Software Delivery Management > Start OpenText Software Delivery Management**

4. Check the **wrapper.log** file. If you encounter a recoverable error in the **wrapper.log** or **upgrade.log** files, fix the problem and restart the server.

OS	Path
Linux	/opt/octane/log/wrapper.log
Windows	C:\Program Files\octane\log\wrapper.log