Quick Start Guide for AWS (Windows)

Arcserve® Live Migration



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Chapter 1: Introduction

Arcserve Live Migration simplifies the process of migrating data, applications, and workloads. It allows you to move virtually any type of data or workload to cloud, on-premises, or remote locations, such as the edge, with support for virtual, cloud and physical systems. An assured validation of the migrated workload completes the process of enabling customers to continue operations without risks of losing data.

You can easily migrate:

From	То
On-premises	Cloud
Cloud	Cloud
Cloud	On-premises
Physical	Physical
Physical	Virtual
Virtual	Virtual

Live Migration provides the following:

Unlimited use of the Arcserve Live Migration technology enhanced by Arcserve Continuity Suite.

Every source that you plan to migrate requires 1 license.

Seamless access to the entitled software for a period of 90-days.

On expiry of the license, new scenarios cannot be started, but the existing ones will continue.

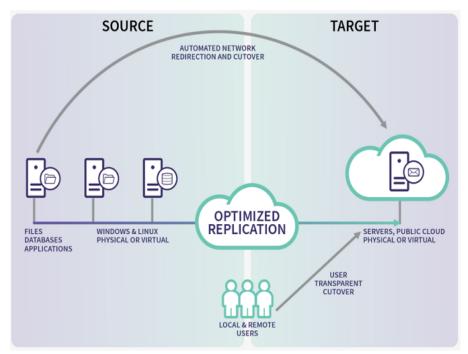
For each license, Live Migration provides free of cost technical assistance for two incidents.

Note: Arcserve currently does not provide professional services to help you with implementation, deployment, and any other migration services.

Overview

Arcserve Live Migration automatically synchronizes files, databases, and applications on Windows and Linux systems with a second physical or virtual environment located on-premises, at a remote location, or in the cloud. After synchronization, changes are replicated in real time to ensure the source and target are in sync prior to the migration.

Encryption enables secure data transfers between local systems and remote locations without the need for a VPN, and automated network redirection makes the switchover process seamless with push-button cutover to ensure availability to the new production environment.



Your typical migration process includes the following steps:

Install Components on Master

Configure Amazon EC2

Provision VA on Amazon EC2

Install Engine on Replica

Create Full System Scenario for Amazon EC2

Perform Assured Recovery Testing

Perform Cut off/Switchover

Terminologies

This document uses the following terminologies:

Virtual Appliance: This is a virtual machine that acts as the Replication/Migration proxy server (install the Arcserve Continuity Suite Engine here and deploy on the hypervisor/cloud destination). If you are using a Hyper-V virtual platform, the Virtual Platform Hostname/IP field is disabled (appears dim).

Control Service: Control Service is a management component of Arcserve Continuity Suite. It is a Windows based service that must be deployed first. It hosts web-based information portal and rich Management UI, which is used for creating and monitoring migration scenarios.

Engine: Replication Engine is a background service that moves data from source to destination during migration. Install the Engine on any source that you plan to migrate. You may use the Remote Installer feature to mass deploy Engines.

FSHA: Full System High Availability (FSHA) is a scenario type that allows replication and fail-over of full server. This scenario type is used for migrating full systems.

Management UI: A UI that you use for creating and managing replication/migration scenarios. The Control Server hosts the Management UI. To start the Management UI, log into the Management Portal.

Master (Source): A host/computer that you want to migrate. You can migrate the whole system using the full system migration scenario or the host containing the applications.

PowerShell: Arcserve offers PowerShell Command Line Interface as an alternative if you do not want to manage the replication process using the Manager graphic user interface.

Replica (Target): In case of full system migration, VA (replication proxy) serves as a Replica. Upon completion, VA spins off new VM containing replicated disks or data. For application-based scenarios, the VA hosts and runs replicated application and data.

Scenario: A configuration unit describing migration job/task. You can create and manage scenarios using rich management GUI or PowerShell CLI. Scenarios contain key information about replication/migration jobs to be performed.

Switchover: The cutover to the newly migrated workload from where the operations can begin.

Synchronization: The process of making the set of files identical on the Master and Replica servers. It is usually necessary to synchronize the Master and Replica as the initial step of a replication/migration scenario.

Virtual Platform Host: The machine that hosts the Appliance VM, which acts as a Replica server. Based on the scenario type, it acts as a local hypervisor or cloud platform (AWS or Azure).

Requirements

Before you migrate, make sure to meet the following requirements:

Arcserve Live Migration supports both Windows and Linux operating systems for Full System migration scenarios. If the source host is Windows, then the Virtual Appliance (VA) must be Windows; if the source host is Linux, then the VA must be Linux as well.

Note: Before deploying Arcserve Live Migration scenarios, see <u>Limitations</u> in Release Notes.

When migrating workloads to AWS, corresponding AWS cloud credentials must be registered in Arcserve Continuity Suite Management UI.

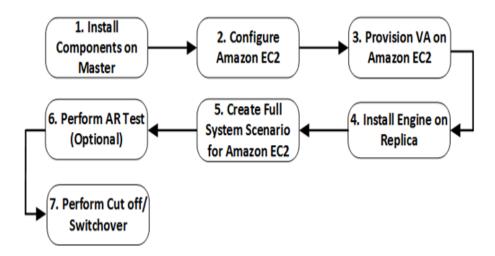
Software Compatibility

For more information about compatibility, see **Compatibility Matrix**.

Note: Make sure that your source OS and application versions are explicitly listed on the support matrix.

Chapter 2: Perform Live Migration

The following flowchart provides the Live Migration process given in this document:



Install Components on Master

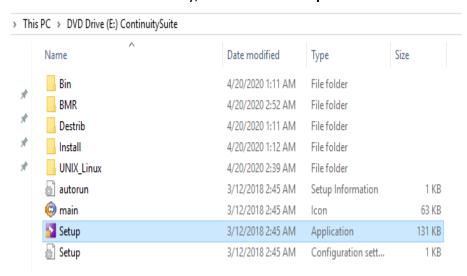
This section describes how to install the Arcserve Continuity Suite Control Service and Engine on Master.

Installing Control Service

The Control Service component functions as the single-point-of-control that contains the entire dataset of the existing scenarios. Control Service communicates with the Engines and the Managers. It is responsible for the management of all scenario-related-tasks, such as creation, configuration, monitoring, and running of the scenarios.

To install Control Service, follow these steps:

- 1. Download RHA iso for Continuity Suite, and then open the folder.
- 2. From the mounted directory, double-click **Setup**.



3. On the Arcserve Continuity Suite installation wizard, click **Install Components**.

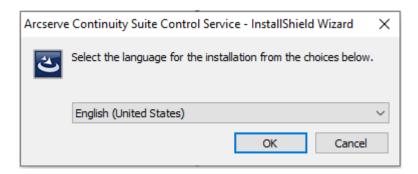


The wizard displays the components.

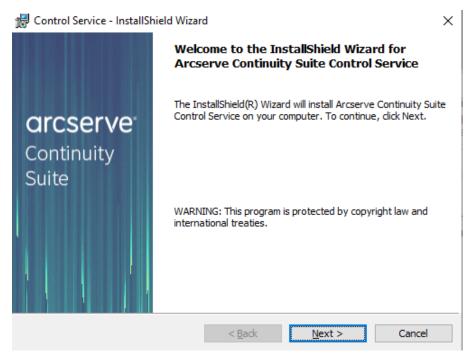
4. Click Install Control Service.



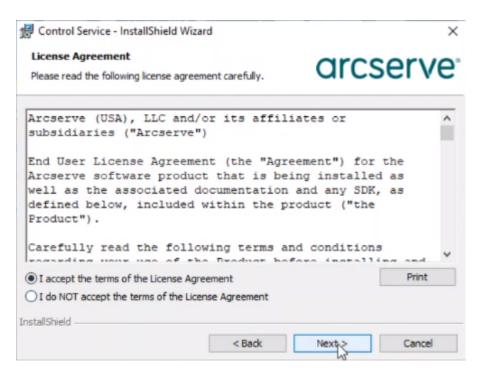
5. On the Arcserve Continuity Suite Control Service - InstallShield Wizard, from the drop-down list, select your preferred language, and then click **OK**.



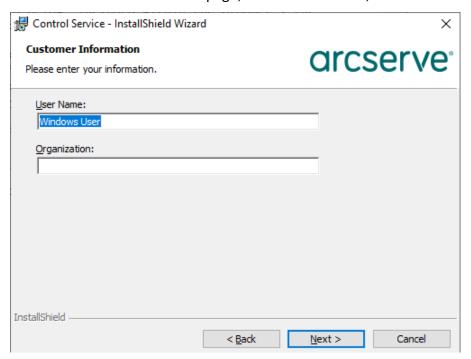
After the initial process is complete, the Welcome page appears.



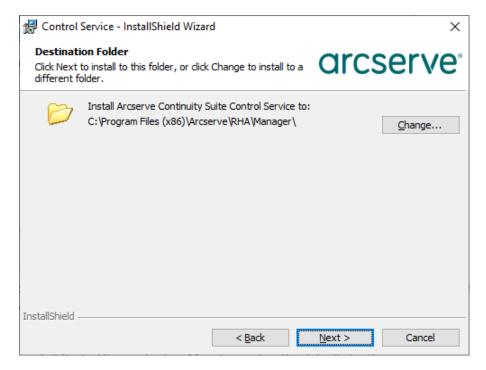
- 6. Click Next.
- On the License Agreement page, read the terms of the License Agreement, select the I accept the terms of the License Agreement option, and then click Next.



8. On the Customer Information page, enter a user name, and then click **Next**.



9. On the Destination Folder page, retain the defaults, and then click **Next**. To change the destination folder, click **Change**.

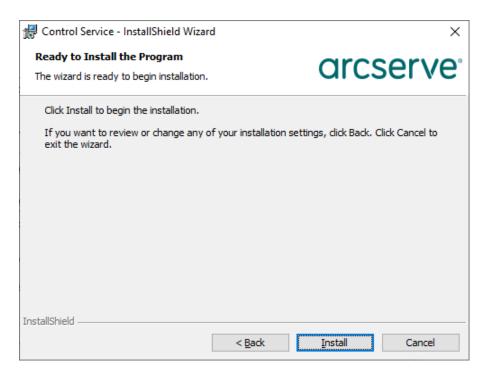


Note: The default installation directory is: *C:\Program Files (x86)\Arc-serve\RHA\Manager*. All executables, DLLs and configuration files are located within the INSTALLDIR.

10. For the upcoming screens, retain the defaults, and then click **Next** to continue.

Note: For more information about how to configure SSL Configuration, Service Logon Information, and Control Service Role, see <u>Install a Control Service</u> for a Standard Operation.

11. On the Ready to Install the Program page, click **Install**.



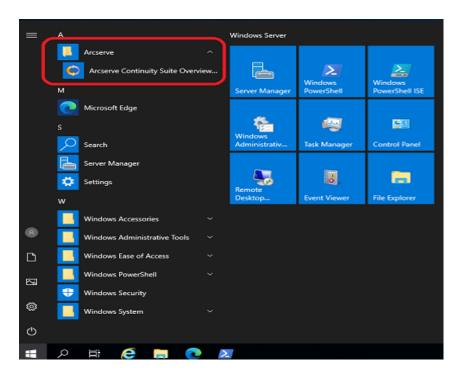
Note: Click the **Back** button to return to the previous pages and change any configuration as needed.

12. After installation is complete, click **Finish** to close the wizard.

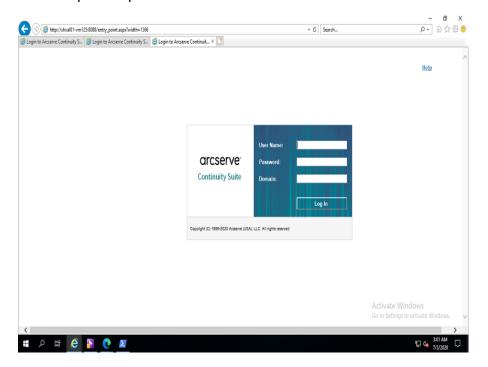


The Arcserve Continuity Suite Control Service is installed.

13. To open Control Service in a web portal, go to **Start > Arcserve > Arcserve Continuity Suite Overview**.



The web portal opens in a browser.

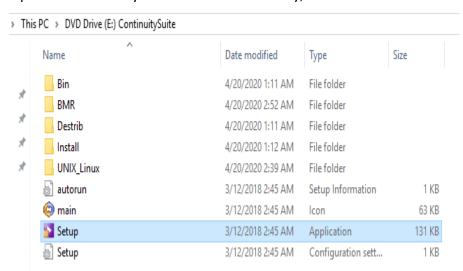


Installing Engine

Make sure that the Engine component, which is a service, is running before you start any scenario. Install Engine on every server participating in any given scenario such as the Master (source) and Replica (target) hosts. Each Engine supports both Master and Replica functionality in addition to both Replication and High Availability scenarios. It may participate in multiple scenarios and serve in a different role for each scenario. You can install Engines one by one locally on each host, or concurrently through a remote installer on numerous hosts. You can also install it during scenario creation if needed.

To Install Engine, follow these steps:

- 1. Download RHA iso for Continuity Suite, and then open the folder.
- 2. Open the Continuity Suite mounted directory, and then double-click **Setup**.



3. On the Arcserve Continuity Suite installation wizard, click **Install Components**.

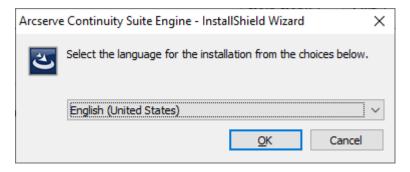


The wizard displays the components.

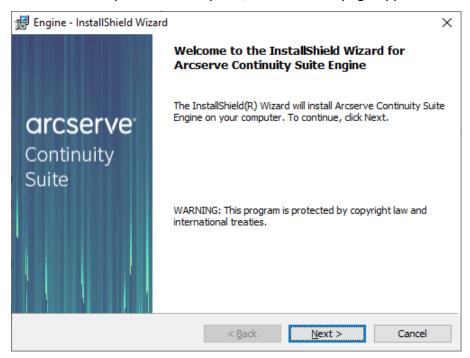
4. Click Install Engine.



5. On the Arcserve Continuity Suite Engine - InstallShield Wizard, from the drop-down list, select your preferred language, and then click **OK**.



After the initial process is complete, the Welcome page appears.

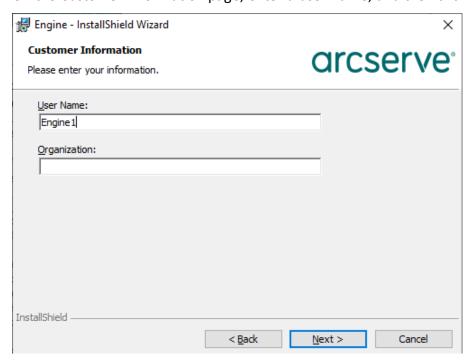


- 6. Click Next.
- On the License Agreement page, read the terms of the License Agreement, select the I accept the terms of the License Agreement option, and then click Next.

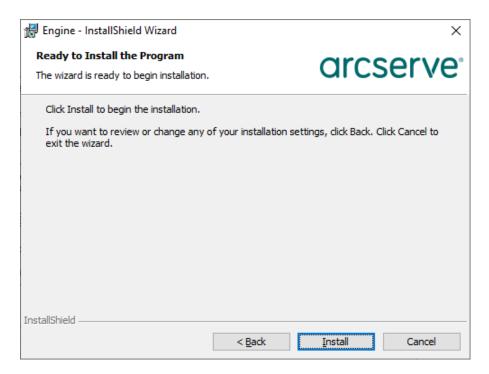


Note: If an Engine from the previous version exists on your server, the information about the previous version page appears with an option to uninstall the Engine.

8. On the Customer Information page, enter a user name, and then click **Next**.

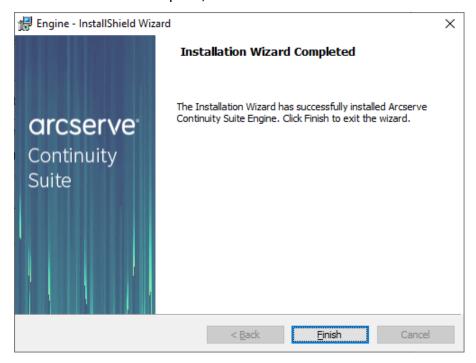


- 9. For the upcoming screens, retain the defaults, and then click **Next** to continue.
- 10. On the Ready to Install the Program page, click **Install**.



Note: Click the **Back** button to return to the previous pages and change any configuration as needed.

11. After installation is complete, click **Finish** to close the wizard.



The Arcserve Continuity Suite Engine is installed.

Configure Amazon EC2

The Arcserve Replication and High Availability VA virtual machine resides in VPC (default or customized), and the Master servers are replicated to that VPC.

Note: To set up VPC, subnets, IP gateway, and so on according to your DR network requirements, see the Amazon online help.

Consider the following before deploying EC2-based Full System scenarios:

Arcserve Replication and High Availability needs the Access Key ID and Secret Access Key of Amazon EC2 account to work with EC2. You can get the required information from your administrator.

The Amazon EC2 user in Arcserve Replication and High Availability should have required permissions. For more information, see the <u>Arcserve KB</u> <u>article</u>.

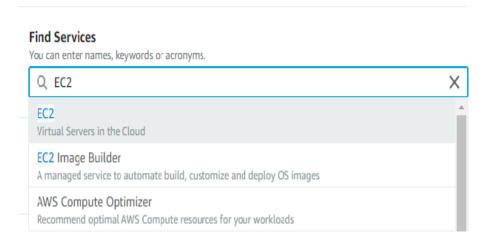
If you want Arcserve Replication and High Availability to start the DR VM with a specific public IP address, pre-allocate such Elastic IPs in the Amazon EC2 web portal. Later in the Network Mapping dialog of Continuity Suite Scenario, you can select a public IP from the existing Elastic IP addresses for the DR VM.

Provision VA on Amazon EC2

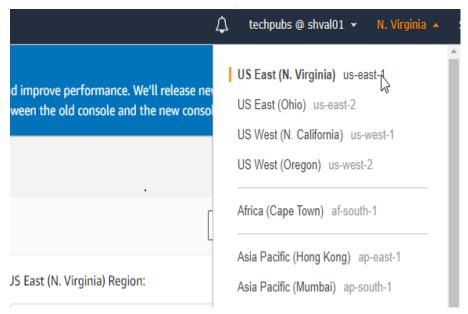
The Continuity Suite Virtual Appliance (VA) is a VM running on the virtualization platform or cloud where you want to replicate the Master servers. The VA acts as Replica in a Continuity Suite Full System scenario. The Master server is replicated to this virtualization platform or cloud. However, the Disaster Recovery VM of Master server starts and runs on this virtualization platform or cloud for multiple reasons, such as Assured Recovery testing, Switchover, and Start VM.

Follow these steps:

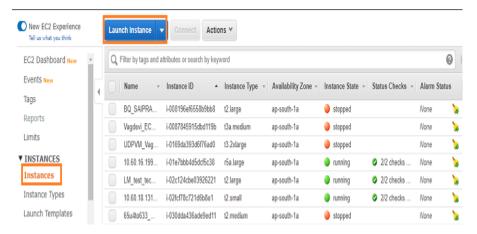
- 1. Log into Amazon Web Services as an IAM user.
- 2. Under Find Services, search for EC2, and then select EC2.



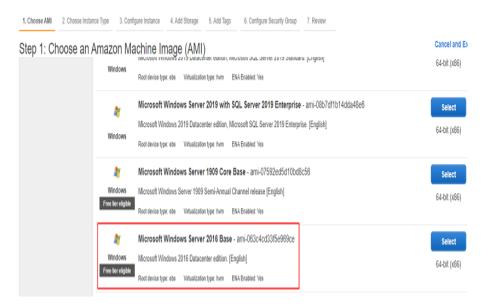
3. On the top-right corner of the EC2 dashboard, select the AWS region in which you want to provision the EC2 server.



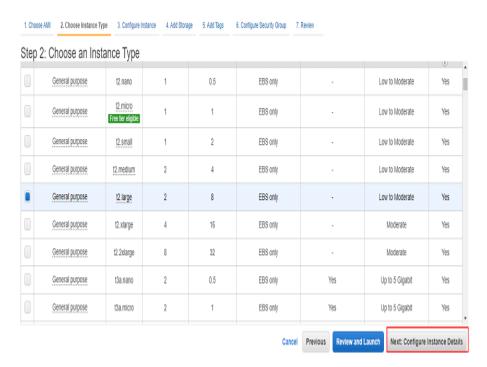
4. On the left panel, go to Instances, and then click Launch Instance.



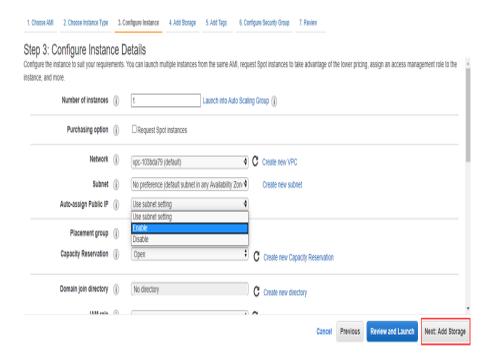
5. On the Step 1: Choose an Amazon Machine Image (AMI) page, from the list of AMI, for Microsoft Windows Server 2016 Base, click **Select**.



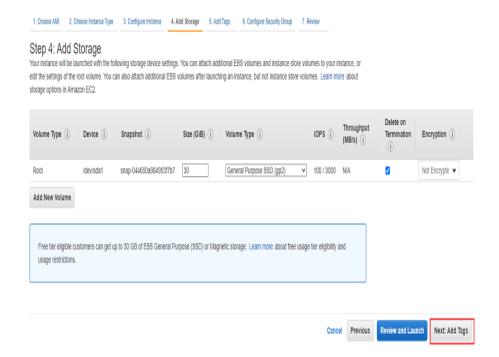
6. On the Step 2: Choose an Instance Type page, select an instance type, and then click **Next: Configure Instance Details**.



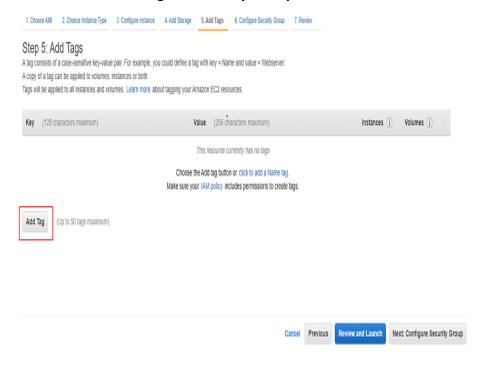
7. On the Step 3: Configure Instance Details page, select **Enable** from the Autoassign Public IP field, and then click **Next: Add Storage**.

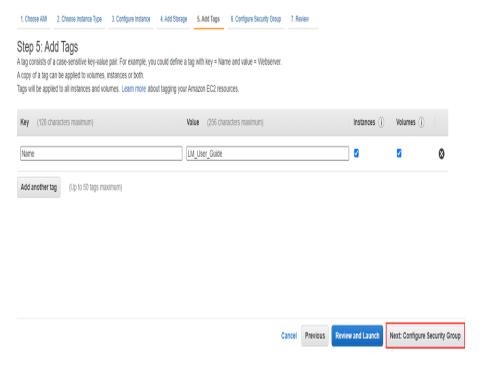


8. On the Step 4: Add Storage page, retain the defaults, and then click **Next:** Add Tags.



9. On the Step 5: Add Tags page, click **Add Tag**, Enter the Key and Value, and then click **Next: Configure Security Group**.

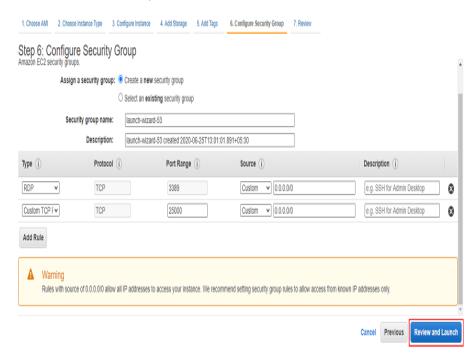




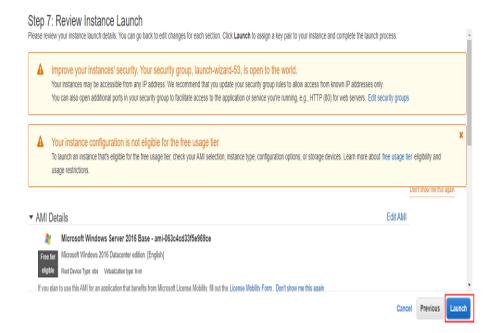
10. On the Step 6: Configure Security Group page, click **Add Rule**, enter the following values, and then click **Review and Launch**:

Port Range: 25000

Source: 0.0.0.0/0



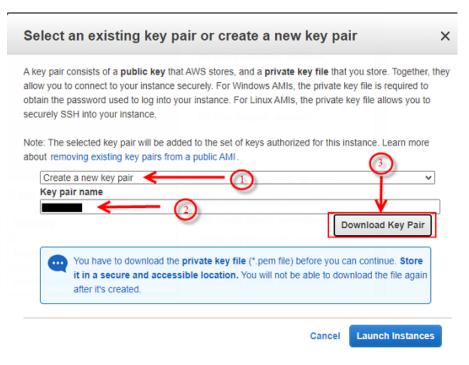
11. On the Step 7: Review Instance Launch page, review the information, and then click **Launch**.



12. On the Select an existing key pair or create a new key pair page, do one of the following, and then click **Launch Instances**:

To create a new key pair, follow these steps:

- 1. From the drop-down list, select Create a new key pair.
- 2. Enter key pair name.
- 3. To save the key pair, click the **Download Key Pair** button.
- 4. Click Launch Instances.

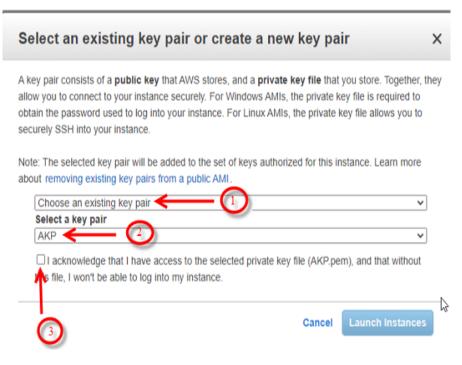


Note: To connect to your EC2 instance, we recommend you that download the key pair. If you launch your instance without a key pair, you cannot connect to your instance.

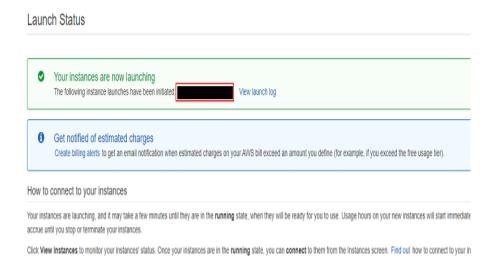
Important! Copy and save the private key file in a safe place as you cannot download it later.

To select an existing key pair, follow these steps:

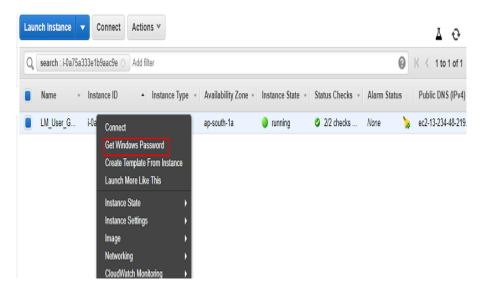
- 1. From the drop-down list, select **Choose an existing key pair**.
- 2. From the Select a key pair drop-down list, select as needed.
- 3. Select the acknowledgment check box, and then click **Launch Instances**.



13. On the Launch Status page, click the launch ID.



14. To get the Windows password, right-click the instance, and then select **Get Windows Password**.

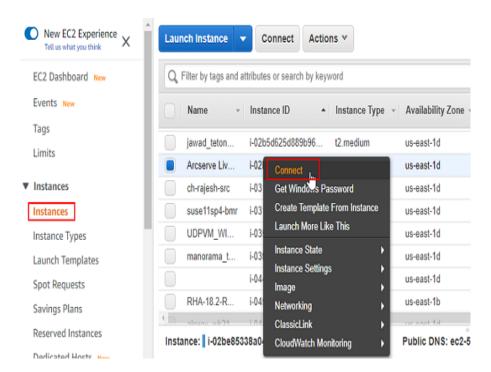


Notes:

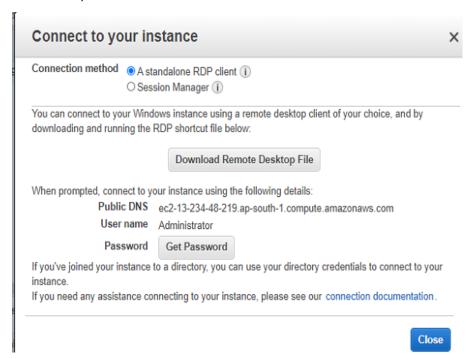
You can get the password only after the Status Checks displays 2/2 checks.

To get the Windows password, see How to Get Windows Password.

15. On the left panel, go to **Instances**, right-click the instance you have launched, and then click **Connect**.

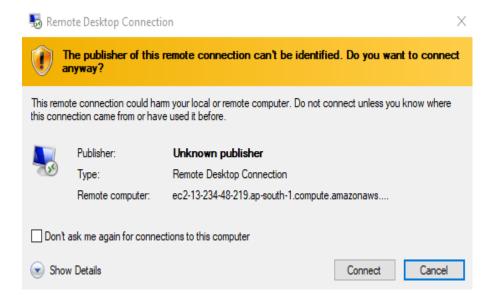


16. On the Connect to your instance page, click the **Download Remote Desktop File** button, and then click **Close**.



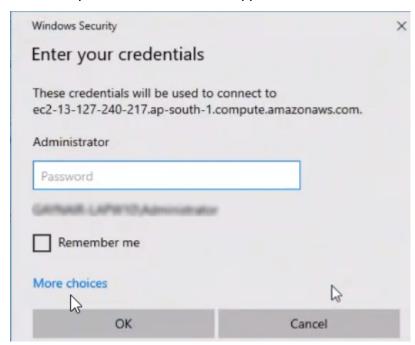
17. Double-click the downloaded file.

The Remote Desktop Connection screen appears.



18. Click Connect.

The Enter your credentials screen appears.



19. Paste the password you have copied to the clipboard, and then click **OK**.

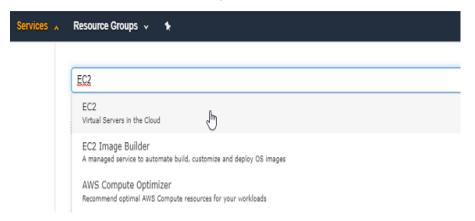
The virtual machine is now created on AWS.

How to Get Windows Password

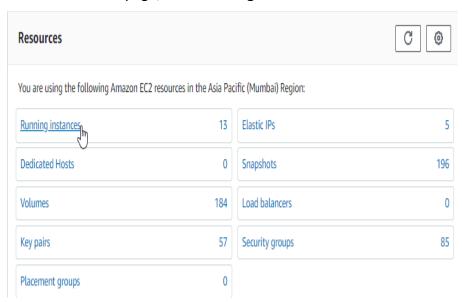
This section provides information about how to get the Windows password.

Follow these steps:

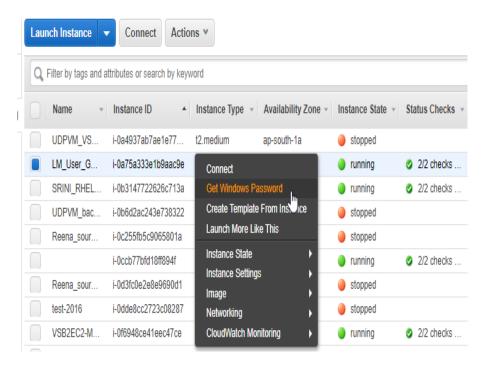
- 1. Navigate to the AWS console > Services.
- 2. Search for EC2 in the search bar, and then select EC2.



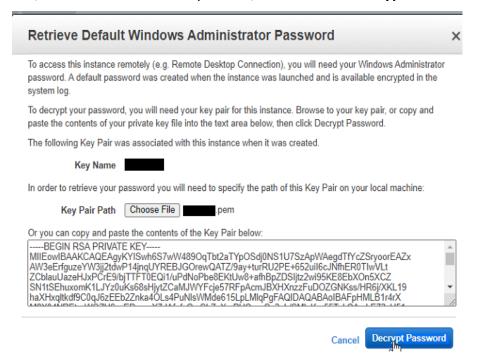
3. On the Resources page, click **Running instances**.



4. From the list of instances, select and right-click the instance, and then click **Get Windows Password**.

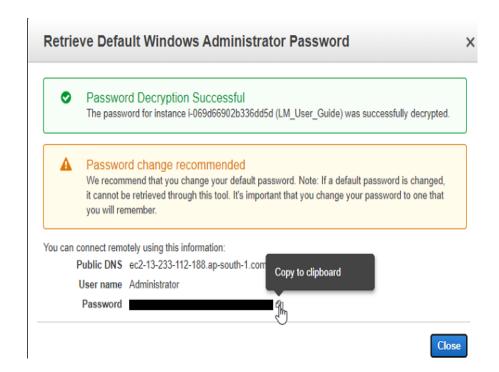


5. On the Retrieve Default Windows Administrator Password page, click **Choose File**, select the downloaded .pem file, and then click **Decrypt Password**.



On the Retrieve Default Windows Administrator Password page, the *Password Decryption Successful* message appears.

6. Copy password to the clipboard, and then click Close.

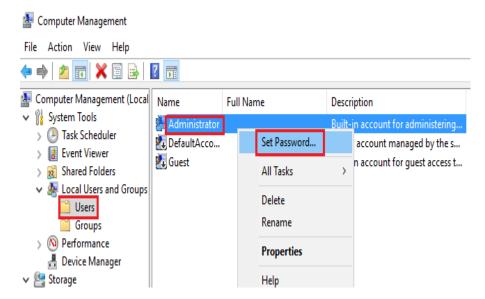


How to Change EC2 VM Password

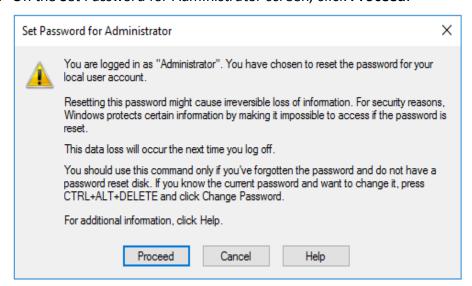
This section provides information about how to change EC2 VM password.

Follow these steps:

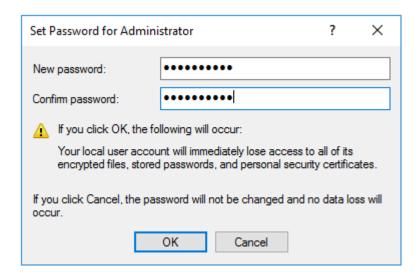
- Go to virtual machine, right-click the start menu, and then select Computer Management.
- 2. On the Computer Management page, from the left pane, navigate to Local Users and Groups > Users, right-click Administrator, and then click Set Password.



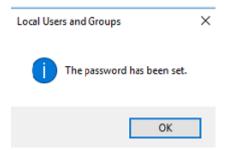
3. On the Set Password for Administrator screen, click **Proceed**.



4. Enter the new password, confirm the new password, and then click **OK**.



The Local Users and Groups screen appears, and displays the message "The password has been set".



5. Click **OK** to close the Local Users and Groups screen.

Install Engine on Replica

To install Engine on Replica server, see <u>Installing Engine</u>.

Create Full System Scenario for Amazon EC2

Arcserve Live Migration supports both Windows and Linux for Full System scenario. If the source server is Windows, then the Virtual Appliance (VA) must be Windows. If the source server is Linux, then the VA must be Linux as well.

Before you create a scenario, add Amazon EC2 Cloud Account in Continuity Suite Manager.

To Add Amazon EC2 Cloud Account in Continuity Suite Manager, follow these steps:

 On the Continuity Suite Manager, navigate to Cloud > Manage Cloud Accounts.



2. On the Manage Cloud Accounts screen, click Add.



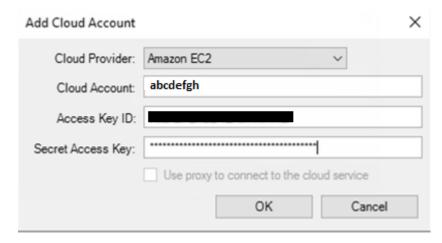
3. On the Add Cloud Account screen, enter the following details in the required fields, and then click **OK**.

Cloud Provider - Select Amazon EC2 as a Cloud Provider.

Cloud Account - Enter the account name you had defined while creating the AWS account.

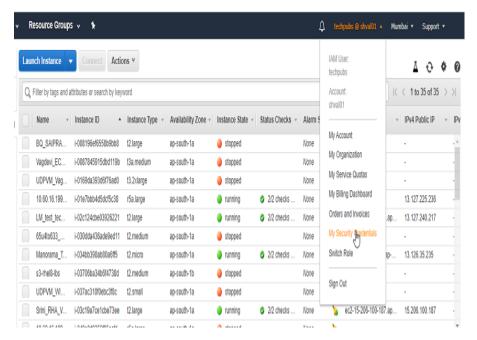
Access Keys (access key ID and secret access key) - Access keys are long-term credentials for an IAM user or the AWS account root user. Access Key Id (for example, AKIAIOSFODNN7EXAMPLE) and Secret Access Key (for example, wJalrXUt-nFEMI/K7MDENG/bPxRfiCYEXAMPLEKEY) are used to sign

programmatic requests to the AWS CLI or AWS API, like a user name and password are used to access your AWS Management Console.

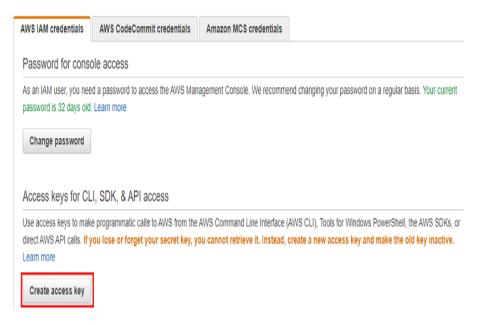


To generate Access Keys, follow these steps:

 On the top right corner, go to your Amazon account name, and then select My Security Credentials.



b. On the My security credentials page, click the **Create access key** button.



Important! If you lose or forget your secret access key, you cannot retrieve it later. Instead, create a new access key, and make the old key inactive.

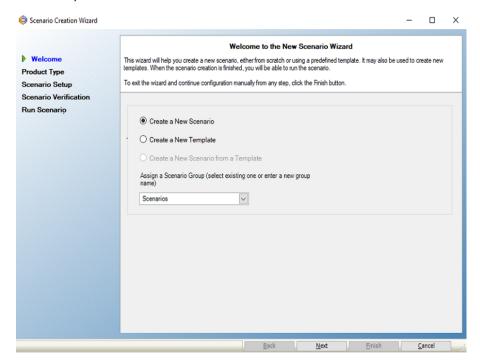
The Amazon EC2 account for Live Migration is now configured.

Creating Full System Scenario for Amazon EC2

This section provides instructions on how to create full system scenario for Amazon EC2.

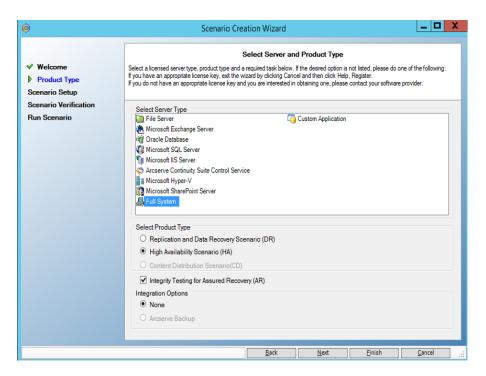
Follow these steps:

- 1. Open the Arcserve Continuity Suite Manager, navigate to **Scenario>New** or click the **New Scenario** button to launch the wizard.
- On the Welcome to the New Scenario Wizard screen, select Create a New Scenario, select a Scenario Group from the Assign a Scenario Group dropdown list, and then click Next.

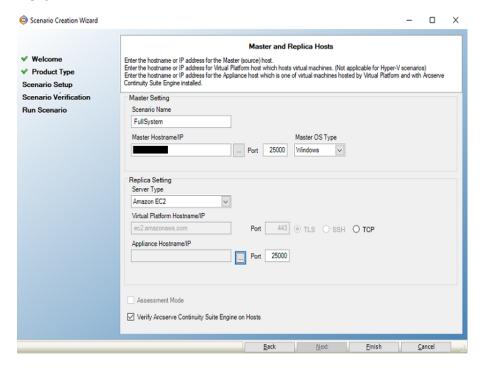


3. On the Select Server and Product Type screen, select Full System, High Availability Scenario (HA), and then click **Next**.

Note: To perform Assured Recovery testing, select the **Integrity Testing for Assured Recover (AR)** check box.



4. On the Master and Replica Hosts screen, do the following, and then click **Next**:



Scenario Name - Enter a Scenario Name. The default value is the scenario type, for example, Full System.

Master Hostname/IP - Enter the IP address of a physical machine you want to protect.

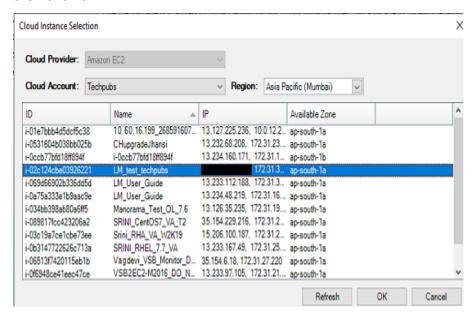
Master OS Type - Select Windows as the Master OS Type.

Server Type - Select Amazon EC2 as the Replica server.

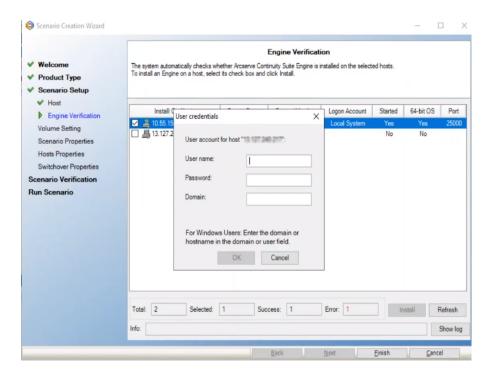
Appliance Hostname/IP - Browse the Appliance Hostname/IP to select the Replica server.

Note: Use the **Verify Arcserve Continuity Suite Engine on Hosts** to verify the connectivity between Master and Replica. It verifies that the engines are installed on the Master. To skip verification, clear the check box.

On the Cloud Instance Selection dialog, from the Region drop-down list, select the region. The list refreshes to display the relevant EC2 instances. From the list, select the EC2 instance you had created, and then click **OK**.



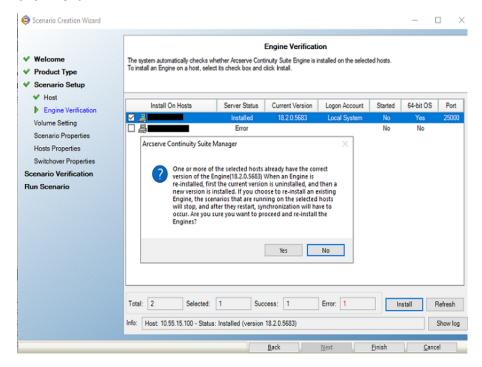
5. On the Engine Verification screen, the User credentials screen appears. Enter the User name and Password, and then click **OK**.



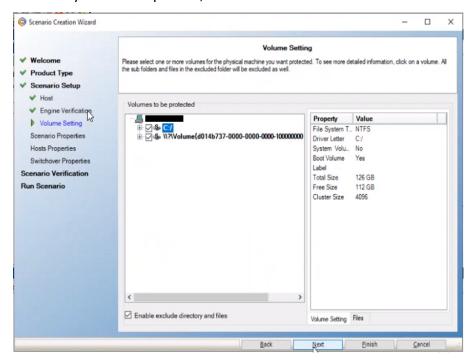
Note: Use the password that you had copied to the clipboard while creating an AWS account. To retrieve a forgotten password, see How to get Windows Password.

Wait for Engine verification to complete, and then click Next.

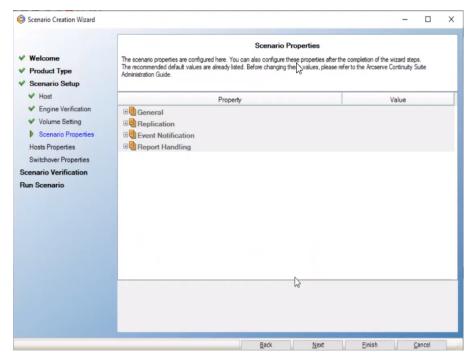
Note: If an error occurs, click **Install**. A confirmation message appears asking if the Engine can be upgraded on one or both servers; click **Yes**, and then click **Next**.



6. On the Volume Setting screen, select one or more volumes for the physical machine you want to protect, and then click **Next**.



7. On the Scenario Properties screen, click **Next**.



8. On the High Availability Network Adapter Mapping dialog, enter the following details, and then click **OK**.

Choose VPC -Select VPC from the drop-down list.

Replica Network Adapter - Select the Replica network adapter from the drop-down list.

Security Group - Select **default** from the drop-down list.

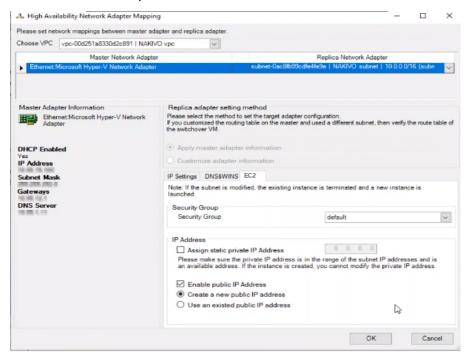
IP Address - Select one of the following:

Assign static private IP Address

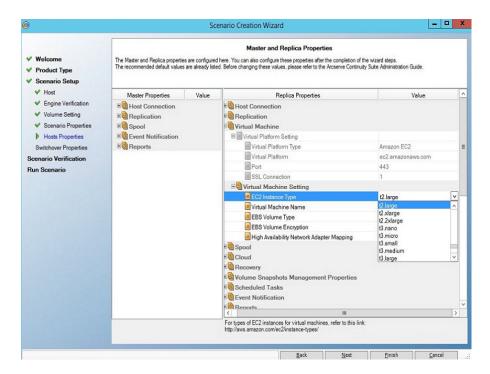
Enable public IP address

If you want to create a new public IP address, enable the **Create a new public IP address** option.

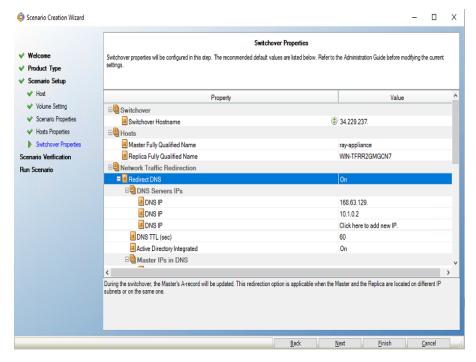
If you want to connect to the virtual machine from outside your network, enable the **Use an existed public IP address** option.



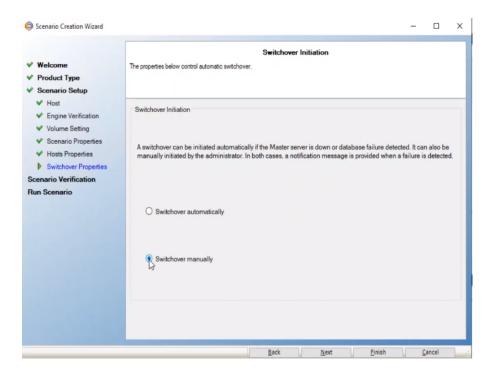
On the Master and Replica Properties screen, navigate to Virtual Machine > Virtual Machine Setting > EC2 Instance Type, select the instance type, and then click Next.



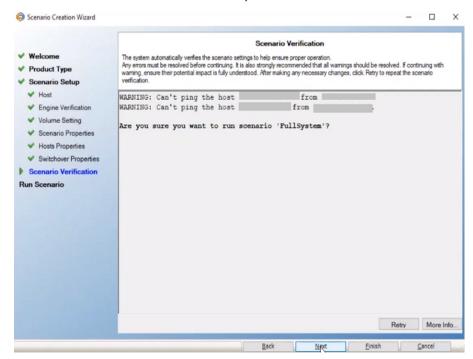
10. On the Switchover Properties screen, accept the default values or modify the values, and then click **Next**.



11. On the Switchover Initiation screen, specify if the switchover start automatically or manually, and then click **Next**.



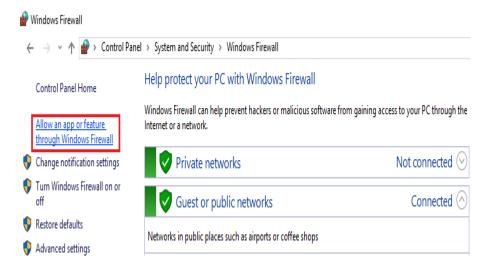
12. On the Scenario Verification screen, click Next.



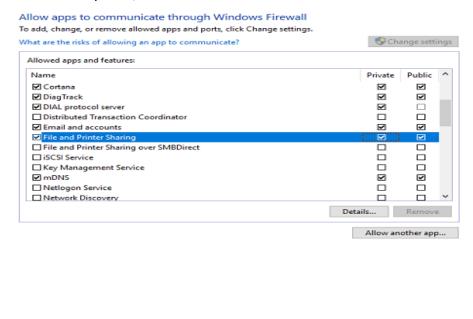
If the Master and Replica servers fail to ping each other, do the firewall and NAT settings.

To do the firewall settings on both the Master server and the EC2 VM, follow these steps:

a. Navigate to Control Panel > System & Security > Windows Firewall > Allow an app or feature through Windows Firewall.



b. On the Allow apps to communicate through Windows Firewall page, select File and Printer Sharing check box, enable Private and Public options, and then click OK.



To do the NAT settings on the Master server, do the following:

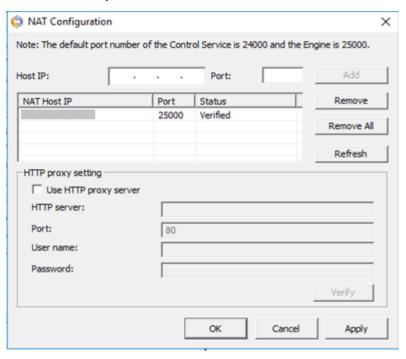
a. Open the natutilgui from the engine installation directory.

Note: The default installation directory is: C:\Program Files\Arcserve\RHA\Engine

b. On the NAT Configuration dialog, do the following, and then click **Add**:

Host IP: Type the EC2 VM IP address.

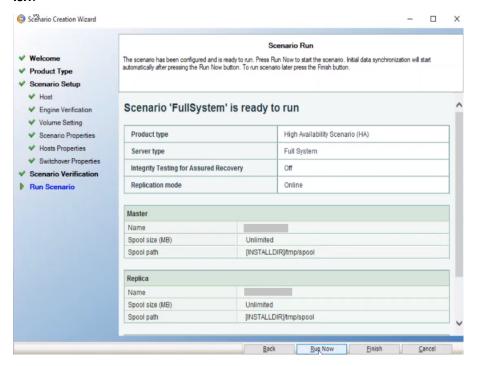
Port: Enter the port value as 25000.



c. Click **Apply**, and then click **OK**.

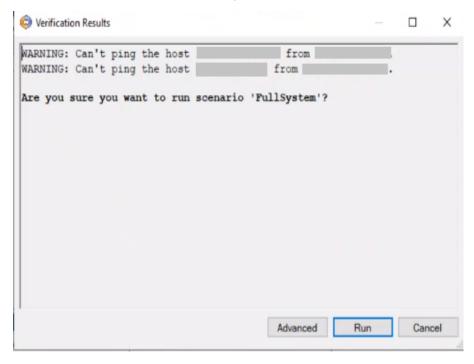
Now, the Master server can communicate with Replica server.

13. On the Scenario Run screen, to start synchronization immediately and activate the scenario, click **Run Now**. To save and run the scenario later, click **Finish**.

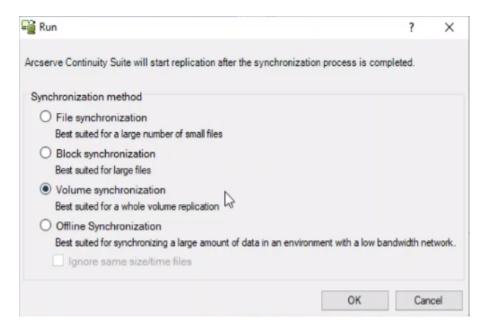


The scenario verification runs automatically, and the Verification Results screen appears.

14. On the Verification Results screen, click Run.

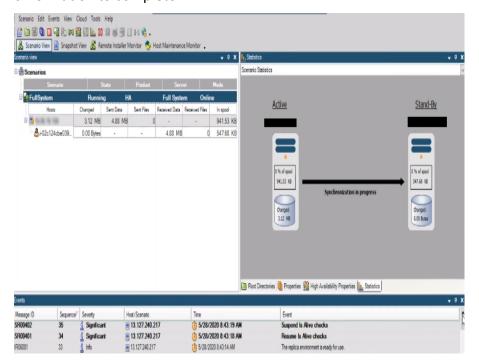


15. On the Run screen, select **Volume synchronization**, and then click **OK**.



Note: For initial synchronization, we recommend that you select **Volume synchronization**, as it usually provides better synchronization performance over LAN or WAN.

The synchronization between Master and Replica servers starts. Wait for synchronization to complete.



Perform Assured Recovery Testing

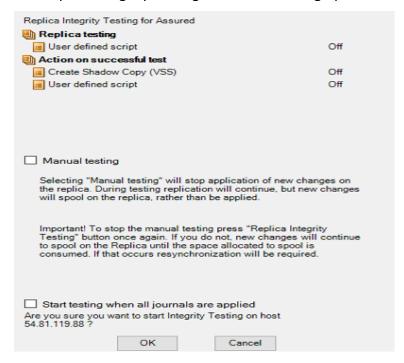
Note: Perform the Assured Recovery test only if you have enabled the **Integrity Testing for Assured Recovery (AR)** option on the Select Server and Product Type screen.

You can fully automate the Assured Recovery tests and schedule these tests as often as needed. On completion, an alert is sent to the appropriate personnel with the test status. You can also trigger additional actions such as taking a VSS snapshot of the data or running a backup. Alternatively, you can perform AR testing in a non-scheduled mode, and initiate the tests automatically or manually.

To perform AR test automatically, follow these steps:

- 1. On the Arcserve Continuity Suite Manager, verify that the AR scenario is running.
- 2. On the Standard toolbar, click the **Replica Integrity Testing** button, or rightclick the Replica and select **Replica Integrity Testing** from the shortcut menu.

The Replica Integrity Testing for Assured dialog opens.



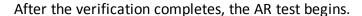
3. To start the automatic AR test using the existing configuration, click **OK**.

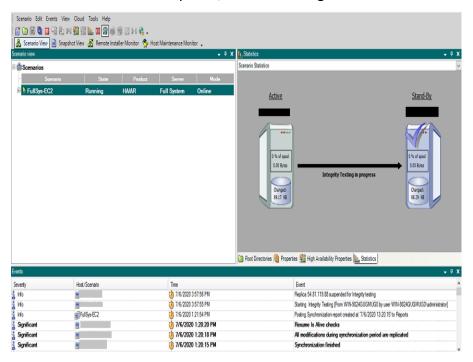
Notes:

To start the AR test manually, select the **Manual testing** checkbox, and then click **OK**.

To change the test configuration before running the test, click **Cancel**. For more information, see Configure Assured Recovery Properties.

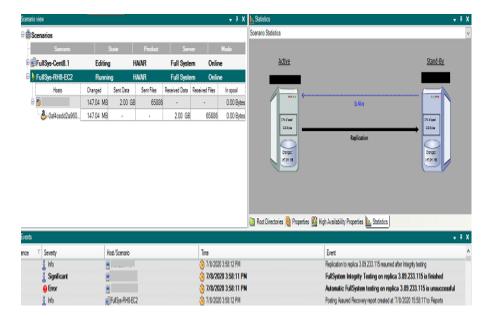
Before the test begins to run, Arcserve Live Migration verifies that no synchronization, AR test or replication suspension tasks are in progress on any of the hosts that participate in the current scenario.





The steps of the test are displayed as messages in the Event pane.

After the test is finished, the Replica is automatically restored to the same state it was when the replication was suspended. The changes that were accumulated in the spool gets applied, and the replication resumes.



By default, after the AR test is performed, an Assured Recovery Report is generated.

Notes:

If the Assured Recovery Report is not generated, on the Replica Properties list, under the Reports group, check the value of the Generate Assured Recovery Report property.

To view the report, see <u>View a Report</u>.

All the tasks that were performed during the AR test are listed in the AR Report, along with their activation time and status.

Perform Cut off/Switchover

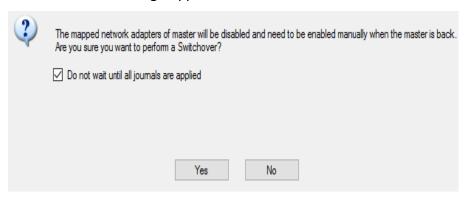
Switchover (or failover) is the process of changing roles between the Master and Replica, that is, making the Master server the standby server, and the Replica server the active server.

Switchover can be triggered automatically by Arcserve Live Migration when it detects that the Master is unavailable (failover). Alternatively, Arcserve Live Migration can simply alert you to the problem, and then you can manually initiate switchover from the Manager.

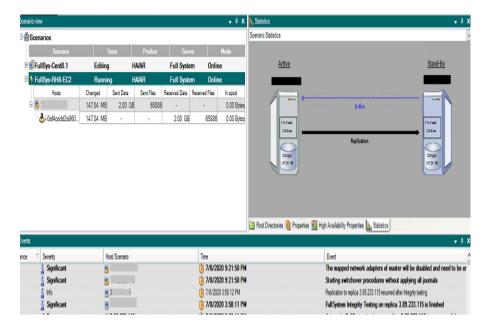
To perform switchover, follow these steps:

- 1. Open the Manager and then select the required scenario from the Scenario pane. Verify if it is running.
- 2. On the standard toolbar, click the **Perform Switchover** button, or select the **Perform Switchover** option from the Tools menu.

A confirmation message appears.



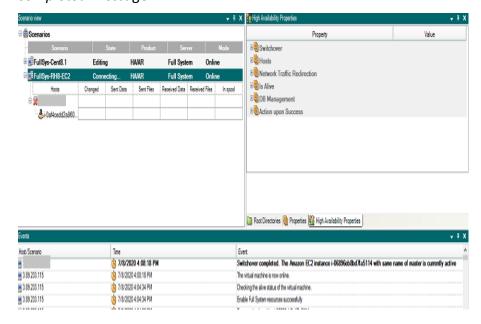
- 3. [Optional] Select the **Do not wait until all journals are applied** check box to immediately perform switchover even before all journals are applied. If you do not select this check box, the switchover process gets initiated only after all journals are applied.
- 4. Click **Yes** on the confirmation message. This procedure initiates a switchover from the Master server to the Replica server.
 - During switchover, the Event pane gives detailed information about the switchover process.



After the switchover is complete, the scenario gets stopped.

Note: The only case in which the scenario may continue to run after switchover is when **automatic reverse replication** is defined as **Start automatically**.

When the switchover is completed, the Event pane displays the *Switchover* completed message.



Now, the original Master becomes the Replica, and the original Replica becomes the Master.