

# Migration and Upgrade Guide

**Citrix® MetaFrame XP™**  
**Application Server for Windows**  
Version 1.0

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# Citrix MetaFrame XP Migration and Upgrade Guide



This guide is for Citrix administrators who are migrating from Citrix *WINFRAME* or MetaFrame 1.x for Windows to MetaFrame XP, and for Citrix administrators who are upgrading from MetaFrame XPs to MetaFrame XPa or XPe, or from MetaFrame XPa to MetaFrame XPe.

This document addresses only migration and upgrade issues. You should be thoroughly familiar with the concepts and procedures outlined in the *MetaFrame XP Administrator's Guide* before reading this *Migration and Upgrade Guide*. The *MetaFrame XP Administrator's Guide* is available in the following locations:

- In the \Doc directory of your MetaFrame XP CD-ROM.
- Installed into the Documentation folder of your MetaFrame XP server. From the **Start** menu, choose **Programs > Citrix > Documentation**.
- On the Citrix Web site at <http://www.citrix.com/support>, select the Product Documentation tab. You can check the Product Documentation area of the Web site at any time for the latest updates to Citrix technical manuals. Any updates to this manual published after the release of MetaFrame will be posted there.

## Before Migrating or Upgrading

You should complete the following tasks before you migrate to MetaFrame XP or upgrade to MetaFrame XPa or MetaFrame XPe.

- Read the Citrix MetaFrame XP Software License Agreement agreement before proceeding with MetaFrame XP installation and setup. All persons executing Citrix software installations, including migrations and upgrades, must abide by this agreement.
- Back up all server data before migrating or upgrading. This is especially important if the MetaFrame XP data store for the farm is stored on the server.
- Make a note of all existing licenses. You will need to enter these during installation of MetaFrame XP.

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**Important** Do not delete any licenses currently in use on your Citrix servers. You will not be able to add and activate a migration or upgrade license unless the licenses currently on your Citrix servers are active and functional.

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## Migrating to MetaFrame XP

You should read this section if you are migrating from an earlier version of a Citrix server product to MetaFrame XP. You need to migrate if you have servers running Citrix *WINFRAME* or Citrix MetaFrame 1.x for Windows and you want these servers to run Citrix MetaFrame XP.

You can operate MetaFrame XP servers in the same server farm as *WINFRAME* or MetaFrame 1.x servers if you install MetaFrame XP in interoperability mode. However, when running in this mode, several features included with MetaFrame XP are not supported on the servers running *WINFRAME* or MetaFrame 1.x. Interoperability mode is designed to facilitate migration to MetaFrame XP; it is not designed to be a permanent solution. You should run in interoperability mode only during the process of migrating the entire server farm to MetaFrame XP.

You can migrate to MetaFrame XP on a server currently running an earlier version of a Citrix server product — called an in-place migration — or on a server not currently running Citrix software.

If you want to perform an in-place migration, you install MetaFrame XP on the server currently running an earlier version of a Citrix server product, and then add new MetaFrame XP licenses.

If you want to migrate your existing installation of a Citrix server product to MetaFrame XP on a new server, you must install MetaFrame XP, transfer the existing licenses to the new server, and then remove all Citrix software from the *WINFRAME* or MetaFrame 1.x server.

## Migration Licensing for MetaFrame XP

A MetaFrame XP migration product license can be applied only to existing *WINFRAME* or MetaFrame 1.x licenses.

For all users that connect to MetaFrame XP servers, the total license count from all MetaFrame XP migration user connection licenses must have a matching total user count of *WINFRAME* or MetaFrame 1.X licenses (for each particular MetaFrame XP server level in use: MetaFrame XPs, XPa, and XPe).

### Migration licensing example:

If your Citrix server farm has three MetaFrame 1.8 servers and a total user license count of 75 (regardless of the number of user license packs installed), install the following products to migrate to MetaFrame XPa:

- **MetaFrame XPa 1.0 Migration - Starter System w/15 Users** - Includes a new MetaFrame XPa server license, a 15-user connection migration license, and all required software media.
- **MetaFrame XPa 1.0 - 50 User Connection Migration Pack** - Includes a 50-user connection migration license.
- **MetaFrame XPa 1.0 - 10 User Connection Migration Pack** - Includes a 10-user connection migration license.

## Migration Summary

This section outlines the general tasks to complete in order to successfully migrate to MetaFrame XP. For details on the concepts discussed here, see the *MetaFrame XP Administrator's Guide*. For step-by-step instructions on using the Citrix Management Console, see the console's online help.

1. Migrate the first server in the farm.
  - Install MetaFrame XP on one of the servers to be migrated.

**Note** During MetaFrame XP installation, you must create the MetaFrame XP data store. You should make a note of the location of this data store, as you will need to point each additional server in the farm to it.

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- When prompted, enter all new licenses delivered with the migration product(s).
  - If performing a new server migration, enter the licenses from the servers that were running *WINFRAME* or MetaFrame 1.x.
  - Verify that the Product Code matches the one provided with the migration product.
2. Migrate each additional server in the farm.
    - Configure each server to point to the previously created data store.
    - Skip the license entry screen; you do not need to enter any more licenses.
    - Enter the Product Code you verified in Step 1.
  3. Open the Citrix Management Console. Activate all new licenses according to the instructions in the “Licensing MetaFrame XP” chapter of the *MetaFrame XP Administrator's Guide*.

## Upgrading to MetaFrame XPa or MetaFrame XPe

You should read this section if you are upgrading from MetaFrame XPs to MetaFrame XPa or XPe, or from MetaFrame XPa to MetaFrame XPe.

### Upgrade Licensing for MetaFrame XP

A MetaFrame XP upgrade product license can be applied only to existing MetaFrame XP licenses.

For all users that connect to the upgraded MetaFrame XP servers, the total user count from all MetaFrame XP user connection upgrade licenses must have a matching total user count of MetaFrame XP user connection licenses for the product currently running on the server.

Citrix MetaFrame XPs, XPa, and XPe servers may be operated in the same server farm. Each server in the farm draws from the available user connection license pools for the particular server type as required.

## Upgrade licensing example:

If your Citrix server farm has five MetaFrame XPs servers and a total MetaFrame XPs user license count of 150 (regardless of the number of user license packs installed), install the following products to upgrade to MetaFrame XPe:

- **MetaFrame XPs 1.0 to XPe 1.0 Upgrade - Starter System w/20 Users -**  
Includes a new MetaFrame XPe server license, a 20-user connection upgrade license, and all required software media.
- **MetaFrame XPs 1.0 to XPe 1.0 - 50 User Connection Upgrade Pack -**  
Includes a 50-user connection upgrade license.
- **MetaFrame XPs 1.0 to XPe 1.0 - 50 User Connection Upgrade Pack -**  
Includes a 50-user connection upgrade license.
- **MetaFrame XPs 1.0 to XPe 1.0 - 20 User Connection Upgrade Pack -**  
Includes a 20-user connection upgrade license.
- **MetaFrame XPs 1.0 to XPe 1.0 - 10 User Connection Upgrade Pack -**  
Includes a 10-user connection upgrade license.

## Upgrade Summary

This section outlines the general tasks to complete in order to successfully upgrade to MetaFrame XPa or XPe. For details on the concepts discussed here, see the *MetaFrame XP Administrator's Guide*. For step-by-step instructions on using the Citrix Management Console, see the console's online help.

1. Open the Citrix Management Console.
2. Select the **Licenses** node.
3. Click the **Add License** button to add all new licenses that were delivered with the upgrade product(s).
4. Right-click the servers to upgrade and choose **Set MetaFrame Product Code**.
5. Change the Product Code to the new code delivered with the upgrade product.
6. Activate all new licenses according to the instructions in the "Licensing MetaFrame XP" chapter of the *MetaFrame XP Administrator's Guide*.

**Important** If you are upgrading to MetaFrame XPe, you must install the desired MetaFrame XPe components from the following CDs on each server:

- System Monitoring & Analysis
- Application Packaging & Delivery
- Network Management

If you are upgrading from MetaFrame XPs, Load Management is automatically enabled when you apply the appropriate upgrade license.

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