# Installing or Upgrading EFT Server in a Cluster

EFT Server can be installed in an active-passive cluster to achieve high availability through failover clustering. Separate instructions are provided below for installing and upgrading EFT Server in a cluster.

## Installing EFT Server in a Cluster Configuration

> ⓘ *Before you add EFT Server to your cluster, you must setup your cluster manager. Please consult your cluster manager vendor's documentation for details. GlobalSCAPE's Server Support team can provide assistance with basic configuration questions, and GlobalSCAPE Professional Services group provide assistance with installing and configuring a cluster.*

**To install an EFT Server version 6 or later in a cluster configuration:**

| ☑ | Step | Owner |
|---|---|---|
| ☐ | 1. Setup Microsoft Clustering Services (MSCS), Symantec's Veritas Cluster Server, or other cluster manager according to your cluster manager vendor's documentation. | |
| ☐ | 2. Make sure the first node has access to the shared resource drive (and is the cluster group owner). | |
| ☐ | 3. Run the EFT Server installer on the cluster group owner. | |
| ☐ | 4. On the **Choose install type** page, click **Part of a cluster**, then click **Next**. When the confirmation prompt appears, click **Yes**. | |
| ☐ | 5. Specify the installation location on your local physical drive, then click **Next**. | |
| ☐ | 6. Specify the shared resource drive when prompted for the configuration data location. *Note: If you cannot browse to the shared drive, then the resources are not being seen by the cluster. If so, CANCEL the installation, verify the shared resource drive can be accessed on the node you are installing on, and restart the installation process.* | |
| ☐ | 7. A prompt appears asking "Is this the first node in the cluster?" Do one of the following:<br>• Click **Yes** if this is the first node in the cluster.<br>• Click **No** if you already installed EFT Server on the first node and you are now installing EFT Server on the second node. | |
| ☐ | 8. Follow the prompts in the wizard to create the admin account, install the ARM database, etc. If this is the first node, on the final page of the installer, ensure that the **Start the EFT Server Enterprise service** check box is *NOT* selected, and then click **Finish**. | |
| ☐ | 9. Ensure that the EFT Server service is set to **Manual**, not **Automatic** (**Start > Run > services.msc**). | |
| ☐ | 10. Now make the second node the cluster group owner (so that it has access to the resource drive). | |
| ☐ | 11. Repeat steps 3 – 8 on the second node. | |
| ☐ | 12. On the final page of the installer, ensure *all* check boxes are selected, then click **Finish**. | |
| ☐ | 13. Configure EFT Server and license the product and any add-on modules. | |
| ☐ | 14. Once you have configured EFT Server to your liking, make the first node the cluster the group owner, then license EFT Server and any add-on modules in that node. (Notice that EFT Server on the first (primary) node picks up all configuration done to the second node in step 13, because the nodes share the configuration files.) | |

# Upgrading EFT Server in an Existing Cluster

ℹ️ • *These steps do not apply to EFT Server versions prior to version 6.*
  • ***Only upgrade during a maintenance window, as the upgrade process will bring all services offline!***
  • ***All steps must be performed on the Active node!***

**To upgrade an EFT Server version 6 or later that is already installed in a cluster configuration:**

| ☑ | Step | Owner |
|---|------|-------|
| ☐ | 1. Verify your EFT Server administrator credentials by logging in to EFT Server as a Server-level administrator. | |
| ☐ | 2. Verify your SQL or Oracle auditing and reporting (ARM) database owner login credentials. Disregard if using Windows authentication for the database connection. | |
| ☐ | 3. Log in to the EFT Server administration interface and run the **Backup Server Configuration** tool to backup EFT Server's configuration folder located on the shared resource drive. *(Available in EFT Server Enterprise only.)* | |
| ☐ | 4. Copy the entire EFT Server configuration folder directory located on the shared resource drive to a safe location. | |
| | 5. Backup your EFT Server auditing and reporting database. (Strongly recommended.) | |
| ☐ | 6. Open the 3rd-party cluster administrator tool (such as MSCS) and take the EFT Server Enterprise resource ***offline***. | |
| ☐ | 7. Start the latest EFT Server installer on the cluster group owner (**Active node**). | |
| ☐ | 8. On the **Prior version detected** page, click **Upgrade cluster**, then click **Yes** to confirm that you have read the cluster documentation. | |
| ☐ | • If a .NET warning prompt appears and you are NOT using AS2 or AWE modules, click **OK** to dismiss the message. | |
| ☐ | 9. A prompt appears asking "Is this the first node in the cluster?" Do one of the following:<br>• Click **Yes** if you are upgrading the first node in the cluster.<br>• Click **No** if you already upgraded the first node and are now going through the steps again for the second or Nth node. | |
| ☐ | 10. Verify that the installation **Destination Folder** matches the current program install directory, typically **C:\Program Files\GlobalSCAPE\EFT Server Enterprise**.<br>• If you are upgrading from EFT Server version 6.0, you will be prompted for the **Configuration Data Location**. You must specify the correct folder where your configuration data is located, usually on the shared drive.<br>*Note: If you cannot browse to the shared drive then you are likely attempting an upgrade on the passive node. If so, CANCEL the installation and start again on the Active node.* | |
| ☐ | 11. On the **Auditing and Reporting database configuration** page, click **Configure Auditing and Reporting** (most likely) or skip if auditing is not being used (rare). | |
| ☐ | 12. Click **Use existing SQL Server** or **Use existing Oracle database**, as appropriate, then click **Next**. | |
| ☐ | 13. Provide your database credentials if using SQL or Oracle authentication, otherwise click **Windows authentication**. Click **Test** to verify your database connection.<br>*Note: Do not proceed with the installation if you are unable to validate your database connection. Contact GlobalSCAPE support or your database administrator for further assistance.* | |
| ☐ | 14. On the final page of the installer, ensure that the **Start the EFT Server Enterprise service** check box is **NOT** selected, then click **Finish**. | |
| ☐ | 15. Ensure that the EFT Server service is set to **Manual**, not **Automatic** (**Start > Run > services.msc**). | |
| ☐ | 16. Use the 3rd-party's cluster administrator's **Move Group** function to change ownership of the cluster group to the second node. The second node is now the Active node. | |
| ☐ | 17. Repeat step 7-15 above on the new Active node (formerly passive node), making sure to click **No** in step 9 when the prompt asks "Is this the first node in the cluster?" You will not be prompted to upgrade the database for the second node. | |
| ☐ | 18. Once the second node has been upgraded, use the 3rd-party cluster administrator to bring the EFT Server resource back online. | |