Generate an upgrade plan

Digital Advisor

NetApp
March 15, 2024

This PDF was generated from https://docs.netapp.com/us-en/active-iq/upgrade_advisor_overview.html on March 15, 2024. Always check docs.netapp.com for the latest.

Table of Contents

Generate an upgrade plan 1
Overview 1
Generate an upgrade plan for single cluster and multiple clusters 1
Generate an upgrade plan for nodes 9

Generate an upgrade plan

Overview

Upgrade Advisor enables you to generate an upgrade plan that includes detailed and step-by-step information required for a successful ONTAP upgrade or revert.

You can generate automated nondisruptive upgrade plans for a single cluster and multiple clusters. You can view the upgrade recommendation only for a single cluster, which includes a list of risks associated with a cluster, a pre-upgrade check report containing a list of upgrade blockers and warnings, and information about new features and enhancements. To learn more, see Generate an upgrade plan for single cluster and multiple clusters.

For each cluster in a MetroCluster configuration, generate an individual upgrade plan for complete upgrade instructions.

You can generate automated nondisruptive, disruptive, and nondisruptive upgrade plans for nodes (storage systems). You can review the recommended upgrade paths and generate an upgrade plan. To learn more, see Generate an upgrade plan for your nodes.

Before generating an upgrade plan, you should prepare for an ONTAP upgrade. Proper preparation helps in identifying and mitigating potential upgrade risks or blockers before you begin the upgrade process. To learn more, see Prepare for an ONTAP upgrade.

Generate an upgrade plan for single cluster and multiple clusters

You can use Upgrade Advisor to view the list of clusters that are eligible or ineligible for an upgrade. You can view the upgrade recommendation for an eligible cluster and generate an upgrade plan. You can fix the issues with an ineligible cluster to make it eligible for an upgrade.

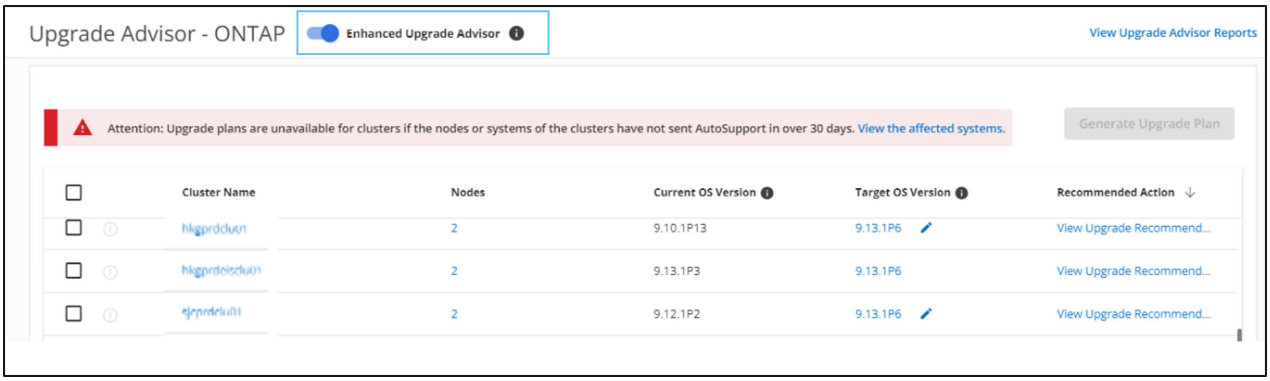
You can follow these steps to generate an upgrade plan for a single cluster and multiple clusters:

Single cluster

1. On the dashboard, click number of clusters in the **Upgrade Advisor** widget.

   The **Upgrade Advisor-ONTAP** page appears.

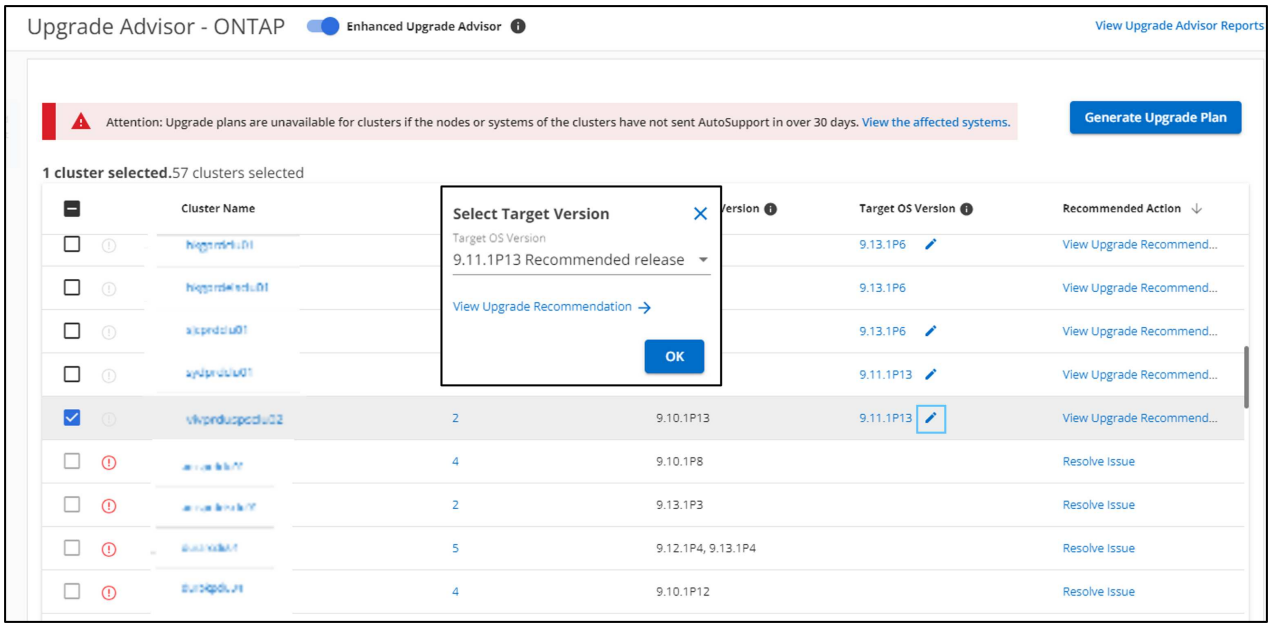
2. Verify that the **Enhanced Upgrade Advisor** toggle is enabled.



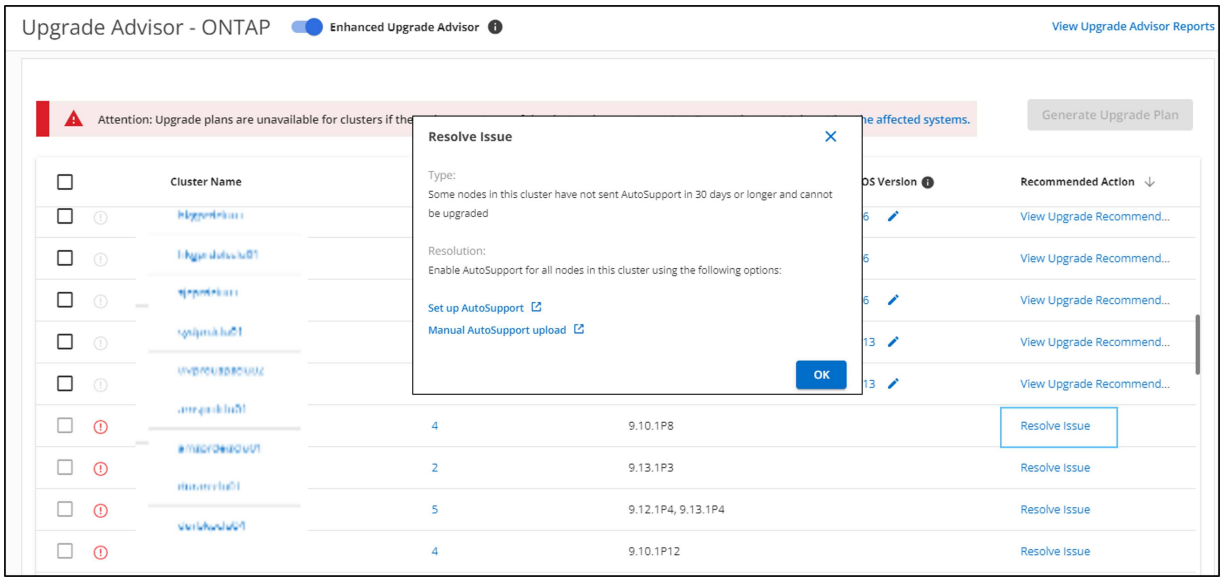
   You can view a list of eligible and ineligible clusters for an upgrade.

3. Select a cluster for an upgrade.

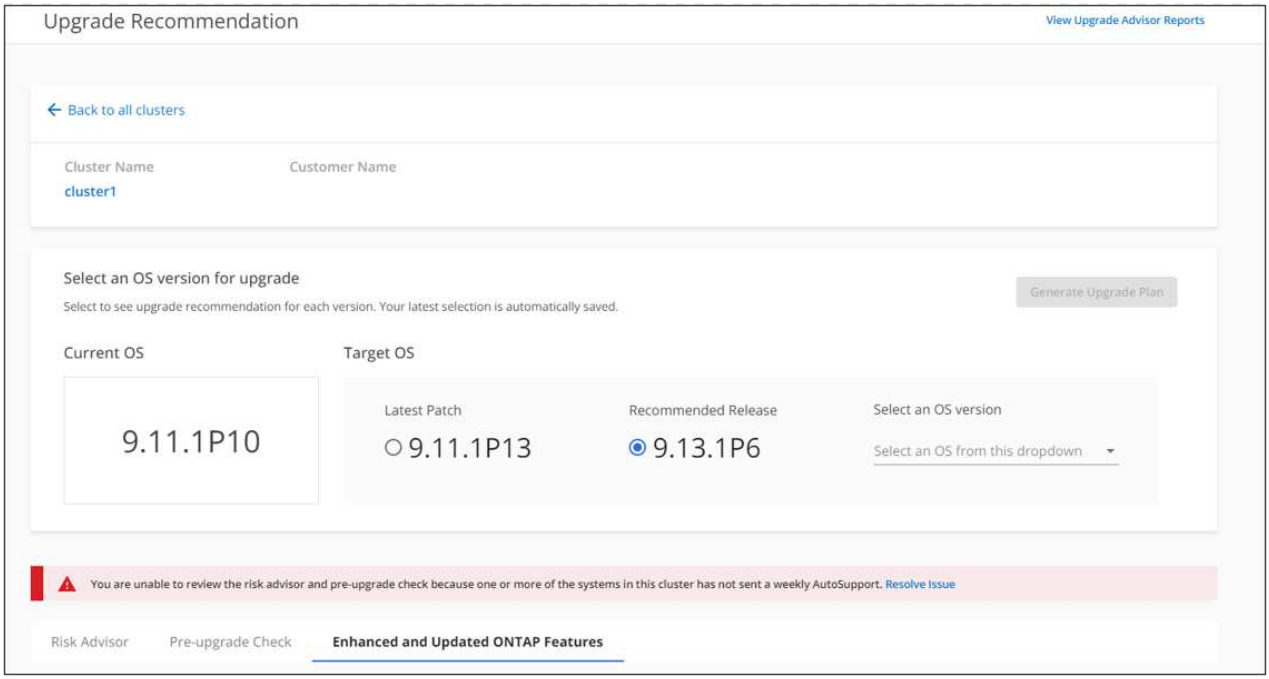
   The **Target OS Version** column displays the recommended target OS version. You can click the icon to select another target OS version of a cluster.



- You can click the number of nodes in the **Nodes** column to see the node summary of a cluster.
- You can click **Resolve Issues** from the **Recommended Action** column to fix the issues with an ineligible cluster to make it eligible for an upgrade.

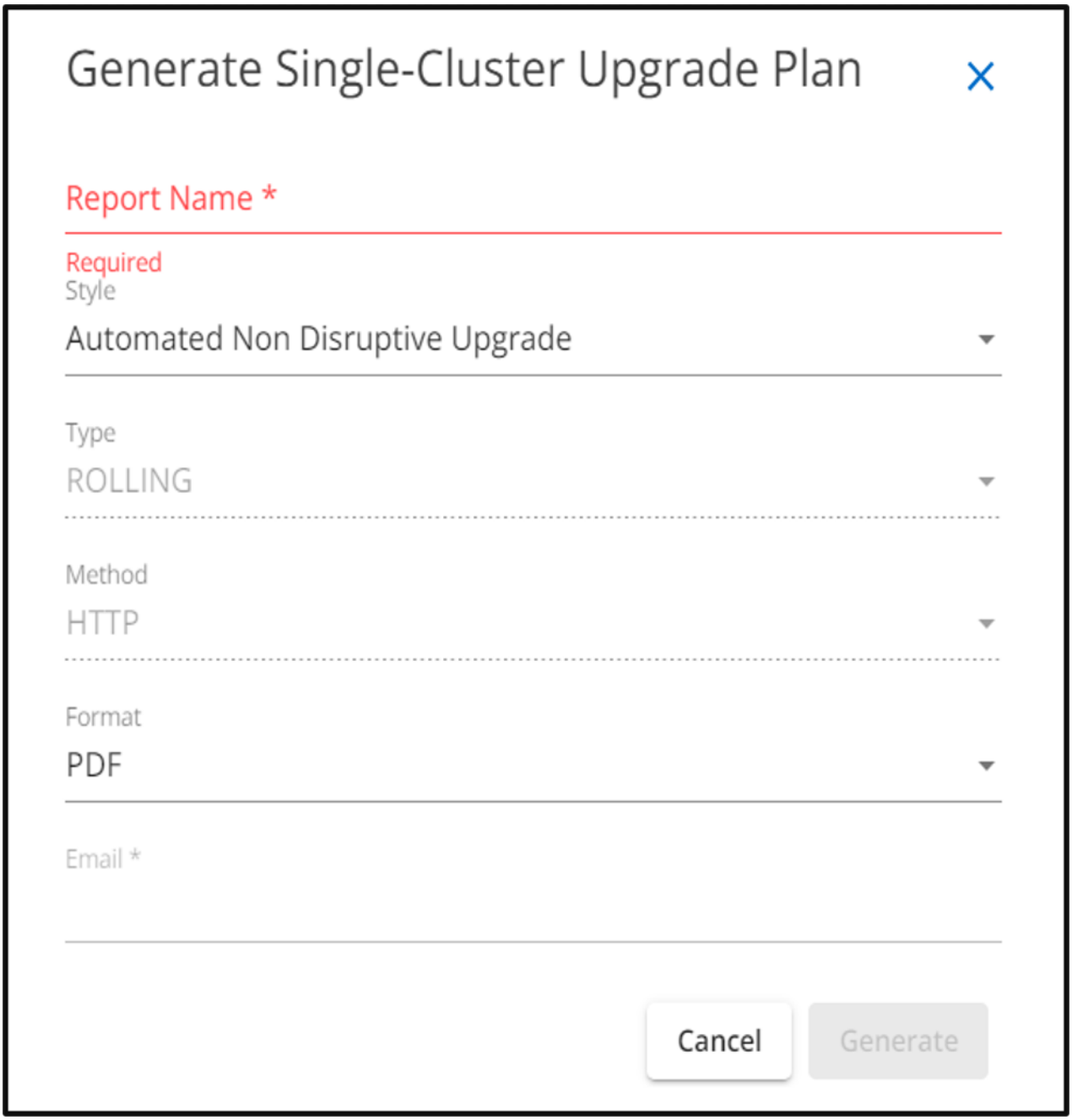


4. Click **Generate Upgrade Plan**.
   You will be redirected to the **Upgrade Recommendation** page.
5. On the **Upgrade Recommendation** page, you can view the details of the risks associated with a cluster through the **Risk Advisor** tab. You can view the upgrade blockers, upgrade warnings, and required actions through the **Pre-upgrade Check** tab, and information about the new features and enhancements that are relevant to the selected target OS version through the **Enhanced and Updated ONTAP Features** tab.



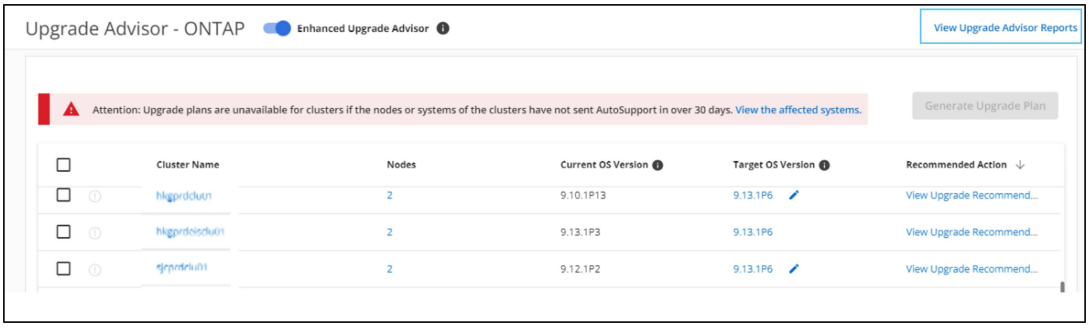
- You can select another target OS version and view the risk summary, pre-upgrade check report, and information on new features and enhancements related to that target OS version.
- You can click the Export icon to export the risk summary to an Excel sheet.

6. Click **Generate Upgrade Plan** from the **Upgrade Recommendation** page.
7. Provide the details in the displayed pop-up.



8. Click **Generate**.
   You will be redirected to the **Reports** page.
9. You can download the upgrade plan from the **Reports** page once it is available.

You can click **View Upgrade Advisor Reports** to go to the **Reports** page.



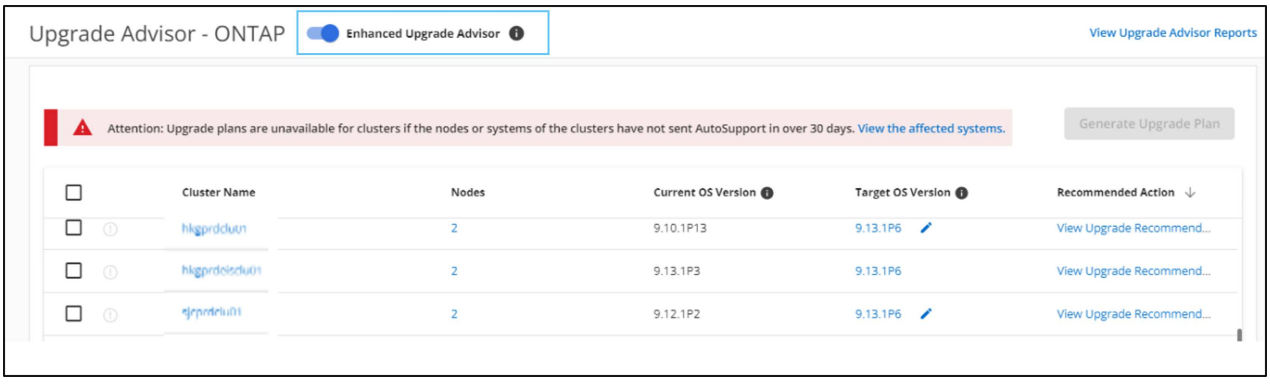
There are some tasks you should perform to confirm the readiness of the cluster after you upgrade ONTAP. To learn more, see What to do after an ONTAP upgrade.

Multiple clusters

1. On the dashboard, click number of clusters in the **Upgrade Advisor** widget.

   The **Upgrade Advisor-ONTAP** page appears.

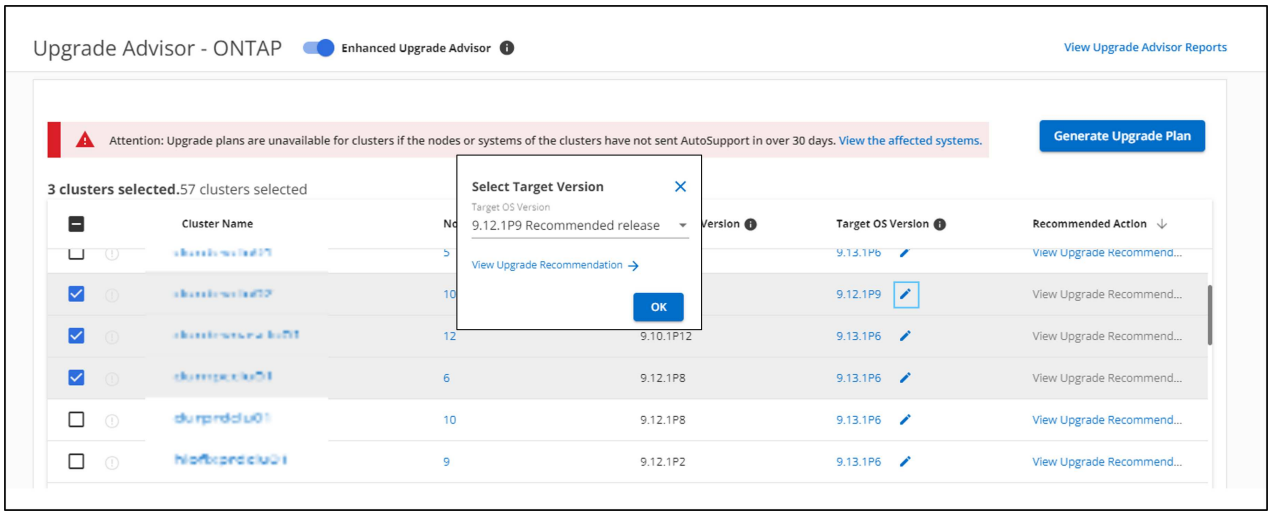
2. Verify that the **Enhanced Upgrade Advisor** toggle is enabled.



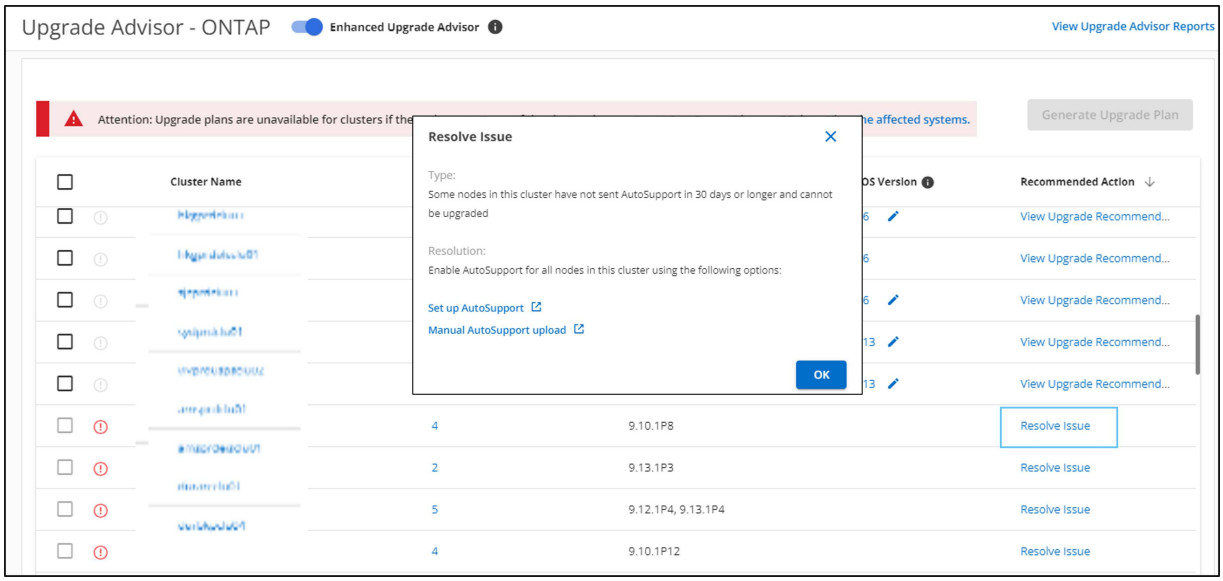
   You can view a list of eligible and ineligible clusters for an upgrade.

3. Select clusters for an upgrade.

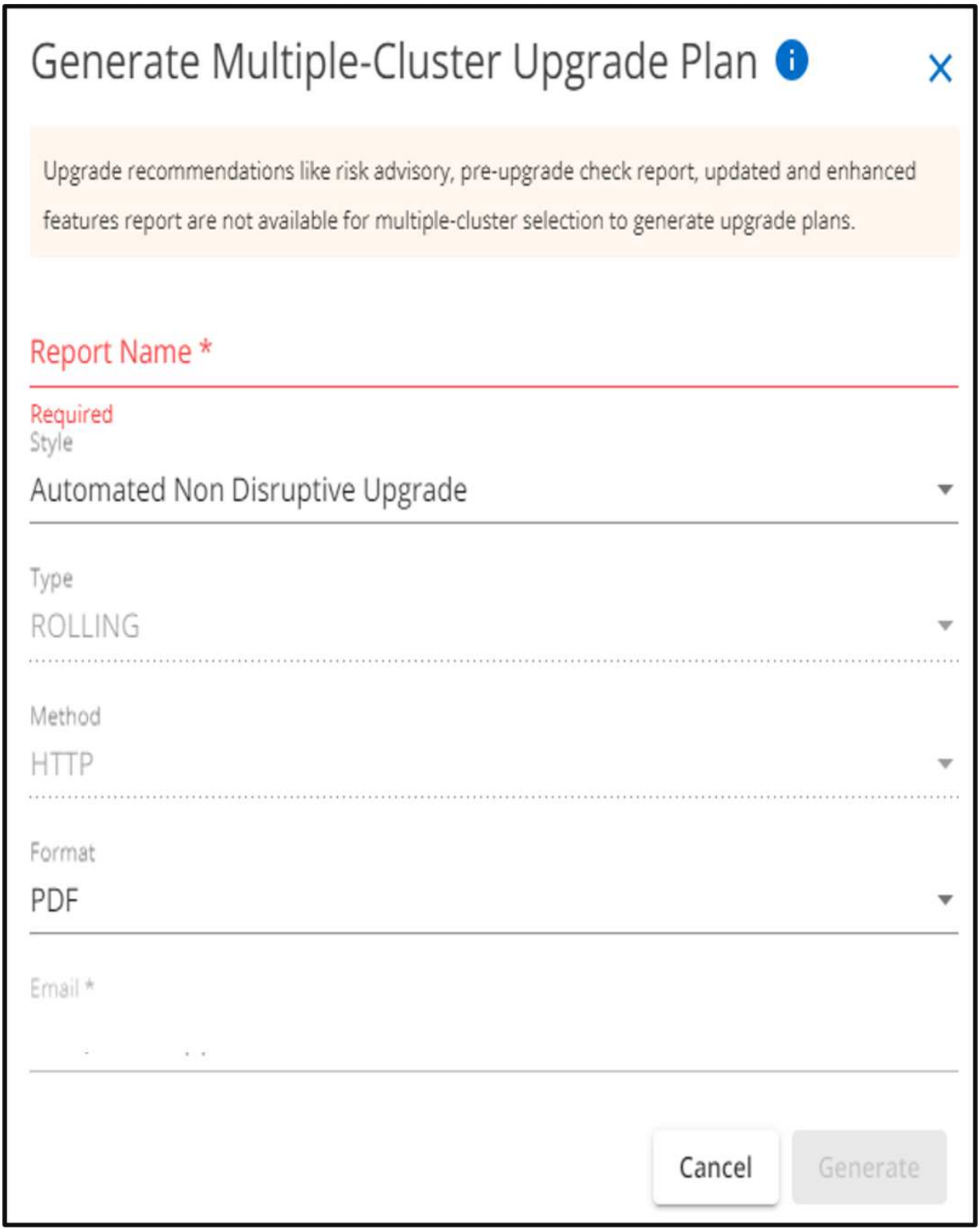
The **Target OS Version** column displays the recommended target OS version.You can click the icon to select another target OS version of a cluster.



- You can click the number of nodes in the **Nodes** column to see the node summary of a cluster.
- You can click **Resolve Issues** from the **Recommended Action** column to fix the issues with ineligible clusters to make them eligible for an upgrade.

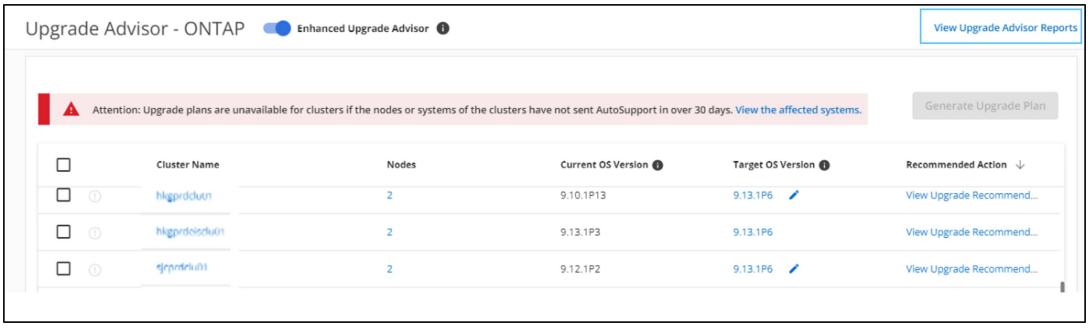


4. Click **Generate Upgrade Plan**.
5. Provide the details in the displayed pop-up.



6. Click **Generate**.
   You will be redirected to the **Reports** page.
7. You can download the upgrade plan from the **Reports** page once it is available.

You can click **View Upgrade Advisor Reports** to go to the **Reports** page.



There are some tasks you should perform to confirm the readiness of the cluster after you upgrade ONTAP. To learn more, see What to do after an ONTAP upgrade.

Generate an upgrade plan for nodes

You can use Upgrade Advisor to view recommended upgrades and generate an upgrade plan for nodes (storage systems). You can view the list of risks in the Risk Advisor tab associated with nodes and mitigate these risks if you upgrade to a newer version of ONTAP.

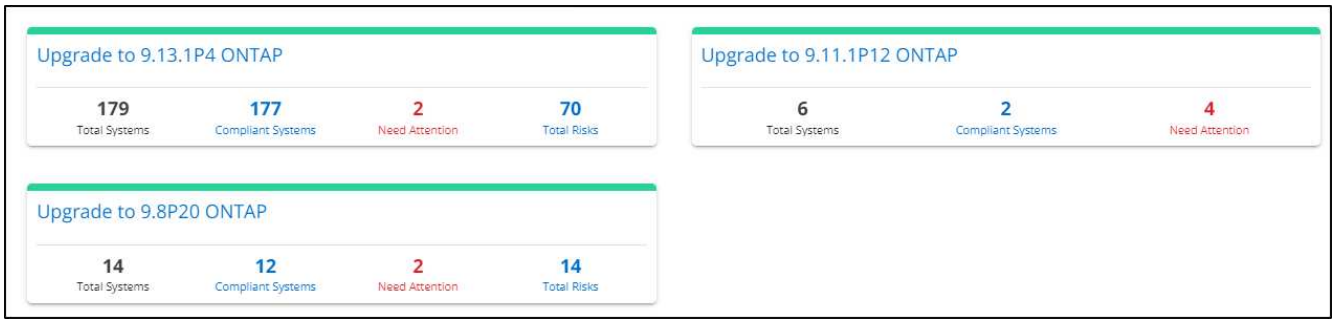
Steps

1. On the dashboard, click number of clusters in the **Upgrade Advisor** widget.

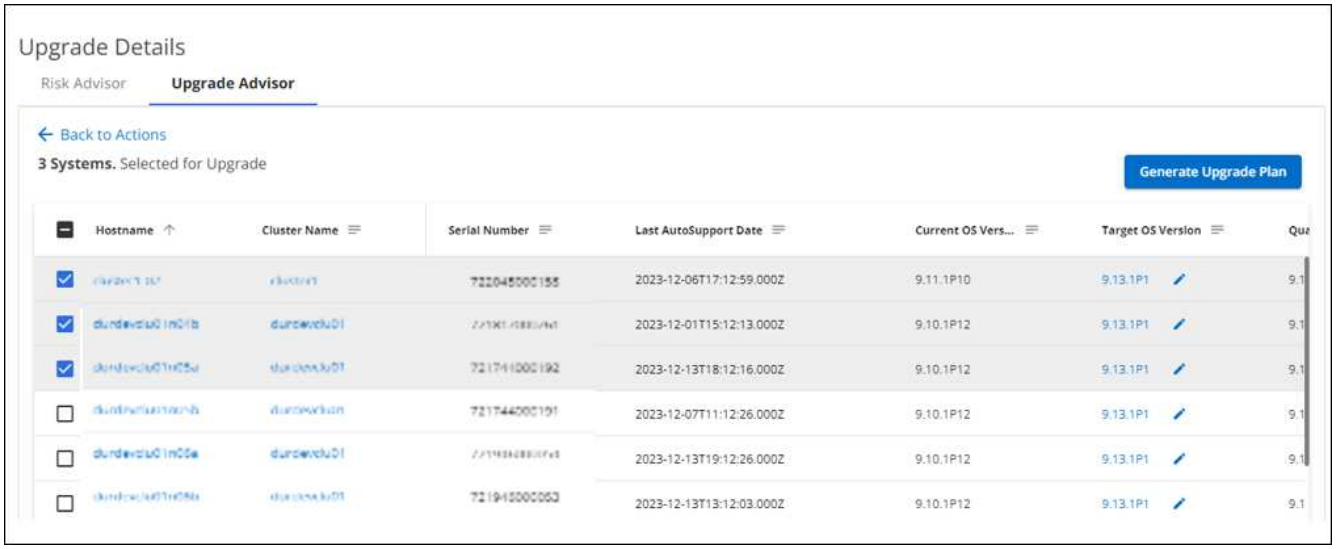
   The **Upgrade Advisor-ONTAP** page appears.

2. Disable the **Enhanced Upgrade Advisor** toggle.

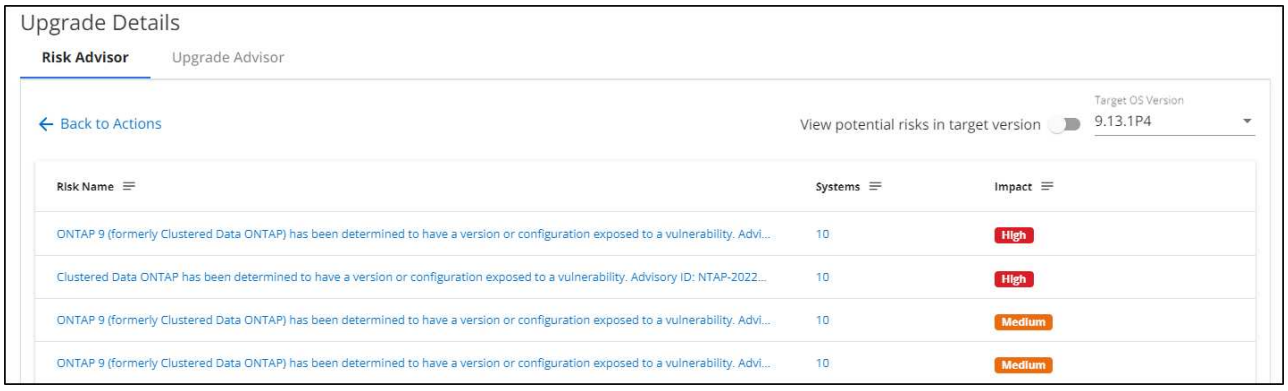
3. Select the upgrade option.



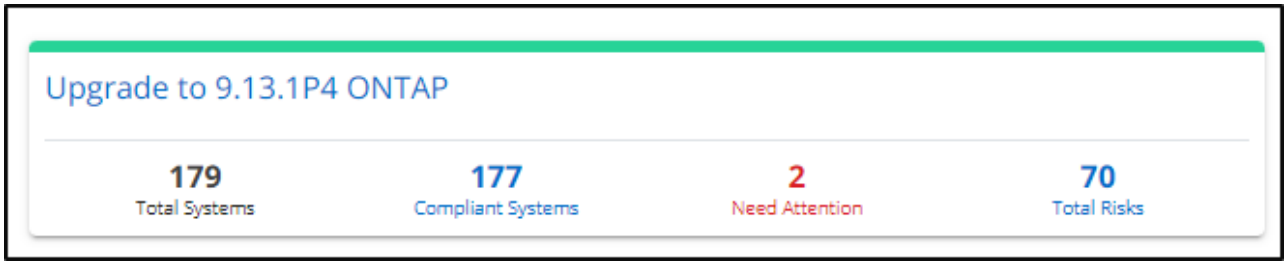
4. Click the number of compliant systems to generate an upgrade plan.
The **Upgrade Details** page is displayed.



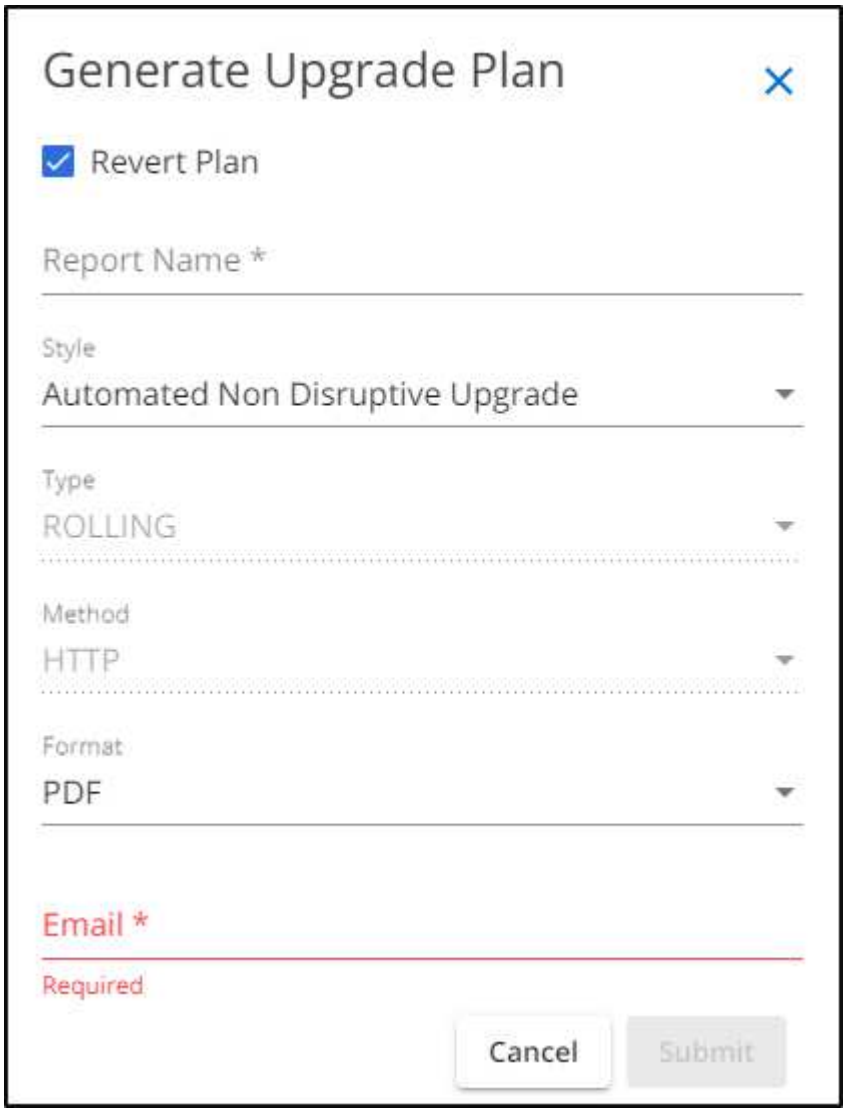
- You can click the icon from the **Target OS Version** to select another target OS version of a cluster.
- You can go to the **Risk Advisor** tab to view the list of risks along with their severity level.



- You can click the number of total risks to view the list of risks in the **Risk Advisor** tab if the upgrade option includes **Total Risks**.



5. In the **Upgrade Advisor** tab, select systems for an upgrade.
6. Click **Generate Upgrade Plan**.
7. Provide the details in the displayed pop-up. You can also select the **Revert Plan** checkbox to include the backout plan in the upgrade plan.



8. Click **Submit**.
   You will be redirected to the **Reports** page.
9. You can download the upgrade plan from the **Reports** page once it is available.

There are some tasks you should perform to confirm the readiness of the cluster after you upgrade ONTAP. To learn more, see What to do after an ONTAP upgrade.

Copyright information

Copyright © 2024 NetApp, Inc. All Rights Reserved. Printed in the U.S. No part of this document covered by copyright may be reproduced in any form or by any means—graphic, electronic, or mechanical, including photocopying, recording, taping, or storage in an electronic retrieval system—without prior written permission of the copyright owner.

Software derived from copyrighted NetApp material is subject to the following license and disclaimer:

THIS SOFTWARE IS PROVIDED BY NETAPP “AS IS” AND WITHOUT ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE, WHICH ARE HEREBY DISCLAIMED. IN NO EVENT SHALL NETAPP BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

NetApp reserves the right to change any products described herein at any time, and without notice. NetApp assumes no responsibility or liability arising from the use of products described herein, except as expressly agreed to in writing by NetApp. The use or purchase of this product does not convey a license under any patent rights, trademark rights, or any other intellectual property rights of NetApp.

The product described in this manual may be protected by one or more U.S. patents, foreign patents, or pending applications.

LIMITED RIGHTS LEGEND: Use, duplication, or disclosure by the government is subject to restrictions as set forth in subparagraph (b)(3) of the Rights in Technical Data -Noncommercial Items at DFARS 252.227-7013 (FEB 2014) and FAR 52.227-19 (DEC 2007).

Data contained herein pertains to a commercial product and/or commercial service (as defined in FAR 2.101) and is proprietary to NetApp, Inc. All NetApp technical data and computer software provided under this Agreement is commercial in nature and developed solely at private expense. The U.S. Government has a non-exclusive, non-transferrable, nonsublicensable, worldwide, limited irrevocable license to use the Data only in connection with and in support of the U.S. Government contract under which the Data was delivered. Except as provided herein, the Data may not be used, disclosed, reproduced, modified, performed, or displayed without the prior written approval of NetApp, Inc. United States Government license rights for the Department of Defense are limited to those rights identified in DFARS clause 252.227-7015(b) (FEB 2014).

Trademark information

NETAPP, the NETAPP logo, and the marks listed at http://www.netapp.com/TM are trademarks of NetApp, Inc. Other company and product names may be trademarks of their respective owners.