# Lifecycle planning documentation

## Lifecycle planning

NetApp
December 15, 2025

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# Lifecycle planning documentation

# Release notes

## What's new in Lifecycle planning

Learn what's new in Lifecycle planning.

### 06 October 2025

#### BlueXP economic efficiency is now Lifecycle planning

BlueXP economic efficiency has been renamed to Lifecycle planning.

You can access it from the NetApp Console left navigation bar by selecting **Storage** > **Lifecycle planning**.

#### BlueXP is now NetApp Console

The NetApp Console, built on the enhanced and restructured BlueXP foundation, provides centralized management of NetApp storage and NetApp Data Services across on-premises and cloud environments at enterprise grade—delivering real-time insights, faster workflows, and simplified administration, that is highly secure and compliant.

For details on what's changed, see the NetApp Console release notes.

### 15 May 2024

#### Disabled features

Some BlueXP economic efficiency features have been temporarily disabled:

- Technology refresh
- Add capacity

### 14 March 2024

#### Technology refresh options

If you have existing assets in place and want to determine whether a technology needs to be updated, you can use the BlueXP ecomomic efficiency technology refresh options. You can either review a short assessment of your current workloads and get recommendations, or if you sent AutoSupport logs to NetApp within the past 90 days, the service can now provide a workload simulation to see how your workloads perform on new hardware.

You can also add a workload and exclude existing workloads from the simulation.

Previously, you could only take an assessment of your assets and identify whether a technology refresh is recommended.

The feature is now part of the Tech refresh option in the left navigation.

Learn more about the Evaluate a technology refresh.

## 08 November 2023

### Technology refresh

This release of BlueXP economic efficiency includes a new option to take an assessment of your assets and identify whether a technology refresh is recommended. BlueXP economic efficiency includes a new Tech refresh option in the left navigation, new pages where you can take an assessment of your current workloads and assets, and a report that provides recommendations to you.

## 02 April 2023

### Introducing BlueXP economic efficiency

The new BlueXP economic efficiency identifies storage assets with current or forecasted low capacity and provides recommendations on data tiering or additional capacity for on-premises AFF systems.

Learn more about NetApp Economic Efficiency.

# Get started

## Learn about Lifecycle planning

Lifecycle planning assesses your storage assets with current or forecasted low capacity and provides recommendations on data tiering options that meet your business needs.

### NetApp Console

Lifecycle planning is accessible through the NetApp Console.

The NetApp Console provides centralized management of NetApp storage and data services across on-premises and cloud environments at enterprise grade. The Console is required to access and use NetApp data services. As a management interface, it enables you to manage many storage resources from one interface. Console administrators can control access to storage and services for all systems within the enterprise.

You don't need a license or subscription to start using NetApp Console and you only incur charges when you need to deploy Console agents in your cloud to ensure connectivity to your storage systems or NetApp data services. However, some NetApp data services accessible from the Console are licensed or subscription-based.

Learn more about the NetApp Console.

### What can you do with Lifecycle planning?

Lifecycle planning can help you accomplish the following goals.

#### Capacity information

- Identify storage assets in your environment that are showing low capacity.
- Review assets for current and forecasted capacity.

### Benefits of Lifecycle planning

Lifecycle planning offers the following benefits:

- Identifies systems that are approaching lifecycle events to help you plan for a technology refresh
- Offers a trusted advisor's recommendations to address capacity issues in your environment
- Reduces the time spent in planning for additional storage

### Cost

NetApp doesn't charge you for using Lifecycle planning.

If you decide to tier cold data to cloud storage, you'll need to check your cloud provider for applicable charges.

### Access

You can access this feature either through the NetApp Console (**Storage** > **Lifecycle planning**) or through Active IQ Digital Advisor (also known as Digital Advisor) (**Dashboard** > **Planning widget** > **Tech refresh**).

# Lifecycle planning prerequisites

Get started with Lifecycle planning by verifying the readiness of your operational environment, login, and network access. To use Lifecycle planning, you should ensure that your environment meets all requirements.

- Your environment must meet all NetApp Console requirements including a login and network access from a web browser.

  Refer to the NetApp Console Quick start and NetApp Console networking information.

- You need to have access credentials to the clusters.
- While not a requirement, it is helpful if the NetApp Console agent is in place and enabled and the ONTAP system is discovered. If not, the service walks you through those processes.
- If you plan on tiering cold data to cloud storage, ensure that the cluster is eligible per the license.

# Quick start for Lifecycle planning

Here’s an overview of the steps needed to get started with Lifecycle planning. The links within each step take you to a page that provides more details.

1 **Review prerequisites**

Ensure your environment meets these requirements.

2 **Set up lifecycle planning**

Complete steps to set up Lifecycle planning.

3 **What’s next?**

After you set up Lifecycle planning, here’s what you might do next.

- Review capacity status.
- Tier cold data to cloud storage to free up storage.
- Optionally, set reminders to check again.

# Set up Lifecycle planning

To use Lifecycle planning, perform a few steps to set it up.

- Review prerequisites to ensure that your system is ready.
- Create a Console agent in the NetApp Console.
- Discover the cluster in the Console.

You can create a Console agent directly in the Console and use that agent later in BlueXP economic efficiency.

Or, you can create the Console agent in the middle of the capacity remediation process.

Similarly, you can discover the cluster ahead of time using the Console or during the capacity remediation process.

### Create a Console agent in the NetApp Console

A NetApp Console agent includes credentials to NetApp ONTAP machines.

To create a Console agent in the Console before using the service, refer to the the Console documentation that describes how to create a NetApp Console agent.

### Discover the cluster in the NetApp Console

Part of the setup involves identifying the cluster name, IP, user name, and password within the Console.

For instructions before using Lifecycle planning, refer to Discover on-premises ONTAP clusters.

# Access Lifecycle planning

You use the NetApp Console to access Lifecycle planning.

To log in to the Console, you can use your NetApp Support Site credentials. Learn more about logging in.

> You can access this feature either through the NetApp Console (**Storage** > **Lifecycle planning**) or through Digital Advisor (**Dashboard** > **Planning widget** > **Tech refresh**).

**Steps**

1. Open a web browser and go to the NetApp Console.

   The Console login page appears.

2. Log in to the Console.
3. From the Console left navigation, select **Storage** > **Lifecycle planning**.

# Frequently asked questions for Lifecycle planning

This FAQ can help if you're just looking for a quick answer to a question about Lifecycle planning.

## Access to Lifecycle planning

**What's the Lifecycle planning URL?**

For the URL, in a browser, enter: https://console.netapp.com/ to access the the NetApp Console.

## Licensing

**Do you need a license to use Lifecycle planning?**

A NetApp License File (NLF) is not required.

# Use NetApp lifecycle planning

## Review and remediate capacity issues identified by Lifecycle planning

Capacity planning involves identifying low-capacity areas in your environment, both current and forecasted. Lifecycle planning uses AI to forecast data growth to help in the planning process. Lifecycle planning identifies those low-capacity areas in your environment.

Using Lifecycle planning, you can accomplish these goals:

- Review capacity status
- Tier cold data to cloud storage and free up storage
- Select no action and set reminders to check again

## Review capacity status in Lifecycle planning

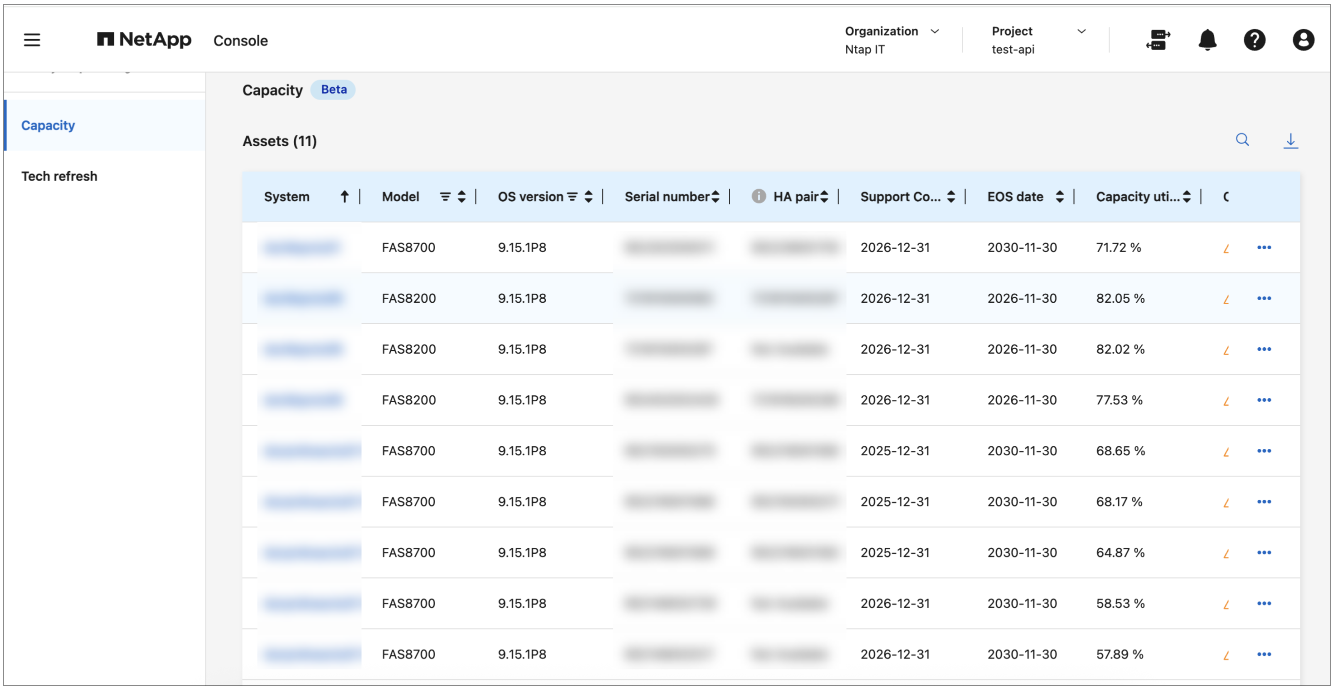
If storage assets in your environment are currently below or forecasted to be below the threshold of 90% capacity, Lifecycle planning identifies those as low-capacity resources and alerts you. Additionally, Lifecycle planning provides recommendations on whether you should tier data.

You can review the following types of data to assist in the capacity issue resolution.

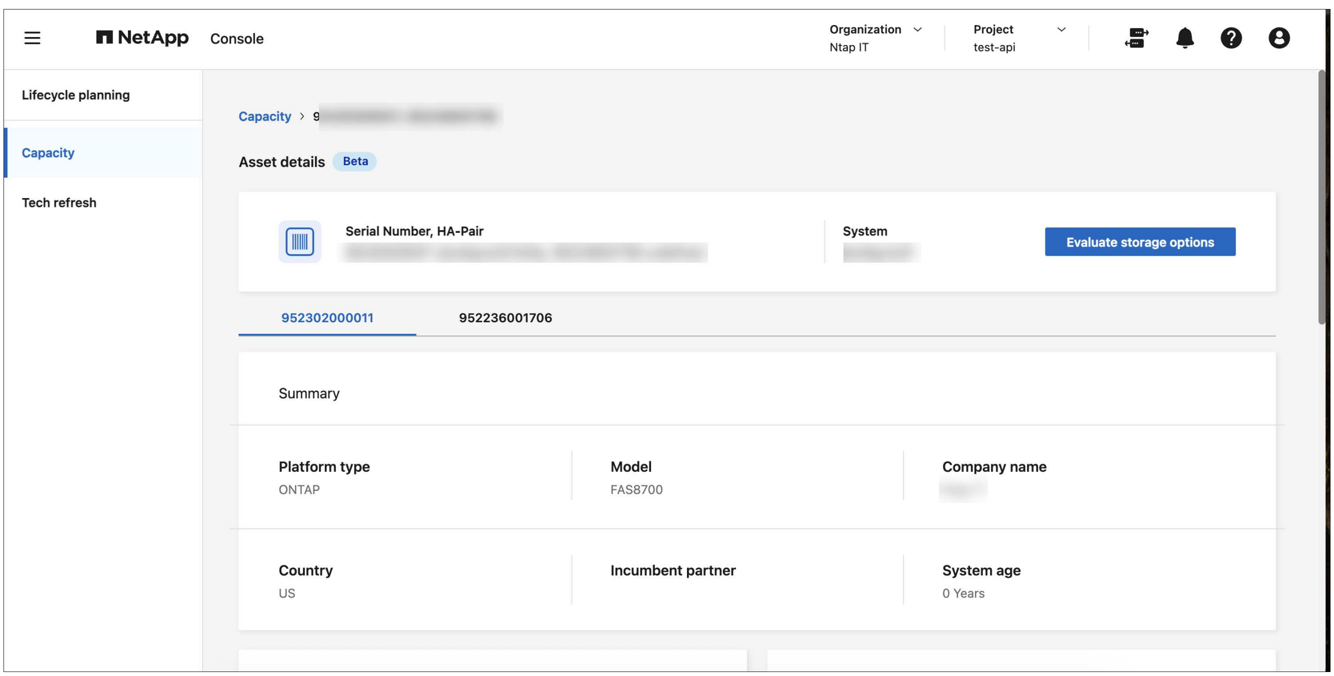
- Platform
- Country where asset is located
- Current and forecasted capacity by month

**Steps**

1. Log in to the NetApp Console.
2. From the left navigation, select **Capacity**.




3. From the Capacity page, select a system.




4. Select **Evaluate Storage Options** for the asset.
5. Choose one of the options:
   - **Best Practices**: Continue by clicking on the link to view best practices.
   - **Tier cold data**: Continue by tiering cold data to cloud storage and freeing up storage.
   - **No action needed**: Continue by selecting no action and setting reminders to check again.

# Tier cold data to cloud storage and free up storage identified by Lifecycle planning

Lifecycle planning provides recommendations based on forecasted data growth. You can accept the forecast or enter your own forecast. Based on this, lifecycle planning presents recommendations that satisfy the projected capacity growth and are most optimal for the storage asset configuration. One of the recommendations might be to tier cold data to cloud storage to free up capacity. This recommendation initiates the connection to NetApp Cloud Tiering, another product.

From there, you can tier the data and easily return to Lifecycle planning to take action on other systems.

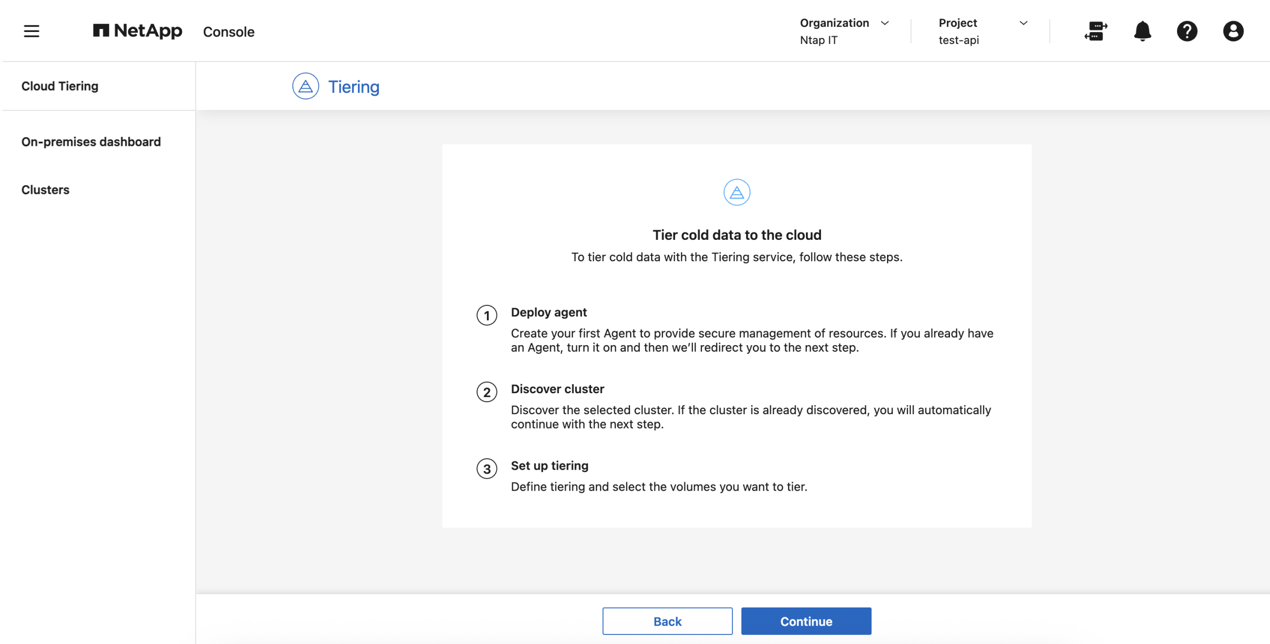
The cloud tiering process includes these processes:

- Deploy a Console agent
- Discover the cluster
- Set up tiering to the cloud

**Steps**

1. Log in to the NetApp Console.
2. Select **Evaluate Storage Options** for the asset.
3. Select **Tier Cold Data**.
4. The next steps depend on whether you have the Console agent deployed already and the cluster discovered:
   - If you need to deploy the Console agent, refer to the NetApp Console documentation that describes How to create the Console agent. Otherwise, if you already deployed the Console agent, the option to deploy the agent does not appear.
   - If the service needs to discover the cluster, refer to Discover on-premises ONTAP clusters. Otherwise, if the cluster has already been discovered, the option to discover the cluster does not appear.

     Lifecycle planning initiates the connection to NetApp Cloud Tiering, another product.




5. Select **Deploy agent**.
6. Choose a cloud provider, and select **Continue**.
7. Select **Continue** or **Skip to Deployment**.

   After deploying the Console agent, NetApp Cloud Tiering discovers the cluster, if not already discovered.

8. After the cluster is discovered, set up the tiering.

   For details about tiering, refer to NetApp Cloud Tiering documentation.

# Set reminders to check again in Lifecycle planning

Rather than add capacity or tier cold data, in Lifecycle planning you can choose no action required at this time and set reminders for yourself to check again after 30, 60, or 90 days.

### Steps

1. Log in to the NetApp Console.
2. Select **Evaluate Storage Options** for the asset.
3. Select **No action needed**.
4. Choose when you want to be notified again of a potential low-capacity issue: 30, 60, or 90 days.
5. Select **Save**.

### Result

After that time elapses, the risk appears again in the list of risks.

# Knowledge and support

## Register for support

Support registration is required to receive technical support specific to the NetApp Console and its storage solutions and data services. Support registration is also required to enable key workflows for Cloud Volumes ONTAP systems.

Registering for support does not enable NetApp support for a cloud provider file service. For technical support related to a cloud provider file service, its infrastructure, or any solution using the service, refer to "Getting help" in the documentation for that product.

- Amazon FSx for ONTAP
- Azure NetApp Files
- Google Cloud NetApp Volumes

### Support registration overview

There are two forms of registration to activate support entitlement:

- Registering your NetApp Console account serial number (your 20 digit 960xxxxxxxxx serial number located on the Support Resources page in the Console).

  This serves as your single support subscription ID for any service within the Console. Each Console account must be registered.

- Registering the Cloud Volumes ONTAP serial numbers associated with a subscription in your cloud provider's marketplace (these are 20 digit 909201xxxxxxxx serial numbers).

  These serial numbers are commonly referred to as *PAYGO serial numbers* and get generated by the NetApp Console at the time of Cloud Volumes ONTAP deployment.

Registering both types of serial numbers enables capabilities like opening support tickets and automatic case generation. Registration is completed by adding NetApp Support Site (NSS) accounts to the Console as described below.

### Register NetApp Console for NetApp support

To register for support and activate support entitlement, one user in your NetApp Console account must associate a NetApp Support Site account with their Console login. How you register for NetApp support depends on whether you already have a NetApp Support Site (NSS) account.

#### Existing customer with an NSS account

If you're a NetApp customer with an NSS account, you simply need to register for support through the Console.

**Steps**

1. Select **Administration** > **Credentials**.
2. Select **User Credentials**.

3. Select **Add NSS credentials** and follow the NetApp Support Site (NSS) authentication prompt.
4. To confirm that the registration process was successful, select the Help icon, and select **Support**.

   The **Resources** page should show that your Console account is registered for support.

   Note that other Console users will not see this same support registration status if they have not associated a NetApp Support Site account with their login. However, that doesn't mean that your account is not registered for support. As long as one user in the organization has followed these steps, then your account has been registered.

### Existing customer but no NSS account

If you're an existing NetApp customer with existing licenses and serial numbers but *no* NSS account, you need to create an NSS account and associate it with your Console login.

**Steps**

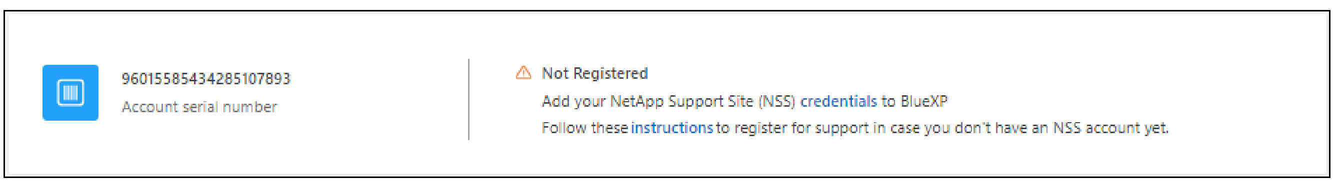
1. Create a NetApp Support Site account by completing the NetApp Support Site User Registration form
   a. Be sure to select the appropriate User Level, which is typically **NetApp Customer/End User**.
   b. Be sure to copy the Console account serial number (960xxxx) used above for the serial number field. This will speed up the account processing.
2. Associate your new NSS account with your Console login by completing the steps under Existing customer with an NSS account.

### Brand new to NetApp

If you are brand new to NetApp and you don't have an NSS account, follow each step below.

**Steps**

1. In the upper right of the Console, select the Help icon, and select **Support**.
2. Locate your account ID serial number from the Support Registration page.




3. Navigate to NetApp's support registration site and select **I am not a registered NetApp Customer**.
4. Fill out the mandatory fields (those with red asterisks).
5. In the **Product Line** field, select **Cloud Manager** and then select your applicable billing provider.
6. Copy your account serial number from step 2 above, complete the security check, and then confirm that you read NetApp's Global Data Privacy Policy.

   An email is immediately sent to the mailbox provided to finalize this secure transaction. Be sure to check your spam folders if the validation email doesn't arrive in few minutes.

7. Confirm the action from within the email.

   Confirming submits your request to NetApp and recommends that you create a NetApp Support Site account.

8. Create a NetApp Support Site account by completing the NetApp Support Site User Registration form
    a. Be sure to select the appropriate User Level, which is typically **NetApp Customer/End User**.
    b. Be sure to copy the account serial number (960xxxx) used above for the serial number field. This will speed up processing.

**After you finish**

NetApp should reach out to you during this process. This is a one-time onboarding exercise for new users.

Once you have your NetApp Support Site account, associate the account with your Console login by completing the steps under Existing customer with an NSS account.

## Associate NSS credentials for Cloud Volumes ONTAP support

Associating NetApp Support Site credentials with your Console account is required to enable the following key workflows for Cloud Volumes ONTAP:

- Registering pay-as-you-go Cloud Volumes ONTAP systems for support

  Providing your NSS account is required to activate support for your system and to gain access to NetApp technical support resources.

- Deploying Cloud Volumes ONTAP when you bring your own license (BYOL)

  Providing your NSS account is required so that the Console can upload your license key and to enable the subscription for the term that you purchased. This includes automatic updates for term renewals.

- Upgrading Cloud Volumes ONTAP software to the latest release

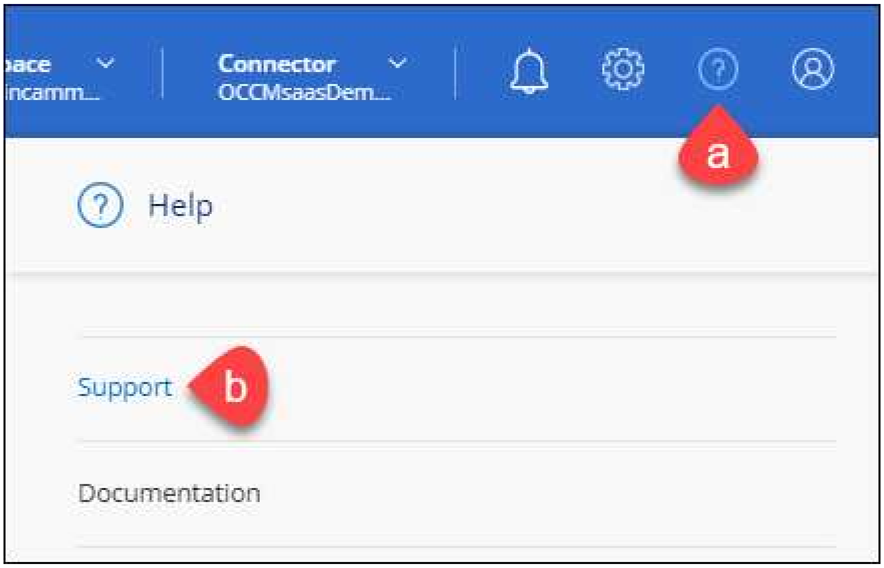
Associating NSS credentials with your NetApp Console account is different than the NSS account that is associated with a Console user login.

These NSS credentials are associated with your specific Console account ID. Users who belong to the Console organization can access these credentials from **Support > NSS Management**.

- If you have a customer-level account, you can add one or more NSS accounts.
- If you have a partner or reseller account, you can add one or more NSS accounts, but they can't be added alongside customer-level accounts.

**Steps**

1. In the upper right of the Console, select the Help icon, and select **Support**.




2. Select **NSS Management > Add NSS Account**.
3. When you're prompted, select **Continue** to be redirected to a Microsoft login page.

   NetApp uses Microsoft Entra ID as the identity provider for authentication services specific to support and licensing.

4. At the login page, provide your NetApp Support Site registered email address and password to perform the authentication process.

   These actions enable the Console to use your NSS account for things like license downloads, software upgrade verification, and future support registrations.

   Note the following:

   - The NSS account must be a customer-level account (not a guest or temp account). You can have multiple customer-level NSS accounts.
   - There can be only one NSS account if that account is a partner-level account. If you try to add customer-level NSS accounts and a partner-level account exists, you'll get the following error message:

     "The NSS customer type is not allowed for this account as there are already NSS Users of different type."

     The same is true if you have pre-existing customer-level NSS accounts and try to add a partner-level account.

   - Upon successful login, NetApp will store the NSS user name.

     This is a system-generated ID that maps to your email. On the **NSS Management** page, you can display your email from the ••• menu.

   - If you ever need to refresh your login credential tokens, there is also an **Update Credentials** option in the ••• menu.

     Using this option prompts you to log in again. Note that the token for these accounts expire after 90 days. A notification will be posted to alert you of this.

# Get help

NetApp provides support for BlueXP and its cloud services in a variety of ways. Extensive free self-support options are available 24/7, such as knowledgebase (KB) articles and a community forum. Your support registration includes remote technical support via web ticketing.

## Get support for a cloud provider file service

For technical support related to a cloud provider file service, its infrastructure, or any solution using the service, refer to "Getting help" in the BlueXP documentation for that product.

- Amazon FSx for ONTAP
- Azure NetApp Files
- Google Cloud NetApp Volumes

To receive technical support specific to BlueXP and its storage solutions and services, use the support options described below.

## Use self-support options

These options are available for free, 24 hours a day, 7 days a week:

- Documentation

  The BlueXP documentation that you're currently viewing.

- Knowledge base

  Search through the BlueXP knowledge base to find helpful articles to troubleshoot issues.

- Communities

  Join the BlueXP community to follow ongoing discussions or create new ones.

## Create a case with NetApp support

In addition to the self-support options above, you can work with a NetApp Support specialist to resolve any issues after you activate support.

**Before you get started**

- To use the **Create a Case** capability, you must first associate your NetApp Support Site credentials with your BlueXP login. Learn how to manage credentials associated with your BlueXP login.
- If you're opening a case for an ONTAP system that has a serial number, then your NSS account must be associated with the serial number for that system.

**Steps**

1. In BlueXP, select **Help > Support**.
2. On the **Resources** page, choose one of the available options under Technical Support:

a. Select **Call Us** if you'd like to speak with someone on the phone. You'll be directed to a page on netapp.com that lists the phone numbers that you can call.

b. Select **Create a Case** to open a ticket with a NetApp Support specialist:

   - **Service**: Select the service that the issue is associated with. For example, BlueXP when specific to a technical support issue with workflows or functionality within the service.
   - **Working Environment**: If applicable to storage, select **Cloud Volumes ONTAP** or **On-Prem** and then the associated working environment.

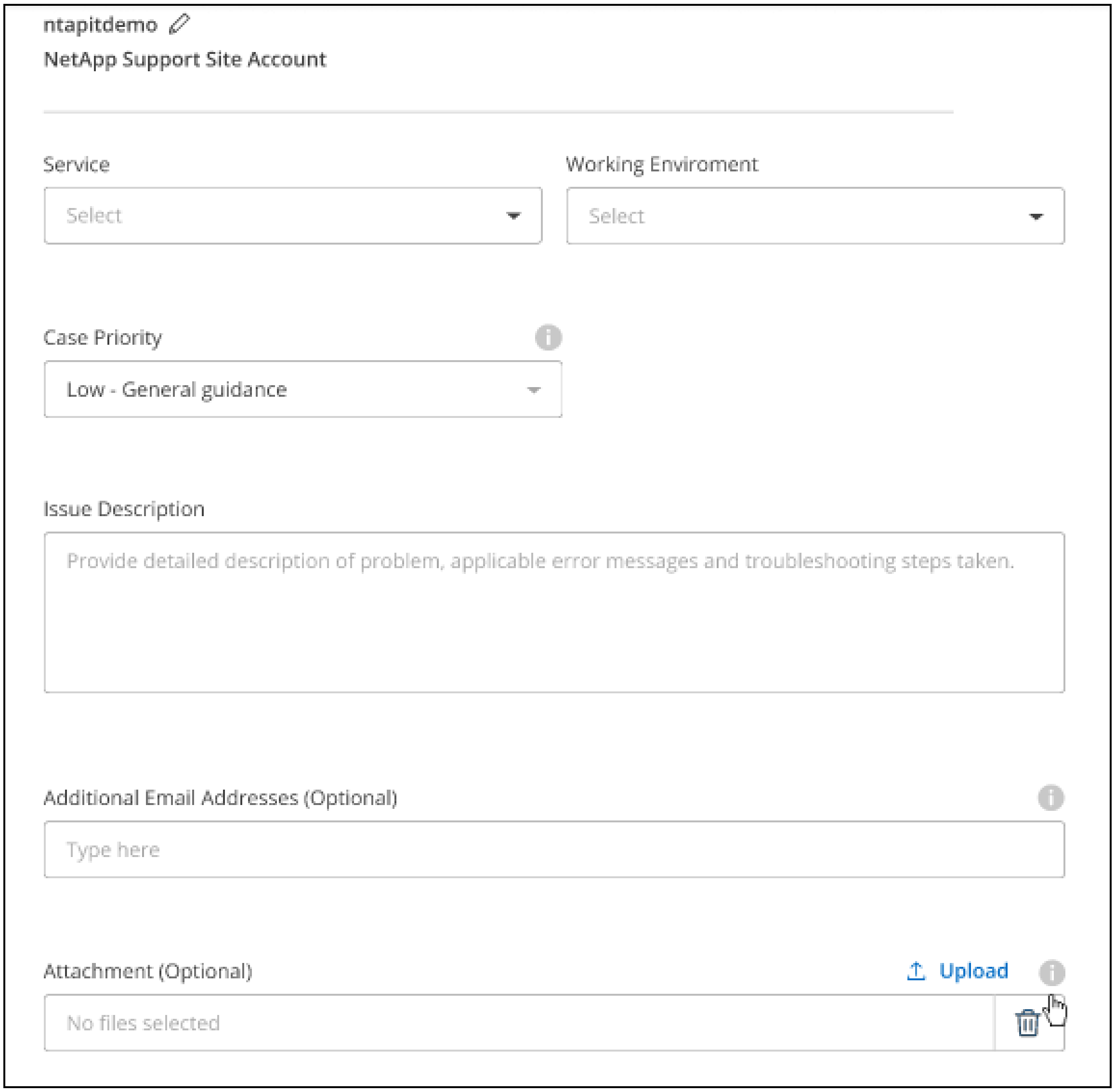
     The list of working environments are within scope of the BlueXP organization (or account), project (or workspace), and Connector you have selected in the top banner of the service.

   - **Case Priority**: Choose the priority for the case, which can be Low, Medium, High, or Critical.

     To learn more details about these priorities, hover your mouse over the information icon next to the field name.

   - **Issue Description**: Provide a detailed description of your problem, including any applicable error messages or troubleshooting steps that you performed.
   - **Additional Email Addresses**: Enter additional email addresses if you'd like to make someone else aware of this issue.
   - **Attachment (Optional)**: Upload up to five attachments, one at a time.

     Attachments are limited to 25 MB per file. The following file extensions are supported: txt, log, pdf, jpg/jpeg, rtf, doc/docx, xls/xlsx, and csv.




**After you finish**

A pop-up will appear with your support case number. A NetApp Support specialist will review your case and get back to you soon.

For a history of your support cases, you can select **Settings > Timeline** and look for actions named "create support case." A button to the far right lets you expand the action to see details.

It's possible that you might encounter the following error message when trying to create a case:

"You are not authorized to Create a Case against the selected service"

This error could mean that the NSS account and the company of record it's associated with is not the same company of record for the BlueXP account serial number (ie. 960xxxx) or the working environment serial number. You can seek assistance using one of the following options:

- Use the in-product chat
- Submit a non-technical case at https://mysupport.netapp.com/site/help

## Manage your support cases (Preview)

You can view and manage active and resolved support cases directly from BlueXP. You can manage the cases associated with your NSS account and with your company.

Case management is available as a Preview. We plan to refine this experience and add enhancements in upcoming releases. Please send us feedback by using the in-product chat.

Note the following:

- The case management dashboard at the top of the page offers two views:
  - The view on the left shows the total cases opened in the past 3 months by the user NSS account you provided.
  - The view on the right shows the total cases opened in the past 3 months at your company level based on your user NSS account.

  The results in the table reflect the cases related to the view that you selected.

- You can add or remove columns of interest and you can filter the contents of columns like Priority and Status. Other columns provide just sorting capabilities.

  View the steps below for more details.

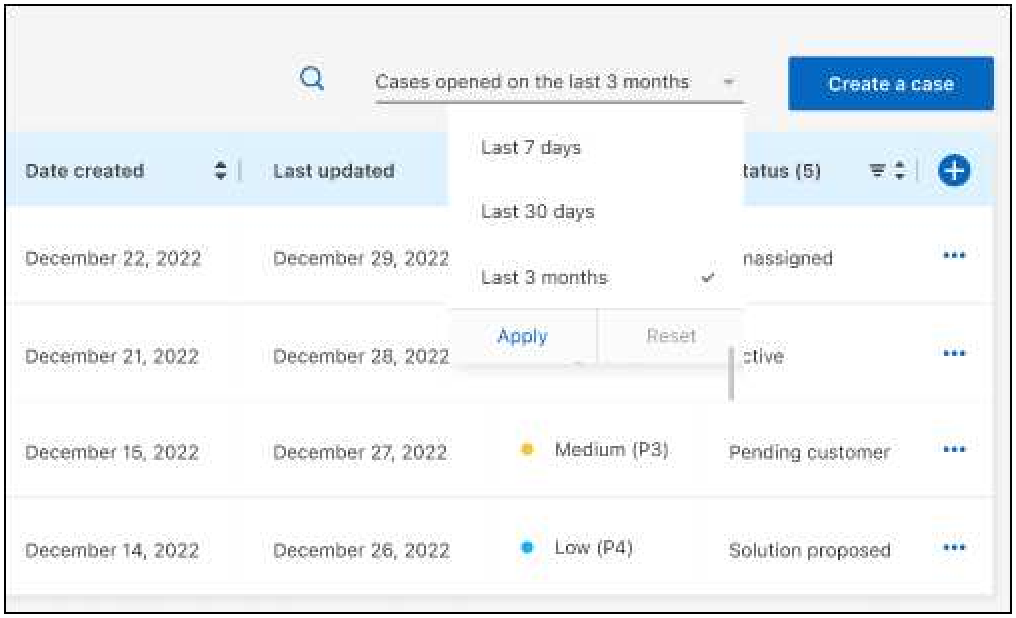
- At a per-case level, we offer the ability to update case notes or close a case that is not already in Closed or Pending Closed status.

**Steps**

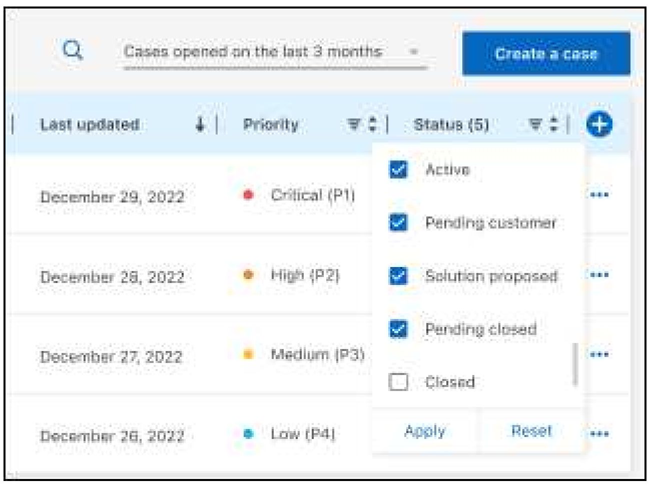
1. In BlueXP, select **Help > Support**.
2. Select **Case Management** and if you’re prompted, add your NSS account to BlueXP.

   The **Case management** page shows open cases related to the NSS account that is associated with your BlueXP user account. This is the same NSS account that appears at the top of the **NSS management** page.

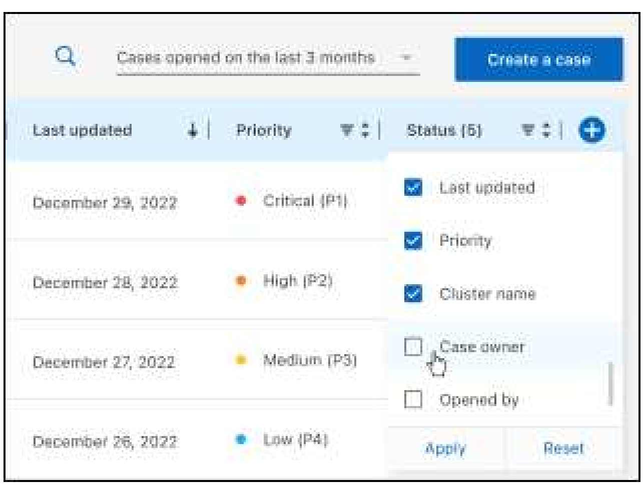
3. Optionally modify the information that displays in the table:
   - Under **Organization’s cases**, select **View** to view all cases associated with your company.
   - Modify the date range by choosing an exact date range or by choosing a different time frame.




◦ Filter the contents of the columns.




◦ Change the columns that appear in the table by selecting ⊕ and then choosing the columns that you'd like to display.

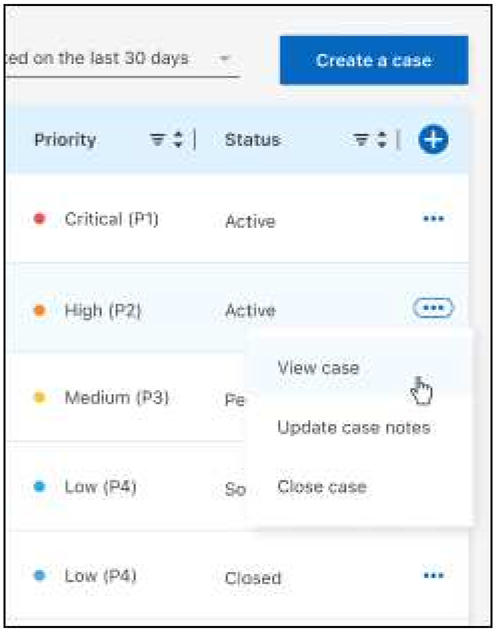


4. Manage an existing case by selecting ••• and selecting one of the available options:

    ◦ **View case**: View full details about a specific case.
    ◦ **Update case notes**: Provide additional details about your problem or select **Upload files** to attach up to a maximum of five files.

      Attachments are limited to 25 MB per file. The following file extensions are supported: txt, log, pdf, jpg/jpeg, rtf, doc/docx, xls/xlsx, and csv.

    ◦ **Close case**: Provide details about why you're closing the case and select **Close case**.



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