

Citrix Presentation Server™ 4.0 Technical Upgrade Guide

THIS PAPER DISCUSSES HOW TO PLAN FOR YOUR UPGRADE
AND HOW TO UPDATE LICENSING FOR CITRIX PRESENTATION SERVER 4.0.

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Preparing for Upgrade

When planning a major upgrade, consider any changes or enhancements to the environment you may also be planning. No single set of procedures can cover every environment's need. Review the issues discussed in this guide and formulate the plan best tailored for your environment. At a minimum, consider the following topics before you update any components:

Server operating systems. Citrix Presentation Server™ 4.0 for Windows® requires Microsoft® Windows 2000 Server or Windows Server® 2003. If you upgrade the platform release of the server's operating system; for example, if you upgrade the server from Windows 2000 Server to Windows Server 2003, Citrix recommends that you use a fresh installation of Presentation Server.

Server farm design. Now is a good time to consider whether or not your present use of farms and zones best fits your organization, network, and user access needs. For example, adding network segments may require that you redesign the environment. If users' remote access needs have grown, your organization has added sites, or your staff now has expanded database expertise—all of these factors can support a new farm design. For more information about designing farms, see the [*Presentation Server Administrator's Guide*](#).

User access during upgrade. The easiest and recommended way to provide published applications and resources to users during and after an upgrade is through the Web Interface or Version 9.0 of the Citrix® Program Neighborhood® Agent. If you are not currently using these interfaces, consider incorporating one of them.

License use during upgrade. If you run Presentation Server with Citrix MetaFrame XP® or Citrix MetaFrame® 1.8 during an upgrade phase, you must provide both types of licensing during that upgrade phase. Connection licenses are not shared between Presentation Server and previous versions. For example, users can consume one Presentation Server license if they launch an application on a server running Presentation Server and also consume a MetaFrame XP license if they launch an application on a server running MetaFrame XP.

Note: The reason for this is that the licensing mechanisms of MetaFrame XP and MetaFrame 1.8 are completely different and do not integrate with the licensing system of Presentation Server 3.0 and 4.0.

Manageable phases. For large server farms or multi-farm environments, consider Upgrading in phases. Deciding how to group users, applications, and servers into manageable chunks for your staff is unique to any organization and greatly influences your Upgrade plan.

When planning an upgrade, engaging the services of Citrix® Consulting or a Citrix Partner may be advantageous as part of large or complex upgrades. External consultants with experience with large upgrade projects can typically save an organization time and money based on their experiences with similar implementations. For these companies, the urgent need is to modernize, centralize, and optimize how their businesses run.

Supported Upgrades and Restrictions

When upgrading to Presentation Server 4.0 please be aware of the following:

General

- Citrix recommends that you deploy the latest version of Presentation Server of all servers in the server farm.
- Citrix does not support upgrading a server's operating system. For example, if you are upgrading your server from Windows NT® 4.0 to Windows 2000 Server or Windows 2000 Server to Windows Server 2003, after upgrading, you must install Presentation Server as a new installation.
- You can only directly upgrade to Presentation Server 4.0 from MetaFrame XP FR3 and Presentation Server 3.0. You cannot upgrade servers running MetaFrame 1.0, MetaFrame 1.8, or versions of MetaFrame XP prior to Feature Release 3 directly to Presentation Server 4.0. These versions can be upgraded to Presentation Server 3.0 and then upgraded to 4.0. Refer to the [*Presentation Server 4.0 Administrator's Guide for more details.*](#)
- If you are upgrading Conferencing Manager, please note that a direct upgrade from Conferencing Manager 2.0 to version 4.0 is not supported. Refer to the [*Administrator's Guide for Citrix MetaFrame Conferencing Manager Version 4.0*](#) for more details.

Service Pack 2005.04 and Mixed Farm Considerations

- Installing Service Pack 2005.04 on Presentation Server 3.0 effectively upgrades its binaries to the Presentation Server 4.0 level. If you wish to install Service Pack 2005.04 into your Presentation Server 3.0 farm, please be aware of the potential interoperability issues that could arise with printing as well as the recommendations for upgrading farm data collectors, farm metric servers and data connection servers that are mentioned below.
- During the upgrade to Presentation Server 4.0 or installation of Service Pack 2005.04 some farm servers may remain at their existing version level while others should be upgraded to Presentation Server 4.0. Special consideration should be given to data collectors, farm metric servers and database connection servers. These servers should be updated to the Presentation Server 4.0 level prior to other farm servers. Keeping them at their existing level could cause issues with your server farm and resource manager functionality. Refer to the [*Presentation Server 4.0 Administrator's Guide*](#) for complete order of operation details.
- The installation of Presentation Server 4.0 or Service Pack 2005.04 introduces a new policy, the session printers policy, which replaces previous methods of managing network printer settings. This new policy cannot be used to manage the network printer settings of previous versions of Presentation Server. Citrix only recommends maintaining a farm containing mixed versions of Presentation Server for minimal periods of transition. If you have a farm with multiple versions of Presentation Server, use the previous version of the Presentation Server Console to manage network printer settings for previous versions of Presentation Server in your farm.
- Presentation Server 4.0 and Service Pack 2005.04 cannot be installed on a domain controller. Please refer to Knowledge base article CTX106529 for further information.
- For more information regarding Service Pack 2005.04 please refer to the **Service Pack 2005.04 FAQ**.

Upgrade Steps

The following sections explain the procedures for Upgrading to Presentation Server 4.0 from a licensing and installation/upgrade perspective.

- Upgrade of licenses for MetaFrame 1.8, MetaFrame XP and Presentation Server 3.0
- Upgrade of MetaFrame XP FR3 and Presentation Server 3.0 software
- Upgrade of MetaFrame XP FR2 or earlier software

Upgrading Licenses

From a licensing perspective you can only upgrade directly to Presentation Server 4.0 from MetaFrame XP. If you are running MetaFrame 1.8, you must first upgrade to MetaFrame XP and then upgrade from MetaFrame XP to Presentation Server 4.0. For more information, refer to the Upgrading from MetaFrame 1.8 to Citrix Presentation Server 4.0 section below.

If you are a current Citrix Subscription Advantage™ customer, you are eligible to upgrade, or fulfill, your existing MetaFrame XP connection licenses to Presentation Server 4.0 as a benefit of the Subscription Advantage program. This exchange allows you to maintain the same level of user connectivity as you move from MetaFrame XP to Presentation Server 4.0.

Presentation Server 3.0 farms may continue to use their existing licenses if the Subscription Advantage Expiration Date in their license file is after the Subscription Advantage Eligibility Date of April 27, 2005. If not, renew your Subscription Advantage membership and obtain a renewal license. After renewing, logon to <http://www.mycitrix.com> to download your license file and add it to your license server.

See the sections below for step-by-step procedures.

UPGRADING LICENSES FROM CITRIX METAFRAME XP TO CITRIX PRESENTATION SERVER 4.0

To upgrade to Presentation Server 4.0, complete the following tasks:

1. Exchange your existing product license for a Presentation Server 4.0 license code. Before you begin, you must have the license code from your existing product (that is, MetaFrame XP) handy.
2. Install the Presentation Server 4.0 License Server and License Management Console from the Presentation Server 4.0 CD-ROM. For further information on installing the licensing components please refer to the *[Presentation Server 4.0 Licensing Guide](#)*.
3. Logon to MyCitrix.com.
4. Click on the **Licensing** menu and choose the **Fulfillment -> Fulfill Eligible Products** option.
5. On the **Product Fulfillment Selection** page choose your license program type and the product to which you want to upgrade (i.e. Citrix Presentation Server).

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6. Follow the rest of the upgrade process. A Product Fulfillment Certificate verifies license conversion and presents the resulting license codes. You will be given a new Presentation Server license code.

To active and download license files:

7. From the **License Management Console Welcome** page, click **Configure License Server**. On the **License Files** page, click **Download license file from MyCitrix.com**.
8. Choose **Licensing > Citrix Activation System > Activate or Allocate Licenses**. The Citrix Activation System prompts you through the activation process until you receive a notice that the licenses are successfully activated.
9. Choose **Download License File** from the left menu.
10. You can choose to allocate all or a portion of the licensed quantity. For the **License Server Name**, type the name of the license server where you will be storing this license file. The server name is **cAsE sENsITiVE**.
11. Download the license file.
12. In the **License Files** page, click **Copy license file to License Server**.

Note: The Citrix Activation System saves files by default to the last location you used for the Save As control. License files have the extension .lic. You can search for license files with the text string *.lic.

13. In the **License Management Console**, navigate to the **Licenses Files** pages of the **Configuration** tab.
14. In the **License Files** page, click **Copy license file to License Server**.
15. In the **License Files** page, click **Update License Data**.

Caution: Do not edit license files without understanding their format. You can unintentionally corrupt them and render the licensing system unusable.

UPGRADING LICENSES FROM CITRIX METAFRAME 1.8 TO CITRIX PRESENTATION SERVER 4.0

If you are using MetaFrame 1.8, you must follow a two-step process that involves first converting your licenses to MetaFrame XP and then converting these licenses to Presentation Server 4.0. You must install and activate the MetaFrame XP licenses before you convert them to Presentation Server 4.0.

To upgrade licenses from MetaFrame 1.8:

1. Log on to MyCitrix.com (<http://www.mycitrix.com>).
2. Choose **Licensing > Fulfillment > Fulfill Eligible Products**. Follow the onscreen instructions to choose the licensing program type of your license and select MetaFrame XP Presentation Server as the product you want to receive. Note that your Subscription Advantage must be current in order for this to work.

Note: The Citrix Activation System saves files by default to the last location you used for the Save As control. License files have the extension .lic. You can search for license files with the text string *.lic.

3. Follow instructions on the **MetaFrame XP Presentation Server Upgrade** page to select licenses to upgrade. A Product Fulfillment Certificate confirms license conversion and displays the resulting license codes.

4. Install and activate the MetaFrame XP license code in the Citrix Management Console of your MetaFrame XP farm.
5. After you activate the license codes for MetaFrame XP, you can use the procedures in the previous section to upgrade the MetaFrame XP licenses to Presentation Server 4.0, allocate the licenses into license files, and download the license files to your license server.
6. For more information about planning your deployment, installing a license server, and obtaining license files, please refer the [Citrix Presentation Server Licensing Guide](#).

Because licensing is a crucial part of your product installation, Citrix recommends that you read the licensing manual before installing Presentation Server licensing. Configure a license server before attempting to upgrade licenses. You designate a license server when you download the license files that result from converting existing licenses.

Upgrade of Citrix MetaFrame XP FR3 and Citrix Presentation Server 3.0 Farm Software

For more information regarding the Upgrade a MetaFrame XP FR3 or Presentation Server 3.0 farm please refer to Migration to [Presentation Server](#) section of the [Presentation Server 4.0 Administrator's Guide](#).

Citrix recommends that you maintain all servers in a farm at the most recent release level of Presentation Server. If you find that you need to run different release levels of Presentation Server in your server farm on a temporary basis, configure a server running the latest release as the zone's data collector.

To upgrade a server farm to MetaFrame Presentation Server

1. Verify installation prerequisites — To verify that your computer satisfies installation prerequisites for each component you are installing, review the installation checklist. To access the installation checklist, select View installation checklist from the initial Autorun screen.
2. Install the license server — Citrix licensing has changed from MetaFrame XP, Feature Release 3. If you are upgrading from MetaFrame XP, Feature Release 3, before you upgrade the first server in a farm, install a license server. Before upgrading, ensure you download current licenses. For information about installing the license server, see the [Presentation Server Licensing Guide](#).
3. Upgrade MetaFrame Conferencing Manager from Version 2.0 to Version 4.0. MetaFrame Conferencing Manager, Version 2.0 is not compatible with Presentation Server 4.0.
4. Turn off interoperability mode in the farm you are upgrading.
5. Upgrade farm metric servers and database connection servers.

If you are upgrading from an earlier release of MetaFrame Presentation Server, Enterprise Edition, upgrade the farm metric servers (primary and backup) before upgrading other servers in the farm. Resource Manager, a component of Enterprise Edition, uses the farm metric servers to interpret information collected from other servers. Farm metric servers running earlier versions of Resource Manager than other servers in the farm may cause inconsistencies.

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6. Upgrade Presentation Server Console, Access Suite Console, and Web Interface. To automatically upgrade the consoles and the Web Interface and preserve custom configuration settings, accept the default settings of the Install MetaFrame Presentation Server and its components option in Autorun.

Accepting the default settings automatically upgrades the consoles and the Web Interface before upgrading the server and preserves custom configuration settings.

Note: When you upgrade the Access Suite Console, or if you are sharing My Views between systems running different versions of the Access Suite Console, there are certain restrictions on how the upgraded console recognizes previously saved My Views. Specifically, this restriction applies if you are using the consoles included with MetaFrame Presentation Server 3.0 and Presentation Server 4.0. If, after upgrading, you are asked whether or not you want to upgrade your .msc configuration file, choose one of the following options:

- If you choose to upgrade your file, you cannot use an older version of the console to access the My Views stored in the file, but you can save My Views in your new version of the console.
- If you choose Don't Upgrade, the file is not upgraded. You can continue to use either version of the console to access the My Views stored in the file, but you can save only My Views to this file using the older version of the console.

7. Upgrade zone data collectors.
8. Upgrade farm servers.
9. If you are using MetaFrame Conferencing Manager, install and configure the Guest Attendee Web Interface.

Upgrade of Citrix MetaFrame XP FR2 or Earlier Software

Direct upgrades to Presentation Server 4.0 from versions of MetaFrame XP FR2 or earlier are not supported. You may upgrade to Presentation Server 3.0 first and then upgrade to Presentation Server 4.0. However, there would be less effort involved in uninstalling the earlier versions and installing a fresh copy of Presentation Server 4.0. For information regarding the upgrade of a MetaFrame XP FR2 or earlier farm, please refer to [Presentation Server 4.0 Administrator's Guide](#). It contains a step-by-step explanation of the sequence of actions and strategies required for a smooth upgrade.

Presentation Server 4.0 no longer supports interoperability mode. Because there is no longer support for interoperability with farm servers running MetaFrame 1.0 or 1.8, follow this general procedure for the Upgrade of a server farm.

To upgrade a farm from MetaFrame 1.0 or 1.8

1. Install Presentation Server 4.0 on a server that is independent of your MetaFrame 1.0 or 1.8 farm.
2. Use the Presentation Server Console to configure your newly installed farm to match the settings of your farm running MetaFrame 1.0 or 1.8. Ensure that you also match the settings for published applications. Alternatively, you can create a script to export and import published application information. See the Citrix Developer Network™ (<http://apps.citrix.com/cdn/>) for additional information about the Citrix Application Publishing SDK and MetaFrame Presentation Server SDK (MPSSDK).

3. Deploy Web Interface as the primary entry point for your newly installed farm. Use DNS CNAME (alias) records for the Web Interface servers. Use a simple mnemonic for the DNS alias, such as myapps. For example, you could have an internal Web Interface deployment with multiple servers that share the DNS alias myapps.citrix.com. Not only is this configuration easy for users to remember, it is also useful for load balancing multiple Web Interface servers.
4. Open the new deployment for testing by pilot users.
5. After refining the pilot deployment, switch users to it. Instruct users to access your Web Interface server URL. Here is an example based on the previous DNS alias example:

<https://myapps.citrix.com>
6. If most clients in your organization are Win32 based, Citrix recommends that you deploy Web Interface with Program Neighborhood Agent. Use the Citrix client packager to repackage the Program Neighborhood Agent and include the URL of your Web Interface deployment.
7. Deploy the new package to client desktops using Active Directory® group policy, Microsoft Systems Management Server (SMS), or other third party deployment product. This deployment method requires no user input.
8. Decommission the farm running MetaFrame 1.0 or 1.8. You can use the Web Interface for Presentation Server 4.0 to aggregate the published applications from the MetaFrame 1.8 farm alongside the Presentation Server 4.0. This is useful if the transition from MetaFrame 1.8 to MetaFrame Presentation Server 4.0 takes place over a period of weeks or months.

When using Web Interface with MetaFrame 1.8, you must ensure that ICA® authentication tickets are disabled for the MetaFrame 1.8 farm configuration. If ICA authentication tickets are not disabled, the following message is displayed in the browser of the Web Interface client:

Error: An error has occurred while connecting to the requested resource.

You also see the following event in the application log of the Web Interface server:

Event Type: Error

Event Source: Web Interface at <Site_Path>

Event Category: None

Event ID: 0

Description:

The farm <Farm_Name> has been configured to use MetaFrame Presentation Server ticketing, but no ticket tag was received.

Check that the farm supports ticketing. [Log ID: a561610e]



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