

Migrate sites and licenses to a new BeyondTrust Virtual Appliance

Introduction

This video will guide you through the most common steps for migrating your sites and licenses to a new BeyondTrust RS Virtual Appliance. Because of the different environments, individual case preferences, and setup conditions, your migration process may vary slightly from the one shown here.

If you would like to review the installation process, the various installation scenarios, and firewall port requirements, please check these guides:

- **RS Virtual Appliance Setup Guide:** www.beyondtrust.com/docs/remote-support/getting-started/deployment/virtual
- **BeyondTrust in the Network:** www.beyondtrust.com/docs/remote-support/getting-started/deployment/dmz

BeyondTrust offers a variety of implementation service packages that provide customized migration planning and upgrade assistance. For more details, please contact your account manager.

Please be aware that if your existing appliance is not running a recent software version, you may be directed to install a series of intermediate updates on your existing appliance before migrating to your new RS Virtual Appliance.

Back up your current appliance configuration

First you need to make a backup of your current appliance configuration. To back up your portal settings, log into the /login interface of your current appliance, click on the **Management** tab, and in the **Software** sub-tab click **Download Backup**. If you do not enter a backup password, you are prompted to confirm you want to proceed without one.

Save the backup file to a secure location. You will need it later.

Export your existing SSL certificate chain from your current appliance

Next, you need to export your existing SSL certificate chain from your current appliance.

Log into the /appliance interface of your current appliance and browse to the **Security** tab, the **Certificates** sub-tab, and then the **Certificates** section.

Check the box next to your correct BeyondTrust site certificate, select **Export** from the **Select Action** dropdown box, and click **Apply**. On the next screen, choose **ALL** options -- **Include Certificate**, **Include Private Key**, and **Include Certificate Chain** (if available).

Finally, click the **Export** button. Save this file to a secure location. It will be used in a step below.

Install the new software version

Use the directions in the BeyondTrust RS Virtual Appliance Installation Kit to install the software in your virtual environment. You will find instructions on how to access the /appliance web interface via an IP address.

Please note that you must allocate storage space before booting your BeyondTrust RS Virtual Appliance, not afterwards.

You will need to install Base software update(s) on the new RS Virtual Appliance. You may have to install one or more updates at this time. There will be a separate email containing instructions on how to install and update the Base software for the new RS Virtual Appliance. The Base software is tied to the new appliance serial number.

You will need to locate the SSL chain you exported earlier, and import it into the virtual appliance.

To do this, log into the /appliance interface of your new RS Virtual Appliance. Click on the **Security** tab and then the **Certificates** sub-tab. Choose **Import**.

Browse to the certificate file that you previously exported, and click **Upload**.

Finally, be sure to mark it as the default certificate by clicking the radio button in the right hand column of the **Certificate** description.

Install a License Package

After the previous steps are completed, install the Remote Support software using one of the following methods:

- If the appliance has internet access, follow the steps found here: <https://www.beyondtrust.com/docs/remote-support/updates/upgrade/automatic.htm>
- If the appliance does not have internet access, follow the steps found here: <https://www.beyondtrust.com/docs/remote-support/updates/upgrade/manual.htm>

You now should have a functioning support portal and should be able to access the /login interface to create user accounts and so forth.

For your first login, use **admin** and **password** for your credentials.

As a side note, please remember that if you are trying to reach /login by using the IP address and not the hostname, you need to mark the new site as the default site. As shown in the video, this setting is located at **/appliance > Status > Basics > Default Site**.

Once logged in, click **Management**, then **Software Management**.

Click **Choose File** and find the backup file you created at the beginning of the process. A warning appears to remind you that you also need to provide a Vault key backup if you are restoring a configuration containing Vault credentials onto a new appliance. Click **Yes** if you wish to continue and then click **Upload Backup**.

You will now need to update your DNS record and confirm login.

First, update your DNS A-record to route BeyondTrust site traffic to the IP address of the new appliance. Please note that DNS changes can take a little while to propagate.

Next, log into your rep console and allow it to update (if applicable for your situation). Test by starting a remote support session.

To migrate currently deployed Jump Clients over to the new appliance, you will need to power down the old appliance.

If you need immediate technical assistance, please visit www.beyondtrust.com/support to start a live support session with the next available representative.