How to upgrade to syslog-ng Store Box 4 LTS

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1. Preface

Welcome to syslog-ng Store Box (SSB) version 4 LTS and thank you for choosing our product. This document describes the process to upgrade existing SSB installations to SSB 4 LTS. The main aim of this paper is to aid system administrators in planning the migration to the new version of SSB.

Warning
Read the entire document thoroughly before starting the upgrade.

Upgrading to SSB 4 LTS is supported from versions 3.0.1 and later. If you are using version SSB 3.0.0 or earlier, you need to upgrade to 3.0.1.

2. Prerequisites and Notes

2.1. Upgrade checklist

- You have created a configuration backup of SSB.
  For detailed instructions, refer to _Procedure 6.3.7, Exporting the configuration of SSB_ in _The syslog-ng Store Box 4 LTS Administrator Guide_.

- You have a valid MyBalaBit account.
  To download the required firmware files and the license, you need a valid _MyDownloads_ account. Note that the registration is not automatic, and might require up to two working days to process.

- You have downloaded the new 4 LTS license file. As license files are specific to each long term release, upgrading to SSB 4 LTS removes any earlier license.

- You have downloaded the latest SSB core firmware and boot firmware from the _syslog-ng Downloads page_.
  For a detailed description of the different firmwares, see _Section 2.7, Firmware in SSB_ in _The syslog-ng Store Box 4 LTS Administrator Guide_.

- You have read the Release Notes of the firmware(s) before updating. The Release Notes might include additional instructions specific to the firmware version.
  The Release Notes are available at the _syslog-ng Downloads page_.

- _If you have a high availability cluster:_
  You have IPMI access (or direct local access) to the slave node. You can find detailed information on using the IPMI interface in the following documents:

  The _Onboard BMC/IPMI User's Guide_, available on the BalaBit Hardware Documentation page at _https://www.balabit.com/support/documentation/_.

- _If you have a high availability cluster with asynchronous data replication (geoclustering) enabled:_
  Perform the firmware upload steps an hour before the actual upgrade. Asynchronous data replication can introduce delays in master-slave synchronization, and the slave node might not be able to sync the new firmware from the master node on time.

During the upgrade, SSB displays information about the progress of the upgrade and any possible problems to the console, which you can monitor with IPMI (ILOM) or console access.

We recommend that you test the upgrade process in a non-productive (virtual, etc.) environment first.

Upgrading SSB requires a reboot. We strongly suggest that you perform the upgrade on the productive appliance during maintenance hours only, to avoid any potential data loss.

2.2. Notes and warnings specific to SSB 4 LTS

The following is a list of important notes and warnings about the upgrade process and changes in SSB 4 LTS.

- Redundant high availability gateways can no longer be configured. To avoid HA status warnings, move all SSB appliances in the HA cluster to the same network domain.

- The SAN support is discontinued from version 3 F1 in SSB. If you have SANConnect, do not upgrade to version 4 LTS.

- Support for Sun hardware is discontinued from version 3 F1 in SSB. If you have Sun hardware, do not upgrade to this release.

3. Upgrading to SSB 4 LTS

3.1. Procedure – Upgrading SSB (single node)

Steps:

Step 1.   Update the core firmware of SSB using the web interface.

   Step a. Navigate to **Basic Settings > System > Core firmwares**.

   Step b. Upload the new core firmware.

   Step c. When the upload is finished, select the **After reboot** option for the new firmware.
   Do not reboot SSB yet.

Step 2.   Upload the boot firmware of SSB using the web interface.

   Step a. Navigate to **Basic Settings > System > Boot firmwares**.

   Step b. Upload the new boot firmware.

   Step c. When the upload is finished, select the **After reboot** option for the new firmware.

Step 3.   Navigate to **Basic Settings > System > System Control > This node**, and choose **Reboot**.
   SSB attempts to boot with the new firmware. Wait for the process to complete.

Step 4.   Login to the SSB web interface to verify that the upgrade was successful.
   Navigate to **Basic Settings > System > Version details** and check the version numbers of SSB. In case you encounter problems, you can find common troubleshooting steps in *Section 4, Troubleshooting (p. 8)*.

3.2. Procedure – Upgrading an SSB cluster

Steps:

Step 1.   Update the core firmware of SSB using the web interface.

   Step a. Navigate to **Basic Settings > System > Core firmwares**.

   Step b. Upload the new core firmware.

   Step c. When the upload is finished, select the **After reboot** option for the new firmware.
   Do not reboot SSB yet.

Step 2.   Upload the boot firmware of SSB using the web interface.

   Step a. Navigate to **Basic Settings > System > Boot firmwares**.

   Step b. Upload the new boot firmware.

   Step c. When the upload is finished, select the **After reboot** option for the new firmware.
   Do not reboot SSB yet.

Step 3.   Navigate to **Basic Settings > System > High availability & Nodes > Other node** and choose **Shutdown**.

Step 4. Restart the master node: choose **This node > Reboot**.
SSB attempts to boot with the new firmware. Wait for the process to complete.

Step 5. Login to the SSB web interface to verify that the master node upgrade was successful.
Navigate to **Basic Settings > System > Version details** and check the version numbers of SSB. In case you encounter problems, you can find common troubleshooting steps in *Section 4, Troubleshooting (p. 8)*.

Step 6. Use the IPMI interface to reboot the slave node.
The slave node attempts to boot with the new firmware, and reconnects to the master node to sync data. During the sync process, certain services (including Heartbeat) are not available. Wait for the process to finish, and the slave node to boot fully.

Step 7. Navigate to **Basic Settings > System > High availability & Nodes** and verify that the slave node is connected, and has the same firmware versions as the master node.

3.3. Procedure – Updating the SSB license

Steps:

Step 1. Navigate to **Basic Settings > System > License**.

Step 2. Click **Browse** and select the new license file.
You can upload compressed licenses (for example, `.zip` archives).

Step 3. Click **Upload**, then **Commit**.

Step 4. Navigate to **Service control > Syslog traffic, indexing & search:**.

Step 5. Click **Restart syslog-ng**.

3.4. Procedure – Changing the root password of SSB

We recommend changing the root password of SSB after finishing the upgrade. The new password is stored with a stronger hash than the old password.

Steps:

Step 1. Navigate to **Basic Settings > Management > Change root password**.

Step 2. Enter the new password into the **New root password** and **Confirm password** fields.
SSB accepts passwords that are not longer than 150 characters. The following special characters can be used: *!"#$%&'()*+,-./:;<=>?@[\]^-`{|}*

Step 3. Click **Commit**.

4. Troubleshooting

If you experience any strange behavior of the web interface, first try to reload the page by holding the SHIFT key while clicking the Reload button of your browser to remove any cached version of the page.

In the unlikely case that SSB encounters a problem during the upgrade process and cannot revert to its original state, SSB performs the following actions:

- Initializes the network interfaces using the already configured IP addresses.
- Enables SSH-access to SSB, unless SSB is running in sealed mode. That way it is possible to access the logs of the upgrade process that helps the BalaBit Support Team to diagnose and solve the problem. Note that SSH access will be enabled on every active interface, even if management access has not been enabled for the interface.

In case the web interface is not available within 30 minutes of rebooting SSB, check the information displayed on the local console and contact the BalaBit Support Team.