Zerto Installation Guide
Microsoft Azure Environment
Version 7.0
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CHAPTER 1: INSTALLING THE ZERTO SOLUTION

Zerto provides a business continuity (BC) and disaster recovery (DR) solution in a virtual environment, enabling the replication of mission-critical applications and data as quickly as possible, with minimal data loss. When devising a recovery plan, these two objectives, minimum time to recover and maximum data to recover, are assigned target values: the recovery time objective (RTO) and the recovery point objective (RPO). Zerto enables a virtual-aware recovery with low values for both the RTO and RPO. In addition, Zerto enables protecting virtual machines for extended, longer term recovery using a Long Term Retention process mechanism.

You install a Zerto Cloud Appliance (ZCA) in the Azure site that is to be used for recovery. The Zerto Cloud Appliance is comprised of the following:

Zerto helps customers accelerate IT transformation by eliminating the risk and complexity of modernization and cloud adoption. By replacing multiple legacy solutions with a single IT Resilience Platform™, Zerto is changing the way disaster recovery, retention and cloud are managed. This is done by providing enterprise-class disaster recovery and business continuity software for virtualized infrastructure and cloud environments.

In on-premise environments, Zerto Virtual Replication (ZVR) is installed with virtual machines to be protected and recovered.

In public cloud environments, Zerto Cloud Appliance (ZCA) is installed in the public cloud site that is to be used for recovery.

The installation includes the following:

- **Zerto Virtual Manager (ZVM):** The ZVM is a Windows service, running on a dedicated Windows VM, that manages everything required for the replication between the protection and recovery sites, except for the actual replication of data. The ZVM interacts with the hypervisor management user interface, such as vCenter Server or Microsoft SCVMM, to get the inventory of VMs, disks, networks, hosts, etc. It also monitors changes in the hypervisor environment and responds accordingly. For example, a VMware vMotion operation, or Microsoft Live Migration of a protected VM from one host to another is seen by the ZVM, and the Zerto User Interface is updated accordingly.
  - For the maximum number of virtual machines, either being protected or recovered to that site, see Zerto Scale and Benchmarking Guidelines.

- **Virtual Replication Appliance* (VRA):** A VRA is a virtual machine installed on each hypervisor host where VMs are to be protected from or to. The VRA manages the replication of data from protected virtual machines to the recovery site. The target VRAs are responsible for maintaining any protected VMs disks. VMware limits the number of SCSI Controllers (4 per VM) and targets per Controller (15 per controller), leaving a maximum of 60 SCSI targets per VM. When managing a larger quantity of virtual disks, Zerto utilizes Virtual Replication Appliance Helpers (VRA-H), which act as a disk box with no IP and nearly no resources. VRA-Hs are spun up and down by Zerto automatically when nearing the 60-disk limit of the VRA or last VRA-H.
  - For the maximum number of volumes, either being protected or recovered to that site, see Zerto Scale and Benchmarking Guidelines.

  *Note:* In vSphere installations, OVF to enable installing Virtual Replication Appliances.

- **Virtual Backup Appliance (VBA):** A Windows service that manages File Level Recovery operations within the Zerto solution.

- **Zerto User Interface:** Recovery using the Zerto solution is managed in a browser or, in VMware vSphere Web Client or Client console.

When Zerto is installed to work with an on-premise hypervisor it also comprises the following component:

- **Data Streaming Service (DSS):** Installed on the VRA machine, and runs in the same process as the VRA. It is responsible for all the retention data path operations.

The following topics are described in this section:

- “Zerto Architecture in Azure Environments”, below
- “Requirements - Zerto in Microsoft Azure Environments”, on page 6
- “Database Requirements in Microsoft Azure Environments”, on page 6
Installing the Zerto Solution

■ “Firewall Considerations in Microsoft Azure Environments”, on page 7
■ “Deploy Zerto Cloud Appliance from Azure Marketplace Portal”, on page 8
■ “Installing Zerto in Microsoft Azure Environments”, on page 10
■ “Installing Zerto Cmdlets”, on page 17
■ “Uninstalling Zerto”, on page 17
Zerto Architecture in Azure Environments

The following diagram shows how the main components of Zerto are deployed across protected sites and Azure to provide disaster recovery.

Note: For cloud-based architecture diagrams for cloud service providers, see Zerto Cloud Manager Installation Guide.

Zerto can be installed at multiple sites, all of which can be paired to Azure. For information about the ports used by Zerto, see “Firewall Considerations in Microsoft Azure Environments”, on page 7.

Requirements - Zerto in Microsoft Azure Environments

For complete and detailed requirements, see Enterprise Guidelines for Microsoft Azure Environments.

Database Requirements in Microsoft Azure Environments

During the Zerto Virtual Manager installation, the user is able to select whether to install and use an embedded SQL Server (localdb) as the database.

Alternatively, and also during the installation, the user is able to choose whether to instead select and use an external SQL Server instance. To use an externally managed database, during the installation select the Custom Installation option.

The larger the environment protected by Zerto Virtual Manager, the larger the database size required to support it.

Supported Microsoft SQL Server versions: 2008, and higher.

Before installing Zerto Virtual Manager, click to thoroughly review the following guides:
- Migrating the Zerto Database to Microsoft SQL Server.
- Zerto Scale and Benchmarking Guidelines.

You must have the following permissions set:
- Public and dbcreatore server roles.
- Permission to connect to the database engine.
- Login enabled.
- In User Mapping choose the master database under which to create the Zerto database and set both db_owner and public for database role membership.
Firewall Considerations in Microsoft Azure Environments

The following architecture diagram shows the ports that must be opened in the firewalls on all sites.

The following table provides basic information about the ports shown in the above diagram by Zerto.

Zerto Cloud Appliance (ZCA) requires the following ports to be open in the Azure site firewall, set in the Azure network security group:

<table>
<thead>
<tr>
<th>PORT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>443</td>
<td>Required between the ZVM and the Azure Cloud environment.</td>
</tr>
<tr>
<td>4005</td>
<td>Log collection between the ZVM and site VRAs.</td>
</tr>
<tr>
<td>4006</td>
<td>Communication between the ZVM and local site VRAs and the site VBA.</td>
</tr>
<tr>
<td>4007</td>
<td>Communication between protecting and peer VRAs.</td>
</tr>
<tr>
<td>4008</td>
<td>Communication between VRAs to pass data from protected virtual machines to a VRA on a recovery site.</td>
</tr>
<tr>
<td>4009</td>
<td>Communication between the ZVM and local site VRAs to handle checkpoints.</td>
</tr>
<tr>
<td>7072</td>
<td>Communication between the VRA and ZVM. Required for metadata promotion.</td>
</tr>
<tr>
<td>9779</td>
<td>Communication between ZVM and ZSSP (Zerto Self Service Portal).</td>
</tr>
<tr>
<td>9989</td>
<td>Communication between ZCM, and ZCM GUI and ZCM REST APIs.</td>
</tr>
<tr>
<td>9080*</td>
<td>Communication between the ZVM, Zerto Powershell Cmdlets, and Zerto Diagnostic tool.</td>
</tr>
<tr>
<td>9081*</td>
<td>Communication between paired ZVMs**</td>
</tr>
<tr>
<td>9180*</td>
<td>Communication between the ZVM and the VBA.</td>
</tr>
<tr>
<td>9669*</td>
<td>Communication between ZVM and ZVM GUI and ZVM REST APIs, and the ZCM.</td>
</tr>
</tbody>
</table>

*The default port provided during the Zerto installation which can be changed during the installation.
Deploy Zerto Cloud Appliance from Azure Marketplace Portal

In order to install Zerto, you must first deploy Zerto Cloud Appliance VM. You will find Zerto Cloud Appliance in the Azure marketplace portal.

To deploy Zerto from the Microsoft Azure Marketplace:


2. In the left pane at the top, click New, and in the search field that appears, enter the text Zerto. The predefined name, Zerto for Azure, appears in a drop-down.

3. Select the predefined name, Zerto for Azure. The Zerto for Azure application appears in the right pane.
4. Click the Zerto for Azure application icon.

The Zerto for Azure application page appears.

Scroll down to read the section What you will need, and verify

5. Click **Create**, then define and deploy the VM. This VM is your **Zerto Cloud Appliance**.

Installing Zerto in Microsoft Azure Environments

The process of installing the Zerto Virtual Manager in Azure also installs the Virtual Replication Appliance and the Zerto Backup Appliance.

You can install Zerto using the defaults provided by Zerto or perform a custom install, in which you determine the ports that will be used by Zerto.

- “Performing an Express Installation”, below
- “Performing a Custom Installation”, on page 12

Performing an Express Installation

You can install Zerto using the defaults provided by Zerto. Site and connectivity information can be updated in the Zerto User Interface after installation, if required.

Before you Begin:
- Make sure you deployed Zerto Cloud Appliance.
- Make sure you reviewed “Database Requirements in Microsoft Azure Environments” on page 6.

To perform an express install of Zerto:
1. Run the Zerto Installer for Microsoft Azure.
2. Follow the wizard through the installation until the window for the Installation Type and select the **Express Installation** option.
3. Click **NEXT**.
4. Define a new storage account that will be used for replication and recovery, or select one from a list of existing storage accounts in the drop down menu.

By default, the Create new storage account option is selected.

Important:

Each ZCA requires a separate storage account. Multiple ZCAs using the same account is not supported.

a) By using the default option Create new in the Storage Account field, the installation creates a new resource group and a Standard storage account.
b) Click Use existing to select an existing storage account. When you select this option, the drop down menu becomes active.

- Only Standard storage accounts which exist in the selected region and subscription are displayed in the storage account drop down menu.
- General-purpose v1 (GPv1) accounts are supported.
- Blob Storage accounts are not displayed for selection since the Blob Storage account type is not supported.
- When you select an existing storage account, the account is automatically tagged with a Zerto unique tag.

Note:

When a storage account is either created or selected, the following occurs:
- The journal and recovery disks are created in the storage account.
- The selected storage account appears in Site Settings, in the Site Information tab.
5. Click **NEXT**.
   
The Connectivity window is displayed.

6. Select the IP address of the machine on which you are installing the Zerto Cloud Appliance. The protected site accesses the Azure site through VPN using this IP.

7. Specify a name to identify this site.

8. Click **NEXT**.
   
The Online Services and Zerto Mobile Application window is displayed.

9. Click **NEXT**.

10. If you reached the subscription’s **maximum limit of storage accounts**, a message appears informing the user that creating a new storage account has **failed**.

11. The Validation window appears.

    Review any errors and warnings. The Zerto installation also validates the limit and availability of the core quota in the Azure region, and in DSv2. For example:
    - If you have 200 core in the region, but the core quota limit for DSv2 is set to 10, instead of the 50 minimum cores required, then during the Zerto installation an error will appear.
    - If your core quota limit for DSv2 is set to 100, and you have 20 available cores in the region, then during the Zerto installation a warning will appear.
    - If your core quota limit for DSv2 is set to 100, and you already have 70 cores used by DSv2 instances, then during the Zerto installation a warning will appear.

12. After you see that Zerto software can be installed successfully, click **RUN** and continue to the end of the installation.

13. If you are managing your disaster recovery from this machine, you can select to open the Zerto Virtual Manager (ZVM) Interface at the end of the installation, logging in with the user name and password for the Azure instance on which you installed the Zerto Virtual Manager. In this user interface you set up Zerto, as described in “Initial Configuration”, on page 20.

14. You must **exclude** the following folders from **antivirus scanning**:

    - Zerto Virtual Replication
    - %ProgramData%\Zerto\Data\zvm_db.mdf
    - C:\Program Files\Zerto\Zerto Virtual Replication\Zerto.Zvm.Service.exe
    - C:\Program Files\Zerto\Zerto Virtual Replication\Zerto.Vba.VbaService.exe
Installing Zerto in Microsoft Azure Environments

Performing a Custom Installation

You can install Zerto providing specific details including the ports that will be used by Zerto and full contact details.

Before you Begin:
■ Make sure you deployed Zerto Cloud Appliance.
■ Make sure you reviewed “Database Requirements in Microsoft Azure Environments” on page 6.

To perform a custom install of Zerto:
1. Run the Zerto Installer for Microsoft Azure.
2. Follow the wizard through the installation until the window for the Installation Type and select the Custom Installation option.
3. Click Next.
   The Choose Stand-alone Or Clustered Installation window appears.

4. Select Stand-alone Installation, then click Next.
   The Windows Service User window is displayed.

5. Select either Local System account or This account:
   ■ Local System account: Use the Local System account to run the Zerto Virtual Manager service, which is installed as part of Zerto. The Local System account has unrestricted access to local resources.
   ■ This account: Use a specific account as the user account to run the Zerto Virtual Manager service, which is installed as part of Zerto. The account must have unrestricted access to local resources.
     ■ Password: The password to use to run the service under the specified account.
     ■ Confirm Password: Confirmation of the password.

   Note: The account under which the Zerto Virtual Manager service runs must be able to authenticate against the Azure Active Directory Server if login authentication to the Zerto Virtual Manager is to be handled by Azure Active Directory.
6. Click NEXT.
The Database Type window is displayed.

Information required by Zerto is stored in a database embedded in the Zerto Virtual Manager. This information includes details of the site where the Zerto Virtual Manager is installed, details of the Virtual Replication Appliance and the volumes it uses, and points-in-time recorded for recovery purposes. By default an embedded SQL-based database is used, but you can use an externally managed database, either Microsoft SQL Server or SQL Server Express.

**Note:** Protection and recovery can only be performed when the database is running. Therefore, if you use an external database and it is down for any reason, protection and the possibility of recovery ceases.

7. To use the embedded database, leave the default, or select the option to connect to an external Microsoft SQL Server database.

Zerto recommends using SQL Server when a site has more than 40 hosts that have virtual machines that need protecting, and the site has more than 400 virtual machines that need protecting.

If you select the external database option, the SQL Server Authentication section is enabled.

a) Enter the following details to enable access to the SQL Server database:
   - **Server Name:** The domain name and server instance to connect to, with the format `<server_name>\<instance_name>` or `<Server_IP>\<instance_name>`

b) Specify one of the following authentication options:
   - **Windows Authentication:** Use Windows authentication. This option is only enabled if a specific service user account was specified in the previous Windows Service User dialog, in which case the service account name and password are used.
   - **SQL Server Authentication:** Use SQL Server authentication.
     - **Username:** The user name for the SQL Server database.
     - **Password:** A valid password for the given user name.

   c) When you select SQL Server authentication and enter a user name and password, click **TEST AUTHENTICATION**, which is displayed.

   The installer checks whether it can connect to the specified database with the specified username and password. You can only continue when the authentication is successful.

8. Click **NEXT**.

9. Define a new storage account that will be used for replication and recovery or select one from a list of existing storage accounts in the drop down menu.
By default, the Create new storage account option is selected.

**Important:**

<table>
<thead>
<tr>
<th>Each ZCA requires a separate storage account. Multiple ZCAs using the same account is not supported.</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) By using the default option Create new in the Storage Account field, the installation creates a new resource group and a Standard storage account.</td>
</tr>
<tr>
<td>b) Click Use existing to select an existing storage account. When you select this option, the drop down menu becomes active.</td>
</tr>
<tr>
<td>■ Only Standard storage accounts which exist in the selected region and subscription are displayed in the storage account drop down menu.</td>
</tr>
<tr>
<td>■ General-purpose v1 (GPv1) accounts are supported.</td>
</tr>
<tr>
<td>■ Blob Storage accounts are not displayed for selection since the Blob Storage account type is not supported.</td>
</tr>
<tr>
<td>■ When you select an existing storage account, the account is automatically tagged with a Zerto unique tag.</td>
</tr>
</tbody>
</table>

**Note:**

When a storage account is either created or selected, the following occurs:

- The journal and recovery disks are created in the storage account.
- The selected storage account appears in Site Settings, in the Site Information tab.

10. Click **NEXT**.

The Connectivity page is displayed.

11. Select the IP address of the machine on which you are installing the Zerto Cloud Appliance. The protected site accesses the Azure site through VPN using this IP.

12. Click **NEXT**.

The Zerto Virtual Manager Site Details window is displayed. Enter the site details:

| Site Name: | (Optional) A name to identify the site. This name is displayed in the Zerto User Interface. |
| Site Location: | (Mandatory) Information such as the address, or name of the site to identify it. |
| Contact Name: | (Mandatory) The name of the person to contact if a need arises. |
| Contact Email: | (Optional) The email address to contact if a need arises. |
| Contact Phone: | (Optional) The phone number to contact if a need arises. |

13. Click **NEXT**.

The Zerto Virtual Manager Communication window is displayed.
14. Click NEXT.

The Validation window is displayed.

Review any errors and warnings. The Zerto installation also validates the limit and availability of the core quota in the Azure region, and in Dsv2. For example:

- If you have 200 core in the region, but the core quota limit for Dsv2 is set to 10, instead of the 50 minimum cores required, then during the Zerto installation an error will appear.
- If your core quota limit for Dsv2 is set to 100, and you have 20 available cores in the region, then during the Zerto installation a warning will appear.
- If your core quota limit for Dsv2 is set to 100, and you already have 70 cores used by Dsv2 instances, then during the Zerto installation a warning will appear.

15. Review any errors and warnings, and after you see that Zerto software can be installed successfully, click RUN and continue to the end of the installation.

16. If you intend managing your disaster recovery from this machine, you can select to open the Zerto Virtual Manager (ZVM) Interface at the end of the installation, logging in with the user name and password for the Azure instance on which you
installed the Zerto Virtual Manager. In this user interface you set up Zerto, as described in “Initial Configuration”, on page 20.

17. You must exclude the following folders from **antivirus scanning:**

<table>
<thead>
<tr>
<th>Zerto Virtual Replication</th>
</tr>
</thead>
<tbody>
<tr>
<td>%ProgramData%\Zerto\Data\zvm_db.mdf</td>
</tr>
<tr>
<td>C:\Program Files\Zerto\Zerto Virtual Replication\Zerto.Zvm.Service.exe</td>
</tr>
<tr>
<td>C:\Program Files\Zerto\Zerto Virtual Replication\Zerto.Vba.VbaService.exe</td>
</tr>
<tr>
<td>C:\Program Files\Zerto\Zerto Virtual Replication\Zerto Online Services Connector\Zerto.Online.Services.Connector.exe</td>
</tr>
<tr>
<td>C:\Program Files\Zerto\Zerto Virtual Replication\Embedded DB Manager Service\Zerto.LocalDbInstanceManagerService.exe</td>
</tr>
</tbody>
</table>

Failure to do so may lead to the Zerto Virtual Replication folder being incorrectly identified as a threat and in some circumstances corrupt the Zerto Virtual Replication folder.
Installing Zerto Cmdlets

Windows PowerShell is a command-line shell running under Windows for system administrators. The Windows PowerShell includes both an interactive command line prompt and a scripting environment. Each can be used independently or they can be used together.

Windows PowerShell is built on top of the .NET Framework common language runtime (CLR), enabling it to accept and return .NET Framework objects.

To run the Zerto cmdlets you must first run the installation package supplied by Zerto.

**Note:** You must have both Microsoft .NET Framework 4.7.2 and Windows PowerShell installed.

**To install the Zerto cmdlets:**

1. Make sure that Windows PowerShell is closed.
2. Run the installation file.

After installing the Zerto cmdlets, either add the cmdlets each time you open the Windows PowerShell or create a Windows PowerShell profile.

The following procedure describes how to add the Zerto cmdlets to every Windows PowerShell session.

**To add the cmdlets to the current session:**

1. Open Windows PowerShell with the following arguments:
   ```powershell
   -NoExit -Command Add-PSSnapIn Zerto.PS.Commands
   ```
   The Add-PSSnapin cmdlet adds registered Windows PowerShell snap-ins to the current session.

2. To add the Zerto cmdlets to every session, in the Properties dialog for a PowerShell shortcut specify a Target value similar to the following:
   ```powershell
   C:\Windows\SysWOW64\WindowsPowerShell\v1.0\powershell.exe -NoExit
   -Command Add-PSSnapIn Zerto.PS.Commands
   ```

   **Note:** You can create a Windows PowerShell profile, as described in the Windows PowerShell Help, to add the snap-in to all future Windows PowerShell sessions.

   For more details, see *Zerto Virtual Replication PowerShell Cmdlets Guide*.

**Uninstalling Zerto**

You uninstall Zerto via the *Uninstall a program* in the Windows Control Panel.

When you uninstall Zerto the following are also removed:

- The Zerto Cloud Appliance.
- All the virtual protection groups defined to protect virtual machines, including all the target disks managed by the Zerto Cloud Appliance for the virtual machines that were being protected.

If, for any reason, a Zerto Cloud Appliance cannot be removed, contact Zerto support.
You manage the protection and replication of virtual machines between the protected and recovery sites using the Zerto User Interface. On first access to the user interface, you might have to add a security certificate to set up secure communication, as described in “Adding a Security Certificate for the Zerto User Interface”, below. Zerto also provides a set of RESTful APIs and PowerShell cmdlets to enable incorporating some of the disaster recovery functionality within scripts or programs.

**Note:**
- For supported browsers, see Zerto Interoperability Matrix.
- The **lowest** supported screen resolution is **1366x768**.

**Note:** You must exclude the following folders from antivirus scanning:

<table>
<thead>
<tr>
<th>Folder Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>%ProgramData%\Zerto\Data\zvm_db.mdf</td>
</tr>
<tr>
<td>C:\Program Files\Zerto\Zerto Virtual Replication\Zerto.Zvm.Service.exe</td>
</tr>
<tr>
<td>C:\Program Files\Zerto\Zerto Virtual Replication\Zerto.Vba.VbaService.exe</td>
</tr>
<tr>
<td>C:\Program Files\Zerto\Zerto Virtual Replication\Zerto Online Services Connector\Zerto.Online.Services.Connector.exe</td>
</tr>
<tr>
<td>C:\Program Files\Zerto\Zerto Virtual Replication\Embedded DB Manager Service\Zerto.LocalDbInstanceManagerService.exe</td>
</tr>
</tbody>
</table>

Failure to do so may lead to the Zerto Virtual Replication folder being incorrectly identified as a threat and in some circumstances corrupt the Zerto Virtual Replication folder.

**To use the Zerto Virtual Manager Web Client:**

1. In a browser, enter the following URL:
   
   https://zvm_IP:9669
   
   where zvm_IP is the IP address of the Zerto Virtual Manager for the Azure site. Ensure that port 9669 is open and set as an inbound rule in the security group of the instance where Zerto is installed.

2. Log in using the user name and password of the instance in Azure on which you installed the Zerto Cloud Appliance.

**Adding a Security Certificate for the Zerto User Interface**

Communication between the Zerto Virtual Manager and the user interface uses HTTPS. On the first login to the Zerto User Interface, you must install a security certificate in order to be able to continue working without each login requiring acceptance of the security.

**To install a security certificate for the Zerto User Interface:**

On first access to the Zerto User Interface, if you haven’t installed the security certificate, a security alert is issued.

Note the following:
- To run this procedure run Microsoft Internet Explorer as administrator. The procedure is similar for Google Chrome and for Mozilla Firefox.
- Access the Zerto User Interface using the IP and not the name of the machine where Zerto is installed.

1. Click **View Certificate**.
   
   The Certificate dialog is displayed.

2. Click **Install Certificate**.
   
   The Certificate Import wizard dialog is displayed.
3. Follow the wizard: Place all the certificates in the **Trusted Root Certification Authorities store**: Select the **Place all certificates in the following store** option and browse to select the **Trusted Root Certification Authorities store**.

4. Continue to the end of the wizard. Click **Yes** when the Security Warning is displayed.

5. Click **OK** that the installation was successful.

6. Click **OK** when prompted and then **Yes** in the **Security Alert** dialog to continue.
After installing Zerto, you configure the site. Zerto is configured and managed from within the Zerto User Interface. This section describes the initial configuration required after installing Zerto.

The following topics are described in this section:

■ “Registering the Zerto License”, below
■ “Pairing an Azure Site”, on page 20

Registering the Zerto License

When you first access the Zerto User Interface, you must register your use of Zerto by entering the Zerto Cloud Appliance (ZCA) license, or Zerto Virtual Replication Enterprise Cloud Edition (ZVRCE) license supplied by Zerto.

![Zerto Management Interface]

After entering a valid license, the DASHBOARD tab is displayed with a summary of the site.

In order to protect virtual machines to Azure, you must first pair the protected site containing the virtual machines that you want to protect with the Azure site on which you installed the Zerto Cloud Appliance. This is described in “Pairing an Azure Site”, below.

Pairing an Azure Site

See the following sections:

■ “Pair to Another Site”, below
■ “Unpairing Sites”, on page 21

Pair to Another Site

You can pair to any site where Zerto is installed.

Zerto can be installed at multiple sites and each of these sites can be paired to any other site on which Zerto has been installed. Virtual machines that are protected on one site can be recovered to any paired site.
To pair to a site:
1. In the Zerto User Interface, in the SITES tab click **PAIR**.
   The Add Site dialog is displayed.
   
   ![Add Site Dialog](image)

   **Host name/IP:** IP address or fully qualified DNS host name of the **remote** site Zerto Virtual Manager to pair to.

   **Port:** The TCP port communication between the sites. Enter the port that was specified during the installation. The default port during the installation was 9081.

2. Click **PAIR**.
   The sites are paired, meaning that the Zerto Virtual Manager for the local site is connected to the Zerto Virtual Manager at the remote site.
   After the pairing completes the content of the SITES tab changes to include summary information about the paired site.

Unpairing Sites

You can unpair any two sites that are paired to each other.

**IMPORTANT:** if there is a VPG on either of the sites you are unpairing, the VPGs will be **deleted**.

To unpair two sites:
1. In the Zerto User Interface, in the SITES tab, select the site which you want to unpair.
2. Click **UNPAIR**.
   A message appears warning the user that the sites are about to unpair.
   If there are either protected or recovered VPGs on the paired sites, a message appears warning the user that the VPGs will be deleted.
3. For vSphere, Hyper-V and Azure platforms, you can select to keep disks to use for preseeding if the VMs are re-protected.
   If you select this option, the disks are not removed from the recovery site.
4. To unpair, click **CONTINUE**.
   The sites are no longer paired. If there are VPGs on either site, they are deleted.
   The VRA on the recovery site that handles the replication for the VPG is updated including keeping or removing the replicated data for the deleted VPG, depending if you selected to keep disks to use for preseeding.
   The locations of the saved target disks are specified in the **Events** tab in the ZVM application on the **Recovery** site.
CHAPTER 4: UPGRADING ZERTO

Zerto releases regular updates. VMware and Microsoft also release new versions of their products which can impact Zerto. This document describes different options for different upgrade scenarios.

The following topics are described in this section:

- “Guidelines to Upgrading Zerto”, on page 22
- “Upgrading Multiple Sites Running Different Versions”, on page 24
- “Upgrading To More Than One Version Higher”, on page 25
- “Upgrading Zerto PowerShell Cmdlets”, on page 27.
- “Upgrading Zerto Cloud Manager”, on page 28
- “Upgrading Zerto Cloud Connectors”, on page 28

Guidelines to Upgrading Zerto

Before upgrading, review the following documents for compatibility:

- Product Version Lifecycle Matrix for Zerto Virtual Replication
- Zerto Interoperability Matrix
- Zerto Scale and Benchmarking Guidelines

Then, review the following considerations:

- Zerto recommends upgrading to the latest version of Zerto that supports the environment you are using. See the Zerto Interoperability Matrix for the list of environments supported by this version of Zerto.
- The order you upgrade the sites, protected or recovery, is not relevant as long as paired sites remain only one version apart, that is, only one version higher or lower.
- When upgrading from versions prior to Zerto 6.0U2, changing the Journal Size Hard Limit requires restarting the VRAs.
- During an upgrade from v6.0x to v6.5, all back up and repositories configurations are deleted.

Note: Upgrade releases are considered to be upgrades of the same version. Releases 6.0, 6.0U1, etc., are the same version.

The following table shows what version you can upgrade to, based on the current version running at the site:

<table>
<thead>
<tr>
<th>CURRENT VERSION:</th>
<th>CAN UPGRADE TO:</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.5, 5.5Ux</td>
<td>6.0Ux</td>
</tr>
<tr>
<td>6.0, 6.0Ux</td>
<td>6.5Ux</td>
</tr>
<tr>
<td>6.5, 6.5Ux</td>
<td>7.0</td>
</tr>
</tbody>
</table>

- You do not need to move workloads during an upgrade.
- When upgrading a protected vSphere or Hyper-V environment, after the upgrade, a bitmap sync is performed for VPGs on the protected VRA.
- In a Hyper-V environment, SCVMM 2016 is supported on Zerto installations from version 6.0x.
- Zerto Cloud Appliance is supported for Azure and AWS (ZCA) on:
  - Windows 2016
  - Windows 2012R2
- A Zerto Virtual Manager can be used with a different version on another site, as long as the other version is only one version higher or lower.
- You can upgrade from version N to the next version (N+1) of Zerto including to any update within the current version. You cannot do an N+2 upgrade directly.
Guidelines to Upgrading Zerto

The following table shows what versions can be used on a peer site, based on the version on the current site.

<table>
<thead>
<tr>
<th>VERSION (N-1)</th>
<th>CURRENT VERSION (N)</th>
<th>VERSION (N+1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.0, 5.0Ux</td>
<td>5.5, 5.5Ux</td>
<td>6.0, 6.0Ux</td>
</tr>
<tr>
<td>5.5, 5.5Ux</td>
<td>6.0, 6.0Ux</td>
<td>6.5, 6.5Ux</td>
</tr>
<tr>
<td>6.0, 6.0Ux</td>
<td>6.5, 6.5Ux</td>
<td>7.0</td>
</tr>
</tbody>
</table>

See the following sections:
- “Before Upgrading Zerto”, on page 23
- “Upgrading the Current Installation”, on page 23
- “Upgrading Environments Which are Connected to Zerto Cloud Manager”, on page 24

Before Upgrading Zerto

Before upgrading to a new version, either by installing the new version over the existing version or by uninstalling the existing version and then installing the new version, Zerto recommends doing the following:

- Clear the Microsoft Internet Explorer cache of temporary Internet files. Not clearing the cache of temporary files can result in problems when accessing the Zerto Virtual Manager. In vSphere environments, this would be via the vSphere Client console.
- Make sure that all VPGs are in the state Protecting, and not in a sync state, such as Delta Sync, or in an error state, such as Needs Configuration.
- Complete any recovery operation before starting the upgrade.
- Create a backup of the machine where the Zerto Virtual Manager runs, which you will use if the upgrade fails. Zerto recommends taking a snapshot of the machine after stopping the Zerto Virtual Manager service.
  
  Note: The snapshot should only be used to rollback to the pre-upgrade state immediately after the upgrade has completed. The snapshot should not be used after the protection of virtual machines has restarted.

The installation procedure checks for an existing installation that is either one version lower than the new version or is the same version. If an installation is found you can upgrade the installation.

Upgrading the Current Installation

The existing Virtual Replication Appliances and protected virtual machines, together with all other information, such as checkpoints, journals, sites, and pairing details, are retained and are available in the upgraded installation.

The upgrade is performed without disrupting the protection, but no new checkpoints are written to the journal during the actual upgrade.

This may temporarily cause alerts to be issued, even if only a single site was affected, stating that the journal history and RPO do not meet their specified target settings.

Note:
- VRAs from the existing installation are not automatically upgraded when upgrading Zerto.
- Zerto recommends that you always upgrade the VRAs on your site to the latest version.
- If a newer version of the installed VRAs exists, you can continue to use the current VRAs with the new version of Zerto, or upgrade these VRAs from within the Zerto User Interface.

To upgrade the version:
1. Run the Zerto installation executable for your environment.
   The Zerto Replication Installation Wizard is displayed.
2. Select Upgrade and click Next.
   The upgrade proceeds automatically.
Upgrading Zerto

3. Proceed to completion.

Upgrading Environments Which are Connected to Zerto Cloud Manager

For environments using the Zerto Cloud Manager:
- Upgrade the Zerto Cloud Manager before upgrading the Zerto Virtual Managers.
- Zerto Cloud Manager (ZCM) supports Zerto Virtual Manager (ZVM) of N and N-1 versions.
  
  For Example: ZCM of version 7.0 supports ZVM of versions 6.5, 6.0 and their updates.
- Upgrade the Zerto Cloud Manager to be consistent with the latest version of Zerto run by the CSP.
- Upgrade the version of Zerto run by the CSP after the Zerto Cloud Manager, so that they are never more than one version separated from each other.

For details about upgrading Zerto Cloud Manager, see Zerto Cloud Manager Installation Guide.

Note: Zerto no longer supports vCenter Server vApps. Any VPG protecting a vAPP should be recreated using the virtual machines in the vApp.

Upgrading Multiple Sites Running Different Versions

A Zerto Virtual Manager can be installed on a site running a different version, as long as each version is only one version higher or lower than the other.

When you have multiple sites, make sure that the version of Zerto Virtual Manager is never more than one version higher or lower than any of the versions running on the paired sites.

To upgrade Zerto installed on multiple sites:

1. Upgrade a site whose version is lower than the required version. Start the upgrades with the site whose version is lowest.
   
   Make sure, at all times, that no site is more or less than one version higher or lower than any of the paired sites.

2. If the VRAs on the site need upgrading, upgrade these VRAs to ensure that they are no less than one version higher or lower than any of the VRAs on any of the paired sites.

3. Repeat the above step for all sites.

For Example:
- You have sites running versions 6.0U3, which are paired to a site running 6.5U3.
- You are planning to upgrade to 7.0.
- Upgrade first the 6.0U3 site to a 6.5U3 version, and then both of the sites to 7.0.
Upgrading To More Than One Version Higher

Before upgrading to a new version, make sure that all VPGs are in Protecting state and not in a sync state, such as Delta Sync, or an error state, such as Needs Configuration.

If you need to upgrade more than one version higher, do one of the following:

1. Upgrade versions stepwise, one version at a time, as described above in Upgrading Multiple Sites Running Different Versions, until you reach the required version.
   - or -

2. Use the Zerto Diagnostics utility’s export option to export the existing VPG definitions, then uninstall the old version of Zerto. Install the new version, then use the Zerto Diagnostics utility’s import option to re-create the VPGs. Use the following procedure.

Upgrading Zerto Using the Zerto Diagnostics Utility

To upgrade Zerto using the Zerto Diagnostics utility:

1. Click Start > Programs > Zerto > Zerto Diagnostics. The Zerto Diagnostics menu dialog is displayed.

2. Select the Export Virtual Protection Group (VPG) settings option and click Next.

   Note: Zerto regularly exports settings to the folder <Zerto_Installation_Folder>\Zerto Virtual Replication\ExportedSettings. You can use the last exported file. The default location of ZVR_Installation_Folder is C:\Program Files\Zerto.
3. Select the destination for the file that will contain the exported settings and enter the Zerto Virtual Manager IP address and port for the protected site.
4. Click **Next**.
   - The list of exported VPGs is displayed.
5. Click **Done**.
6. In the Zerto User Interface delete the VPGs, and keep their target disks.
   - **Note:** If you did not export the settings, Zerto regularly exports settings to the folder `<Zerto_Installation_Folder>\ZVR\ExportedSettings`. You can use the last exported file as input to recreate the VPGs to this point in time. The default location of Zerto_Installation_Folder is `C:\Program Files\Zerto`.
7. Uninstall the existing Zerto version.
8. Install the new Zerto version, as described in the *Zerto Installation Guide*.
9. Install the VRAs on the hosts in the site and pair the sites, as described in *Zerto Installation Guide*.
   - **Note:** If the protected site and recovery site are the same for any of the VPGs that were exported, set **Enable replication** to **Self** in the **Advanced Settings** dialog, as described in *Zerto Virtual Manager Administration Guide for the VMware vSphere Environment*.
10. Click **Start > Programs > Zerto > Zerto Diagnostics**.
    - The Zerto Diagnostics menu dialog is displayed.
11. Select **Import Virtual Protection Group (VPG) settings**.
12. Click **Next**.
13. Select the file previously exported and enter the Zerto Virtual Manager IP address and port for the protected site.

14. Click Next.

The list of exported VPGs is displayed.

15. Select the VPGs to import. You cannot import VPGs that have the same name as a VPG that is already defined in current installation. If a VPG in the import file has the same name as an existing VPG, it is disabled and is grayed-out.

16. Click Next.

The list of imported VPGs is displayed. If the VPG cannot not be imported, the reason is specified.

17. Click Done.

**Upgrading Zerto PowerShell Cmdlets**

When upgrading Zerto PowerShell cmdlets, make sure that Windows PowerShell is closed before installing the new version.
Upgrading Zerto Cloud Manager

The Zerto Cloud Manager version must be the same as the Zerto Virtual Manager version.

An upgrade of the Zerto Cloud Manager moves all configuration definitions from the old version to the new version.

The installation checks for an existing installation. If an existing installation is identified, that is one version lower than the new version, you can upgrade or uninstall the existing version.

IMPORTANT!

You must upgrade Zerto and Zerto Cloud Manager in parallel, making sure that you upgrade the version of Zerto Cloud Manager before you upgrade the version of Zerto which is run by the CSP.

This is done so that they are never more than one version apart.

To upgrade the version:

1. Run Zerto Cloud Manager Installer.exe.
   The Zerto Cloud Manager Installation Wizard is displayed.
2. Select Upgrade and click Next.
   The upgrade proceeds automatically.

Upgrading Zerto Cloud Connectors

Zerto Cloud Connectors do not require upgrading when a new Zerto version is released.

Upgrading Zerto Cloud Manager

Zerto helps customers accelerate IT transformation by eliminating the risk and complexity of modernization and cloud adoption. By replacing multiple legacy solutions with a single IT Resilience Platform™, Zerto is changing the way disaster recovery, backup and cloud are managed. With enterprise scale, Zerto's software platform delivers continuous availability for an always-on customer experience while simplifying workload mobility to protect, recover and move applications freely across hybrid and multi-clouds. Zerto is trusted by over 6,000 customers globally and is powering resiliency offerings for Microsoft Azure, IBM Cloud, AWS, SunGard AS and more than 350 cloud services providers.

Learn more at Zerto.com

For assistance using Zerto software, contact: @Zerto Support.

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