Technical Note:
Policy Manager Upgrade
(7.2 to 8.0)

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Overview

This technical note provides instructions for upgrading Policy Manager 7.2 (PM72) to Policy Manager 8.0 (PM80).

1 Perform Policy Manager 8.0 Upgrade

You can install PM80 in a different location, copy the PM72 container instances to the PM80 \instances folder, and upgrade from the PM80 installation.

The upgrade can be performed with any denomination of Policy Manager updates applied to your PM72 Release Directory (i.e., zero updates –7.2.x).

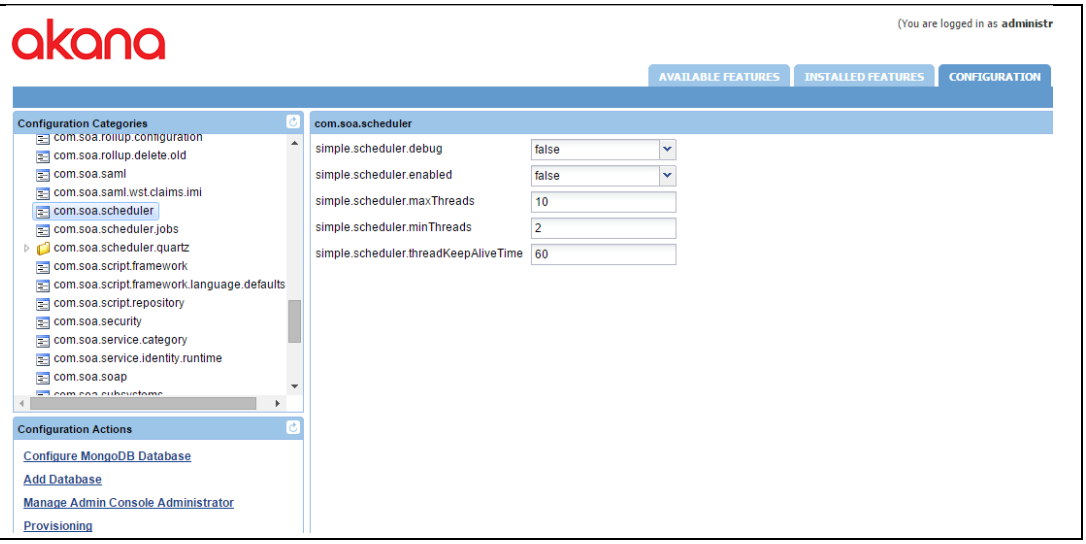
To upgrade, perform the following steps:

Step 1: Turn off com.soa.scheduler.quartz Property (for PM72 Containers with Policy Manager Features Installed)

1.	Set the quartz scheduler property to **False**. To do this: • Launch the Akana *Administration Console*. • Select the *Configuration* tab and the **com.soa.scheduler.quartz** Configuration Category. • Change the **org.quartz.scheduler.enabled** property to **False**.

Step 2: Turn off simple.scheduler.enabled Property (for PM72 Containers with Policy Manager Features Installed)

1.	After you have completed the schema update process, you must configure the `simple.scheduler.enabled` property to **False**. To do this: 1. Launch the *Akana Administration Console* for PM72. 2. Click the "Configuration" tab. 3. In the "Configuration Categories" section select `com.soa.scheduler`. 4. For the `simple.scheduler enabled` property, select **False** from the drop-down list box. 5. Click **Apply Changes** to save your entry. **Note:** This task should be performed on the Policy Manager container instance only.

Step 3: Install Policy Manager 8.0

Install Policy Manager 8.0

Step	***Procedure***
1.	Backup your PM72 Database.
2.	Stop any Containers that are currently running. This is required to update the Policy Manager schema to PM80. This ensures that the database is not locked while the update is in progress. Refer to "Starting and Stopping a Container Instance" on the *Akana Documentation Repository*: http://docs.akana.com/sp/container_management/start_stop_container_instance.htm
3.	Backup your PM72 Release Directory.
4.	Policy Manager 8.0 has a new installation that requires you to copy both **akana-pm-8.x.zip** and **akana-platform-win-jre-8.x.zip** to a new directory, extract them. Refer to the following topic on the Akana Documentation Repository for complete instructions and perform Steps 1, 2, and 3. http://docs.akana.com/sp/platform_install/installing_policy_manager_v80.htm After the installation is complete DO NOT launch the Configure Container Instance Wizard- GUI or Silent mode (i.e., Step 4: Configure Policy Manager Container).

Step 4: Copy *PM72* Container Instances to *PM80*

1.	From your *PM72* backup directory, *manually* copy the *PM72* container instances (sm70/instances/<pm_instance>) to the *PM80* container instances folder (/instances/<pm_instance>). This includes *PM72* , Network Director, and Agent

	container instances. **Note:** Do not include the *PM72* `configurator` or the *PM72* default container folder as part of the copy process.

Step 5: Clear Configurator Cache

1.	Before launching the "Configure Container Instance Wizard" and performing the upgrade, clear (i.e., delete) the configurator cache folder in \instances\configurator folder. 

Step 6: Upgrade Container Instance.

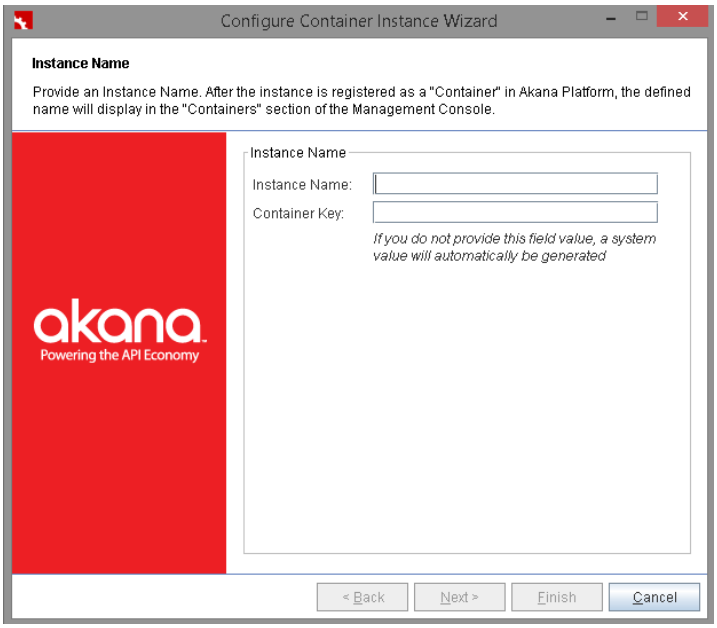
Perform the following update procedure on each Container you would like upgraded to *PM80* using the "Configure Container Instance Wizard." GUI, Silent, and Command Line procedures are provided.

Note: Prior to performing the upgrade, verify that *Step 4: Copy PM72 Container Instances to PM80* has been completed.

Upgrade Container to Policy Manager 8.0 (GUI)

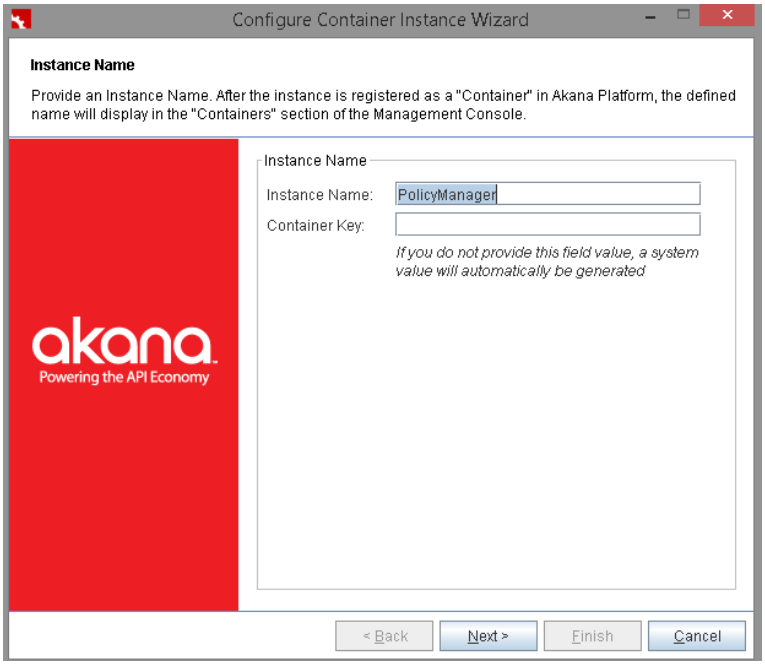
1.	1) Perform a manual start: Navigate to the Akana Platform Release Directory \bin and enter: `startup configurator` The "Welcome to Configure Container Instance Wizard" screen displays. Review the information and click **Next** to continue.

Upgrade Container to Policy Manager 8.0 (GUI)

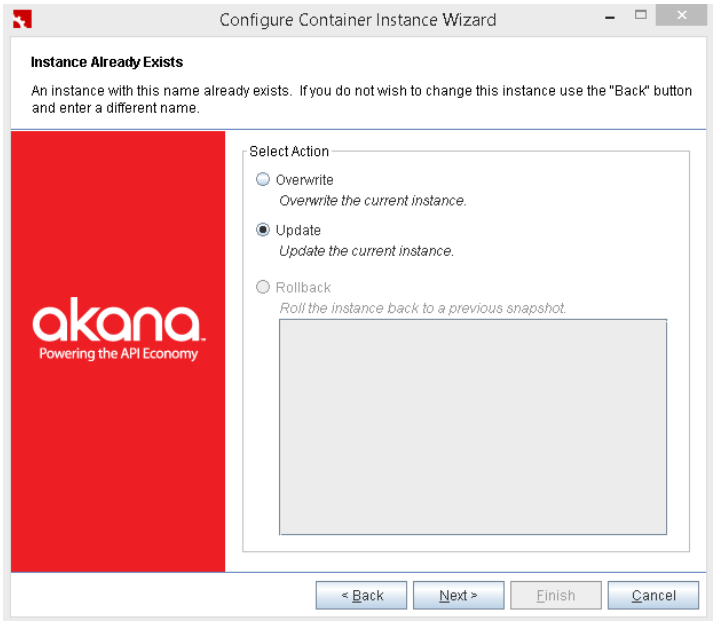
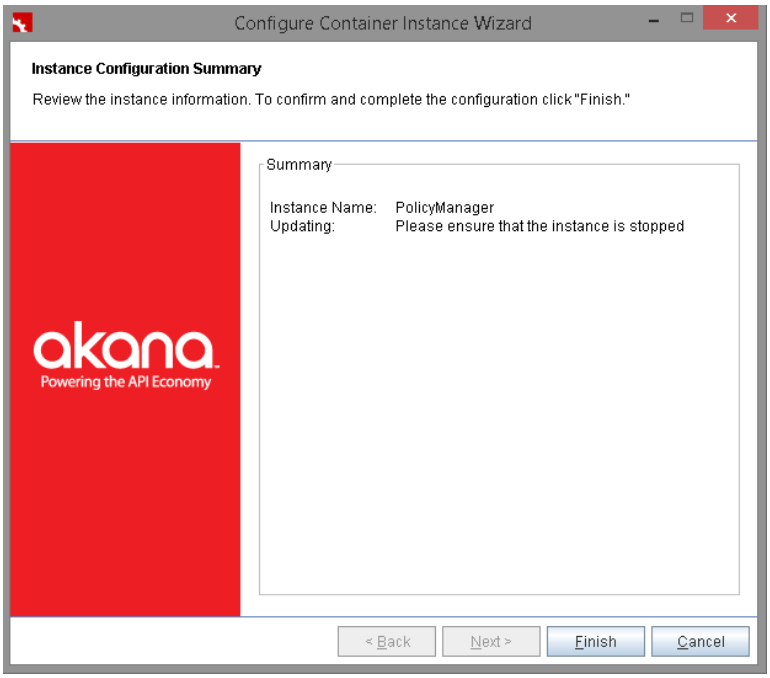


The "Instance Name" screen displays. Specify the name of the "Akana Container Instance" the upgrade will be applied to and click **Next** to continue.

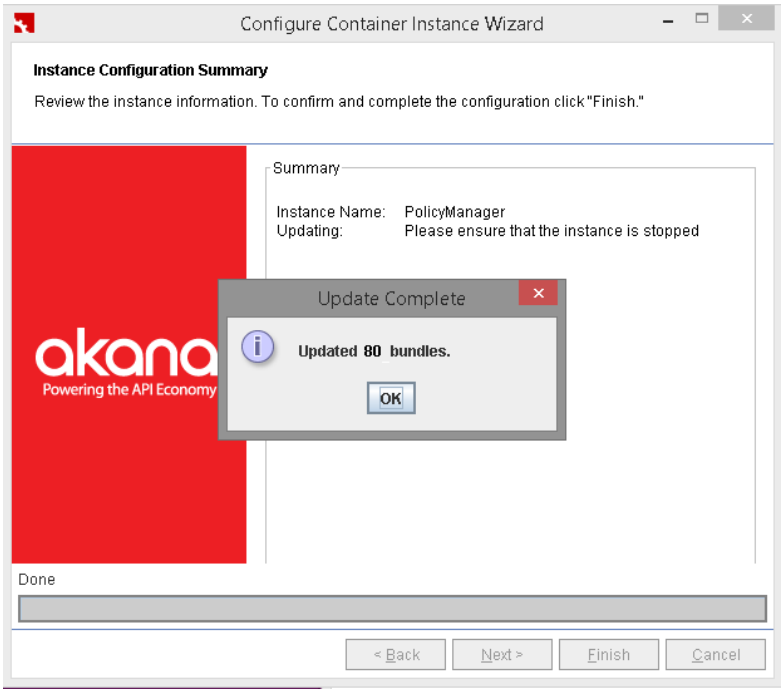
Note: The 8.0 version of the Akana Platform "Configure Container Instance Wizard" includes a "Container Key" option on the "Instance Name" screen. **Leave this field blank and the current key will be picked up for the container being upgraded during the upgrade process.**



Upgrade Container to Policy Manager 8.0 (GUI)

	The "Instance Already Exists" screen displays. To apply the *PM72* to *PM80* Upgrade, click the **Update** radio button, and **Next** to continue. 
2.	The "Instance Configuration Summary" screen displays. To apply the update(s), click **Finish**. Note that the Container Instance must be stopped prior to applying the update(s). 
3.	The Container update process begins and a progress indicator displays. After the update process is complete the "Update Complete" dialog displays and indicates the number of bundles that have been updated.

Upgrade Container to Policy Manager 8.0 (GUI)

	Note: The number of bundles displayed on the "Update Complete" message will vary based on your specific Container configuration and number of updates being applied." 
4.	Click **OK** on the "Update Complete" dialog. The "Configure Container Instance Wizard" closes.
5.	**Repeat this upgrade process on Network Director or Agent Containers before continuing to Step 8.** Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance. 

Upgrade Container to Policy Manager 8.0 (Silent Upgrade)

Step	Procedure

Upgrade Container to Policy Manager 8.0 (Silent Upgrade)

1.	The "Configure Container Instance Wizard" update process can be set up to run in an automated mode (i.e., silent). This is done by defining a properties file and pre-defining a set of property values to be used by the "Configure Container Instance Wizard" to automatically configure a Container instance.
	
	Define Silent Upgrade Property File
	
	1) Define a properties file (e.g., `upgrade.properties`)
	
	2) Add the following default content:
	
	`container.instance.name=policymanager`
	`wizard.mode=update`
	
	Run Silent Configuration
	
	The "Configure Container Instance Wizard (Silent Update)" properties file accepts two system properties which together are used to perform the silent update:
	
	1. **silent** (If True, silent configuration will be performed)
	2. **properties** (location on filesystem of property file to be used for configuration)
	
	Windows:
	
	`\bin>startup.bat configurator "-Dsilent=true" "-Dproperties=<property file directory location>/upgrade.properties"`
	
	UNIX:
	
	`\bin>startup.sh configurator -Dsilent=true -Dproperties=opt/<property file directory location>/upgrade.properties`

2.	Run the silent upgrade.
3.	After the silent upgrade is complete perform the following steps: 1) Users that will not be utilizing the Akana Administration Console can install the "Policy Manager 8.0.0" schema manually using a third-party Database Schema Management Tool. *Refer to Akana Customer Support for assistance installing the "Policy Manager* 8.0.0*" schema.* Users that will not be utilizing the Akana Administration Console can skip the remainder of this procedure.
4.	**Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 8.** Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance.

Upgrade Container to Policy Manager 8.0 (Silent Upgrade)

Upgrade Container to Policy Manager 8.0 (Command Line)

1.	You can also perform the upgrade process using a command line approach. Execute the following in the `\bin` folder: **Windows:** startup.bat configurator "-Dsilent=true" "-Dcontainer.instance.name=<Instance name>" "-Dwizard.mode=update" **UNIX:** startup.sh configurator -Dsilent=true -Dcontainer.instance.name=<Instance name> -Dwizard.mode=update
2.	**Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 8.** Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance. 

Step 7: Unregister and re-register the Windows Service

If the Container is being started as a Windows Service, the service must be re-registered.

1.	Unregister the existing Windows Service ./sm70/bin/unregisterContainerService.bat <instance_name>

	Re-register the Windows Service ./sm70/bin/registerContainerService.bat <instance_name>

Step 8: Start Container (for Containers with Policy Manager Features Installed)

After the "Configure Container Instance Wizard" update process is complete, start the Container.

1.	Start the Container. Start Process in Windows Navigate to \bin and type `startup <instance name>` Start Process as Windows Service Launch Program Group (Settings /Control Panel/Administrative Tools/Services) Select Akana `Container Instance` - Note that the instance name is displayed as the Container Key. From "Actions" menu, select **Start**. Start Process in UNIX Navigate to /bin and type `startup.sh <instance name>` Start Process in UNIX (Background) Navigate to /bin and type `startup.sh <instance name> -bg`

Step 9: Clear Browser Cache

1.	Before launching the "Akana Administration Console," clear the browser cache or start a new session in a browser private window. This is necessary to ensure that user interface changes included in the Policy Manager update(s) display properly.

Step 10: Launch Akana Administration Console

1.	Launch the "Akana Administration Console" for the updated Container Instance: Enter: http://<hostname>:<port>/admin

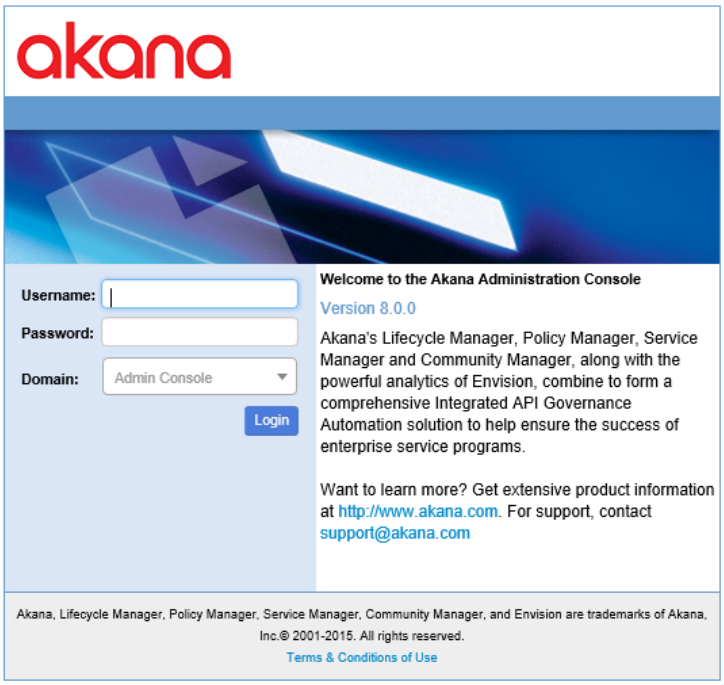


Figure. Akana Administration Console—*Login*

2. Select the "Admin Console" domain, enter the "Username" and "Password," and click **Login**. The Akana Administration Console launches and displays the "Available Features" tab.

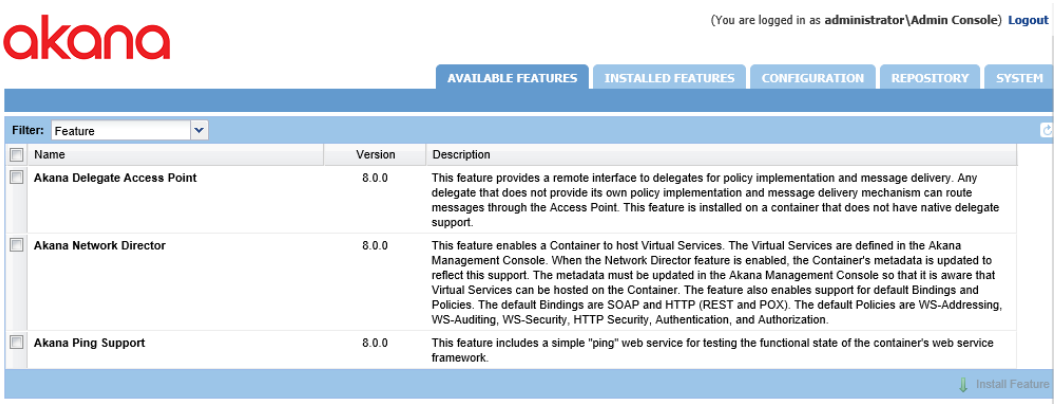
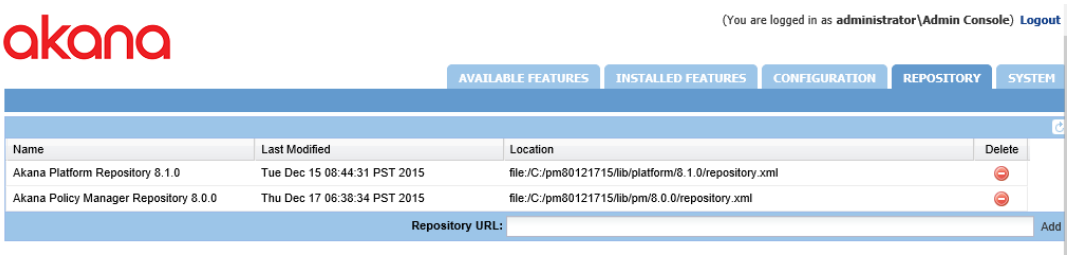


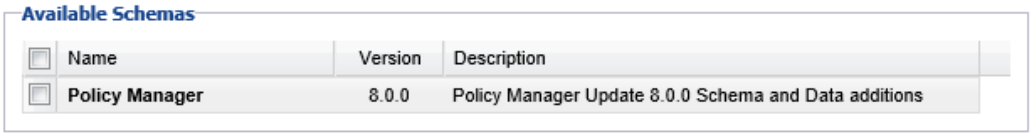
Figure. Akana Administration Console—*Available Features Tab*

Step 11: Refresh Repository

1. Select the "Repository" tab and verify that the repository for the installed update is present. If it is not, click Refresh to update the repository. The repository name is "Akana Platform Default Repository 8.0.0."

	
2.	If your Container *does not* have Policy Manager features (Akana Policy Manager Console and Akana Policy Manager Services) installed, the upgrade is complete. If your SOA Container *does* have Policy Manager features (Akana Policy Manager Console and Akana Policy Manager Services) installed, continue with Steps 13, 14 (if applicable), 15, 16, 17, 18, 19, 20, and 21.

Step 12: Update Schemas (for Containers with Policy Manager Features Installed)

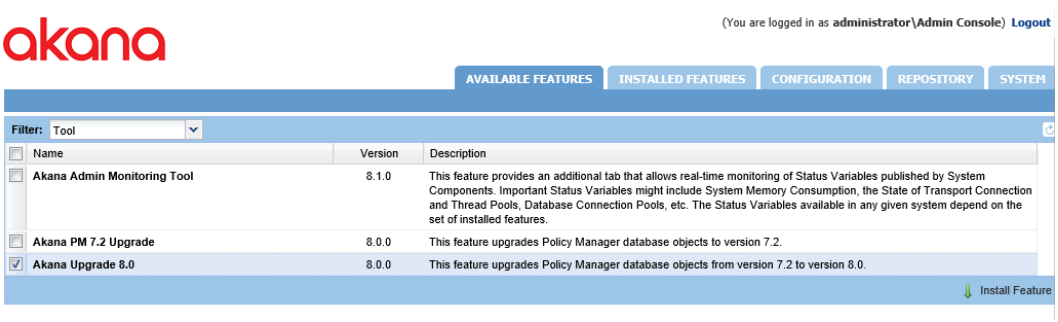
1.	If you've installed and configured the Policy Manager features (Akana Policy Manager Console and Akana Policy Manager Services) on your Container, go to *Installed Features* > *Pending Installation Tasks* and select **Complete Confirmation** to add the new schemas. In the "Manage Schemas Wizard" add the new schemas from the "Available Schemas" section. If multiple Policy Manager instances are configured for load balancing purposes, this step is required on only one of the Policy Manager instances. 

Step 13: Restart Container (for Containers with Policy Manager Features Installed)

1.	Restart the container and continue to the next step.

Step 14: Install Akana Upgrade 8.0

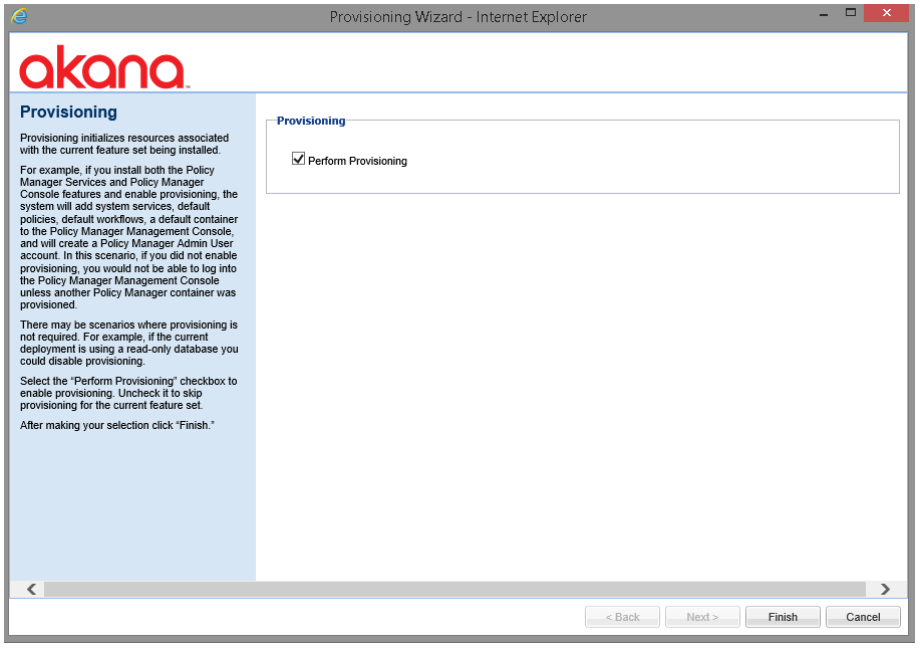
1.	After the Container has successfully restarted, the next step is to upgrade the Policy Manager database. To do this: 1. Launch the *Akana Administration Console* for PM80. 2. Click the "Available Features" tab and select **Tool** from the *Filter* drop-down. 3. Select *Akana Upgrade 8.0* and click **Install Feature**.



4. If the PM80 Schema is not yet installed the **Configure** button displays. Click it, select the PM80 schema, install it, and restart the container.
5. If the PM80 Schema is already installed the **Configure** button will not display. In this scenario the installation is complete. Click **Close** and continue to the next step.

Step 14: Perform Provisioning, and Update SLA Policies and Service Descriptor Documents

1. The Upgrade configuration process requires that you complete the Provisioning task and upgrade SLA Policies and Service Descriptor Documents (i.e., WADL/SWAGGER/RAML, etc.):
   1. Complete the Provisioning task:



   2. After the Provisioning Summary displays, click **Go To Next Task**, and complete the **Upgrade SLA Policies and Service Descriptor Documents** task.
   3. If either of these tasks do not display, go to the "Configuration" tab and complete them manually.
   4. After the upgrade tasks are complete, click **Finish**.

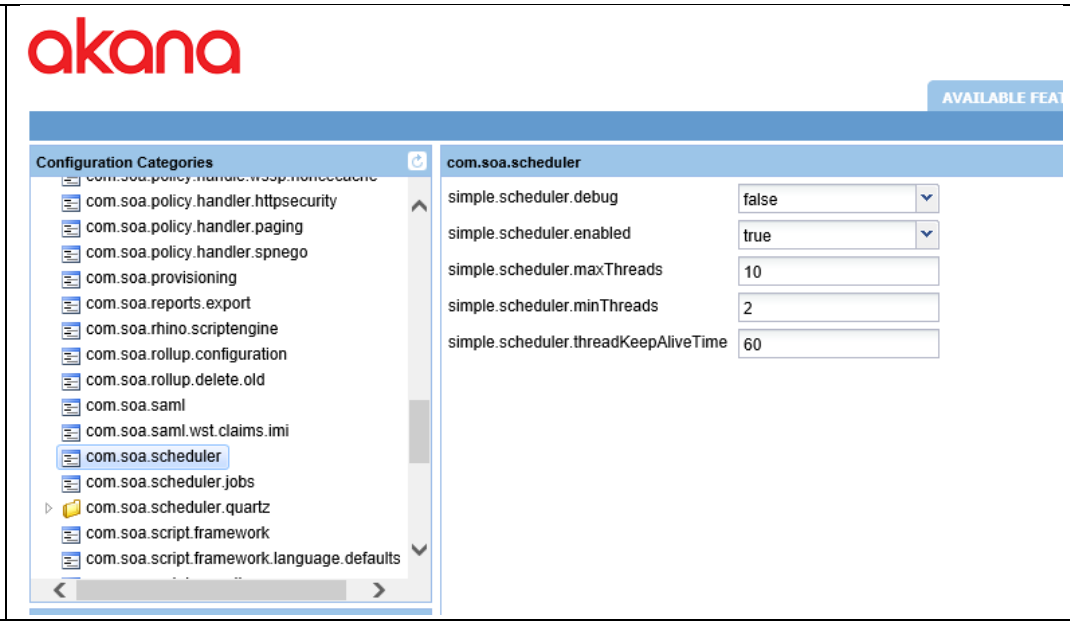
	5. After the task is completed, restart the container.

Step 15: Turn on com.soa.scheduler.quartz Property (for updated PM80 Containers with Policy Manager Features Installed)

1.	Set the quartz scheduler property to **True**. To do this: • Launch the Akana Administration Console. • Select the *Configuration* tab and the **com.soa.scheduler.quartz** Configuration Category. • Change the **org.quartz.scheduler.enabled** property to **True**.

Step 16: Turn on simple.scheduler.enabled Property (for updated PM80 Containers with Policy Manager Features Installed)

1.	After you have completed the schema update process, you must configure the `simple.scheduler.enabled` property to **True**. To do this: 1. Launch the *Akana Administration Console* for PM80. 2. Click the "Configuration" tab. 3. In the "Configuration Categories" section select `com.soa.scheduler`. 4. For the `simple.scheduler enabled` property, select **True** from the drop-down list box. 5. Click **Apply Changes** to save your entry. **Note:** This task should be performed on the Policy Manager container instance only.



Step 17: Update Container Metadata

1.	The final step in the upgrade process is the update the Metadata URL and Authentication Options of each container you upgraded (i.e., PM, ND, Agent). This is accomplished using the **Update Container Metadata** function in the "Containers" section of the *Policy Manager Management Console*. This process updates the container capabilities to support the latest features. From the *Containers* folder, select the PM80 container. From the "Actions Portlet" select **Update Container Metadata**. Enter the Metadata URL for the container being updated (i.e. http://<pm_host>:<pm_port>/metadata or http://<nd_host>:<nd_port>/metadata) or the Metadata Path. If Authentication options are being used or updated, select the authentication options. If the Metadata URL is not accessible from the Policy Manager, the metadata can be updated from a file by accessing the Metadata URL from a machine that has access to the container and saving the metadata document to a file.