



Technical Note

Policy Manager 6.1 to 7.0 Upgrade

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1 Overview

This technical note provides instructions for upgrading your Policy Manager 6.1 installation to Policy Manger 7.0.

2 Perform Policy Manager 6.1 to 7.0 Upgrade

The Policy Manager 6.1 Upgrade is accomplished by installing the SOA Software Platform 7.0 application to the Policy Manager 6.1 Release Directory.

The upgrade can be performed with any denomination of Policy Manager updates applied to your Policy Manager 6.1 Release Directory (i.e., zero updates - soa-update-6.1.24).

To upgrade Policy Manager 6.1 to Policy Manager 7.0, perform the following steps:

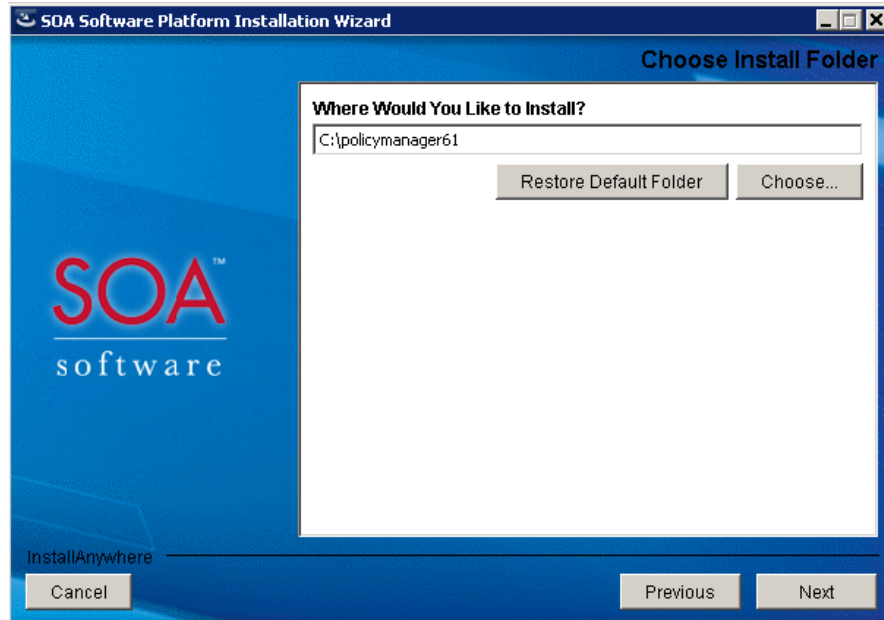
Step 1: Install Policy Manager 7.0

Install Policy Manager 7.0

Step	Procedure
1.	<p>Make a backup copy of your Policy Manager 6.1 Release Directory.</p> <p><i>Note: It's recommended that you archive the Policy Manager 6.1 documents into a PM61_Docs folder prior to performing the upgrade. This includes PDF files, fixed issues files, and Release Notes. After the upgrade the new Policy Manager 7.0 documentation files will be added to the \docs directory. The Users_Guide directory will be completely overwritten as part of the upgrade process, so an archive is not necessary. PDF documents for 7.0 will be available on the SOA Software Support site and on docs.soa.com. All Policy Manager 6.1 documents will reside in your backup copy as well.</i></p>
2.	<hr/> <p>Note: DO NOT RENAME the Policy Manager 6.1 sm60 folder to sm70. The Policy Manager 7.0 installation must be installed into the Policy Manager 6.1 Release Directory "side by side" with the sm70 Release Directory.</p> <p>Before the upgrade process you must manually copy the Policy manager 6.1 container instances to the Policy Manager sm70\instances folder prior to performing the upgrade process (Step 3).</p> <hr/>
3.	<p>Stop any SOA Containers that are currently running.</p> <p><i>Refer to "Appendix A: Start / Stop / Restart Container Instance" of the "SOA Software Platform 7.0 Installation Guide for Windows and UNIX Platforms" for instructions.</i></p>
4.	<p>Install the SOA Software Platform 7.0 application (e.g., <platform>-pm-7.0.xxxx-setup64.exe or <platform>-pm-7.0.xxxx-setup64.bin) and specify your Policy Manager 7.0 Release Directory as the target directory. Available platforms include Windows, Linux, Solaris, and AIX.</p> <p>For example, if your Policy Manager 6.1 installation is installed to the "c:\policymanager61" directory, enter that directory name:</p>

Install Policy Manager 7.0

Here for the GUI installation:



Or here for the Console Installation:

```
-----
Choose Install Folder
-----
                                /opt/policymanager61

Where Would You Like to Install?

  Default Install Folder: /opt/policymanager61

ENTER AN ABSOLUTE PATH. OR PRESS <ENTER> TO ACCEPT THE DEFAULT
: /opt/policymanager61

INSTALL FOLDER IS: /opt/policymanager61
IS THIS CORRECT? (Y/N): Y
```


Refer to "Chapter 1: Installing and Configuring SOA Software Platform" of the *SOA Software Platform 7.0 Installation Guide for Windows and UNIX Platforms* for installation instructions.

After the installation is complete **Do not launch the "Configure Container Instance Wizard."**

Step 2: Clear Configurator Cache

The Policy Manager configurator cache must be cleared prior to launching the "Configure Container Instance Wizard" for *each container instance* you would like to apply the upgrade to.

Clear Configurator Cache

1.	<p>After installing SOA Software Platform 7.0, and prior to launching the "Configure Container Instance Wizard", delete the <code>/sm70/instances/configurator/cache</code> directory if it exists.</p> 
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Step 3: Copy PM61 Container Instances to PM70

1.	<p>After installing SOA Software Platform 7.0, the next step is to <i>manually</i> copy the Policy Manager 6.1 container instances (sm60/instances) to the Policy Manager 7.0 container instances folder (sm70/instances).</p> <hr/> <p>Note: Do not include the Policy Manager 6.1 <code>configurator</code> or the Policy Manager 6.1 default container folder as part of the copy process.</p> <hr/>
----	--

Step 4: Upgrade Container Instance

Perform the following procedure on each SOA Container you would like upgraded to Policy Manager 7.0. This task is performed using the "Configure Container Instance Wizard." GUI, Silent, and Command Line procedures are provided.

Note: Prior to performing the upgrade, the sm60/instances container folders are copied to the sm70/instances container folder.

Upgrade SOA Container to Policy Manager 7.0 (GUI)

1.	After deleting the cache folder launch the "Configure Container Instance Wizard."
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Upgrade SOA Container to Policy Manager 7.0 (GUI)

Two methods can be used to launch the "Configure Container Instance Wizard."

- 1) Launch from the SOA Software Platform Program Group:

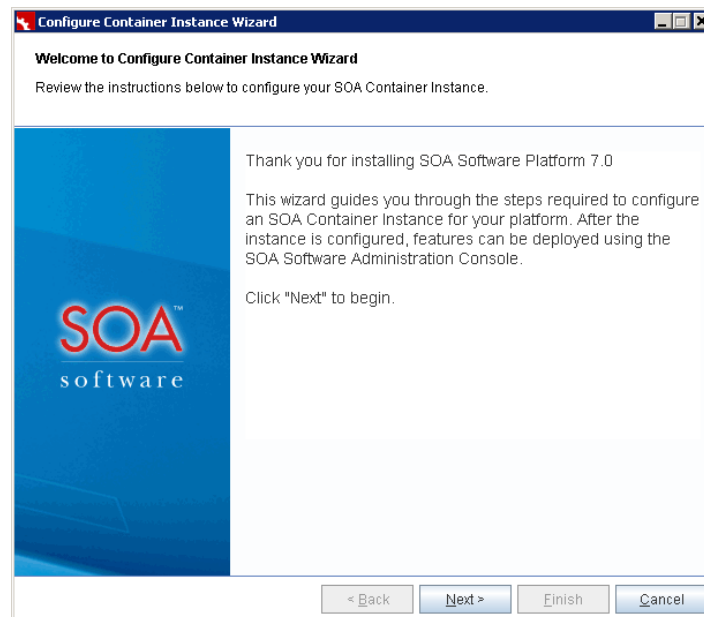
Click the **Start** menu, navigate to the SOA Software Platform Program Group, and click **Configure Container Instance**.

- 2) Perform a manual start:

Navigate to the SOA Software Platform Release Directory `c:\sm70\bin` and enter:

```
startup configurator
```

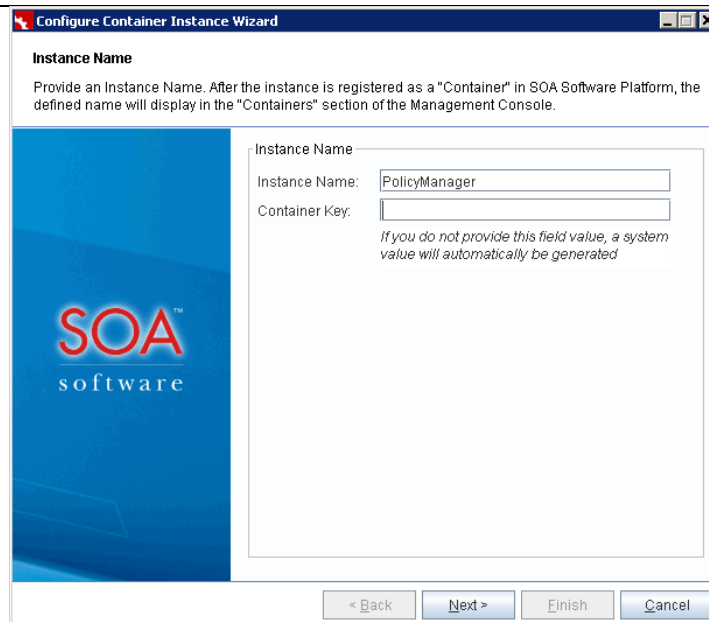
The "Welcome to Configure Container Instance Wizard" screen displays. Review the information and click **Next** to continue.



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

Note: The 7.0 version of the SOA Software Platform "Configure Container Instance Wizard" now includes a "Container Key" option on the "Instance Name" screen. You can find your Container Key on the "Container Overview" page in the Policy Manager Management Console (see screen example below)

Upgrade SOA Container to Policy Manager 7.0 (GUI)



Configure Container Instance Wizard

Instance Name

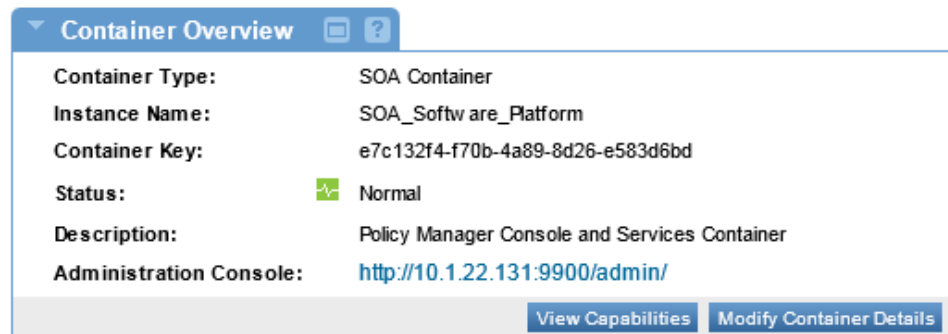
Provide an Instance Name. After the instance is registered as a "Container" in SOA Software Platform, the defined name will display in the "Containers" section of the Management Console.

Instance Name:


Container Key:

If you do not provide this field value, a system value will automatically be generated

< Back Next > Finish Cancel



Container Overview

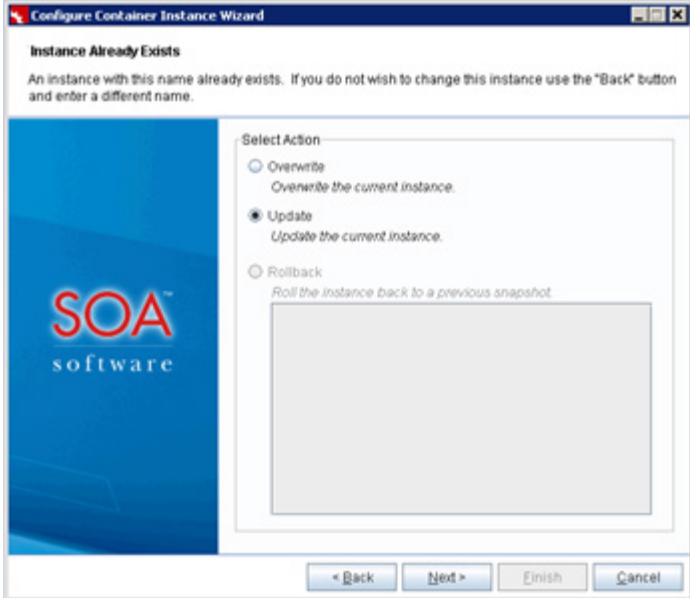
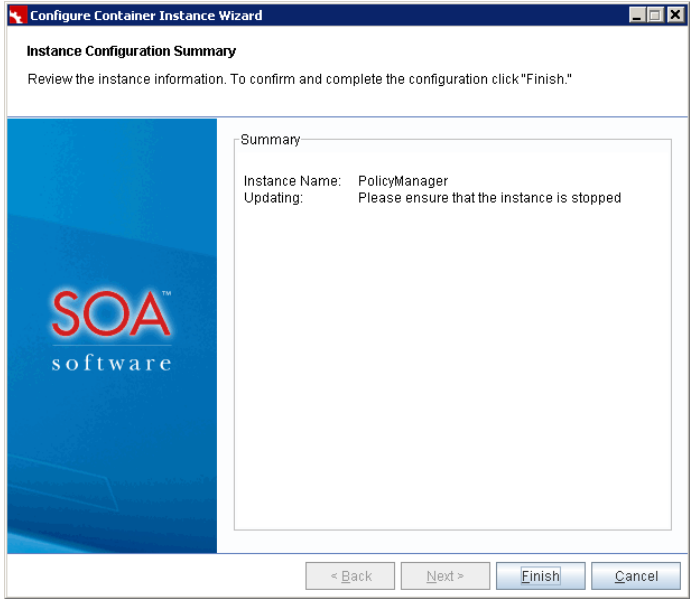
Container Type:	SOA Container
Instance Name:	SOA_Software_Platform
Container Key:	e7c132f4-f70b-4a89-8d26-e583d6bd
Status:	 Normal
Description:	Policy Manager Console and Services Container
Administration Console:	http://10.1.22.131:9900/admin/

[View Capabilities](#) [Modify Container Details](#)

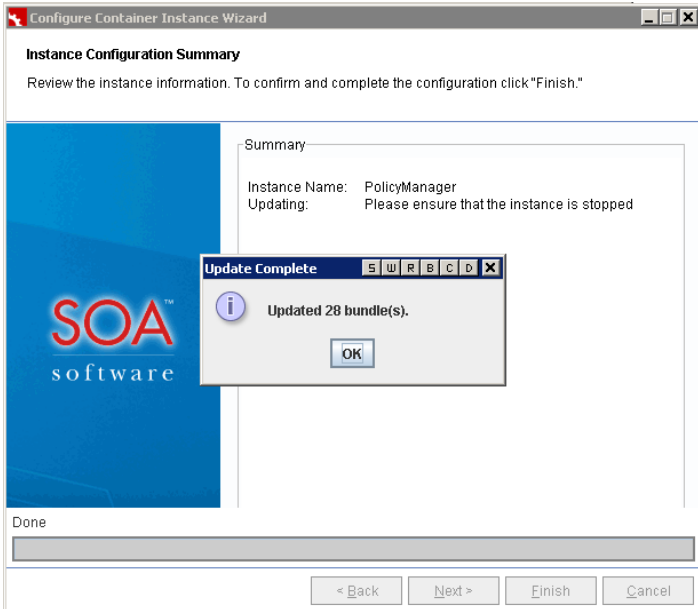
Note: To find the Container Instance Name, navigate to the `sm61/instances` folder and view the instances currently defined. Note that the Container Instance Name is case sensitive.

The "Instance Already Exists" screen displays. To apply the Policy Manager 6.1 to Policy Manager 7.0 Upgrade, click the **Update** radio button, and **Next** to continue.

Upgrade SOA Container to Policy Manager 7.0 (GUI)

	
<p>2.</p>	<p>The "Instance Configuration Summary" screen displays. To apply the update(s), click Finish. Note that the SOA Container Instance must be stopped prior to applying the update(s).</p> 
<p>3.</p>	<p>The SOA 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.</p> <hr/> <p>Note: The number of bundles displayed on the "Update Complete" message will vary based on your specific SOA Container configuration and</p>

Upgrade SOA Container to Policy Manager 7.0 (GUI)

	<p>number of updates being applied."</p> <hr/> 
4.	Click OK on the "Update Complete" dialog. The "Configure Container Instance Wizard" closes.

Upgrade SOA Container to Policy Manager 7.0 (Silent Upgrade)

Step	Procedure
1.	<p>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.</p> <p><u>Define Silent Upgrade Property File</u></p> <ol style="list-style-type: none"> 1) Define a properties file (e.g., <code>upgrade.properties</code>) 2) Add the following default content: <pre>container.instance.name=policymanager wizard.mode=update</pre> <p><u>Run Silent Configuration</u></p> <p>The "Configure Container Instance Wizard (Silent Update)" properties file accepts two system properties which together are used to perform the silent update:</p> <ol style="list-style-type: none"> 1. silent (If True, silent configuration will be performed) 2. properties (location on filesystem of property file to be used for configuration)

Upgrade SOA Container to Policy Manager 7.0 (Silent Upgrade)

	<p><u>Windows:</u></p> <pre>\sm70\bin>startup.bat configurator "-Dsilent=true" "-Dproperties=<property file directory location>/upgrade.properties"</pre> <p><u>UNIX:</u></p> <pre>\sm70\bin>startup.sh configurator -Dsilent=true -Dproperties=opt/<property file directory location>/upgrade.properties</pre>
2.	Run the silent upgrade.
3.	<p>After the silent upgrade is complete perform the following steps:</p> <p>1) Users that will not be utilizing the SOA Software Administration Console can install the "Policy Manager 7.0.0" schema manually using a third-party Database Schema Management Tool.</p> <p><i>Refer to SOA Software Customer Support for assistance installing the "Policy Manager 7.0.0" schema.</i></p> <p>Users that will not be utilizing the SOA Software Administration Console can skip the remainder of this procedure.</p>

Upgrade SOA Container to Policy Manager 7.0 (Command Line)

1.	<p>You can also perform the upgrade process using a command line approach. Execute the following in the <code>sm70\bin</code> folder:</p> <p>Windows:</p> <pre>startup.bat configurator "-Dsilent=true" "-Dcontainer.instance.name=<Instance name>" "-Dwizard.mode=update"</pre> <p>UNIX:</p> <pre>startup.sh configurator -Dsilent=true -Dcontainer.instance.name=<Instance name> -Dwizard.mode=update</pre>
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Step 5: Start SOA Container

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


1.	<p>Start the SOA Container.</p> <p><u>Start Process in Windows</u></p> <p>Navigate to <code>sm70\bin</code> and type <code>startup <instance name></code></p> <p><u>Start Process as Windows Service</u></p> <p>Launch Program Group (Settings /Control Panel/Administrative Tools/Services)</p> <p>Select SOA Software Container Instance - Note that the instance name is displayed</p>
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	<p>as the Container Key.</p> <p>From "Actions" menu, select Start.</p> <p><u>Start Process in UNIX</u></p> <p>Navigate to <code>sm70/bin</code> and type <code>startup.sh <instance name></code></p> <p><u>Start Process in UNIX (Background)</u></p> <p>Navigate to <code>sm70/bin</code> and type <code>startup.sh <instance name> -bg</code></p>
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Step 6: Clear Browser Cache

1.	<p>Before launching the "SOA Software Administration Console," clear the browser cache. This is necessary to ensure that user interface changes included in the Policy Manager update(s) display properly.</p>
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Step 7: Launch SOA Software Administration Console

1.	<p>Launch the "SOA Software Administration Console" for the updated SOA Container Instance:</p> <p>Enter: <code>http://<hostname>:<port>/admin</code></p> <div data-bbox="492 415 1239 1087"></div> <p>Figure. SOA Software Administration Console—Login</p>
2.	<p>Select the "Admin Console" domain, enter the "Username" and "Password," and click Login. The SOA Software Administration Console launches and displays the "Available Features" tab.</p>

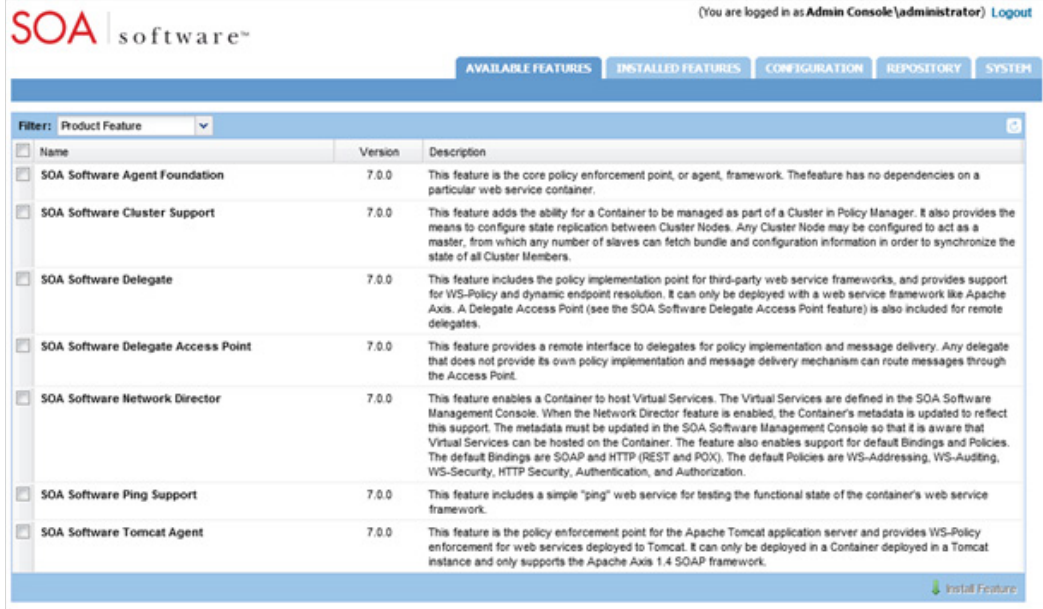
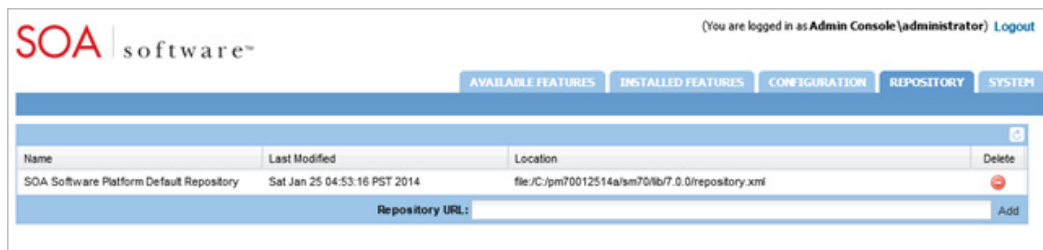


Figure. SOA Software Administration Console—Available Features Tab

Step 8: Refresh Repository

1. Navigate to 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 "SOA Software Platform Default Repository 7.0.0."



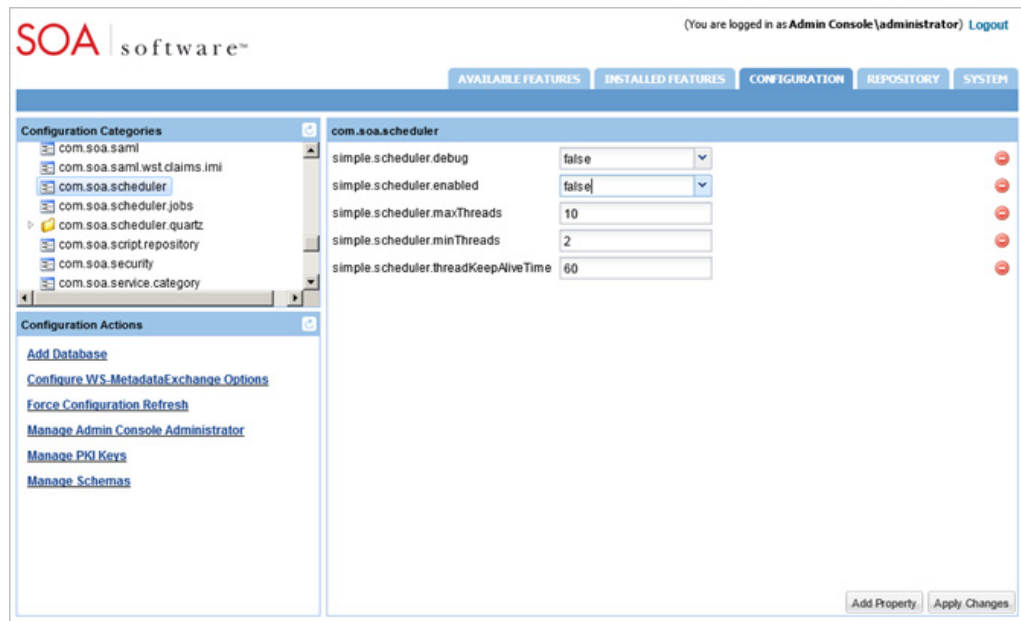
2. If your SOA Container *does not* have Policy Manager features (SOA Software Policy Manager Console and SOA Software Policy Manager Services) installed, the upgrade is complete.
If your SOA Container *does* have Policy Manager features (SOA Software Policy Manager Console and SOA Software Policy Manager Services) installed, continue with Steps 9, 10, 11, and 12.

Step 9: Turn off simple.scheduler.enabled Property (for SOA Containers with Policy Manager Features Installed)

1. Before you update schemas (in Step 10) you must configure the simple.scheduler.enabled property to **False**. To do this:

1. Click the "Configuration" tab.
2. In the "Configuration Categories" section select `com.soa.scheduler`.
3. For the `simple.scheduler.enabled` property, select **False** from the drop-down list box.
4. Click **Apply Changes** to save your entry.

Note: This task should be performed on the Policy Manager container instance only.



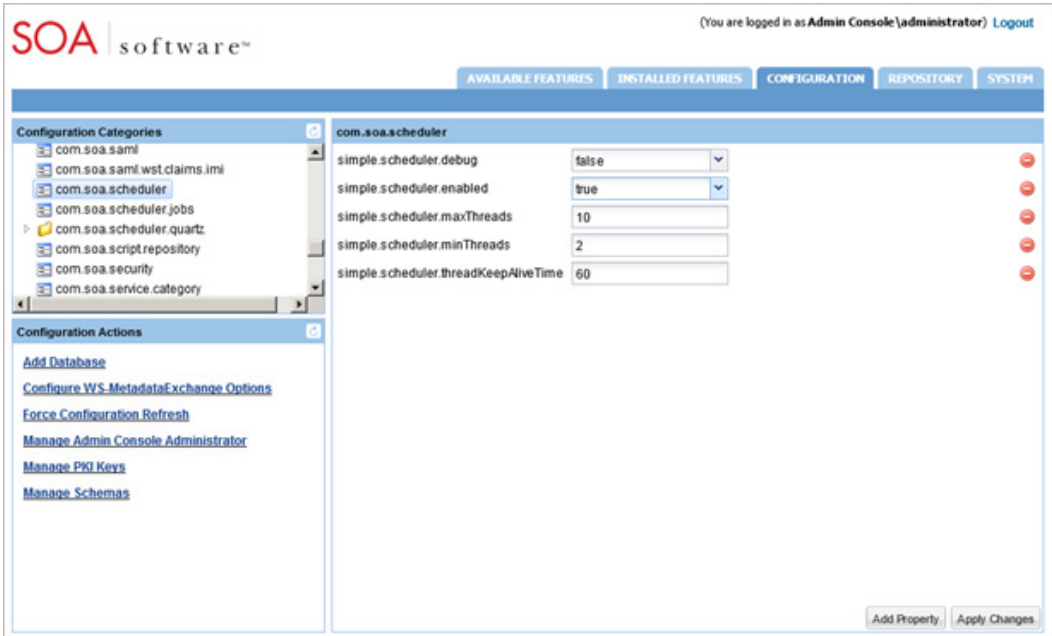
Step 10: Update Schemas (for SOA Containers with Policy Manager Features Installed)

1. If you've installed and configured the Policy Manager features (SOA Software Policy Manager Console and SOA Software Policy Manager Services) on your SOA Container, launch the "Manage Schemas Wizard" via "Configuration > Manage Schemas" and add the new schemas from the "Available Schemas" section.

Available Schemas			
<input type="checkbox"/>	Name	Version	Description
<input type="checkbox"/>	Policy Manager	7.0.0	Policy Manager Update 7.0.0 Schema and Data additions

Step 11: Turn on simple.scheduler.enabled Property (for SOA Containers with Policy Manager Features Installed)

1.	<p>After you have updated the schemas (in Step 10) you must configure the <code>simple.scheduler.enabled</code> property to True. To do this:</p> <ol style="list-style-type: none">1. Click the "Configuration" tab.2. In the "Configuration Categories" section select <code>com.soa.scheduler</code>.3. For the <code>simple.scheduler.enabled</code> property, select True from the drop-down list box.4. Click Apply Changes to save your entry. <hr/> <p>Note: This task should be performed on the Policy Manager container instance only.</p> <hr/>
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Step 12: Restart SOA Container (for SOA Containers with Policy Manager Features Installed)

2.	To complete the upgrade, restart the container.
3.	The upgrade process is now complete.

Step 13: Update Container Metadata

1.	The final step in the upgrade process is the update the Metadata URL and
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Authentication Options of each container you upgraded. This is accomplished using the "Update Container Metadata" function in the "Containers" section of the Policy Manager Management Console. This process registers the container again and rehosts all the virtual services for each container.

SOA Software Policy Manager - Update Container Metadata Wizard - Windows Internet Explorer

POLICY MANAGER™

Specify Metadata Import Options

The "Specify Metadata Import Options" screen is used to specify the location of the container's metadata. Two options for specifying the Metadata location are provided: Metadata URL and Metadata Path.

If you select the "Metadata URL" option, specify a URL to the metadata document describing the container. In the "Authentication Options" section you must also select one of three authentication options including: "Anonymous," "Logged in User," or "Specify Credentials."

If you select the "Metadata Path" option, click "Browse" to select the file system path of the metadata document.

Select the radio button of the Metadata Import Option and configure as appropriate. After completing your entries, click "Apply." The metadata is retrieved and parsed.

Metadata Import Options

Select the mechanism for obtaining the container's metadata document.

☒ Metadata URL:
This option is used to enter the URL address that represents the location where metadata will be retrieved.

Authentication Options

☒ Anonymous
This option does not pass user credentials to the container to retrieve its metadata.

☐ Logged in User
This option passes the current logged in user's credentials to the container to retrieve its metadata.

☐ Specify Credentials
This option passes the supplied credentials in the Username, Password, and Domain fields to the container to retrieve its metadata.

Username:
Password:
Domain:

☐ Metadata Path:
This option is used to enter the file system path of the metadata document.

100%

3 About SOA Software

SOA Software is a leading provider of unified SOA governance and API Management products that enable organizations to successfully plan, build, and run enterprise services and Open APIs. The world's largest companies including Bank of America, Verizon, and Pfizer use SOA Software solutions to transform their business. For more information, please visit <http://www.soa.com>.