# Technical Note

# Policy Manager 6.1 to 7.0 Upgrade

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# Table of Contents

# 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 (\sm60).

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. | Make a backup copy of your Policy Manager 6.1 Release Directory.<br><br>**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.<br><br>Before performing the upgrade process with the Configure Container Instance Wizard, you must manually copy the Policy Manager 6.1 container instances from the sm60\instances folder to the sm70\instances folder (Step 3: Copy PM61 Container Instances to PM70). |
| 2. | Stop any SOA Containers that are currently running.<br><br>*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.* |
| 3. | 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 6.1 Release Directory as the target directory.<br><br>For example, if your Policy Manager 6.1 installation is installed to the "c:\policymanager61" directory, enter that directory name:<br><br>**Here for the GUI installation:** |

**Install Policy Manager 7.0**
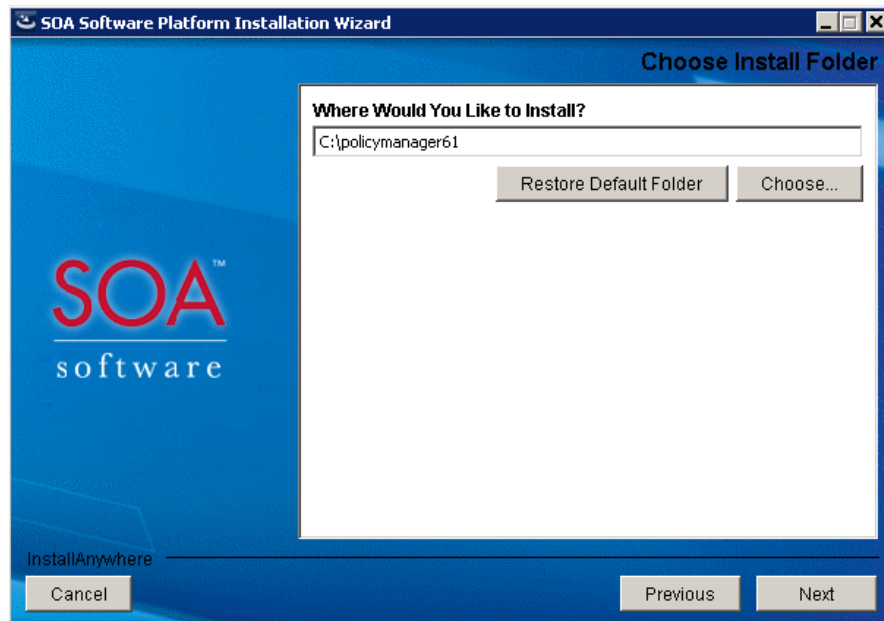


**Or here for the Console Installation:**



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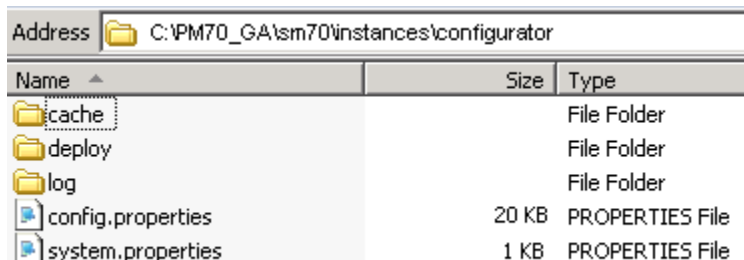
After the installation is complete **Do not launch the "Configure Container Instance Wizard."**

## Step 2: Clear Configurator Cache

The Policy Manager 7.0 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

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|---|---|
| 1. | After installing SOA Software Platform 7.0, and prior to launching the "Configure Container Instance Wizard, delete the `/sm70/instances/configurator/cache` directory if it exists. |



## Step 3: Copy PM61 Container Instances to PM70

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

## 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 must be copied to the sm70/instances container folder. See Step 3 (above).

### Upgrade SOA Container to Policy Manager 7.0 (GUI)

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| 1. | After deleting the cache folder launch the "Configure Container Instance Wizard."<br><br>Two methods can be used to launch the "Configure Container Instance Wizard." |

## Upgrade SOA Container to Policy Manager 7.0 (GUI)

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:
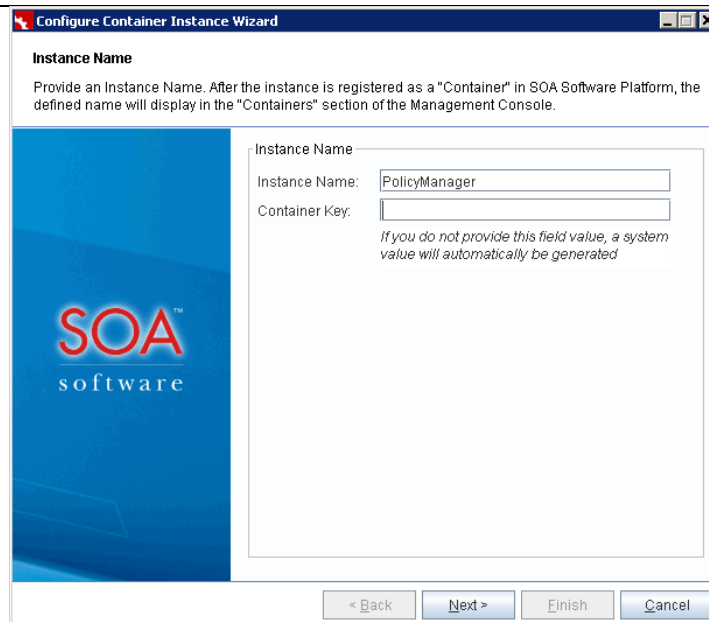
```
startup configurator
```

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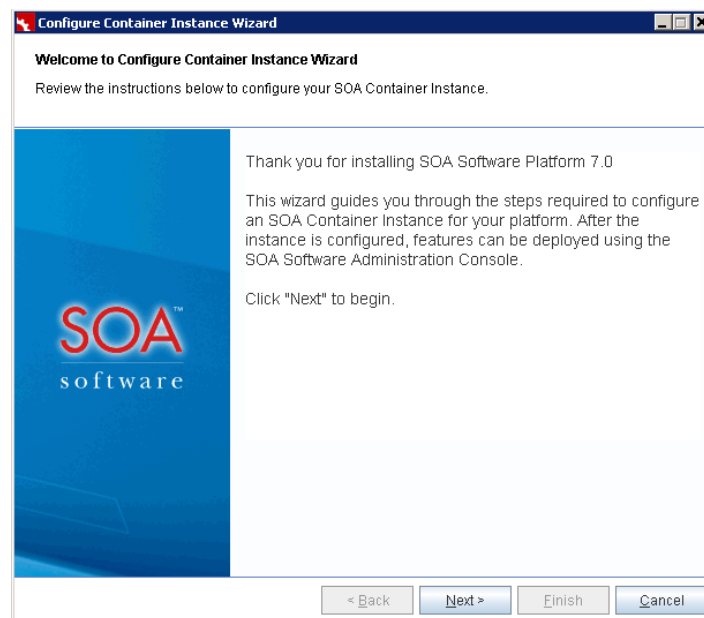


The "Instance Name" screen displays. Specify the name of the "SOA Software Container Instance" the upgrade will be applied to and click **Next** to continue.

**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)
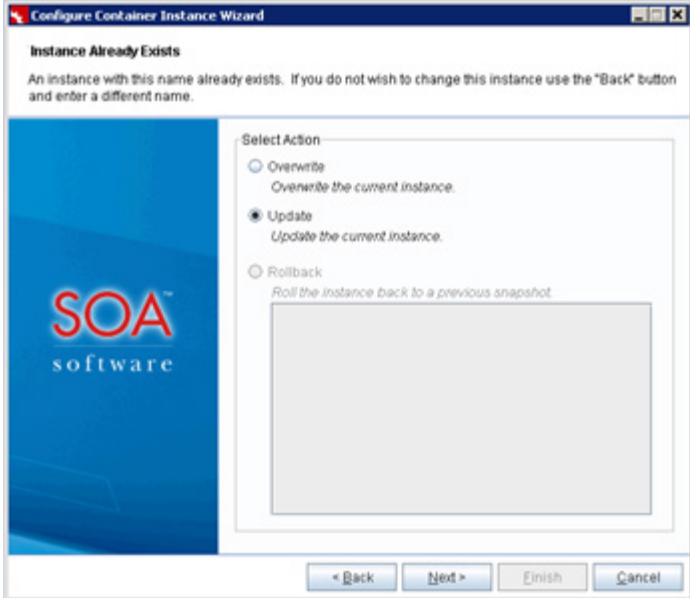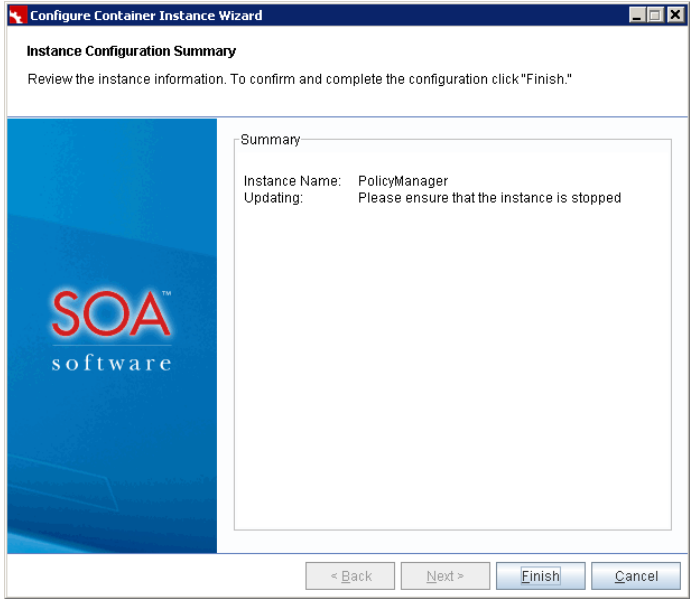


**Note:** To find the Container Instance Name, navigate to the `sm61/instances` folder and view the instances currently defined. Note that the Container Instance Name is case sensitive.

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)

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| | |  |
| 2. | | 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).<br><br> |
| 3. | | 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.<br><br>**Note:** The number of bundles displayed on the "Update Complete" message will vary based on your specific SOA Container configuration and |

## Upgrade SOA Container to Policy Manager 7.0 (GUI)

<table>
<tr>
<td></td>
<td colspan="2">number of updates being applied."

</td>
</tr>
<tr>
<td>4.</td>
<td>Click <strong>OK</strong> on the "Update Complete" dialog. The "Configure Container Instance Wizard" closes.</td>
</tr>
</table>

## Upgrade SOA Container to Policy Manager 7.0 (Silent Upgrade)

| Step | Procedure |
|------|-----------|
| 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.<br><br>Define Silent Upgrade Property File<br><br>1) Define a properties file (e.g., `upgrade.properties`)<br><br>2) Add the following default content:<br>```<br>container.instance.name=policymanager<br>wizard.mode=update<br>```<br><br>Run Silent Configuration<br><br>The "Configure Container Instance Wizard (Silent Update)" properties file accepts two system properties which together are used to perform the silent update:<br><br>   1. **silent** (If True, silent configuration will be performed)<br>   2. **properties** (location on filesystem of property file to be used for configuration) |

**Upgrade SOA Container to Policy Manager 7.0 (Silent Upgrade)**

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| | <u>Windows:</u><br><br>`\sm70\bin>startup.bat configurator "-Dsilent=true" "-`<br>`Dproperties=<property file directory location>/upgrade.properties"`<br><br><u>UNIX:</u><br><br>`\sm70\bin>startup.sh configurator -Dsilent=true -`<br>`Dproperties=opt/<property file directory location>/upgrade.properties` |
| 2. | Run the silent upgrade. |
| 3. | After the silent upgrade is complete perform the following steps:<br><br>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.<br><br>*Refer to SOA Software Customer Support for assistance installing the "Policy Manager 7.0.0" schema.*<br><br>Users that will not be utilizing the SOA Software Administration Console can skip the remainder of this procedure. |

**Upgrade SOA Container to Policy Manager 7.0 (Command Line)**

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| 1. | You can also perform the upgrade process using a command line approach. Execute the following in the `sm70\bin` folder:<br><br>**Windows:**<br>startup.bat configurator "-Dsilent=true" "-Dcontainer.instance.name=<Instance name>" "-Dwizard.mode=update"<br><br>**UNIX:**<br>startup.sh configurator -Dsilent=true -Dcontainer.instance.name=<Instance name> -Dwizard.mode=update |

## Step 5: Start SOA Container

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

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|---|---|
| 1. | Start the SOA Container.<br><br><u>Start Process in Windows</u><br><br>Navigate to `sm70\bin` and type `startup <instance name>`<br><br><u>Start Process as Windows Service</u><br><br>Launch Program Group (Settings /Control Panel/Administrative Tools/Services)<br><br>Select `SOA Software Container Instance` - Note that the instance name is displayed |

| | as the Container Key. |
|---|---|
| | From "Actions" menu, select **Start**. |
| | <u>Start Process in UNIX</u> |
| | Navigate to `sm70/bin` and type `startup.sh <instance name>` |
| | <u>Start Process in UNIX (Background)</u> |
| | Navigate to `sm70/bin` and type `startup.sh <instance name> -bg` |

## Step 6: Clear Browser Cache

| 1. | 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. |
|---|---|

## Step 7: Launch SOA Software Administration Console

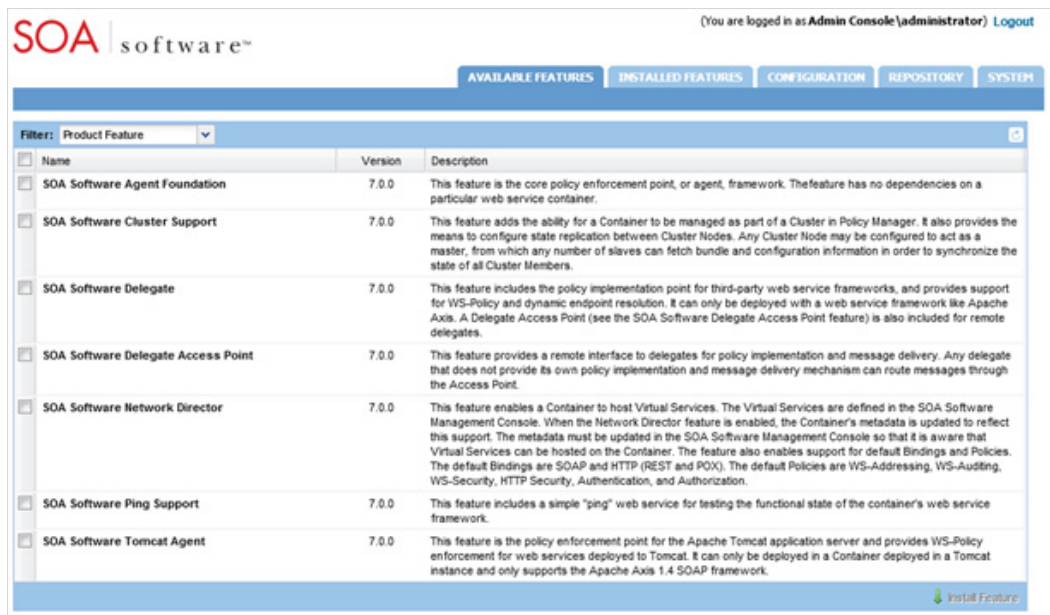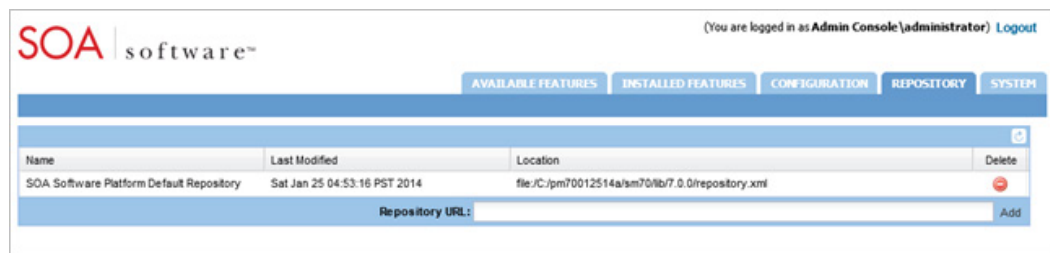| 1. | Launch the "SOA Software Administration Console" for the updated SOA Container Instance: |
|---|---|
| | Enter: `http://<hostname>:<port>/admin` |
| |  |
| | **Figure. SOA Software Administration Console—*Login*** |
| 2. | Select the "Admin Console" domain, enter the "Username" and "Password," and click **Login**. The SOA Software Administration Console launches and displays the "Available |

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| | Features" tab.<br><br><br><br>**Figure. SOA Software Administration Console—*Available Features Tab*** |

## Step 8: Refresh Repository

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| 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 "SOA Software Platform Default Repository 7.0.0."<br><br> |
| 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.<br><br>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)

<table>
<tr>
<td>1.</td>
<td>

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.

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

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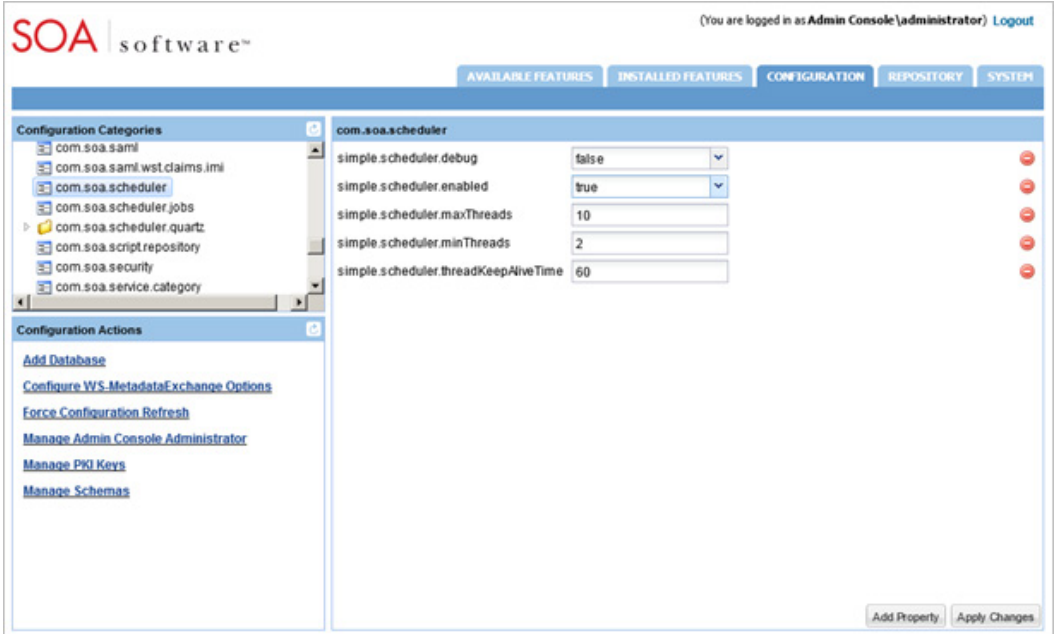</td>
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</table>
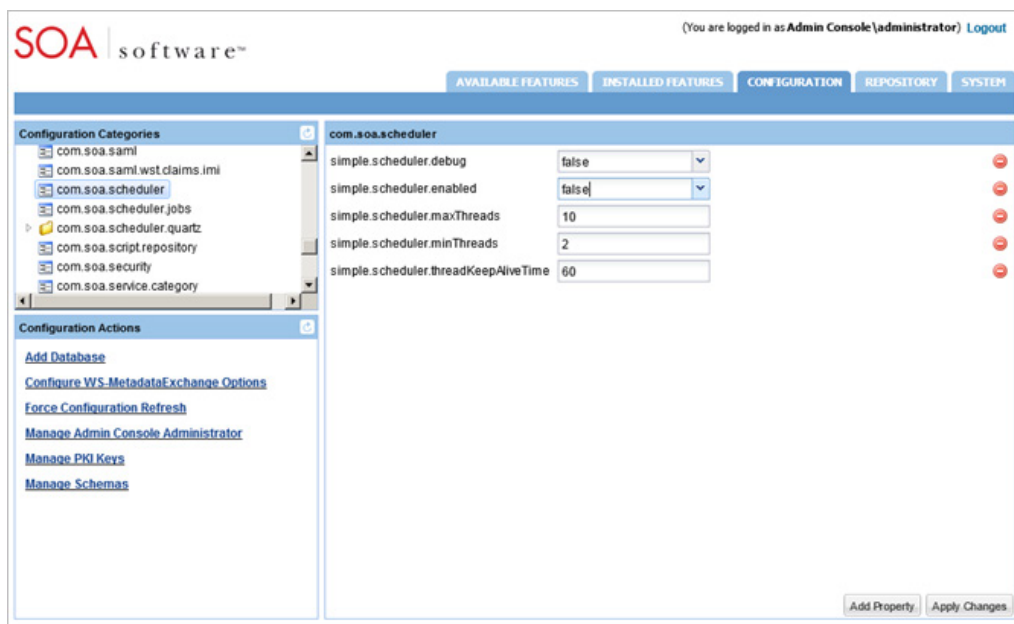
## Step 10: Update Schemas (for SOA Containers with Policy Manager Features Installed)

<table>
<tr>
<td>1.</td>
<td>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.</td>
</tr>
</table>

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

| | |
|---|---|
| 1. | After you have updated the schemas (in Step 10) you must configure the `simple.scheduler.enabled` property to **True**. To do this:<br><br>1. Click the "Configuration" tab.<br>2. In the "Configuration Categories" section select `com.soa.scheduler`.<br>3. For the `simple.scheduler enabled` property, select **True** from the drop-down list box.<br>4. Click **Apply Changes** to save your entry.<br><br>**Note:** This task should be performed on the Policy Manager container instance only.<br><br> |

## Step 12: Restart SOA Container (for SOA Containers with Policy Manager Features Installed)

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| 2. | To complete the upgrade, restart the container. |

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| 3. | The upgrade process is now complete. |

## Step 13: Update Container Metadata

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| 1. | The final step in the upgrade process is the update the Metadata URL and 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.<br><br> |

# 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.