



# Technical Note

## Policy Manager Upgrade (7.1 to 7.2, 7.0 to 7.2, and 6.1 to 7.2)

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# 1 Overview

This technical note provides instructions for upgrading Policy Manager 7.1 (PM71) to Policy Manager 7.2 (PM72), Policy Manager 7.0 (PM70) to Policy Manager 7.2 (PM72), and Policy Manager 6.1 (PM61) to Policy Manger 7.2 (PM72).

## 2 Perform Policy Manager 7.1 to 7.2 Upgrade

Two scenarios can be used to perform the PM71 to PM72 upgrade:

- **Scenario 1:** You can apply the PM72 upgrade directly to the PM71 installation.
- **Scenario 2:** You can install PM72 to a different location, copy the PM71 container instances to the PM72 \instances folder, and upgrade from the PM72 installation.

The upgrade can be performed with any denomination of Policy Manager updates applied to your PM70 Release Directory (i.e., zero updates – 7.1.4).

To upgrade, perform the following steps:

### Step 1: Verify that Contract Workflow is in Draft state or Workflow is Completed

1.	<p>The upgrade process requires that the workflow state for <i>default</i> or <i>custom</i> workflows be in either:</p> <ul style="list-style-type: none"><li>• <b>Draft</b> state, or</li><li>• The <i>Contract Workflow Portlet</i> must say <b>Workflow is Completed</b>.</li></ul> <p>Launch the <i>Policy Manager 7.1 Management Console</i> and confirm that the Contract Workflow meets this requirement for each Contract in each Organization.</p>
----	---

### Step 2: Turn off com.soa.scheduler.quartz Property (for PM71 SOA Containers with Policy Manager Features Installed)

2.	<p>Set the quartz scheduler property to <b>False</b>. To do this:</p> <ul style="list-style-type: none"><li>• Launch the SOA Software Administration Console.</li><li>• Select the <i>Configuration</i> tab and the <b>com.soa.scheduler.quartz</b> Configuration Category.</li><li>• Change the <b>org.quartz.scheduler.enabled</b> property to <b>False</b>.</li></ul>
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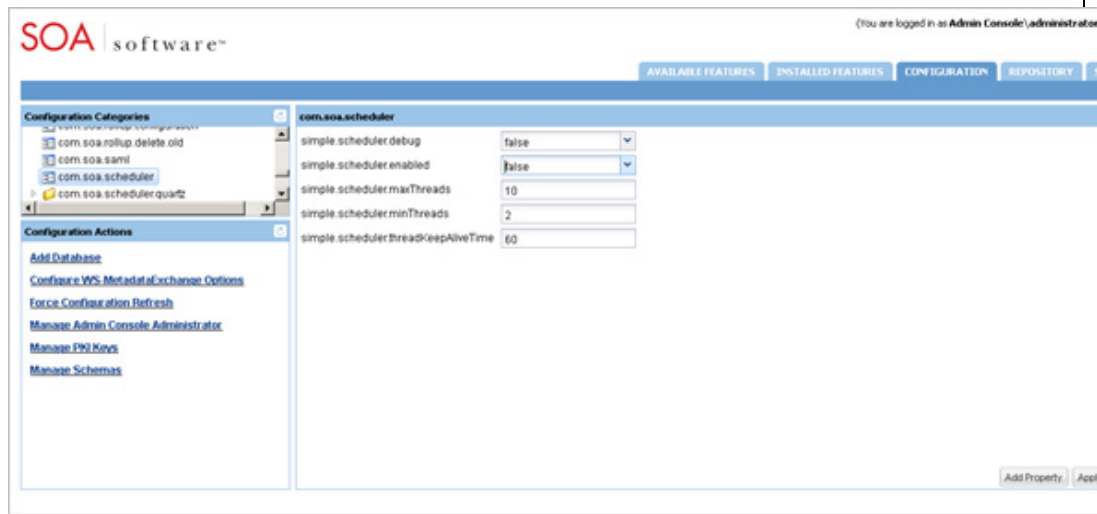
### Step 3: Turn off simple.scheduler.enabled Property (for PM71 SOA Containers with Policy Manager Features Installed)

1.	<p>After you have completed the schema update process, you must configure the <code>simple.scheduler.enabled</code> property to <b>False</b>. To do this:</p> <ol style="list-style-type: none"><li>1. Launch the <i>SOA Software Administration Console</i> for PM71.</li><li>2. Click the "Configuration" tab.</li><li>3. In the "Configuration Categories" section select <code>com.soa.scheduler</code>.</li><li>4. For the <code>simple.scheduler.enabled</code> property, select <b>False</b> from the drop-down</li></ol>
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list box.

5. Click **Apply Changes** to save your entry.

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



## Step 4: Install Policy Manager 7.2

### Install Policy Manager 7.2

Step	Procedure
1.	Backup your PM71 Database.
2.	<p>Stop any SOA Containers that are currently running. This is required to update the Policy Manager schema to PM72. This ensures that the database is not locked while the update is in progress.</p> <p><i>Refer to "Appendix A: Start / Stop / Restart Container Instance" of the "SOA Software Platform 7.2 Installation Guide for Windows and UNIX Platforms" for instructions.</i></p>
3.	Backup your PM71 Release Directory.
4.	<p>Install the SOA Software Platform 7.2 application (e.g., &lt;platform&gt;-pm-7.2.xxxx-setup64.exe or &lt;platform&gt;-pm-7.2.xxxx-setup64.bin).</p> <ul style="list-style-type: none"><li>• <b>For Scenario 1:</b> Install PM72 directly to the PM71 release directory.</li><li>• <b>For Scenario 2:</b> Install PM72 into a new directory.</li></ul> <p><i>Refer to "Chapter 1: Installing and Configuring SOA Software Platform" of the SOA Software Platform 7.2 Installation Guide for Windows and UNIX Platforms" for installation instructions.</i></p> <p>After the installation is complete <b>Do not launch the "Configure Container Instance</b></p>




## Install Policy Manager 7.2

	Wizard."
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### Step 5: Copy PM71 Container Instances to PM72 (For Scenario 2 ONLY)

1.	<p><i>Note: If you installed PM72 directly to the PM71 directory (i.e., Scenario 1), skip this step.</i></p> <p>From your PM71 backup directory, <i>manually</i> copy the PM71 container instances (sm70/instances/&lt;pm_instance) to the PM72 container instances folder (sm70/instances/&lt;pm_instance). This includes PM71, Network Director, and Agent container instances.</p> <hr/> <p><b>Note:</b> Do not include the PM71 configurator or the PM71 default container folder as part of the copy process.</p> <hr/>
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### Step 6: Clear Configurator Cache

1.	<p>Before launching the "Configure Container Instance Wizard" and performing the upgrade, clear (i.e., delete) the configurator cache folder in \instances\configurator folder.</p> 
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### Step 7: Upgrade Container Instance (For Scenarios 1 and 2)

Perform the following update procedure on each SOA Container you would like upgraded to PM72 using the "Configure Container Instance Wizard." GUI, Silent, and Command Line procedures are provided.

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**Note:** For Scenario 2, prior to performing the upgrade, verify that *Step 2: Copy PM71 Container Instances to PM72* has been completed.

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### Upgrade SOA Container to Policy Manager 7.2 (GUI)

## Upgrade SOA Container to Policy Manager 7.2 (GUI)

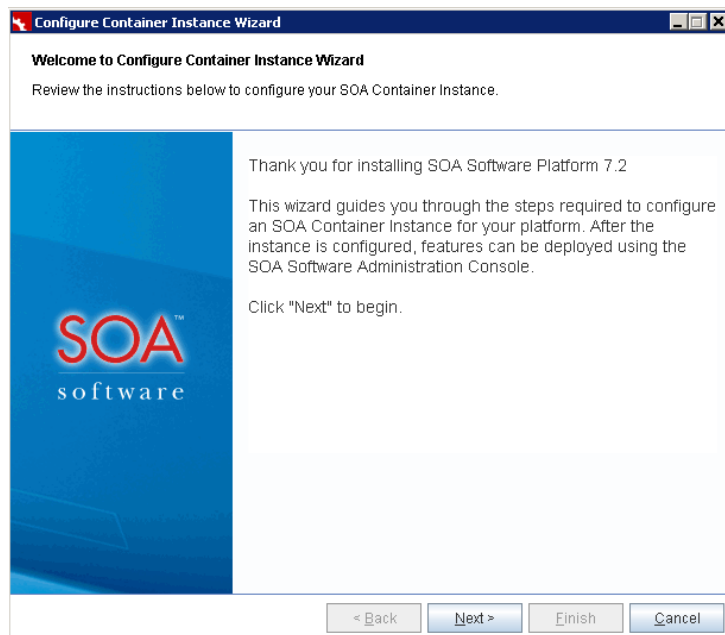
1. Two methods can be used to launch the "Configure Container Instance Wizard."
  - 1) Launch from the SOA Software Platform Program Group:

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.

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**Note:** The 7.2 version of the SOA Software 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.**

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## Upgrade SOA Container to Policy Manager 7.2 (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

The "Instance Already Exists" screen displays. To apply the PM71 to PM72 Upgrade, click the **Update** radio button, and **Next** to continue.

**Configure Container Instance Wizard**

**Instance Already Exists**

An instance with this name already exists. If you do not wish to change this instance use the "Back" button and enter a different name.

**Select Action**

☐ Overwrite  
*Overwrite the current instance.*

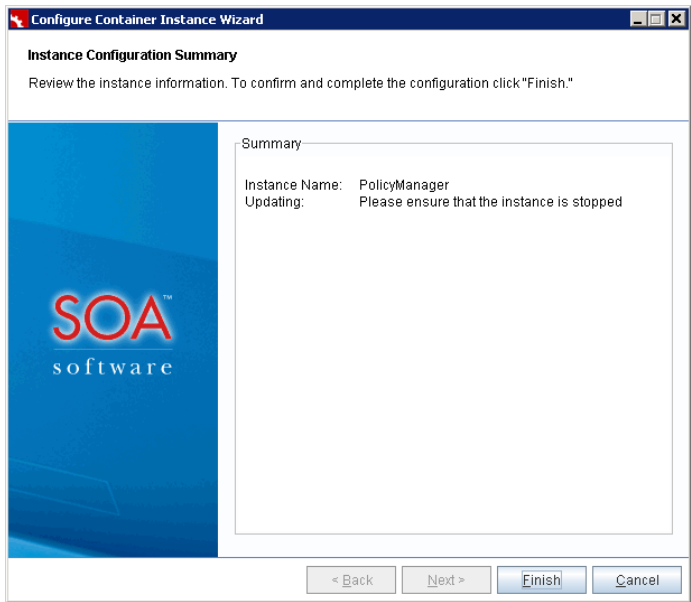
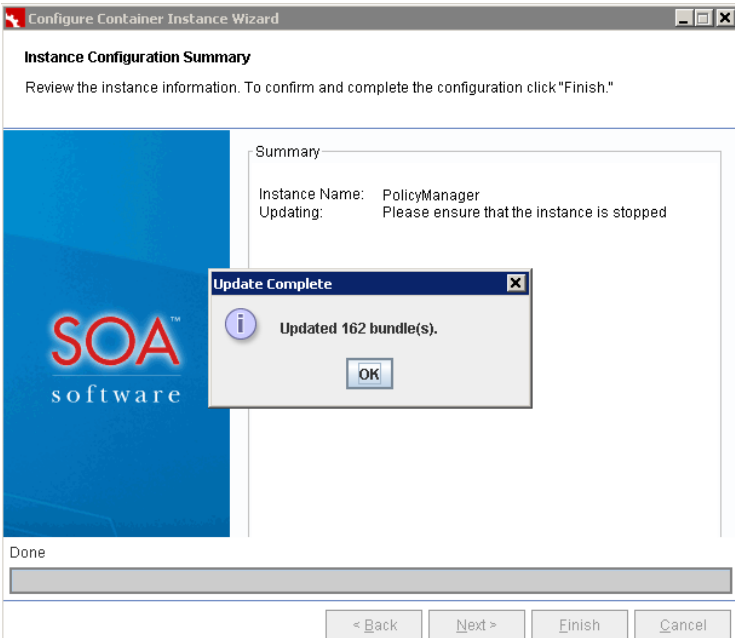
☒ **Update**  
*Update the current instance.*

☐ Rollback  
*Roll the instance back to a previous snapshot.*


< Back   Next >   Finish   Cancel

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).

## Upgrade SOA Container to Policy Manager 7.2 (GUI)

	
3.	<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><b>Note:</b> The number of bundles displayed on the "Update Complete" message will vary based on your specific SOA Container configuration and number of updates being applied."</p> <hr/> 
4.	<p>Click <b>OK</b> on the "Update Complete" dialog. The "Configure Container Instance Wizard"</p>


## Upgrade SOA Container to Policy Manager 7.2 (GUI)

	closes.
5.	<p><b>Repeat this upgrade process on Network Director or Agent Containers before continuing to Step 7.</b></p> <p>Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance.</p> 

## Upgrade SOA Container to Policy Manager 7.2 (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"> <li>1) Define a properties file (e.g., <code>upgrade.properties</code>)</li> <li>2) Add the following default content: <pre>container.instance.name=policymanager wizard.mode=update</pre> </li> </ol> <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"> <li>1. <b>silent</b> (If True, silent configuration will be performed)</li> <li>2. <b>properties</b> (location on filesystem of property file to be used for configuration)</li> </ol> <p><u>Windows:</u></p> <pre>\sm70\bin&gt;startup.bat configurator "-Dsilent=true" "-Dproperties=&lt;property file directory location&gt;/upgrade.properties"</pre> <p><u>UNIX:</u></p> <pre>\sm70\bin&gt;startup.sh configurator -Dsilent=true -Dproperties=opt/&lt;property file directory location&gt;/upgrade.properties</pre>
2.	Run the silent upgrade.

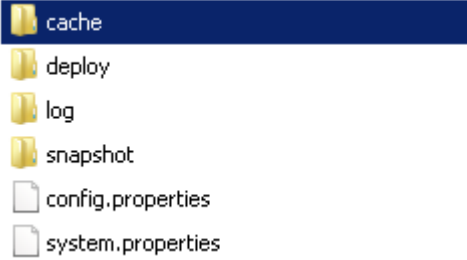
### Upgrade SOA Container to Policy Manager 7.2 (Silent Upgrade)

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 7.2.0" 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 7.2.0" schema.</i></p> <p>Users that will not be utilizing the SOA Software Administration Console can skip the remainder of this procedure.</p>
4.	<p><b>Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 7.</b></p> <p>Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance.</p> 

### Upgrade SOA Container to Policy Manager 7.2 (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><b>Windows:</b></p> <pre>startup.bat configurator "-Dsilent=true" "-Dcontainer.instance.name=&lt;Instance name&gt;" "-Dwizard.mode=update"</pre> <p><b>UNIX:</b></p> <pre>startup.sh configurator -Dsilent=true -Dcontainer.instance.name=&lt;Instance name&gt; -Dwizard.mode=update</pre>
2.	<p><b>Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 7.</b></p> <p>Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance.</p>

## Upgrade SOA Container to Policy Manager 7.2 (Command Line)

	
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## Step 8: Unregister and re-register the Windows Service

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

1.	<p><u>Unregister the existing Windows Service</u></p> <p><code>./sm70/bin/unregisterContainerService.bat &lt;instance_name&gt;</code></p> <p><u>Re-register the Windows Service</u></p> <p><code>./sm70/bin/registerContainerService.bat &lt;instance_name&gt;</code></p>
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## Step 9: Start SOA Container (for SOA Containers with Policy Manager Features Installed)

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 &lt;instance name&gt;</code></p> <p><u>Start Process as Windows Service</u></p> <p>Launch Program Group (Settings /Control Panel/Administrative Tools/Services)</p> <p>Select <code>SOA Software Container Instance</code> - Note that the instance name is displayed as the Container Key.</p> <p>From "Actions" menu, select <b>Start</b>.</p> <p><u>Start Process in UNIX</u></p> <p>Navigate to <code>sm70/bin</code> and type <code>startup.sh &lt;instance name&gt;</code></p> <p><u>Start Process in UNIX (Background)</u></p>
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	Navigate to sm70/bin and type <code>startup.sh &lt;instance name&gt; -bg</code>
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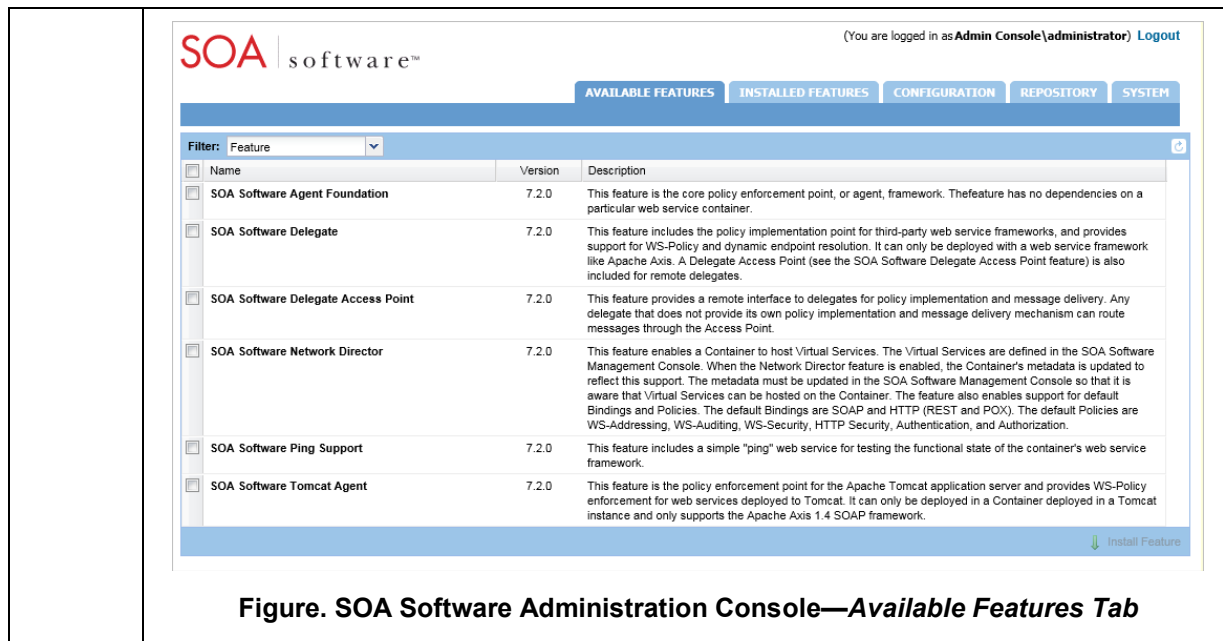
## Step 10: Clear Browser Cache

1.	Before launching the "SOA Software 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.
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## Step 11: Launch SOA Software Administration Console

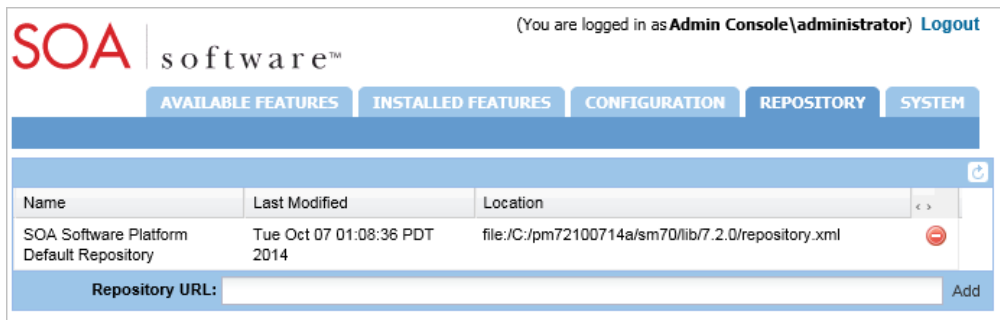
1.	<p>Launch the "SOA Software Administration Console" for the updated SOA Container Instance:</p> <p>Enter: <code>http://&lt;hostname&gt;:&lt;port&gt;/admin</code></p>  <p><b>Figure. SOA Software Administration Console—Login</b></p>
2.	Select the "Admin Console" domain, enter the "Username" and "Password," and click <b>Login</b> . The SOA Software Administration Console launches and displays the "Available Features" tab.





## Step 12: 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 "SOA Software Platform Default Repository 7.2.0."

The screenshot shows the SOA Software Administration Console interface. At the top, the SOA software logo is on the left, and the user is logged in as 'Admin Console\administrator' with a 'Logout' link on the right. Below the header is a navigation bar with five tabs: 'AVAILABLE FEATURES', 'INSTALLED FEATURES', 'CONFIGURATION', 'REPOSITORY', and 'SYSTEM'. The 'REPOSITORY' tab is selected. Below the tabs is a table with the following data:

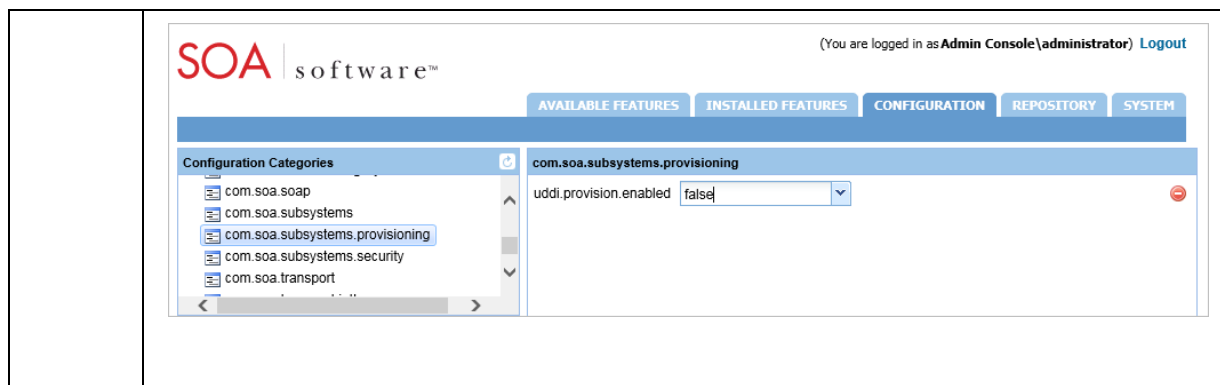
Name	Last Modified	Location
SOA Software Platform Default Repository	Tue Oct 07 01:08:36 PDT 2014	file:/C:/pm72100714a/sm70/lib/7.2.0/repository.xml

Below the table is a 'Repository URL:' label followed by a text input field and an 'Add' button. There are also icons for adding and deleting items in the table.

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 13, 14 (if applicable), 15, 16, 17, 18, 19, 20, and 21.

## Step 13: Disable UDDI Provisioning

1.	<p>Select the <i>Configuration</i> tab and set the <b>uddi.provision.enabled</b> property in the <b>com.soa.subsystems.provisioning</b> category must be set to <b>False</b>.</p>
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## Step 14: 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, 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.
- Available Schemas**

<input type="checkbox"/>	Name	Version	Description
<input type="checkbox"/>	Policy Manager	7.2.0	Policy Manager Update 7.2.0 Schema and Data additions

## Step 15: Enable UDDI Provisioning

1. Select the *Configuration* tab and set the **uddi.provision.enabled** property in the **com.soa.subsystems.provisioning** category must be set to **True**.
- SOA software™ (You are logged in as Admin Console\administrator) Logout

AVAILABLE FEATURES | INSTALLED FEATURES | CONFIGURATION | REPOSITORY | SYSTEM

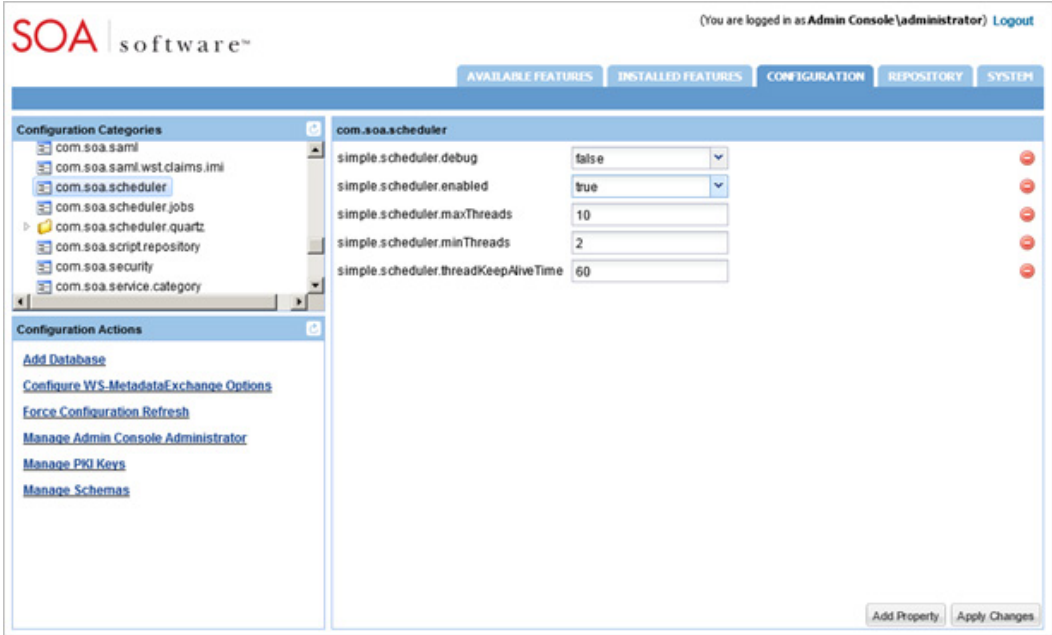
Configuration Categories

  - com.soa.soap
  - com.soa.subsystems
  - com.soa.subsystems.provisioning
  - com.soa.subsystems.security
  - com.soa.transport

com.soa.subsystems.provisioning

uddi.provision.enabled true

## Step 16: Turn on simple.scheduler.enabled Property (for updated PM72 SOA Containers with Policy Manager Features Installed)

1.	<p>After you have completed the schema update process, you must configure the <code>simple.scheduler.enabled</code> property to <b>True</b>. To do this:</p> <ol style="list-style-type: none"><li>1. Launch the <i>SOA Software Administration Console</i> for PM72.</li><li>2. Click the "Configuration" tab.</li><li>3. In the "Configuration Categories" section select <code>com.soa.scheduler</code>.</li><li>4. For the <code>simple.scheduler.enabled</code> property, select <b>True</b> from the drop-down list box.</li><li>5. Click <b>Apply Changes</b> to save your entry.</li></ol> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"><p><b>Note:</b> This task should be performed on the Policy Manager container instance only.</p></div> <div style="text-align: right; margin-top: 10px;"></div>
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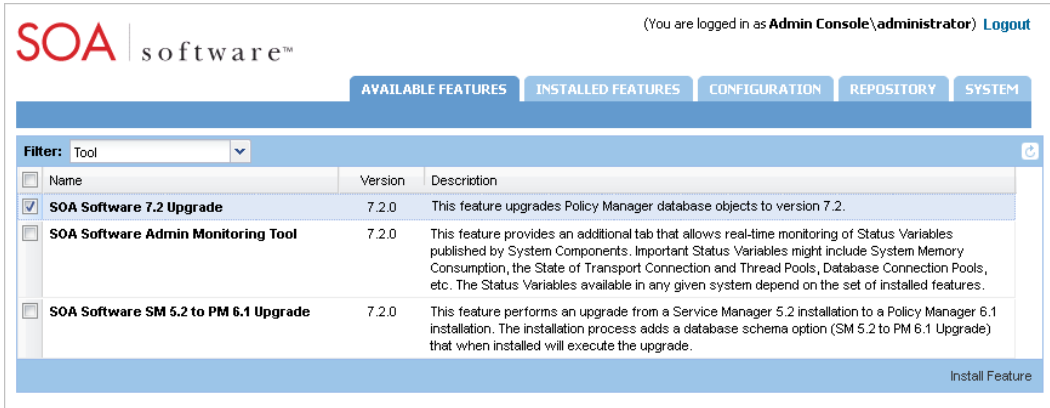
## Step 17: Turn on com.soa.scheduler.quartz Property (for updated PM72 SOA Containers with Policy Manager Features Installed)

1.	<p>Set the quartz scheduler property to <b>True</b>. To do this:</p> <ul style="list-style-type: none"><li>• Launch the SOA Software Administration Console.</li><li>• Select the <i>Configuration</i> tab and the <b>com.soa.scheduler.quartz</b> Configuration Category.</li><li>• Change the <b>org.quartz.scheduler.enabled</b> property to <b>True</b>.</li></ul>
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## Step 18: Restart SOA Container (for SOA Containers with Policy Manager Features Installed)

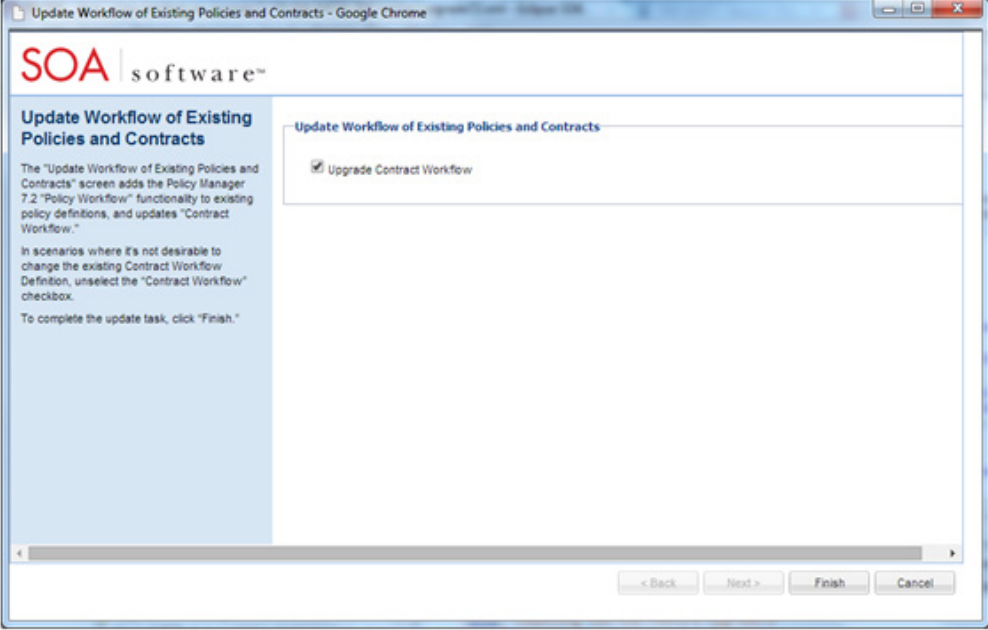
1.	Restart the container and continue to the next step.
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## Step 19: Install SOA Software 7.2 Upgrade

1.	<p>After the SOA Container has successfully restarted, the next step is to upgrade the Policy Manager database. To do this:</p> <ol style="list-style-type: none"><li>1. Launch the <i>SOA Software Administration Console</i> for PM72.</li><li>2. Click the "Available Features" tab and select <b>Tool</b> from the <i>Filter</i> drop-down.</li><li>3. Select <i>SOA Software 7.2 Upgrade</i> and click <b>Install Feature</b>.</li></ol>  <ol style="list-style-type: none"><li>4. If the PM72 Schema is not yet installed the <b>Configure</b> button displays. Click it, select the PM72 schema, install it, and restart the container.</li><li>5. If the PM72 Schema is already installed the <b>Configure</b> button will not display. In this scenario the installation is complete. Click <b>Close</b> and continue to the next step.</li></ol>
----	---

## Step 20: Update Workflow of Existing Policies and Contracts


1.	<p>The next step is to add the Policy Manager 7.2 "Policy Workflow" functionality to existing policies and update "Contract Workflow." To do this:</p> <ol style="list-style-type: none"><li>1. Launch the <i>SOA Software Administration Console</i> for PM72.</li><li>2. Click the "Configuration" tab. In the Configuration Actions section select the <b>Upgrade Policies and Contracts</b> function.</li><li>3. In scenarios where it's not desirable to change the existing Contract Workflow Definition, unselect the "Upgrade Contract Workflow" checkbox.</li></ol>
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	 <p>4. To complete the update task click <b>Finish</b>.</p> <p>5. After the task is completed, restart the SOA container.</p>
--	---

## Step 21: Update Container Metadata

1.	<p>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 <b>Update Container Metadata</b> function in the "Containers" section of the <i>Policy Manager Management Console</i>. This process updates the container capabilities to support the latest features.</p> <p>From the <i>Containers</i> folder, select the PM72 container. From the "Actions Portlet" select <b>Update Container Metadata</b>.</p> <p>Enter the Metadata URL for the container being updated (i.e. <a href="http://&lt;pm_host&gt;:&lt;pm_port&gt;/metadata">http://&lt;pm_host&gt;:&lt;pm_port&gt;/metadata</a> or <a href="http://&lt;nd_host&gt;:&lt;nd_port&gt;/metadata">http://&lt;nd_host&gt;:&lt;nd_port&gt;/metadata</a>) or the Metadata Path.</p> <p>If Authentication options are being used or updated, select the authentication options.</p> <p>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.</p>
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SOA Software Policy Manager - Update Container Metadata Wizard - Windows Internet Explorer



### 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.*

[Help](#) [Apply](#) [Cancel](#)

### 3 Perform Policy Manager 7.0 to 7.2 Upgrade

Two scenarios can be used to perform the PM70 to PM72 upgrade:

- **Scenario 1:** You can apply the PM72 upgrade directly to the PM70 installation.
- **Scenario 2:** You can install PM72 to a different location, copy the PM70 container instances to the PM72 \instances folder, and upgrade from the PM72 installation.

The upgrade can be performed with any denomination of Policy Manager updates applied to your PM70 Release Directory (i.e., zero updates – 7.0.1 – 7.0.8).

To upgrade, perform the following steps:

#### Step 1: Verify that Contract Workflow is in Draft state or Workflow is Completed

1.	<p>The upgrade process requires that the workflow state for <i>default</i> or <i>custom</i> workflows be in either:</p> <ul style="list-style-type: none"><li>• <b>Draft</b> state, or</li><li>• The <i>Contract Workflow Portlet</i> must say <b>Workflow is Completed</b>.</li></ul> <p>Launch the <i>Policy Manager 7.0 Management Console</i> and confirm that the Contract Workflow meets this requirement for each Contract in each Organization.</p>
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#### Step 2: Turn off com.soa.scheduler.quartz Property for PM70 Container (for SOA Containers with Policy Manager Features Installed)

1.	<p>Set the quartz scheduler property to <b>False</b>. To do this:</p> <ul style="list-style-type: none"><li>• Launch the SOA Software Administration Console.</li><li>• Select the <i>Configuration</i> tab and the <b>com.soa.scheduler.quartz</b> Configuration Category.</li><li>• Change the <b>org.quartz.scheduler.enabled</b> property to <b>False</b>.</li></ul>
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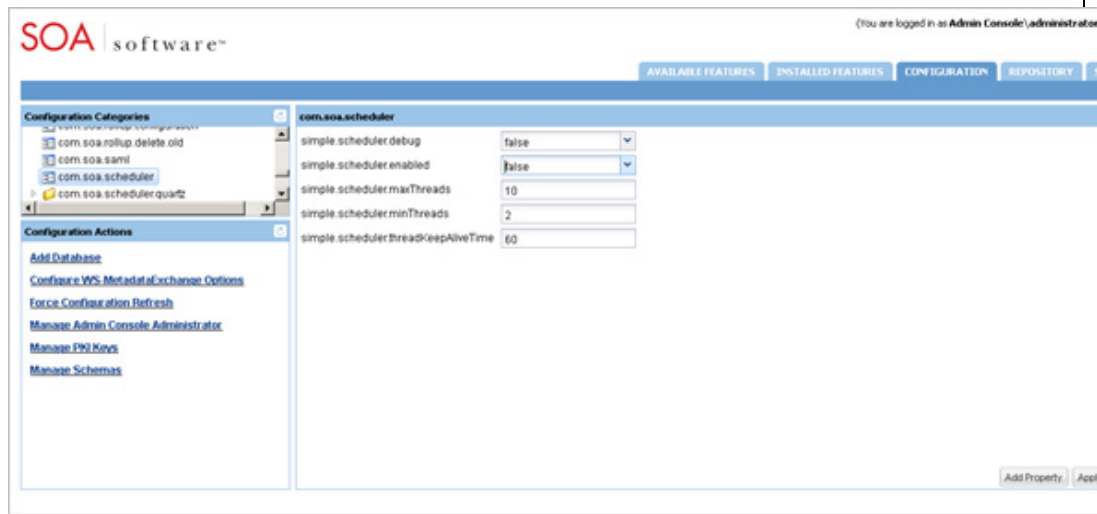
#### Step 3: Turn off simple.scheduler.enabled Property (for PM70 SOA Containers with Policy Manager Features Installed)

1.	<p>After you have completed the schema update process, you must configure the <code>simple.scheduler.enabled</code> property to <b>False</b>. To do this:</p> <ol style="list-style-type: none"><li>1. Launch the <i>SOA Software Administration Console</i> for PM70.</li><li>2. Click the "Configuration" tab.</li><li>3. In the "Configuration Categories" section select <code>com.soa.scheduler</code>.</li><li>4. For the <code>simple.scheduler.enabled</code> property, select <b>False</b> from the drop-down</li></ol>
----	--

list box.

5. Click **Apply Changes** to save your entry.

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



## Step 4: Install Policy Manager 7.2

### Install Policy Manager 7.2

Step	Procedure
1.	Backup your PM70 Database.
2.	<p>Stop any SOA Containers that are currently running. This is required to update the Policy Manager schema to PM72. This ensures that the database is not locked while the update is in progress.</p> <p><i>Refer to "Appendix A: Start / Stop / Restart Container Instance" of the "SOA Software Platform 7.2 Installation Guide for Windows and UNIX Platforms" for instructions.</i></p>
3.	Backup your PM70 Release Directory.
4.	<p>Install the SOA Software Platform 7.2 application (e.g., &lt;platform&gt;-pm-7.2.xxxx-setup64.exe or &lt;platform&gt;-pm-7.2.xxxx-setup64.bin).</p> <ul style="list-style-type: none"><li>• <b>For Scenario 1:</b> Install PM72 directly to the PM70 release directory.</li><li>• <b>For Scenario 2:</b> Install PM72 into a new directory.</li></ul> <p><i>Refer to "Chapter 1: Installing and Configuring SOA Software Platform" of the SOA Software Platform 7.2 Installation Guide for Windows and UNIX Platforms" for installation instructions.</i></p> <p>After the installation is complete <b>Do not launch the "Configure Container Instance</b></p>



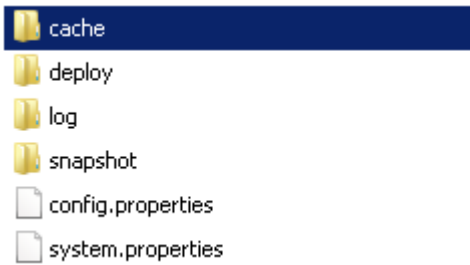
## Install Policy Manager 7.2

	Wizard."
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### Step 5: Copy PM70 Container Instances to PM72 (For Scenario 2 ONLY)

1.	<p><i>Note: If you installed PM72 directly to the PM70 directory (i.e., Scenario 1), skip this step.</i></p> <p>From your PM70 backup directory, <i>manually</i> copy the PM70 container instances (sm70/instances/&lt;pm_instance) to the PM72 container instances folder (sm70/instances/&lt;pm_instance). This includes PM70, Network Director, and Agent container instances.</p> <hr/> <p><b>Note:</b> Do not include the PM70 configurator or the PM70 default container folder as part of the copy process.</p> <hr/>
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### Step 6: Clear Configurator Cache

1.	<p>Before launching the "Configure Container Instance Wizard" and performing the upgrade, clear (i.e., delete) the configurator cache folder in \instances\configurator folder.</p> 
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### Step 7: Upgrade Container Instance (For Scenarios 1 and 2)

Perform the following update procedure on each SOA Container you would like upgraded to PM72 using the "Configure Container Instance Wizard." GUI, Silent, and Command Line procedures are provided.

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**Note:** For Scenario 2, prior to performing the upgrade, verify that *Step 2: Copy PM70 Container Instances to PM72* has been completed.

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### Upgrade SOA Container to Policy Manager 7.2 (GUI)

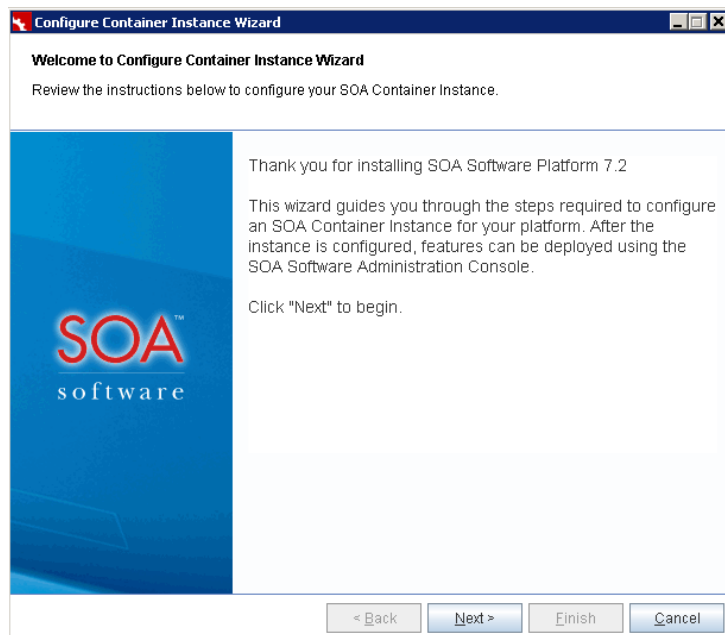
## Upgrade SOA Container to Policy Manager 7.2 (GUI)

1. 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 7.2 version of the SOA Software 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 SOA Container to Policy Manager 7.2 (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

The "Instance Already Exists" screen displays. To apply the PM70 to PM72 Upgrade, click the **Update** radio button, and **Next** to continue.

**Configure Container Instance Wizard**

**Instance Already Exists**

An instance with this name already exists. If you do not wish to change this instance use the "Back" button and enter a different name.

**Select Action**

☐ Overwrite  
*Overwrite the current instance.*

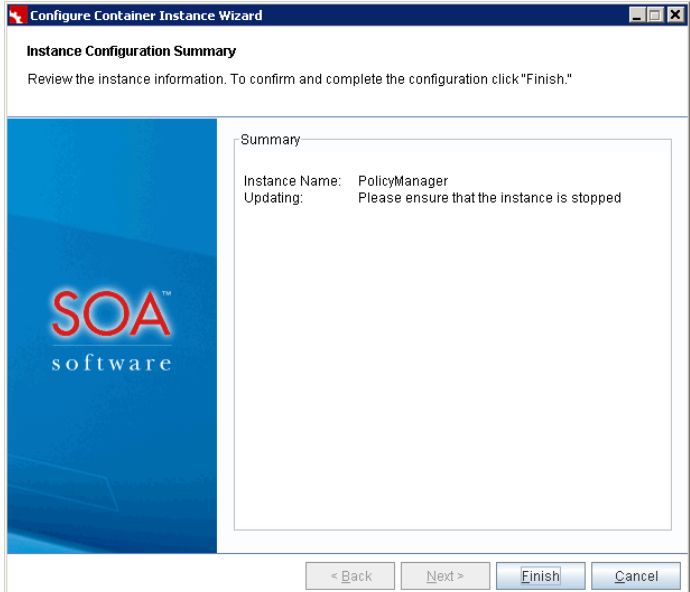
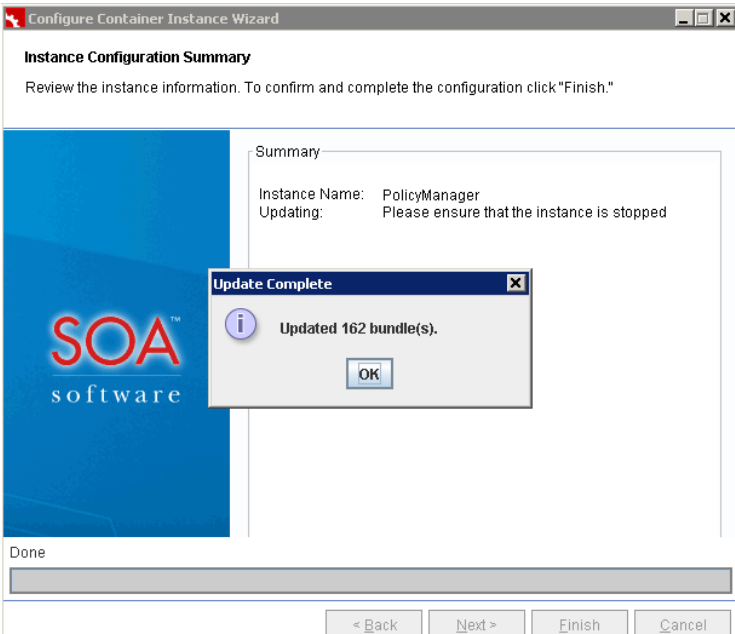
☒ **Update**  
*Update the current instance.*

☐ Rollback  
*Roll the instance back to a previous snapshot.*


< Back   Next >   Finish   Cancel

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).

## Upgrade SOA Container to Policy Manager 7.2 (GUI)

	
<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><b>Note:</b> The number of bundles displayed on the "Update Complete" message will vary based on your specific SOA Container configuration and number of updates being applied.</p> <hr/> 
<p>4.</p>	<p>Click <b>OK</b> on the "Update Complete" dialog. The "Configure Container Instance Wizard"</p>


## Upgrade SOA Container to Policy Manager 7.2 (GUI)

	closes.
5.	<p><b>Repeat this upgrade process on Network Director or Agent Containers before continuing to Step 7.</b></p> <p>Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance.</p> 

## Upgrade SOA Container to Policy Manager 7.2 (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"> <li>1) Define a properties file (e.g., upgrade.properties)</li> <li>2) Add the following default content: <pre>container.instance.name=policymanager wizard.mode=update</pre> </li> </ol> <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"> <li>1. <b>silent</b> (If True, silent configuration will be performed)</li> <li>2. <b>properties</b> (location on filesystem of property file to be used for configuration)</li> </ol> <p><u>Windows:</u></p> <pre>\sm70\bin&gt;startup.bat configurator "-Dsilent=true" "-Dproperties=&lt;property file directory location&gt;/upgrade.properties"</pre> <p><u>UNIX:</u></p> <pre>\sm70\bin&gt;startup.sh configurator -Dsilent=true -Dproperties=opt/&lt;property file directory location&gt;/upgrade.properties</pre>
2.	Run the silent upgrade.

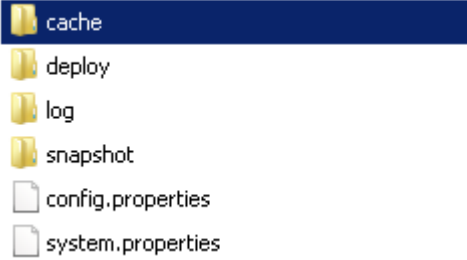
## Upgrade SOA Container to Policy Manager 7.2 (Silent Upgrade)

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 7.2.0" 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 7.2.0" schema.</i></p> <p>Users that will not be utilizing the SOA Software Administration Console can skip the remainder of this procedure.</p>
4.	<p><b>Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 7.</b></p> <p>Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance.</p> 

## Upgrade SOA Container to Policy Manager 7.2 (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><b>Windows:</b></p> <pre>startup.bat configurator "-Dsilent=true" "-Dcontainer.instance.name=&lt;Instance name&gt;" "-Dwizard.mode=update"</pre> <p><b>UNIX:</b></p> <pre>startup.sh configurator -Dsilent=true -Dcontainer.instance.name=&lt;Instance name&gt; -Dwizard.mode=update</pre>
2.	<p><b>Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 7.</b></p> <p>Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance.</p>

## Upgrade SOA Container to Policy Manager 7.2 (Command Line)

	
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## Step 8: Unregister and re-register the Windows Service

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

1.	<p><u>Unregister the existing Windows Service</u></p> <p><code>./sm70/bin/unregisterContainerService.bat &lt;instance_name&gt;</code></p> <p><u>Re-register the Windows Service</u></p> <p><code>./sm70/bin/registerContainerService.bat &lt;instance_name&gt;</code></p>
----	---

## Step 9: Start SOA Container (for SOA Containers with Policy Manager Features Installed)

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 &lt;instance name&gt;</code></p> <p><u>Start Process as Windows Service</u></p> <p>Launch Program Group (Settings /Control Panel/Administrative Tools/Services)</p> <p>Select <code>SOA Software Container Instance</code> - Note that the instance name is displayed as the Container Key.</p> <p>From "Actions" menu, select <b>Start</b>.</p> <p><u>Start Process in UNIX</u></p> <p>Navigate to <code>sm70/bin</code> and type <code>startup.sh &lt;instance name&gt;</code></p> <p><u>Start Process in UNIX (Background)</u></p>
----	--

	Navigate to sm70/bin and type <code>startup.sh &lt;instance name&gt; -bg</code>
--	---

## Step 10: Clear Browser Cache

1.	Before launching the "SOA Software 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.
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## Step 11: Launch SOA Software Administration Console

1.	<p>Launch the "SOA Software Administration Console" for the updated SOA Container Instance:</p> <p>Enter: <code>http://&lt;hostname&gt;:&lt;port&gt;/admin</code></p>  <p><b>Figure. SOA Software Administration Console—Login</b></p>
2.	Select the "Admin Console" domain, enter the "Username" and "Password," and click <b>Login</b> . The SOA Software Administration Console launches and displays the "Available Features" tab.



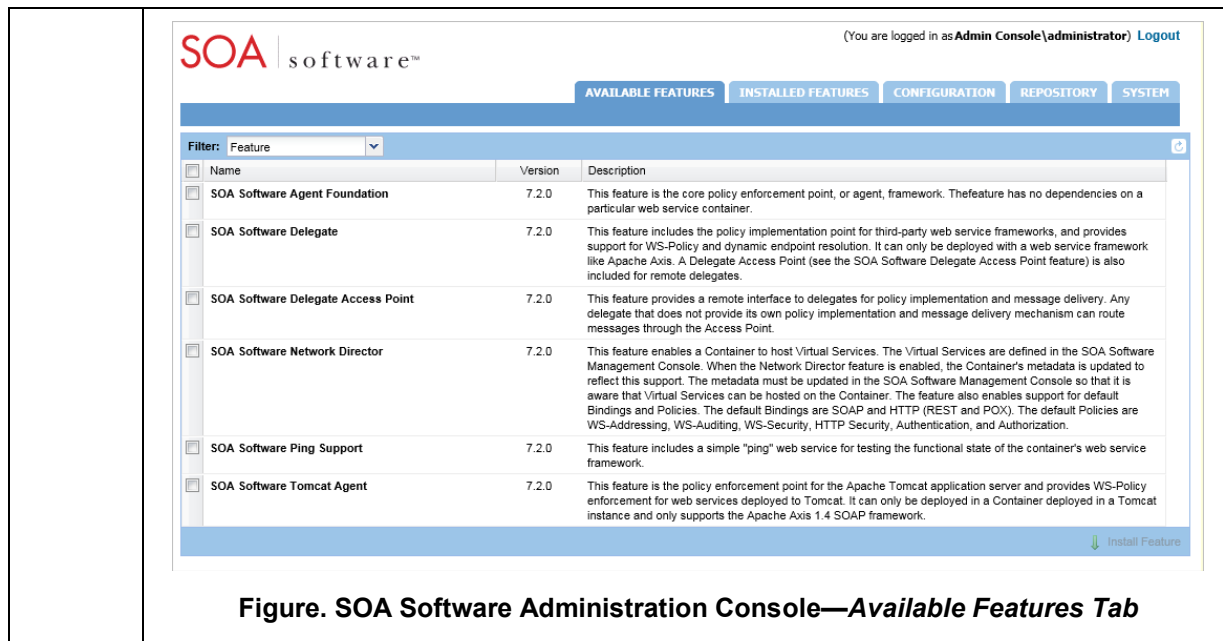

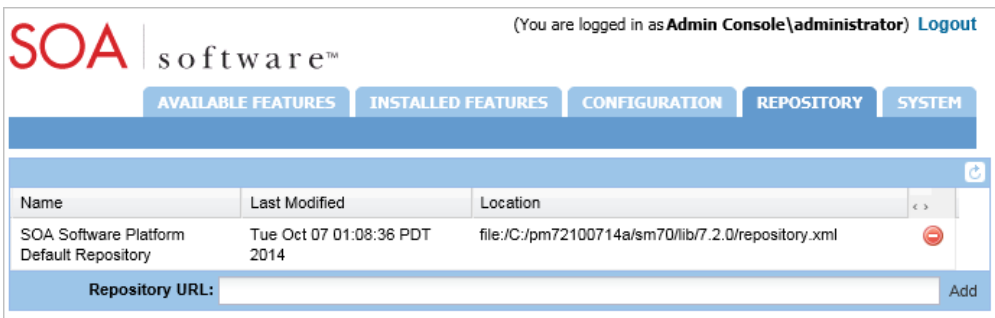


Figure. SOA Software Administration Console—Available Features Tab

## Step 12: 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 "SOA Software Platform Default Repository 7.2.0."



The screenshot shows the SOA Software Administration Console interface. At the top, the SOA software logo is on the left, and the user is logged in as 'Admin Console\administrator' with a 'Logout' link on the right. Below the header, there are five tabs: 'AVAILABLE FEATURES', 'INSTALLED FEATURES', 'CONFIGURATION', 'REPOSITORY', and 'SYSTEM'. The 'REPOSITORY' tab is selected. Below the tabs, there is a table with the following data:

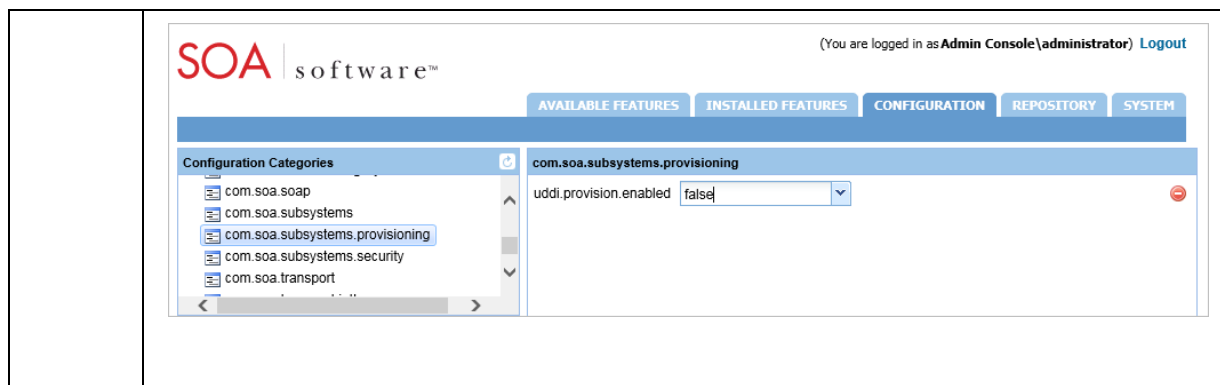
Name	Last Modified	Location
SOA Software Platform Default Repository	Tue Oct 07 01:08:36 PDT 2014	file:/C:/pm72100714a/sm70/lib/7.2.0/repository.xml

Below the table, there is a 'Repository URL:' label followed by a text input field and an 'Add' button. A red minus icon is visible in the bottom right corner of the table area.

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 13, 14 (if applicable), 15, 16, 17, 18, 19, 20, and 21.

## Step 13: Disable UDDI Provisioning

1.	<p>Select the <i>Configuration</i> tab and set the <b>uddi.provision.enabled</b> property in the <b>com.soa.subsystems.provisioning</b> category must be set to <b>False</b>.</p>
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## Step 14: 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, go to *Installed Features > Pending Installation Tasks* and select **Complete Confirmation** to add the new schemas.

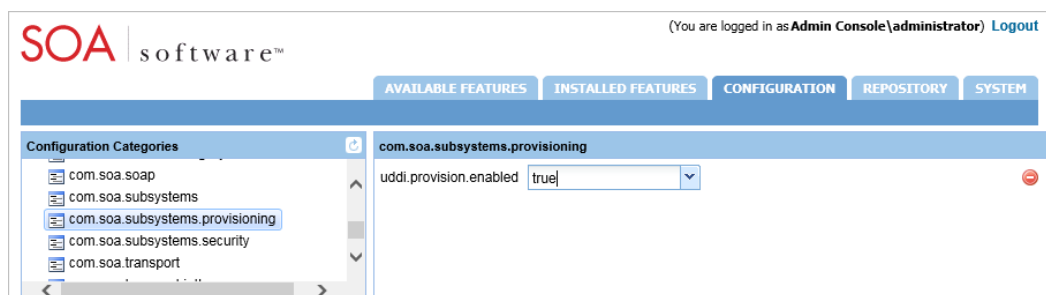
In the "Manage Schemas Wizard" add the new schemas from the "Available Schemas" section. If multiple Policy Manager instances are configured for load balancing purposes, this step is required on only one of the Policy Manager instances.

*Note: The 7.2.0. schema includes schemas for 7.1.0 and 7.0.0.*

Available Schemas			
<input type="checkbox"/>	Name	Version	Description
<input type="checkbox"/>	Policy Manager	7.2.0	Policy Manager Update 7.2.0 Schema and Data additions

## Step 15: Enable UDDI Provisioning

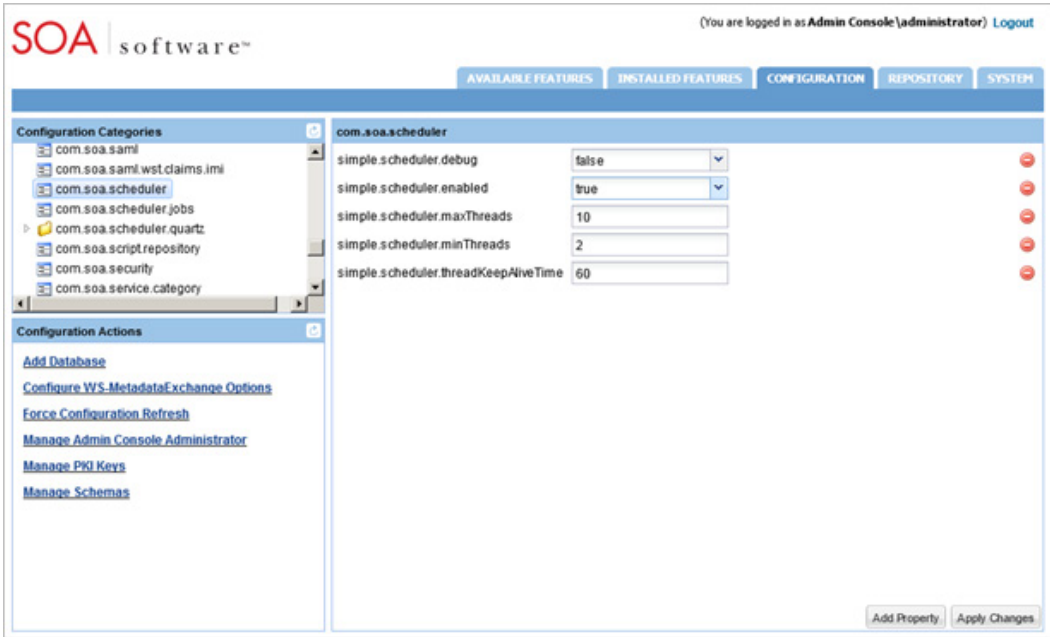
1. Select the *Configuration* tab and set the **uddi.provision.enabled** property in the **com.soa.subsystems.provisioning** category must be set to **True**.



## Step 16: Turn on com.soa.scheduler.quartz Property (for updated PM72 SOA Containers with Policy Manager Features Installed)

1.	<p>Set the quartz scheduler property to <b>True</b>. To do this:</p> <ul style="list-style-type: none"> <li>Launch the SOA Software Administration Console.</li> <li>Select the <i>Configuration</i> tab and the <b>com.soa.scheduler.quartz</b> Configuration Category.</li> <li>Change the <b>org.quartz.scheduler.enabled</b> property to <b>True</b>.</li> </ul>
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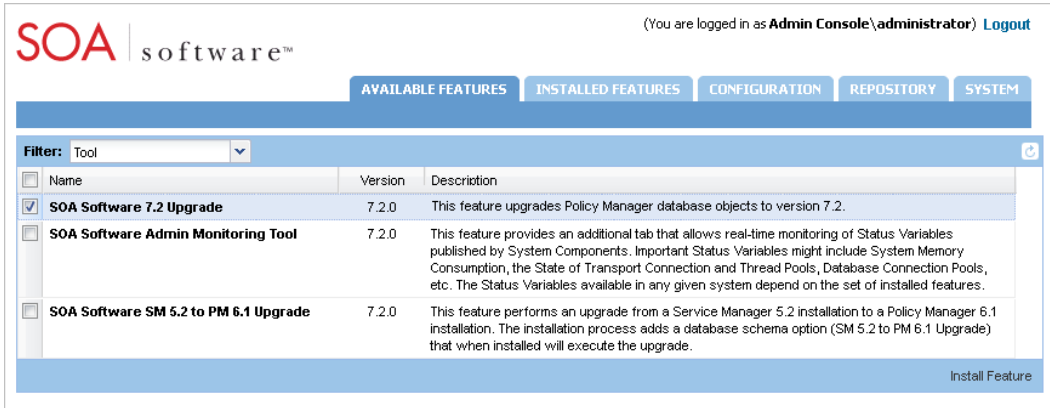
## Step 17: Turn on simple.scheduler.enabled Property (for updated PM72 SOA Containers with Policy Manager Features Installed)

1.	<p>After you have completed the schema update process, you must configure the <code>simple.scheduler.enabled</code> property to <b>True</b>. To do this:</p> <ol style="list-style-type: none"> <li>Launch the <i>SOA Software Administration Console</i> for PM72.</li> <li>Click the "Configuration" tab.</li> <li>In the "Configuration Categories" section select <code>com.soa.scheduler</code>.</li> <li>For the <code>simple.scheduler.enabled</code> property, select <b>True</b> from the drop-down list box.</li> <li>Click <b>Apply Changes</b> to save your entry.</li> </ol> <hr/> <p><b>Note:</b> This task should be performed on the Policy Manager container instance only.</p> <hr/> 
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## Step 18: Restart SOA Container (for SOA Containers with Policy Manager Features Installed)

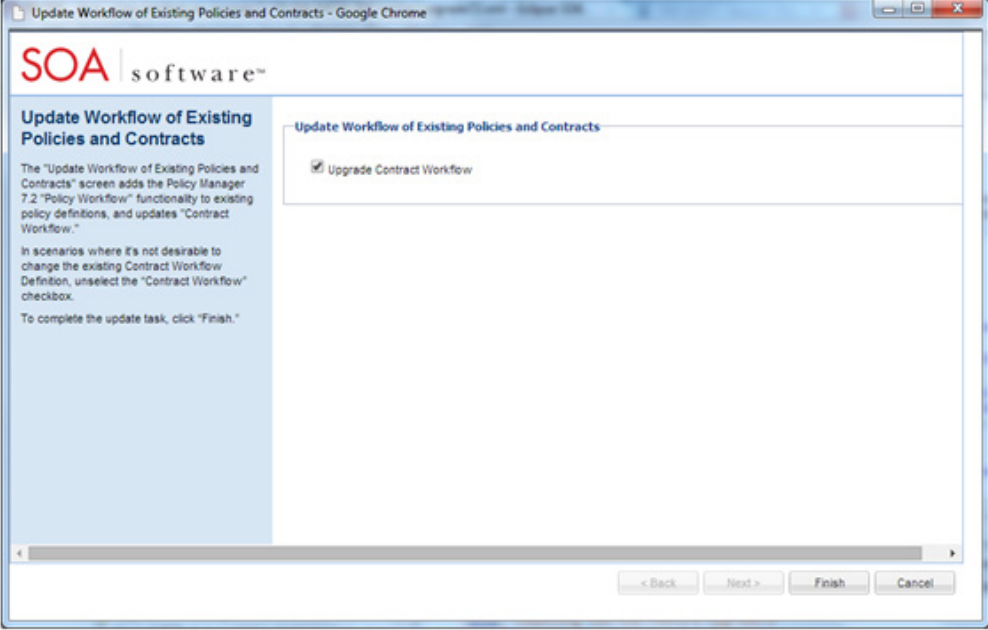
1.	Restart the container and continue to the next step.
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## Step 19: Install SOA Software 7.2 Upgrade

1.	<p>After the SOA Container has successfully restarted, the next step is to upgrade the Policy Manager database. To do this:</p> <ol style="list-style-type: none"><li>1. Launch the <i>SOA Software Administration Console</i> for PM72.</li><li>2. Click the "Available Features" tab and select <b>Tool</b> from the <i>Filter</i> drop-down.</li><li>3. Select <i>SOA Software 7.2 Upgrade</i> and click <b>Install Feature</b>.</li></ol>  <ol style="list-style-type: none"><li>4. If the PM72 Schema is not yet installed the <b>Configure</b> button displays. Click it, select the PM72 schema, install it, and restart the container.</li><li>5. If the PM72 Schema is already installed the <b>Configure</b> button will not display. In this scenario the installation is complete. Click <b>Close</b> and continue to the next step.</li></ol>
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## Step 20: Update Workflow of Existing Policies and Contracts

1.	<p>The next step is to add the Policy Manager 7.2 "Policy Workflow" functionality to existing policies and update "Contract Workflow." To do this:</p> <ol style="list-style-type: none"><li>1. Launch the <i>SOA Software Administration Console</i> for PM72.</li><li>2. Click the "Configuration" tab. In the Configuration Actions section select the <b>Upgrade Policies and Contracts</b> function.</li><li>3. In scenarios where it's not desirable to change the existing Contract Workflow Definition, unselect the "Upgrade Contract Workflow" checkbox.</li></ol>
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	 <p>4. To complete the update task click <b>Finish</b>.</p> <p>5. After the task is completed, restart the SOA container.</p>
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## Step 21: Update Container Metadata

1.	<p>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 <b>Update Container Metadata</b> function in the "Containers" section of the <i>Policy Manager Management Console</i>. This process updates the container capabilities to support the latest features.</p> <p>From the <i>Containers</i> folder, select the PM72 container. From the "Actions Portlet" select <b>Update Container Metadata</b>.</p> <p>Enter the Metadata URL for the container being updated (i.e. <a href="http://&lt;pm_host&gt;:&lt;pm_port&gt;/metadata">http://&lt;pm_host&gt;:&lt;pm_port&gt;/metadata</a> or <a href="http://&lt;nd_host&gt;:&lt;nd_port&gt;/metadata">http://&lt;nd_host&gt;:&lt;nd_port&gt;/metadata</a>) or the Metadata Path.</p> <p>If Authentication options are being used or updated, select the authentication options.</p> <p>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.</p>
----	--

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

### 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.*

[Help](#) [Apply](#) [Cancel](#)

## 4 Perform Policy Manager 6.1 to 7.2 Upgrade

The PM61 upgrade requires that the PM72 product be installed into the *same* installation directory as PM61. The PM61 containers must then be copied into the PM72 installation directory and upgraded from this installation.

The upgrade can be performed with any denomination of Policy Manager updates applied to your PM61 Release Directory (i.e., zero updates - soa-update-7.1.4).

To upgrade, perform the following steps:

### Step 1: Verify that Contract Workflow is in Draft state or Workflow is Completed

1.	<p>The upgrade process requires that the workflow state for <i>default</i> or <i>custom</i> workflows be in either:</p> <ul style="list-style-type: none"><li>• <b>Draft</b> state, or</li><li>• The <i>Contract Workflow Portlet</i> must say <b>Workflow is Completed</b>.</li></ul> <p>Launch the <i>Policy Manager 6.1 Management Console</i> and confirm that the Contract Workflow meets this requirement for each Contract in each Organization.</p>
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### Step 2: Turn off com.soa.scheduler.quartz Property (for PM61 SOA Containers with Policy Manager Features Installed)

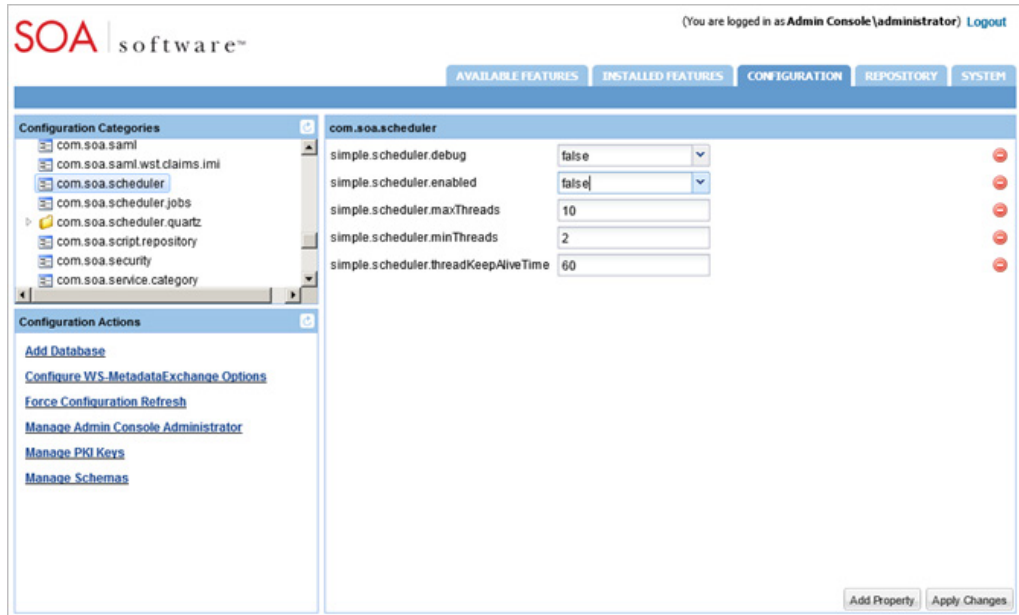
1.	<p>Set the quartz scheduler property to <b>False</b>. To do this:</p> <ul style="list-style-type: none"><li>• Launch the SOA Software Administration Console.</li><li>• Select the <i>Configuration</i> tab and the <b>com.soa.scheduler.quartz</b> Configuration Category.</li><li>• Change the <b>org.quartz.scheduler.enabled</b> property to <b>False</b>.</li></ul>
----	--

### Step 3: Turn off simple.scheduler.enabled Property (for PM61 SOA Containers with Policy Manager Features Installed)

1.	<p>Before you shut down your PM61 containers to begin the upgrade process, you must configure the <code>simple.scheduler.enabled</code> property to <b>False</b>. This will eliminate schema exceptions during startup, since the latest schema has not been installed. To do this:</p> <ol style="list-style-type: none"><li>1. Launch the <i>SOA Software Administration Console</i> for PM61.</li><li>2. Click the "Configuration" tab.</li><li>3. In the "Configuration Categories" section select <code>com.soa.scheduler</code>.</li><li>4. For the <code>simple.scheduler enabled</code> property, select <b>False</b> from the drop-down list box.</li></ol>
----	--

5. Click **Apply Changes** to save your entry.

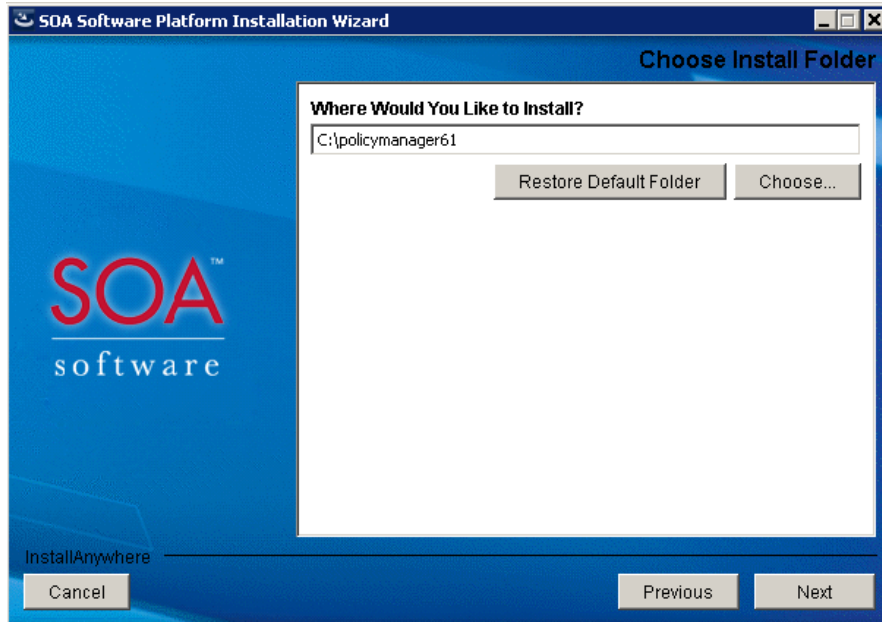
**Note:** This task should be performed on the Policy Manager container instance only.



## Step 4: Install Policy Manager 7.2

Step	Procedure
1.	Backup your PM61 Database.
2.	<p>Stop any SOA Containers that are currently running. This is required to update the Policy Manager schema to PM72. This ensures that the database is not locked while the update is in progress.</p> <p><i>Refer to "Appendix A: Start / Stop / Restart Container Instance" of the "SOA Software Platform 7.2 Installation Guide for Windows and UNIX Platforms" for instructions.</i></p>
3.	Backup your PM61 Release Directory.
4.	<p>Delete the contents of the existing PM61 directory.</p> <p>Install the SOA Software Platform 7.2 application (e.g., &lt;platform&gt;-pm-7.2.xxxx-setup64.exe or &lt;platform&gt;-pm-7.2.xxxx-setup64.bin) and specify your PM61 Release Directory as the target directory.</p> <p>For example, if your PM61 installation is installed to the "c:\policymanager61" directory, enter that directory name:</p> <p><b>Here for the GUI installation:</b></p>





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 7.2 Installation Guide for Windows and UNIX Platforms" for installation instructions.

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

## Step 5: Copy PM61 Container Instances to PM72

1. From your PM61 backup directory, *manually* copy the PM61 container instances (sm60/instances/<pm\_instance) to the PM72 container instances folder (sm70/instances/<pm\_instance). This includes PM61, Network Director, and Agent container instances.

---

**Note:** Do not include the PM61 configurator or the PM61 default container folder as part of the copy process.

---

## Step 6: Upgrade Container Instance

Perform the following update procedure on each SOA Container you would like upgraded to PM72 using the "Configure Container Instance Wizard." GUI, Silent, and Command Line procedures are provided.

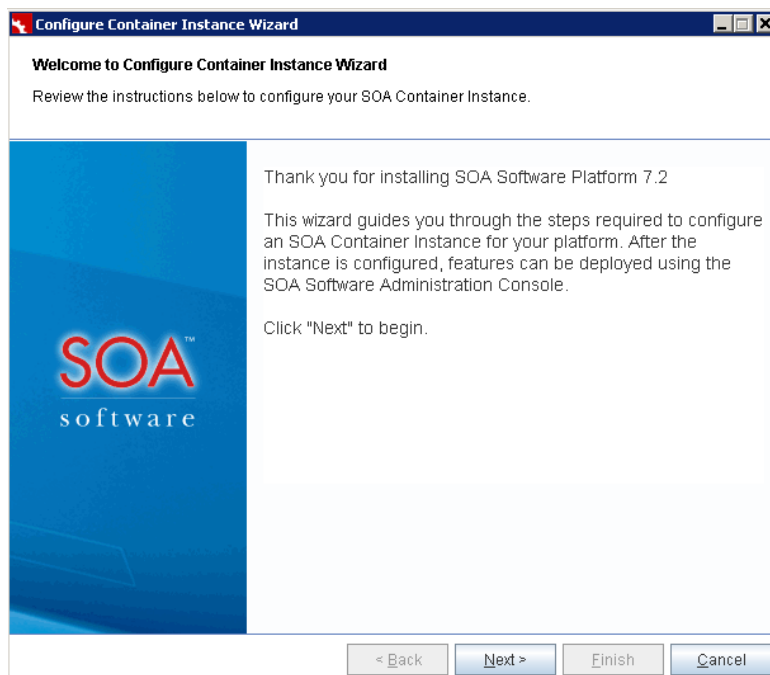
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**Note:** Prior to performing the upgrade, verify that *Step 3: Copy PM61 Container Instances to PM72* has been completed.

---

### Upgrade SOA Container to Policy Manager 7.2 (GUI)

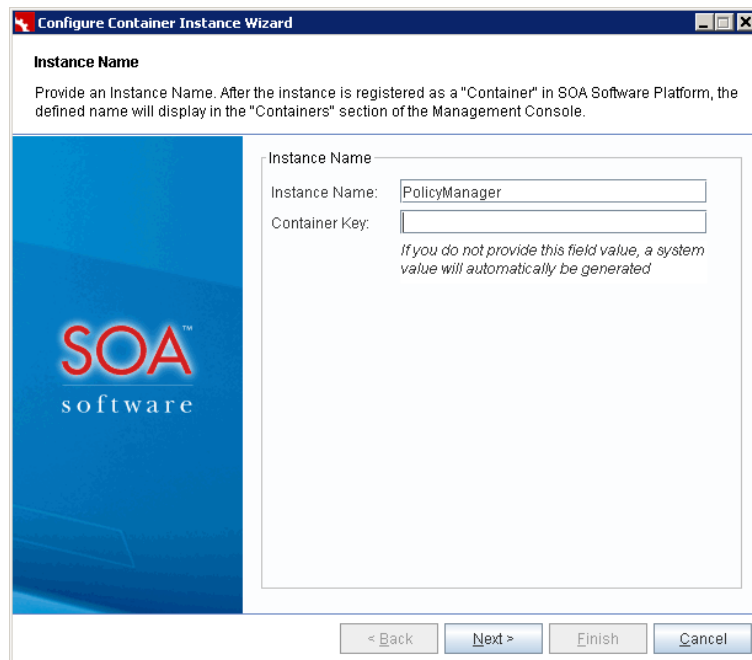
1. Two methods can be used to launch the "Configure Container Instance Wizard."
    - 1) Launch from the SOA Software Platform Program Group:  
  
Click the **Start** menu, navigate to the SOA Software Platform Program Group, and click **Configure Container Instance**.
    - 2) Perform a manual start:  
  
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.

## Upgrade SOA Container to Policy Manager 7.2 (GUI)

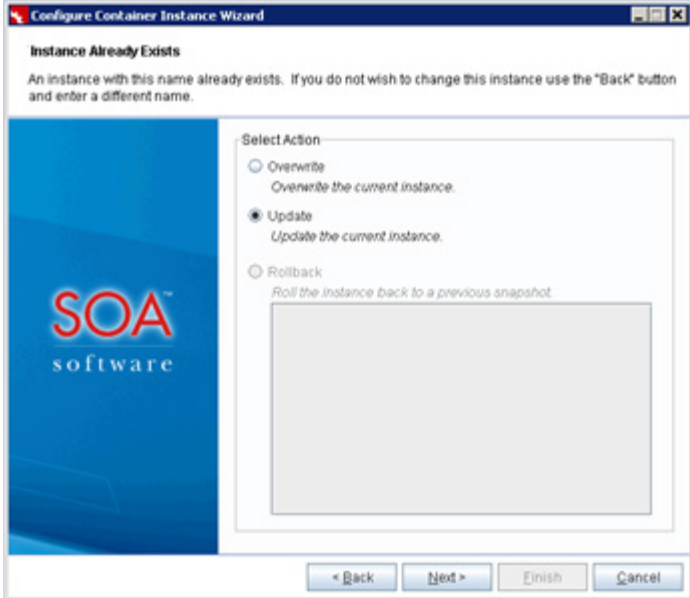
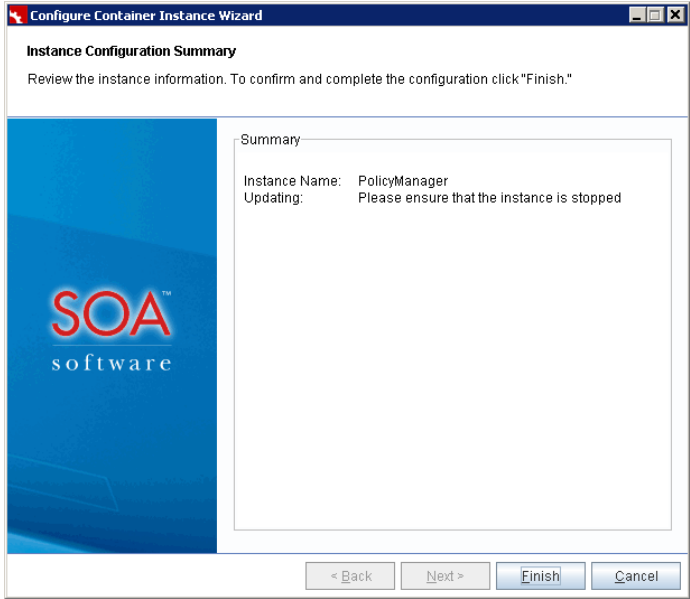
**Note:** The 7.2 version of the SOA Software Platform "Configure Container Instance Wizard" includes a "Container Key" option on the "Instance Name" screen. **Leave this field blank and the current key will be picked up for the container being upgraded during the upgrade process.**



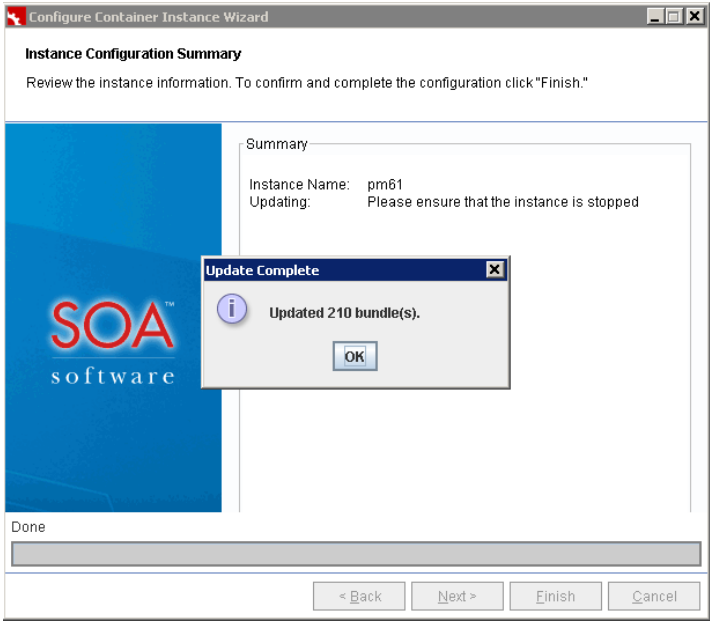

The screenshot shows a Windows-style dialog box titled "Configure Container Instance Wizard". Inside, the "Instance Name" section has a descriptive paragraph: "Provide an Instance Name. After the instance is registered as a 'Container' in SOA Software Platform, the defined name will display in the 'Containers' section of the Management Console." Below this is a large blue graphic with the "SOA software" logo. To the right of the graphic are two input fields: "Instance Name:" with the text "PolicyManager" entered, and "Container Key:" which is empty. A note below the "Container Key" field states: "If you do not provide this field value, a system value will automatically be generated". At the bottom of the dialog are four buttons: "< Back", "Next >", "Finish", and "Cancel".

The "Instance Already Exists" screen displays. To apply the PM61 to PM72 Upgrade, click the **Update** radio button, and **Next** to continue.

## Upgrade SOA Container to Policy Manager 7.2 (GUI)

	
<p>2.</p>	<p>The "Instance Configuration Summary" screen displays. To apply the update(s), click <b>Finish</b>. 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><b>Note:</b> 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 7.2 (GUI)

	<p>number of updates being applied."</p> <hr/> 
4.	Click <b>OK</b> on the "Update Complete" dialog. The "Configure Container Instance Wizard" closes.
5.	<p><b>Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 5.</b></p> <p>Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance.</p> 


## Upgrade SOA Container to Policy Manager 7.2 (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.

## Upgrade SOA Container to Policy Manager 7.2 (Silent Upgrade)

	<p><u>Define Silent Upgrade Property File</u></p> <ol style="list-style-type: none"> <li>1) Define a properties file (e.g., upgrade.properties)</li> <li>2) Add the following default content:  <pre>container.instance.name=policymanager wizard.mode=update</pre> </li> </ol> <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"> <li>1) <b>silent</b> (If True, silent configuration will be performed)</li> <li>2) <b>properties</b> (location on filesystem of property file to be used for configuration)</li> </ol> <p><u>Windows:</u></p> <pre>\sm70\bin&gt;startup.bat configurator "-Dsilent=true" "-Dproperties=&lt;property file directory location&gt;/upgrade.properties"</pre> <p><u>UNIX:</u></p> <pre>\sm70\bin&gt;startup.sh configurator -Dsilent=true -Dproperties=opt/&lt;property file directory location&gt;/upgrade.properties</pre>
2.	Run the silent upgrade.
3.	<p>After the silent upgrade is complete perform the following steps:</p> <ol style="list-style-type: none"> <li>1) Users that will not be utilizing the SOA Software Administration Console can install the "Policy Manager 7.2.0" schema manually using a third-party Database Schema Management Tool.</li> </ol> <p><i>Refer to SOA Software Customer Support for assistance installing the "Policy Manager 7.2.0" schema.</i></p> <p>Users that will not be utilizing the SOA Software Administration Console can skip the remainder of this procedure.</p>
4.	<p><b>Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 5.</b></p> <p>Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance.</p> 

## Upgrade SOA Container to Policy Manager 7.2 (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><b>Windows:</b></p> <pre>startup.bat configurator "-Dsilent=true" "-Dcontainer.instance.name=&lt;Instance name&gt;" "-Dwizard.mode=update"</pre> <p><b>UNIX:</b></p> <pre>startup.sh configurator -Dsilent=true -Dcontainer.instance.name=&lt;Instance name&gt; -Dwizard.mode=update</pre>
2.	<p><b>Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 5.</b></p> <p>Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance.</p> 

## Step 7: Reconfigure startup.bat/sh and RegisterContainerService.bat/sh files

If you made changes to your PM61 startup.bat/.sh or registerContainerService.bat files (i.e., to increase the java heap size), these changes must be updated in the corresponding PM72 installation files `/sm70/bin/startup.bat/.sh` and `/sm70/bin/registerContainerService.bat`.

---

**Note:** The default heap size for PM72 is 2048.

---

## Step 8: Unregister and re-register the Windows Service

If the SOA Container is being started as a Windows Service, the service must be re-registered. Note that the services must be uninstalled using the PM61 installation, and then reinstalled using the PM72 version.

1.	<p><u>Unregister the existing Windows Service</u></p> <pre>./sm60/bin/unregisterContainerService.bat &lt;instance_name&gt;</pre>
----	--

	<u>Re-register the Windows Service</u> <code>./sm70/bin/registerContainerService.bat &lt;instance_name&gt;</code>
--	--

## Step 9: 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 &lt;instance name&gt;</code></p> <p><u>Start Process as Windows Service</u></p> <p>Launch Program Group (Settings /Control Panel/Administrative Tools/Services)</p> <p>Select <code>SOA Software Container Instance</code> - Note that the instance name is displayed as the Container Key.</p> <p>From "Actions" menu, select <b>Start</b>.</p> <p><u>Start Process in UNIX</u></p> <p>Navigate to <code>sm70/bin</code> and type <code>startup.sh &lt;instance name&gt;</code></p> <p><u>Start Process in UNIX (Background)</u></p> <p>Navigate to <code>sm70/bin</code> and type <code>startup.sh &lt;instance name&gt; -bg</code></p>
----	--

## Step 10: Clear Browser Cache

1.	<p>Before launching the "SOA Software 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.</p>
----	---

## Step 11: Launch SOA Software Administration Console

1.	<p>Launch the "SOA Software Administration Console" for the updated SOA Container Instance:</p> <p>Enter: <code>http://&lt;hostname&gt;:&lt;port&gt;/admin</code></p>
----	---





**SOA software™**

Username:

Password:

Domain:

Login

**Welcome to SOA Software Administration Console**  
Version 7.2

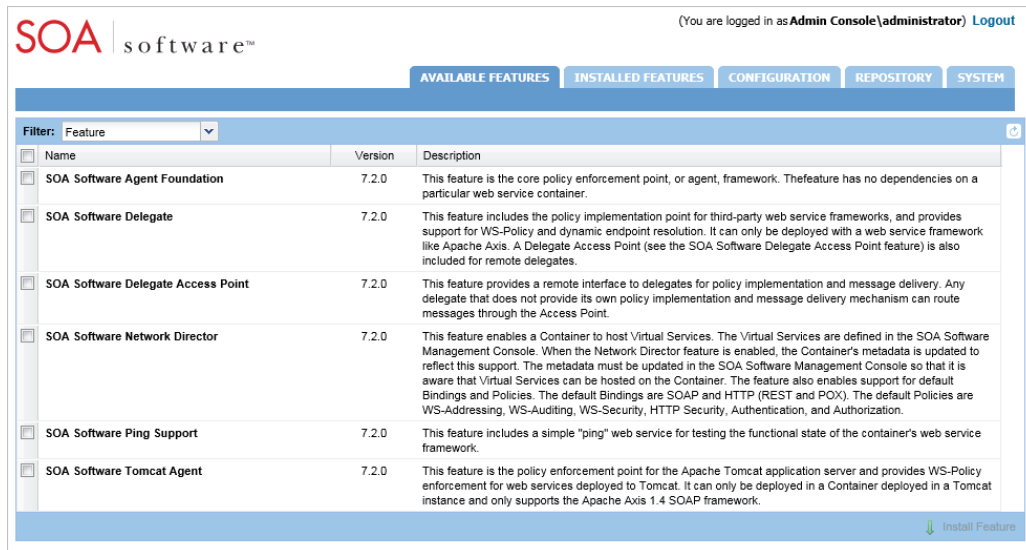
SOA Software's Repository Manager, Policy Manager, and Service Manager combine to form a comprehensive Integrated SOA Governance Automation solution to help ensure the success of enterprise SOA programs.

Want to learn more? Get extensive product information at <http://www.soa.com>. For support, contact [support@soa.com](mailto:support@soa.com)

SOA Software, Service Manager, and Policy Manager are trademarks of SOA Software, Inc. © 2001-2014. All rights reserved.  
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**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 Features" tab.



(You are logged in as Admin Console\administrator) Logout

**SOA software™**

AVAILABLE FEATURES | INSTALLED FEATURES | CONFIGURATION | REPOSITORY | SYSTEM


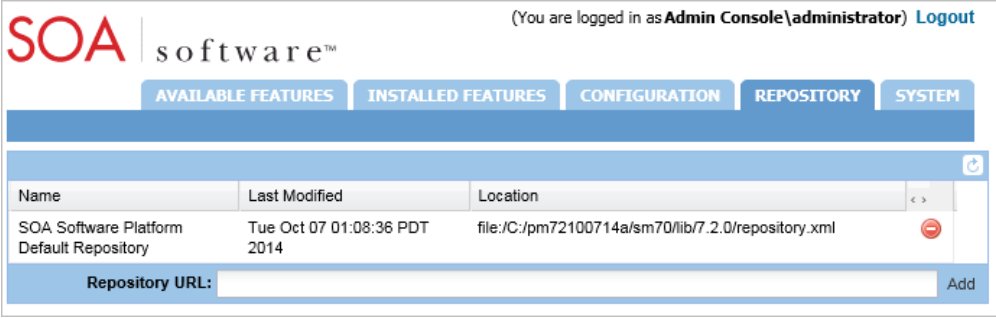
Filter: Feature

Name	Version	Description
<input type="checkbox"/> SOA Software Agent Foundation	7.2.0	This feature is the core policy enforcement point, or agent, framework. The feature has no dependencies on a particular web service container.
<input type="checkbox"/> SOA Software Delegate	7.2.0	This feature includes the policy implementation point for third-party web service frameworks, and provides support for WS-Policy and dynamic endpoint resolution. It can only be deployed with a web service framework like Apache Axis. A Delegate Access Point (see the SOA Software Delegate Access Point feature) is also included for remote delegates.
<input type="checkbox"/> SOA Software Delegate Access Point	7.2.0	This feature provides a remote interface to delegates for policy implementation and message delivery. Any delegate that does not provide its own policy implementation and message delivery mechanism can route messages through the Access Point.
<input type="checkbox"/> SOA Software Network Director	7.2.0	This feature enables a Container to host Virtual Services. The Virtual Services are defined in the SOA Software Management Console. When the Network Director feature is enabled, the Container's metadata is updated to reflect this support. The metadata must be updated in the SOA Software Management Console so that it is aware that Virtual Services can be hosted on the Container. The feature also enables support for default Bindings and Policies. The default Bindings are SOAP and HTTP (REST and POX). The default Policies are WS-Addressing, WS-Auditing, WS-Security, HTTP Security, Authentication, and Authorization.
<input type="checkbox"/> SOA Software Ping Support	7.2.0	This feature includes a simple "ping" web service for testing the functional state of the container's web service framework.
<input type="checkbox"/> SOA Software Tomcat Agent	7.2.0	This feature is the policy enforcement point for the Apache Tomcat application server and provides WS-Policy enforcement for web services deployed to Tomcat. It can only be deployed in a Container deployed in a Tomcat instance and only supports the Apache Axis 1.4 SOAP framework.

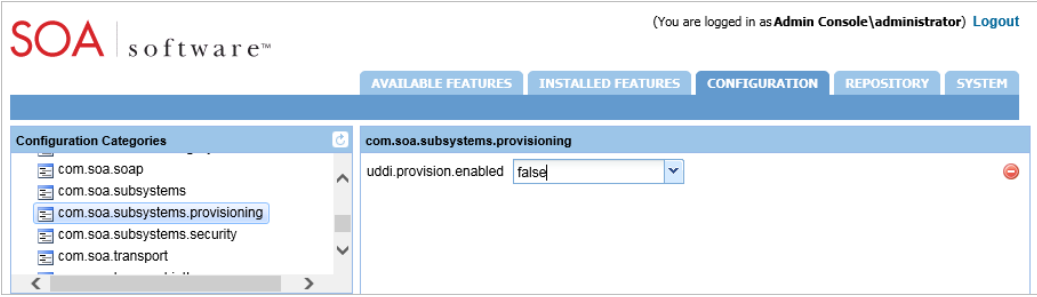
Install Feature

**Figure. SOA Software Administration Console—Available Features Tab**

## Step 12: Refresh Repository

3. 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 7.2.0."
- 
4. 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 13, 14 (if applicable), 15, 16, 17, 18, 19, 20, 21, and 22.

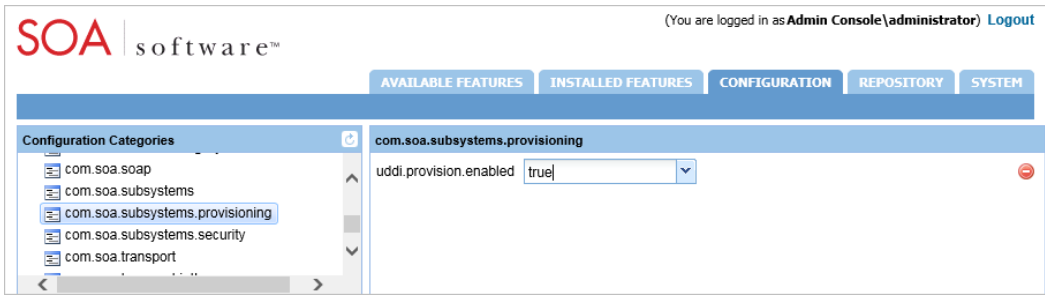
## Step 13: Disable UDDI Provisioning

1. Before the Update Schemas step, select the *Configuration* tab and set the **uddi.provision.enabled** property in the **com.soa.subsystems.provisioning** category must be set to **FALSE**.
- 
- Note:** You will be changing this property back to **True** in a subsequent step after the Update Schemas process is complete.

## Step 14: Update Schemas (for SOA Containers with Policy Manager Features Installed)

1.	<p>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, go to <i>Installed Features &gt; Pending Installation Tasks</i> and select <b>Complete Confirmation</b> to add the new schemas.</p> <p>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.</p> <div><p><b>Available Schemas</b></p><table border="1"><thead><tr><th><input type="checkbox"/></th><th>Name</th><th>Version</th><th>Description</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>Policy Manager</td><td>7.2.0</td><td>Policy Manager Update 7.2.0 Schema and Data additions</td></tr></tbody></table></div>	<input type="checkbox"/>	Name	Version	Description	<input type="checkbox"/>	Policy Manager	7.2.0	Policy Manager Update 7.2.0 Schema and Data additions
<input type="checkbox"/>	Name	Version	Description						
<input type="checkbox"/>	Policy Manager	7.2.0	Policy Manager Update 7.2.0 Schema and Data additions						

## Step 15: Enable UDDI Provisioning

1.	<p>Select the <i>Configuration</i> tab and set the <b>uddi.provision.enabled</b> property in the <b>com.soa.subsystems.provisioning</b> category must be set to <b>True</b>.</p> <div></div>
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## Step 16: Set Quartz Trigger Property to True--MSSQL only (for SOA Containers with Policy Manager Features Installed)

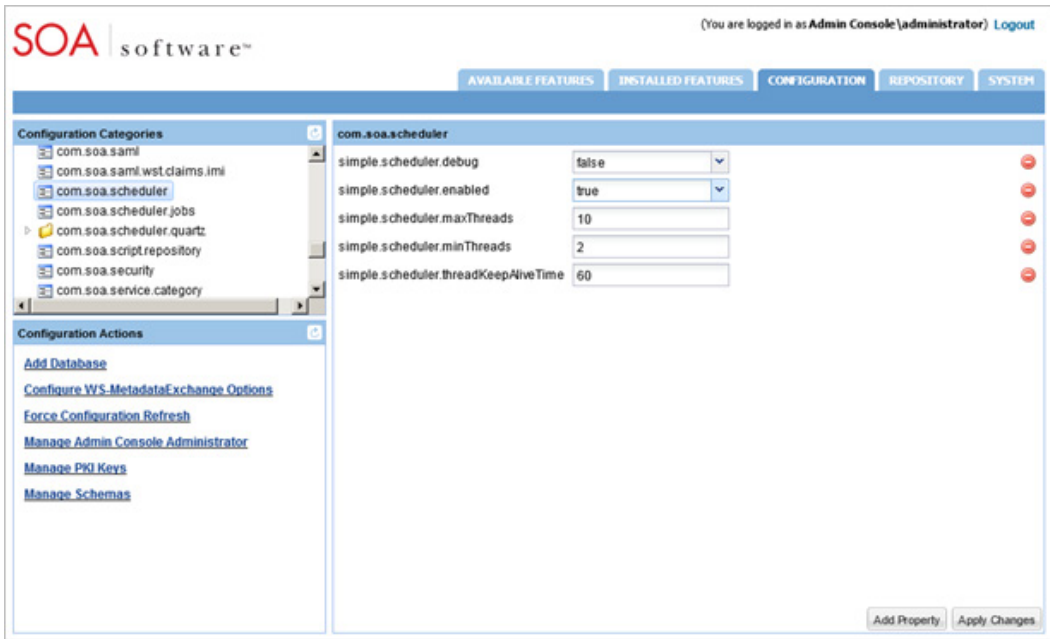
1.	<p>If your PM72 container instance is configured with MSSQL, you must set the quartz trigger property to <b>True</b>. This is a required to prevent database dead-locks. To do this:</p> <ul style="list-style-type: none"><li>• Launch the SOA Software Administration Console.</li><li>• Select the <i>Configuration</i> tab and the <b>com.soa.scheduler.quartz</b> Configuration Category.</li><li>• Change the <b>org.quartz.jobStore.acquireTriggersWithinLock</b> property to <b>True</b>.</li></ul>
----	---

## Step 17: Turn on com.soa.scheduler.quartz Property (for updated PM72 SOA Containers with Policy Manager Features Installed)

1.	<p>Set the quartz scheduler property to <b>True</b>. To do this:</p> <ul style="list-style-type: none"><li>• Launch the SOA Software Administration Console.</li><li>• Select the <i>Configuration</i> tab and the <b>com.soa.scheduler.quartz</b> Configuration Category.</li><li>• Change the <b>org.quartz.scheduler.enabled</b> property to <b>True</b>.</li></ul>
----	--

## Step 18: Turn on simple.scheduler.enabled Property (for updated PM72 SOA Containers with Policy Manager Features Installed)

1.	<p>After you have completed the schema update process, you must configure the <code>simple.scheduler.enabled</code> property to <b>True</b>. To do this:</p> <ol style="list-style-type: none"><li>1. Launch the <i>SOA Software Administration Console</i> for PM72.</li><li>2. Click the "Configuration" tab.</li><li>3. In the "Configuration Categories" section select <code>com.soa.scheduler</code>.</li><li>4. For the <code>simple.scheduler.enabled</code> property, select <b>True</b> from the drop-down list box.</li><li>5. Click <b>Apply Changes</b> to save your entry.</li></ol> <hr/> <p><b>Note:</b> This task should be performed on the Policy Manager container instance only.</p> <hr/>
----	---

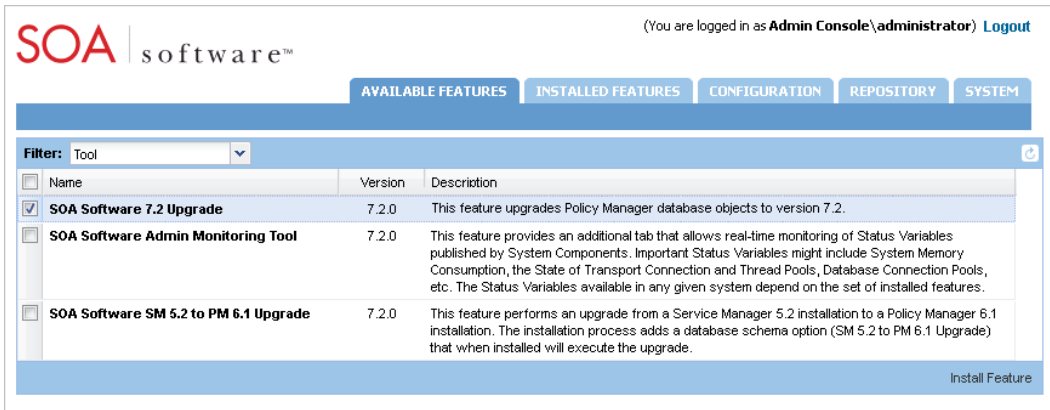


The screenshot shows the SOA Software Administration Console interface. At the top, it says '(You are logged in as Admin Console\administrator) Logout'. Below this are tabs for 'AVAILABLE FEATURES', 'INSTALLED FEATURES', 'CONFIGURATION', 'REPOSITORY', and 'SYSTEM'. The 'CONFIGURATION' tab is selected. On the left, under 'Configuration Categories', 'com.soa.scheduler' is selected. On the right, the configuration for 'com.soa.scheduler' is displayed. The 'simple.scheduler.enabled' property is set to 'true' in a dropdown menu. Other properties include 'simple.scheduler.debug' (false), 'simple.scheduler.maxThreads' (10), 'simple.scheduler.minThreads' (2), and 'simple.scheduler.threadKeepAliveTime' (60). At the bottom right, there are buttons for 'Add Property' and 'Apply Changes'.

## Step 19: Restart SOA Container (for SOA Containers with Policy Manager Features Installed)

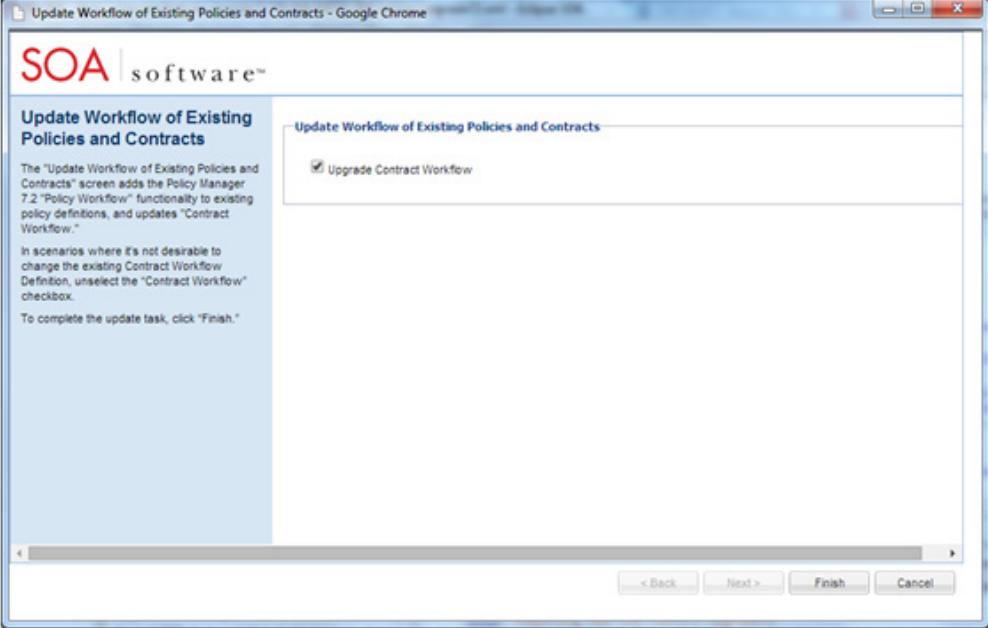
1.	Restart the container and continue to the next step.
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## Step 20: Install SOA Software 7.2 Upgrade

1.	<p>After the SOA Container has successfully restarted, the next step is to upgrade the Policy Manager database. To do this:</p> <ol style="list-style-type: none"><li>1. Launch the <i>SOA Software Administration Console</i> for PM72.</li><li>2. Click the "Available Features" tab and select <b>Tool</b> from the <i>Filter</i> drop-down.</li><li>3. Select <i>SOA Software 7.2 Upgrade</i> and click <b>Install Feature</b>.</li></ol>  <ol style="list-style-type: none"><li>4. If the PM72 Schema is not yet installed the <b>Configure</b> button displays. Click it, select the PM72 schema, install it, and restart the container.</li><li>5. If the PM72 Schema is already installed the <b>Configure</b> button will not display. In this scenario the installation is complete. Click <b>Close</b> and continue to the next step.</li></ol>
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## Step 21: Update Workflow of Existing Policies and Contracts


1.	<p>The next step is to add the Policy Manager 7.2 "Policy Workflow" functionality to existing policies and update "Contract Workflow." To do this:</p> <ol style="list-style-type: none"><li>1. Launch the <i>SOA Software Administration Console</i> for PM72.</li><li>2. Click the "Configuration" tab. In the Configuration Actions section select the <b>Upgrade Policies and Contracts</b> function.</li><li>3. In scenarios where it's not desirable to change the existing Contract Workflow Definition, unselect the "Upgrade Contract Workflow" checkbox.</li></ol>
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	 <p>4. To complete the update task click <b>Finish</b>.</p> <p>5. After the task is completed, restart the SOA container.</p>
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## Step 22: Update Container Metadata

1.	<p>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 <b>Update Container Metadata</b> function in the "Containers" section of the <i>Policy Manager Management Console</i>. This process updates the container capabilities to support the latest features.</p> <p>From the <i>Containers</i> folder, select the PM72 container. From the "Actions Portlet" select <b>Update Container Metadata</b>.</p> <p>Enter the Metadata URL for the container being updated (i.e. <a href="http://&lt;pm_host&gt;:&lt;pm_port&gt;/metadata">http://&lt;pm_host&gt;:&lt;pm_port&gt;/metadata</a> or <a href="http://&lt;nd_host&gt;:&lt;nd_port&gt;/metadata">http://&lt;nd_host&gt;:&lt;nd_port&gt;/metadata</a>) or the Metadata Path.</p> <p>If Authentication options are being used or updated, select the authentication options.</p> <p>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.</p>
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SOA Software Policy Manager - Update Container Metadata Wizard - Windows Internet Explorer



### 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.*

[Help](#)

## 5 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>.