



Technical Note

Policy Manager Upgrade (7.0 to 7.1 and 6.1 to 7.1)

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1 Overview

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

2 Perform Policy Manager 7.0 to 7.1 Upgrade

Two scenarios can be used to perform the PM70 to PM71 upgrade:

- **Scenario 1:** You can apply the PM71 upgrade directly to the PM70 installation.
- **Scenario 2:** You can install PM71 to a different location, copy the PM70 container instances to the PM71 \instances folder, and upgrade from the PM71 installation.

The upgrade can be performed with any denomination of Policy Manager updates applied to your PM70 Release Directory (i.e., zero updates – 7.0.5).

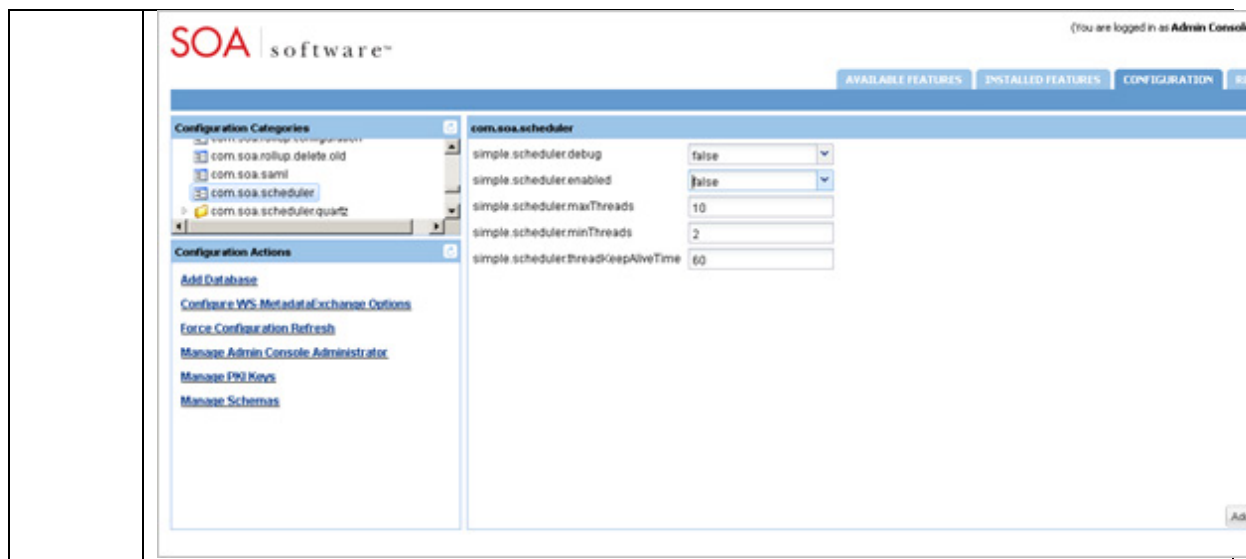
To upgrade, perform the following steps:

Step 1: Set Quartz Trigger Property to False for PM70 Container--MSSQL only (for SOA Containers with Policy Manager Features Installed)

1.	<p>If your PM70 container instance is configured with MSSQL, you must set the quartz trigger property to False. This is a required to prevent database dead-locks. To do this:</p> <ul style="list-style-type: none">• Launch the SOA Software Administration Console.• Select the <i>Configuration</i> tab and the com.soa.scheduler.quartz Configuration Category.• Change the org.quartz.jobStore.acquireTriggersWithinLock property to False.
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Step 2: 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 False. To do this:</p> <ol style="list-style-type: none">1. Launch the <i>SOA Software Administration Console</i> for PM70.2. Click the "Configuration" tab.3. In the "Configuration Categories" section select <code>com.soa.scheduler</code>.4. For the <code>simple.scheduler.enabled</code> property, select False from the drop-down list box.5. Click Apply Changes to save your entry. <hr/> <p>Note: This task should be performed on the Policy Manager container instance only.</p> <hr/>
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Step 3: Install Policy Manager 7.1

Install Policy Manager 7.1


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 PM71. 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 7.1 Installation Guide for Windows and UNIX Platforms" for instructions.</i></p>
3.	Backup your PM70 Release Directory.
4.	<p>Install the SOA Software Platform 7.1 application (e.g., <platform>-pm-7.1.xxxx-setup64.exe or <platform>-pm-7.1.xxxx-setup64.bin).</p> <ul style="list-style-type: none"> For Scenario 1: Install PM71 directly to the PM70 release directory. For Scenario 2: Install PM71 into a new directory. <p><i>Refer to "Chapter 1: Installing and Configuring SOA Software Platform" of the SOA Software Platform 7.1 Installation Guide for Windows and UNIX Platforms" for installation instructions.</i></p> <p>After the installation is complete Do not launch the "Configure Container Instance Wizard."</p>

Step 4: Copy PM70 Container Instances to PM71 (For Scenario 2 ONLY)

1.	<i>Note: If you installed PM71 directly to the PM70 directory (i.e., Scenario 1), skip this step.</i>
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	<p>From your PM70 backup directory, <i>manually</i> copy the PM70 container instances (sm70/instances/<pm_instance) to the PM71 container instances folder (sm70/instances/<pm_instance). This includes PM70, Network Director, and Agent container instances.</p> <hr/> <p>Note: 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 5: 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 6: Upgrade Container Instance (For Scenarios 1 and 2)

Perform the following update procedure on each SOA Container you would like upgraded to PM71 using the "Configure Container Instance Wizard." GUI, Silent, and Command Line procedures are provided.

Note: For Scenario 2, prior to performing the upgrade, verify that *Step 2: Copy PM70 Container Instances to PM71* has been completed.

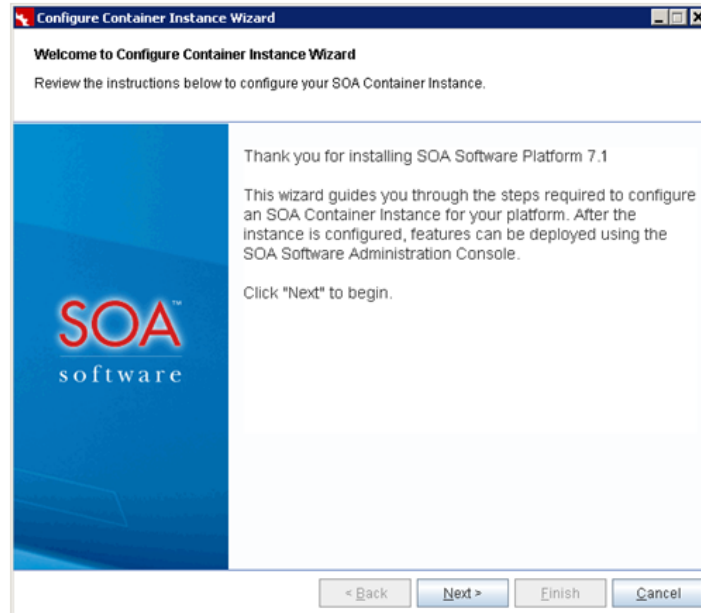
Upgrade SOA Container to Policy Manager 7.1 (GUI)

1.	<p>Two methods can be used to launch the "Configure Container Instance Wizard."</p> <ol style="list-style-type: none"> 1) Launch from the SOA Software Platform Program Group: <p>Click the Start menu, navigate to the SOA Software Platform Program Group, and click Configure Container Instance.</p> 2) Perform a manual start: <p>Navigate to the SOA Software Platform Release Directory <code>c:\sm70\bin</code> and enter:</p>
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Upgrade SOA Container to Policy Manager 7.1 (GUI)

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 7.1 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 7.1 (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 PM71 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.

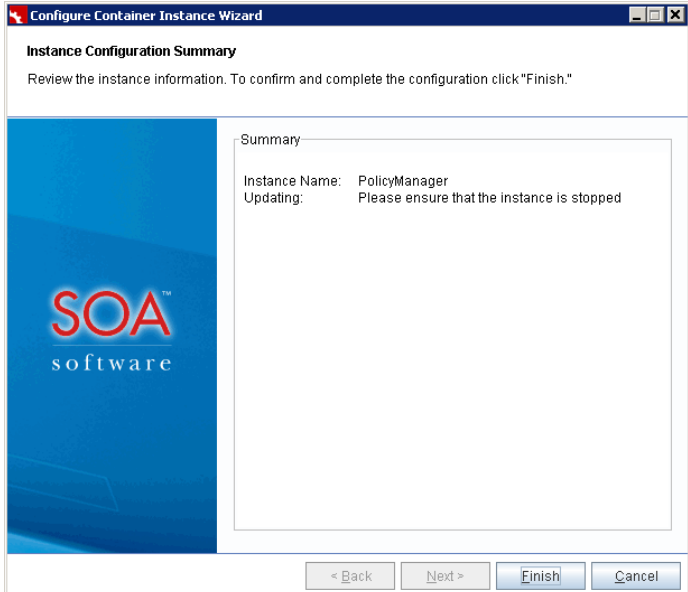
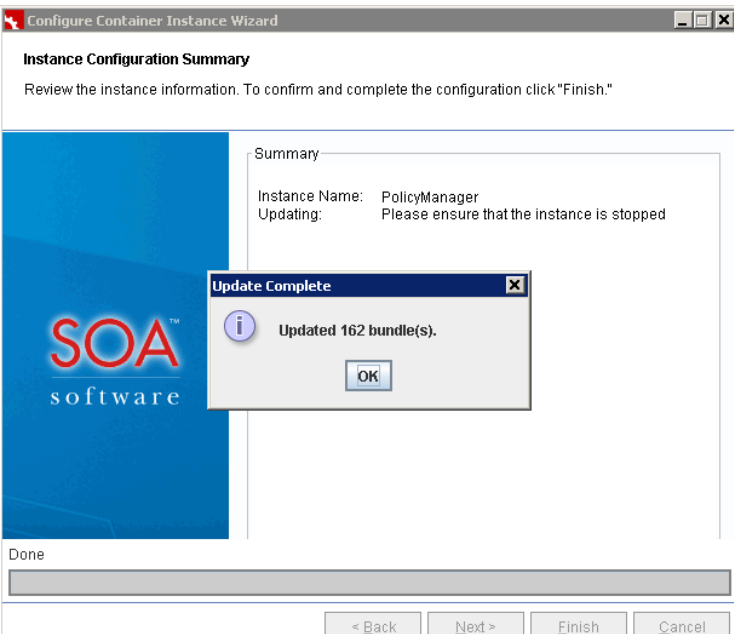
☒ **Update**
Update the current instance.

☐ 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 7.1 (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>Note: 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 OK on the "Update Complete" dialog. The "Configure Container Instance Wizard"</p>


Upgrade SOA Container to Policy Manager 7.1 (GUI)

	closes.
5.	<p>Repeat this upgrade process on Network Director or Agent Containers before continuing to Step 7.</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 7.1 (Silent Upgrade)

Step	Procedure
1.	<p>The "Configure Container Instance Wizard" update process can be set up to run in an automated mode (i.e., silent). This is done by defining a properties file and pre-defining a set of property values to be used by the "Configure Container Instance Wizard" to automatically configure a Container instance.</p> <p><u>Define Silent Upgrade Property File</u></p> <ol style="list-style-type: none"> 1) Define a properties file (e.g., upgrade.properties) 2) Add the following default content: <pre>container.instance.name=policymanager wizard.mode=update</pre> <p><u>Run Silent Configuration</u></p> <p>The "Configure Container Instance Wizard (Silent Update)" properties file accepts two system properties which together are used to perform the silent update:</p> <ol style="list-style-type: none"> 1. silent (If True, silent configuration will be performed) 2. properties (location on filesystem of property file to be used for configuration) <p><u>Windows:</u></p> <pre>\sm70\bin>startup.bat configurator "-Dsilent=true" "-Dproperties=<property file directory location>/upgrade.properties"</pre> <p><u>UNIX:</u></p> <pre>\sm70\bin>startup.sh configurator -Dsilent=true -Dproperties=opt/<property file directory location>/upgrade.properties</pre>
2.	Run the silent upgrade.

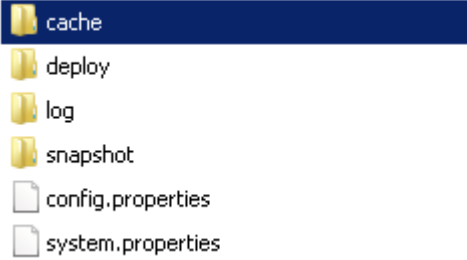
Upgrade SOA Container to Policy Manager 7.1 (Silent Upgrade)

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 7.1.0" 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 7.1.0" 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>Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 7.</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 7.1 (Command Line)

1.	<p>You can also perform the upgrade process using a command line approach. Execute the following in the <code>sm70\bin</code> folder:</p> <p>Windows:</p> <pre>startup.bat configurator "-Dsilent=true" "-Dcontainer.instance.name=<Instance name>" "-Dwizard.mode=update"</pre> <p>UNIX:</p> <pre>startup.sh configurator -Dsilent=true -Dcontainer.instance.name=<Instance name> -Dwizard.mode=update</pre>
2.	<p>Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 7.</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 7.1 (Command Line)

	
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Step 7: 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 <instance_name></code></p> <p><u>Re-register the Windows Service</u></p> <p><code>./sm70/bin/registerContainerService.bat <instance_name></code></p>
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Step 8: 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.

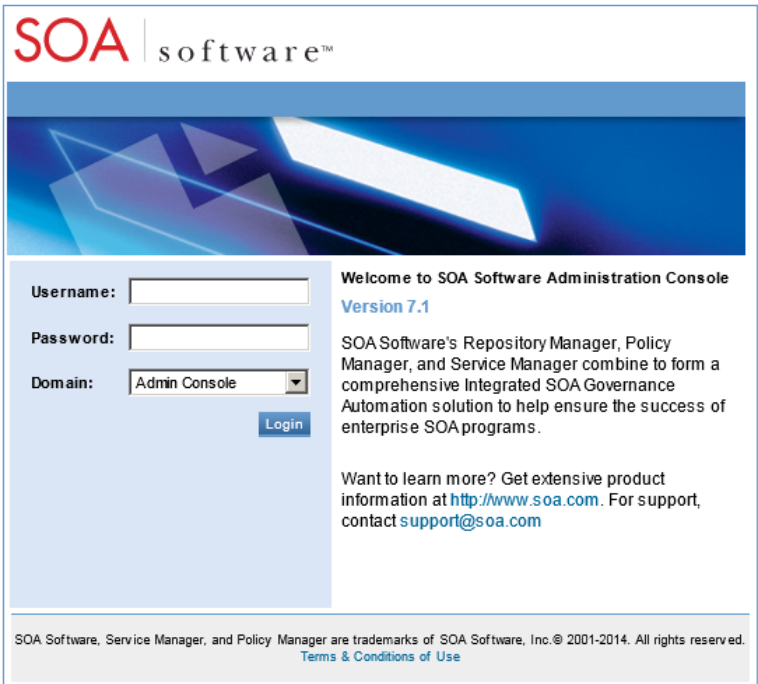
1.	<p>Start the SOA Container.</p> <p><u>Start Process in Windows</u></p> <p>Navigate to <code>sm70\bin</code> and type <code>startup <instance name></code></p> <p><u>Start Process as Windows Service</u></p> <p>Launch Program Group (Settings /Control Panel/Administrative Tools/Services)</p> <p>Select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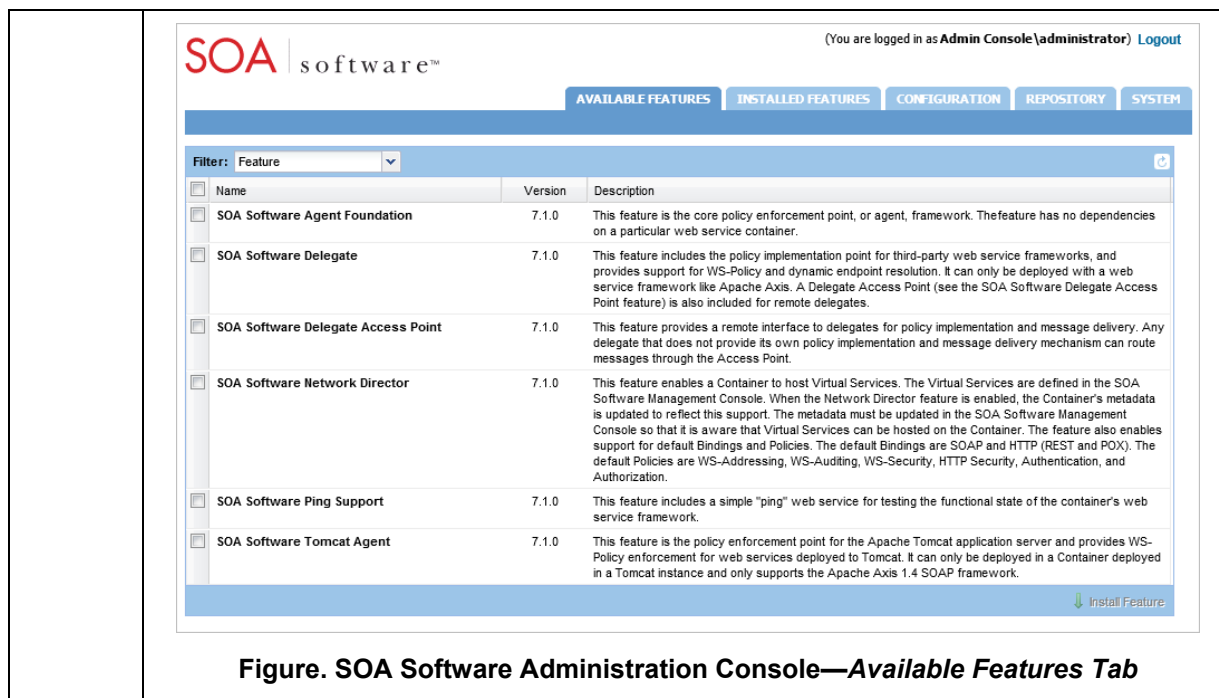
	Navigate to sm70/bin and type <code>startup.sh <instance name> -bg</code>
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Step 9: Clear Browser Cache


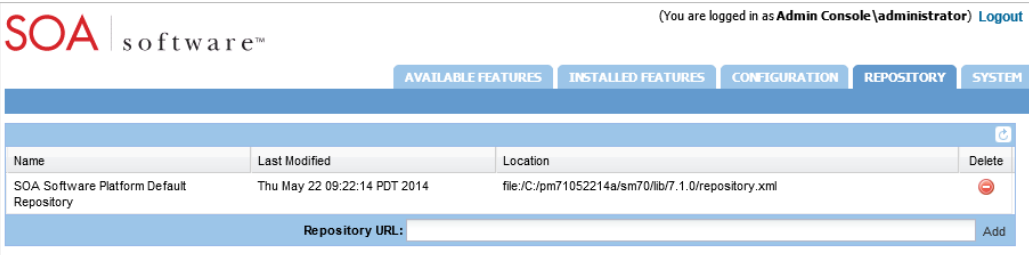
1.	Before launching the "SOA Software Administration Console," clear the browser cache or start a new session in a browser private window. This is necessary to ensure that user interface changes included in the Policy Manager update(s) display properly.
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Step 10: Launch SOA Software Administration Console

1.	<p>Launch the "SOA Software Administration Console" for the updated SOA Container Instance:</p> <p>Enter: <code>http://<hostname>:<port>/admin</code></p>  <p>Figure. SOA Software Administration Console—Login</p>
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.



Step 11: Refresh Repository

1.	<p>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 7.1.0."</p> 
2.	<p>If your SOA Container <i>does not</i> have Policy Manager features (SOA Software Policy Manager Console and SOA Software Policy Manager Services) installed, the upgrade is complete.</p> <p>If your SOA Container <i>does</i> have Policy Manager features (SOA Software Policy Manager Console and SOA Software Policy Manager Services) installed, continue with Steps 12, 13, 14 (if applicable), 15, and 16.</p>

Step 12: 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,
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go to *Installed Features > Pending Installation Tasks* and select **Complete Confirmation** to add the new schemas.

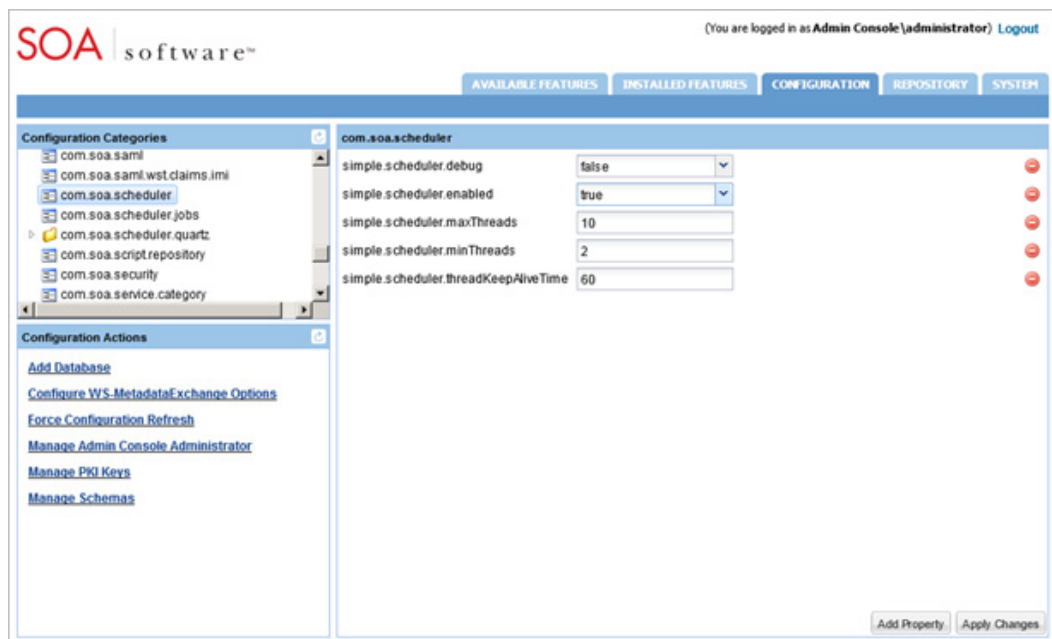
In the "Manage Schemas Wizard" add the new schemas from the "Available Schemas" section. If multiple Policy Manager instances are configured for load balancing purposes, this step is required on only one of the Policy Manager instances.

Available Schemas		
<input type="checkbox"/> Name	Version	Description
<input type="checkbox"/> Policy Manager	7.1.0	Policy Manager Update 7.1.0 Schema and Data additions

Step 13: Turn on simple.scheduler.enabled Property (for updated PM71 SOA Containers with Policy Manager Features Installed)

1. After you have completed the schema update process, you must configure the `simple.scheduler.enabled` property to **True**. To do this:
 1. Launch the *SOA Software Administration Console* for PM71.
 2. Click the "Configuration" tab.
 3. In the "Configuration Categories" section select `com.soa.scheduler`.
 4. For the `simple.scheduler.enabled` property, select **True** from the drop-down list box.
 5. Click **Apply Changes** to save your entry.

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



Step 14: Set Quartz Trigger Property to True--MSSQL only (for SOA Containers with Policy Manager Features Installed)

2.	<p>If your PM71 container instance is configured with MSSQL, you must set the quartz trigger property back to True. To do this:</p> <ul style="list-style-type: none">• Launch the SOA Software Administration Console.• Select the <i>Configuration</i> tab and the com.soa.scheduler.quartz Configuration Category.• Change the org.quartz.jobStore.acquireTriggersWithinLock property to True.
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Step 15: Restart SOA Container (for SOA Containers with Policy Manager Features Installed)

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

Step 16: 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 Update Container Metadata 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 PM71 container. From the "Actions Portlet" select Update Container Metadata.</p> <p>Enter the Metadata URL for the container being updated (i.e. <a href="http://<pm_host>:<pm_port>/metadata">http://<pm_host>:<pm_port>/metadata or <a href="http://<nd_host>:<nd_port>/metadata">http://<nd_host>:<nd_port>/metadata) 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.

3 Perform Policy Manager 6.1 to 7.1 Upgrade

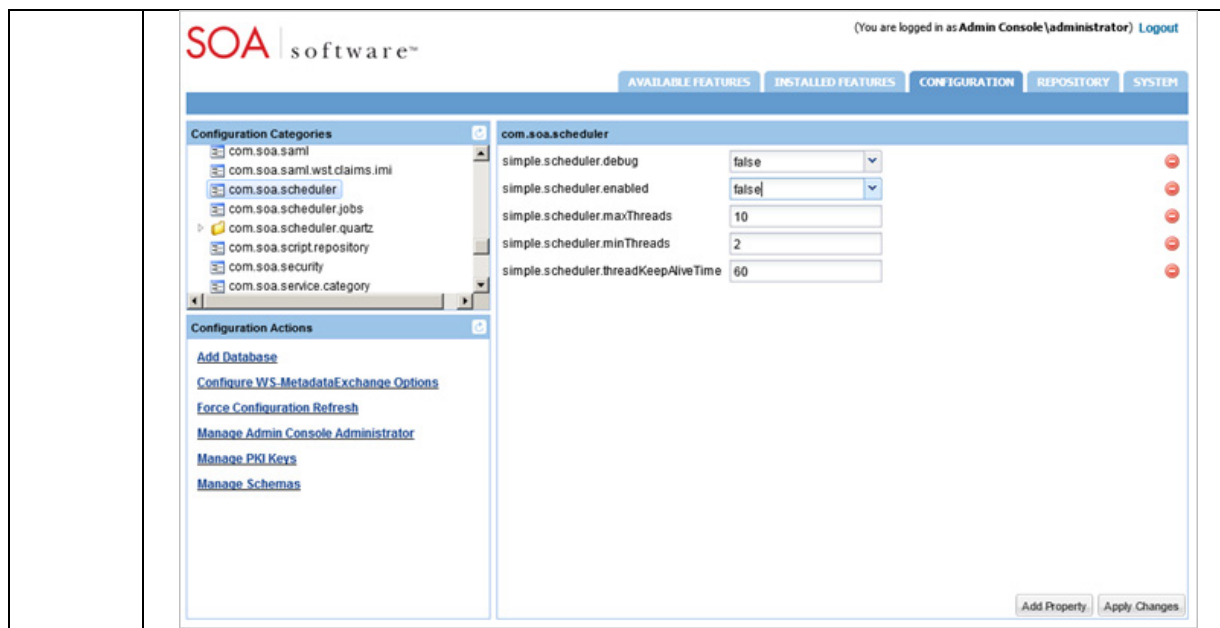
The PM61 upgrade requires that the PM71 product be installed into the *same* installation directory as PM61. The PM61 containers must then be copied into the PM71 installation directory and upgraded from this installation.

The upgrade can be performed with any denomination of Policy Manager updates applied to your PM61 Release Directory (i.e., zero updates - soa-update-6.1.24).

To upgrade, perform the following steps:

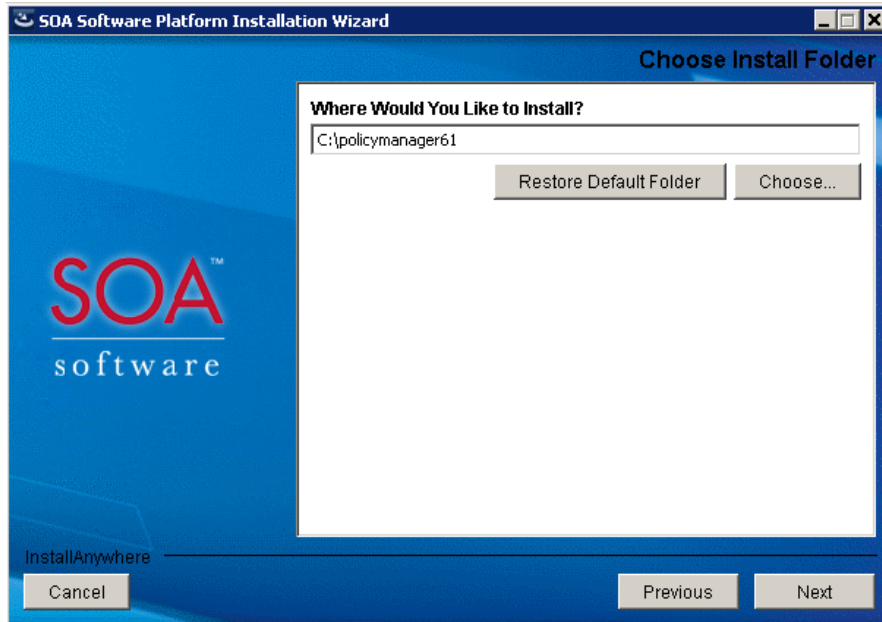
Step 1: Turn off `simple.scheduler.enabled` Property (for PM61 SOA Containers with Policy Manager Features Installed)

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 False. 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">1. Launch the <i>SOA Software Administration Console</i> for PM61.2. Click the "Configuration" tab.3. In the "Configuration Categories" section select <code>com.soa.scheduler</code>.4. For the <code>simple.scheduler.enabled</code> property, select False from the drop-down list box.5. Click Apply Changes to save your entry. <hr/> <p>Note: This task should be performed on the Policy Manager container instance only.</p> <hr/>
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Step 2: Install Policy Manager 7.1

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 PM71. 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 7.1 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 7.1 application (e.g., <platform>-pm-7.1.xxxx-setup64.exe or <platform>-pm-7.1.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>Here for the GUI installation:</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 7.1 Installation Guide for Windows and UNIX Platforms" for installation instructions.

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

Step 3: Copy PM61 Container Instances to PM71

1. From your PM61 backup directory, *manually* copy the PM61 container instances (sm60/instances/<pm_instance) to the PM71 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 4: Upgrade Container Instance

Perform the following update procedure on each SOA Container you would like upgraded to PM71 using the "Configure Container Instance Wizard." GUI, Silent, and Command Line procedures are provided.

Note: Prior to performing the upgrade, verify that *Step 3: Copy PM61 Container Instances to PM71* has been completed.

Upgrade SOA Container to Policy Manager 7.1 (GUI)

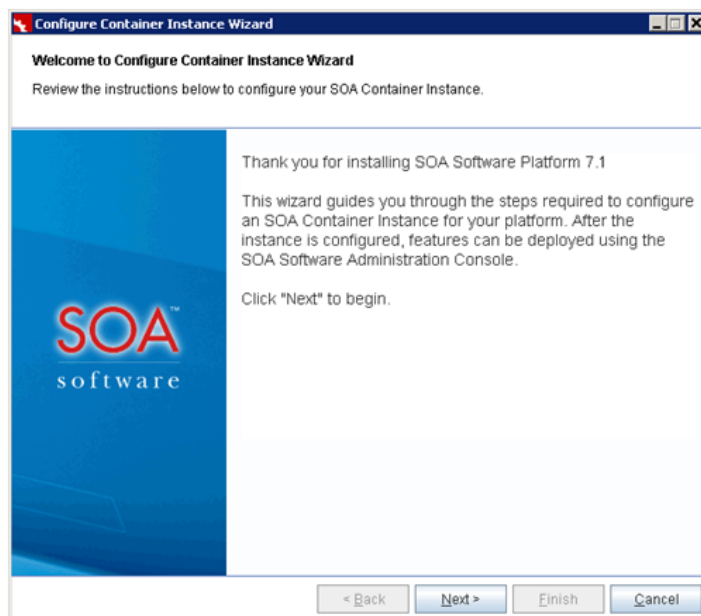
1. Two methods can be used to launch the "Configure Container Instance Wizard."
 - 1) Launch from the SOA Software Platform Program Group:

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
```

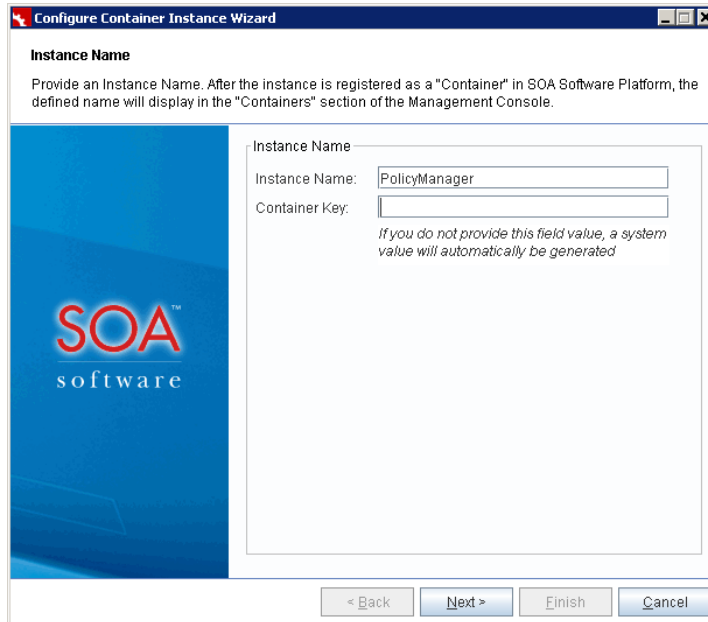
The "Welcome to Configure Container Instance Wizard" screen displays. Review the information and click **Next** to continue.



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.

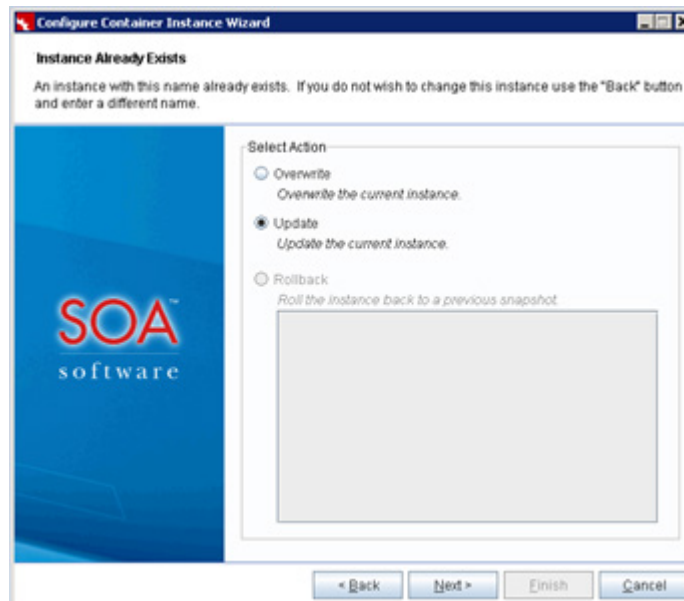
Upgrade SOA Container to Policy Manager 7.1 (GUI)

Note: The 7.1 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.**



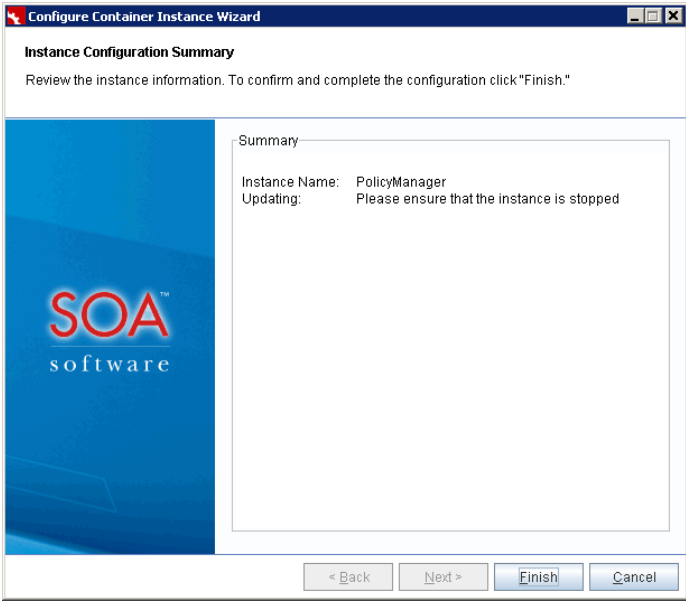
The screenshot shows the 'Configure Container Instance Wizard' window. The title bar reads 'Configure Container Instance Wizard'. The main heading is 'Instance Name'. Below it, a message states: 'Provide an Instance Name. After the instance is registered as a "Container" in SOA Software Platform, the defined name will display in the "Containers" section of the Management Console.' On the left is a blue sidebar with the 'SOA software' logo. The main area contains two input fields: 'Instance Name' with the text 'PolicyManager' and 'Container Key' which is empty. A note below the 'Container Key' field says: 'If you do not provide this field value, a system value will automatically be generated'. At the bottom are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

The "Instance Already Exists" screen displays. To apply the PM61 to PM71 Upgrade, click the **Update** radio button, and **Next** to continue.

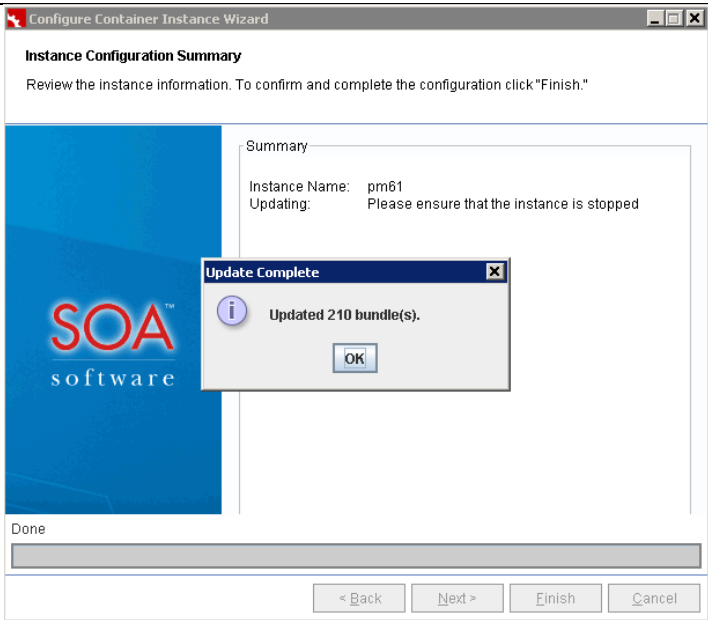



The screenshot shows the 'Configure Container Instance Wizard' window at the 'Instance Already Exists' step. The title bar reads 'Configure Container Instance Wizard'. The main heading is 'Instance Already Exists'. Below it, a message states: 'An instance with this name already exists. If you do not wish to change this instance use the "Back" button and enter a different name.' On the left is a blue sidebar with the 'SOA software' logo. The main area contains a 'Select Action' section with three radio buttons: 'Overwrite' (with subtext 'Overwrite the current instance.'), 'Update' (which is selected, with subtext 'Update the current instance.'), and 'Rollback' (with subtext 'Roll the instance back to a previous snapshot.'). Below these options is a large empty rectangular box. At the bottom are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

Upgrade SOA Container to Policy Manager 7.1 (GUI)

2.	<p>The "Instance Configuration Summary" screen displays. To apply the update(s), click Finish. Note that the SOA Container Instance must be stopped prior to applying the update(s).</p> 
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>Note: 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/>


Upgrade SOA Container to Policy Manager 7.1 (GUI)

	
4.	Click OK on the "Update Complete" dialog. The "Configure Container Instance Wizard" closes.
5.	<p>Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 5.</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 7.1 (Silent Upgrade)

Step	Procedure
1.	<p>The "Configure Container Instance Wizard" update process can be set up to run in an automated mode (i.e., silent). This is done by defining a properties file and pre-defining a set of property values to be used by the "Configure Container Instance Wizard" to automatically configure a Container instance.</p> <p><u>Define Silent Upgrade Property File</u></p> <ol style="list-style-type: none"> 1) Define a properties file (e.g., <code>upgrade.properties</code>) 2) Add the following default content:


Upgrade SOA Container to Policy Manager 7.1 (Silent Upgrade)

	<pre>container.instance.name=policymanager wizard.mode=update</pre> <p><u>Run Silent Configuration</u></p> <p>The "Configure Container Instance Wizard (Silent Update)" properties file accepts two system properties which together are used to perform the silent update:</p> <ol style="list-style-type: none"> 1) silent (If True, silent configuration will be performed) 2) properties (location on filesystem of property file to be used for configuration) <p><u>Windows:</u></p> <pre>\sm70\bin>startup.bat configurator "-Dsilent=true" "-Dproperties=<property file directory location>/upgrade.properties"</pre> <p><u>UNIX:</u></p> <pre>\sm70\bin>startup.sh configurator -Dsilent=true -Dproperties=opt/<property file directory location>/upgrade.properties</pre>
2.	Run the silent upgrade.
3.	<p>After the silent upgrade is complete perform the following steps:</p> <ol style="list-style-type: none"> 1) Users that will not be utilizing the SOA Software Administration Console can install the "Policy Manager 7.1.0" schema manually using a third-party Database Schema Management Tool. <p><i>Refer to SOA Software Customer Support for assistance installing the "Policy Manager 7.1.0" 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>Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 5.</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 7.1 (Command Line)

1.	You can also perform the upgrade process using a command line approach. Execute the following in the sm70\bin folder:
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Upgrade SOA Container to Policy Manager 7.1 (Command Line)

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

Step 5: 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 PM71 installation files /sm70/bin/startup.bat/.sh and /sm70/bin/registerContainerService.bat.

Note: The default heap size for PM71 is 2048.

Step 6: 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> <pre>./sm70/bin/unregisterContainerService.bat <instance_name></pre> <p><u>Re-register the Windows Service</u></p> <pre>./sm70/bin/registerContainerService.bat <instance_name></pre>
----	---

Step 7: Start SOA Container

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

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

Step 8: 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>
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Step 9: Launch SOA Software Administration Console

1.	<p>Launch the "SOA Software Administration Console" for the updated SOA Container Instance:</p> <p>Enter: <code>http://<hostname>:<port>/admin</code></p>
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SOA | software™

Username:

Password:

Domain:

Login

Welcome to SOA Software Administration Console Version 7.1

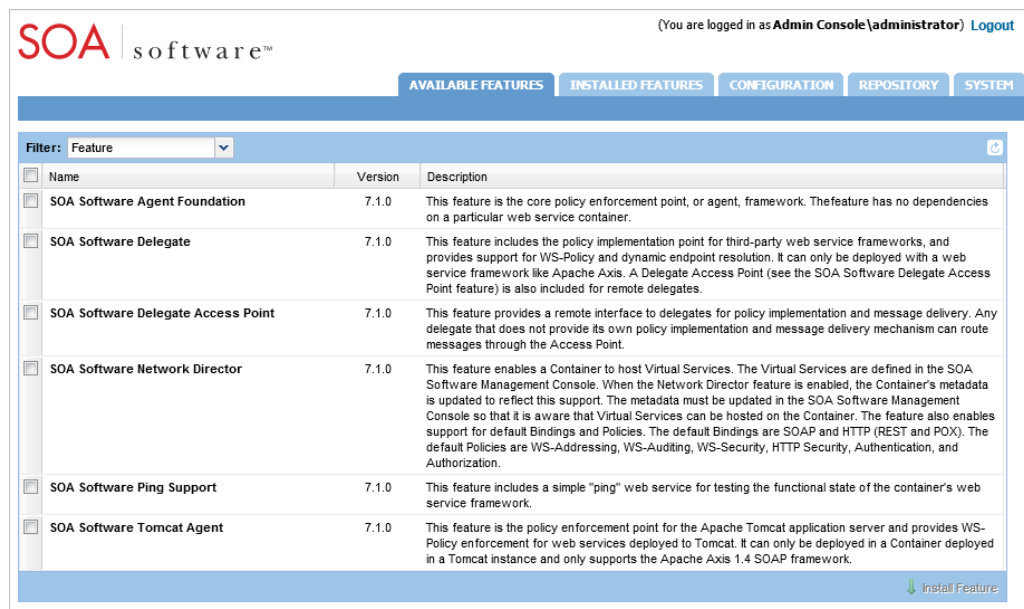
SOA Software's Repository Manager, Policy Manager, and Service Manager combine to form a comprehensive Integrated SOA Governance Automation solution to help ensure the success of enterprise SOA programs.

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

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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.



SOA | software™ (You are logged in as Admin Console\administrator) [Logout](#)

AVAILABLE FEATURES | **INSTALLED FEATURES** | **CONFIGURATION** | **REPOSITORY** | **SYSTEM**


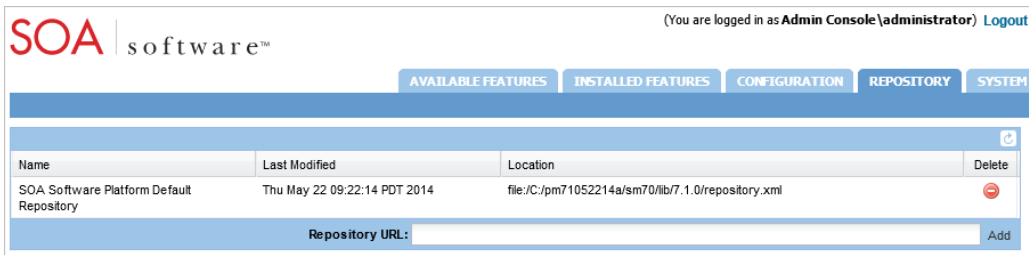
Filter:

<input type="checkbox"/>	Name	Version	Description
<input type="checkbox"/>	SOA Software Agent Foundation	7.1.0	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	7.1.0	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	7.1.0	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	7.1.0	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	7.1.0	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	7.1.0	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.

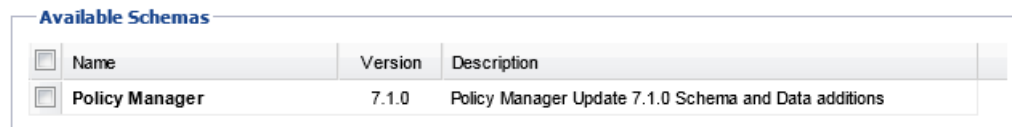
[Install Feature](#)

Figure. SOA Software Administration Console—Available Features Tab

Step 10: Refresh Repository

3.	<p>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 7.1.0."</p> 
4.	<p>If your SOA Container <i>does not</i> have Policy Manager features (SOA Software Policy Manager Console and SOA Software Policy Manager Services) installed, the upgrade is complete.</p> <p>If your SOA Container <i>does</i> have Policy Manager features (SOA Software Policy Manager Console and SOA Software Policy Manager Services) installed, continue with Steps 11, 12 (if applicable), 13, 14, and 15.</p>

Step 11: Update Schemas (for SOA Containers with Policy Manager Features Installed)

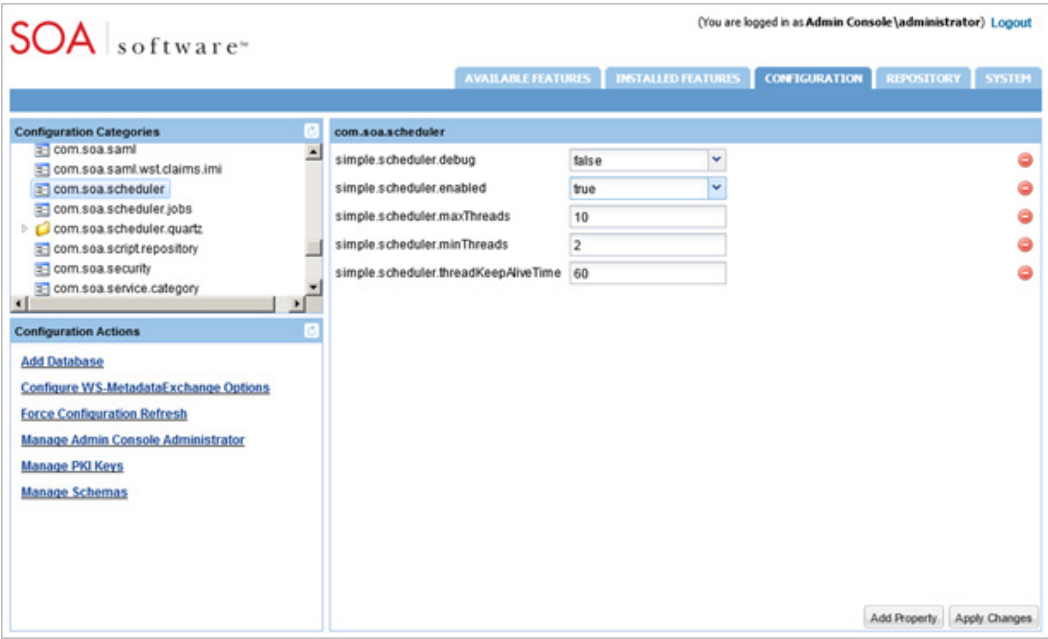
1.	<p>If you've installed and configured the Policy Manager features (SOA Software Policy Manager Console and SOA Software Policy Manager Services) on your SOA Container, go to <i>Installed Features > Pending Installation Tasks</i> and select Complete Confirmation to add the new schemas.</p> <p>In the "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> 
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Step 12: Set Quartz Trigger Property to True--MSSQL only (for SOA Containers with Policy Manager Features Installed)

1.	<p>If your PM71 container instance is configured with MSSQL, you must set the quartz trigger property to True. This is a required to prevent database dead-locks. To do this:</p> <ul style="list-style-type: none">• Launch the SOA Software Administration Console.• Select the <i>Configuration</i> tab and the com.soa.scheduler.quartz Configuration
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	<p>Category.</p> <ul style="list-style-type: none"> Change the org.quartz.jobStore.acquireTriggersWithinLock property to True.
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Step 13: Turn on simple.scheduler.enabled Property (for updated PM71 SOA Containers with Policy Manager Features Installed)

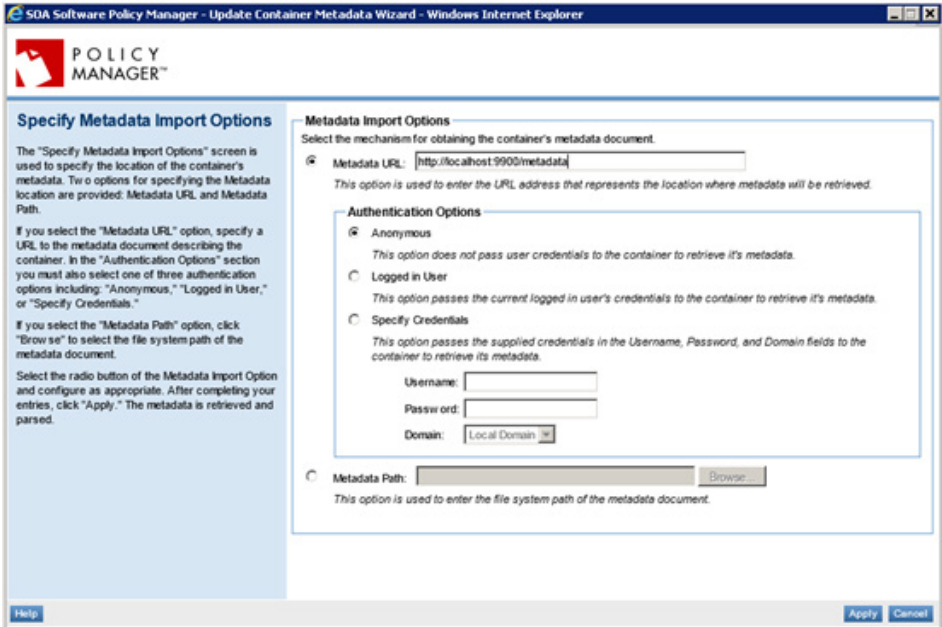
1.	<p>After you have completed the schema update process, you must configure the <code>simple.scheduler.enabled</code> property to True. To do this:</p> <ol style="list-style-type: none"> Launch the <i>SOA Software Administration Console</i> for PM71. Click the "Configuration" tab. In the "Configuration Categories" section select <code>com.soa.scheduler</code>. For the <code>simple.scheduler.enabled</code> property, select True from the drop-down list box. Click Apply Changes to save your entry. <hr/> <p>Note: This task should be performed on the Policy Manager container instance only.</p> <hr/>  <p>The screenshot shows the SOA Software Administration Console interface. The 'CONFIGURATION' tab is selected. In the 'Configuration Categories' list on the left, 'com.soa.scheduler' is selected. The main panel displays the configuration for 'com.soa.scheduler' with the following properties:</p> <table border="1"> <thead> <tr> <th>Property</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>simple.scheduler.debug</td> <td>false</td> </tr> <tr> <td>simple.scheduler.enabled</td> <td>true</td> </tr> <tr> <td>simple.scheduler.maxThreads</td> <td>10</td> </tr> <tr> <td>simple.scheduler.minThreads</td> <td>2</td> </tr> <tr> <td>simple.scheduler.threadKeepAliveTime</td> <td>60</td> </tr> </tbody> </table> <p>At the bottom right of the configuration panel, there are buttons for 'Add Property' and 'Apply Changes'.</p>	Property	Value	simple.scheduler.debug	false	simple.scheduler.enabled	true	simple.scheduler.maxThreads	10	simple.scheduler.minThreads	2	simple.scheduler.threadKeepAliveTime	60
Property	Value												
simple.scheduler.debug	false												
simple.scheduler.enabled	true												
simple.scheduler.maxThreads	10												
simple.scheduler.minThreads	2												
simple.scheduler.threadKeepAliveTime	60												

Step 14: Restart SOA Container (for SOA Containers with Policy Manager Features Installed)

1.	To complete the upgrade, restart the container.
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2.	The upgrade process is now complete.
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Step 15: 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 Update Container Metadata 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 PM71 container. From the "Actions Portlet" select Update Container Metadata.</p> <p>Enter the Metadata URL for the container being updated (i.e. <a href="http://<pm_host>:<pm_port>/metadata">http://<pm_host>:<pm_port>/metadata or <a href="http://<nd_host>:<nd_port>/metadata">http://<nd_host>:<nd_port>/metadata) 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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4 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>.