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), and upgrading 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).

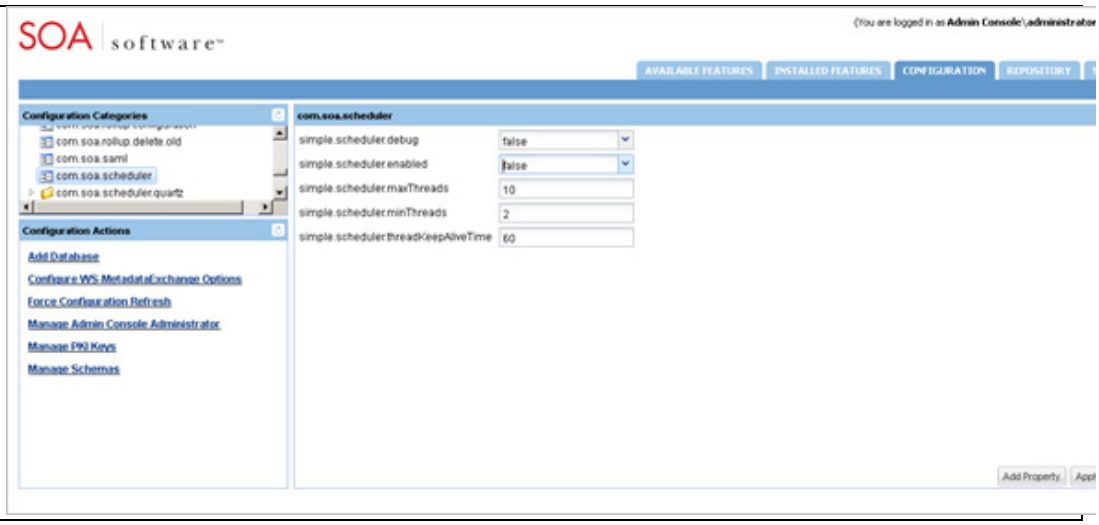
To upgrade, perform the following steps:

Step 1: Turn off com.soa.scheduler.quartz Property (for PM71 SOA Containers with Policy Manager Features Installed)

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

Step 2: Turn off simple.scheduler.enabled Property (for 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 **False**. 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 **False** from the drop-down list box. 5. Click **Apply Changes** to save your entry. **Note:** This task should be performed on the Policy Manager container instance only.

Step 3: Install Policy Manager 7.2

Install Policy Manager 7.2

Step	Procedure
1.	Backup your PM71 Database.
2.	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. *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.*
3.	Backup your PM71 Release Directory.
4.	Install the SOA Software Platform 7.2 application (e.g., <platform>-pm-7.2.xxxx-setup64.exe or <platform>-pm-7.2.xxxx-setup64.bin). • **For Scenario 1:** Install PM72 directly to the PM71 release directory. • **For Scenario 2:** Install PM72 into a new directory. *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 4: Copy PM71 Container Instances to PM72 (For Scenario 2 ONLY)

1.	*Note: If you installed PM72 directly to the PM71 directory (i.e., Scenario 1), skip this step.* From your PM71 backup directory, *manually* copy the PM71 container instances (sm70/instances/<pm_instance) to the PM72 container instances folder

	(sm70/instances/<pm_instance). This includes PM71, Network Director, and Agent container instances. **Note:** Do not include the PM71 `configurator` or the PM71 default container folder as part of the copy process.

Step 5: Clear Configurator Cache

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

Step 6: Upgrade Container Instance (For Scenarios 1 and 2)

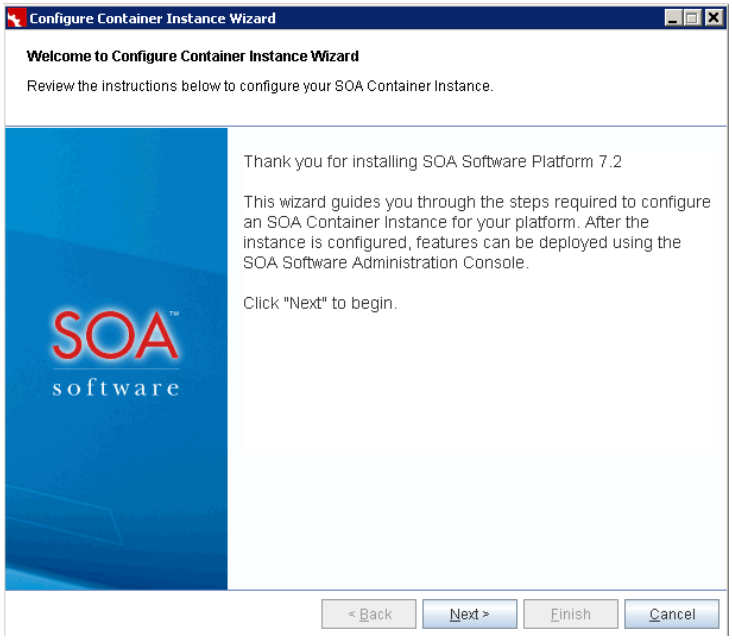
Perform the following update procedure on each SOA Container you would like upgraded to PM72 using the "Configure Container Instance Wizard." GUI, Silent, and Command Line procedures are provided.

Note: For Scenario 2, prior to performing the upgrade, verify that *Step 2: Copy PM71 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.

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)

<table>
<tr>
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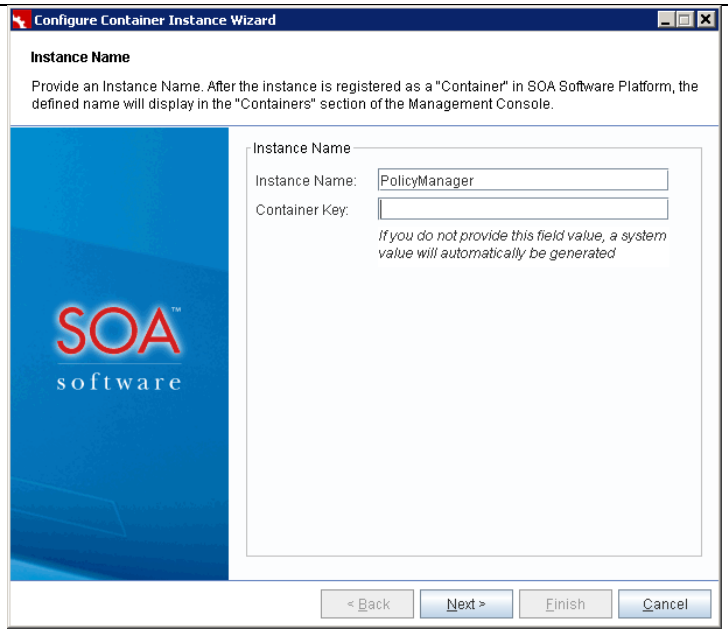
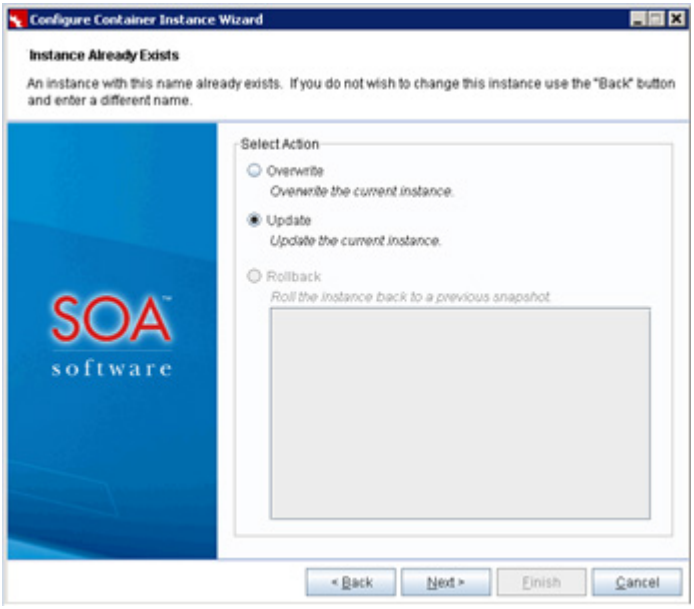


The "Instance Already Exists" screen displays. To apply the PM71 to PM72 Upgrade, click the Update radio button, and Next to continue.



</td>
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<tr>
<td>2.</td>
<td>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).</td>
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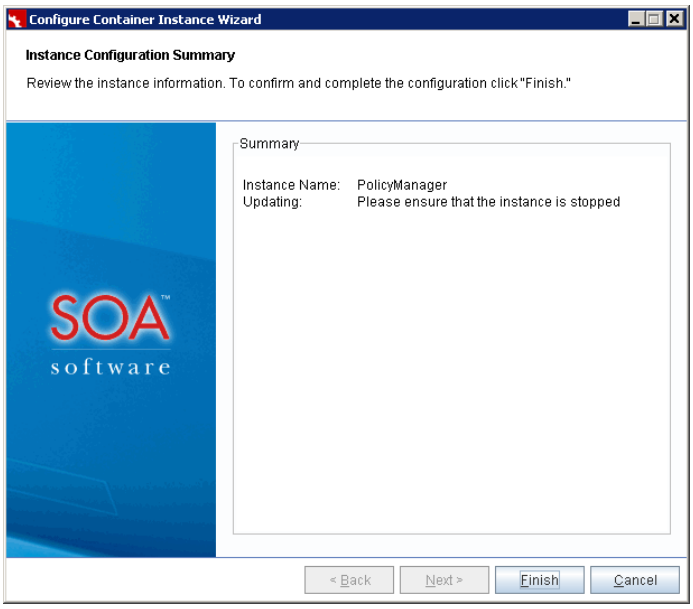
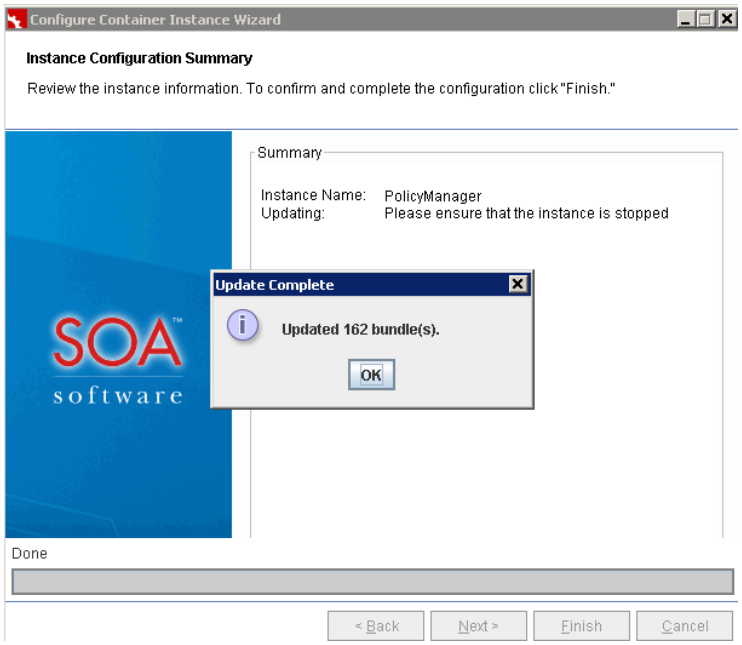
</table>

Upgrade SOA Container to Policy Manager 7.2 (GUI)

	
3.	The SOA Container update process begins and a progress indicator displays. After the update process is complete the "Update Complete" dialog displays and indicates the number of bundles that have been updated. **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." 
4.	Click **OK** on the "Update Complete" dialog. The "Configure Container Instance Wizard"

Upgrade SOA Container to Policy Manager 7.2 (GUI)

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

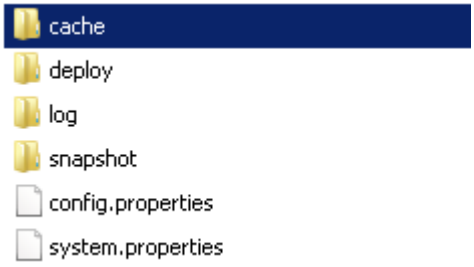
Upgrade SOA Container to Policy Manager 7.2 (Silent Upgrade)

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.
	Define Silent Upgrade Property File
	1) Define a properties file (e.g., `upgrade.properties`)
	2) Add the following default content:
	`container.instance.name=policymanager`
	`wizard.mode=update`
	Run Silent Configuration
	The "Configure Container Instance Wizard (Silent Update)" properties file accepts two system properties which together are used to perform the silent update:
	1. **silent** (If True, silent configuration will be performed)
	2. **properties** (location on filesystem of property file to be used for configuration)
	Windows:
	`\sm70\bin>startup.bat configurator "-Dsilent=true" "-Dproperties=<property file directory location>/upgrade.properties"`
	UNIX:
	`\sm70\bin>startup.sh configurator -Dsilent=true -Dproperties=opt/<property file directory location>/upgrade.properties`

2.	Run the silent upgrade.

Upgrade SOA Container to Policy Manager 7.2 (Silent Upgrade)

3.	After the silent upgrade is complete perform the following steps: 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. *Refer to SOA Software Customer Support for assistance installing the "Policy Manager 7.2.0" schema.* Users that will not be utilizing the SOA Software Administration Console can skip the remainder of this procedure.
4.	**Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 7.** Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance. 

Upgrade SOA Container to Policy Manager 7.2 (Command Line)

1.	You can also perform the upgrade process using a command line approach. Execute the following in the `sm70\bin` folder: **Windows:** startup.bat configurator "-Dsilent=true" "-Dcontainer.instance.name=<Instance name>" "-Dwizard.mode=update" **UNIX:** startup.sh configurator -Dsilent=true -Dcontainer.instance.name=<Instance name> -Dwizard.mode=update
2.	**Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 7.** Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance.

Step 7: Unregister and re-register the Windows Service

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

1.	Unregister the existing Windows Service ./sm70/bin/unregisterContainerService.bat <instance_name> Re-register the Windows Service ./sm70/bin/registerContainerService.bat <instance_name>

Step 8: Start 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.	Start the SOA Container. Start Process in Windows Navigate to `sm70\bin` and type `startup <instance name>` Start Process as Windows Service Launch Program Group (Settings /Control Panel/Administrative Tools/Services) Select `SOA Software Container Instance` - Note that the instance name is displayed as the Container Key. From "Actions" menu, select **Start**. Start Process in UNIX Navigate to `sm70/bin` and type `startup.sh <instance name>` Start Process in UNIX (Background)

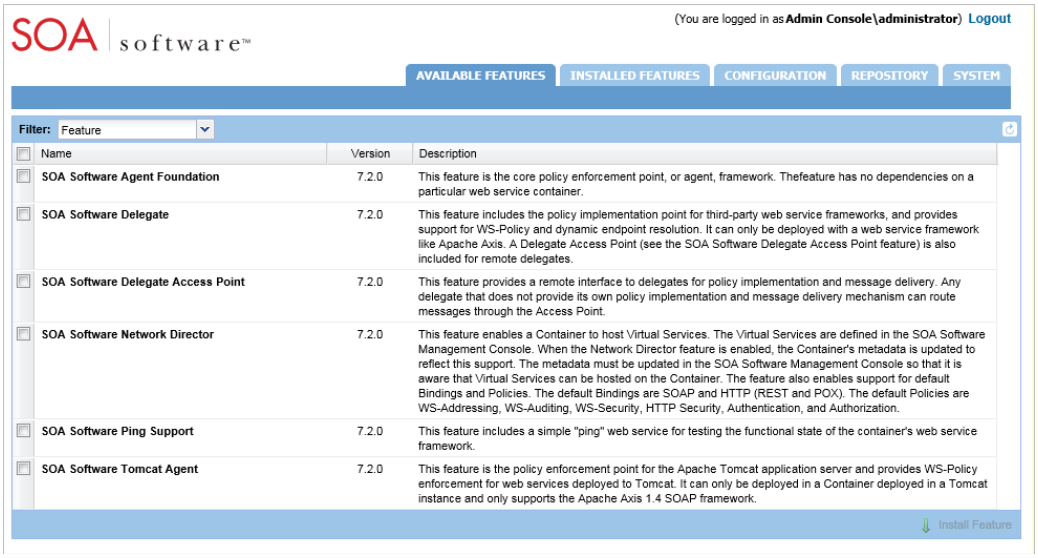
	Navigate to `sm70/bin` and type `startup.sh <instance name> -bg`

Step 9: Clear Browser Cache

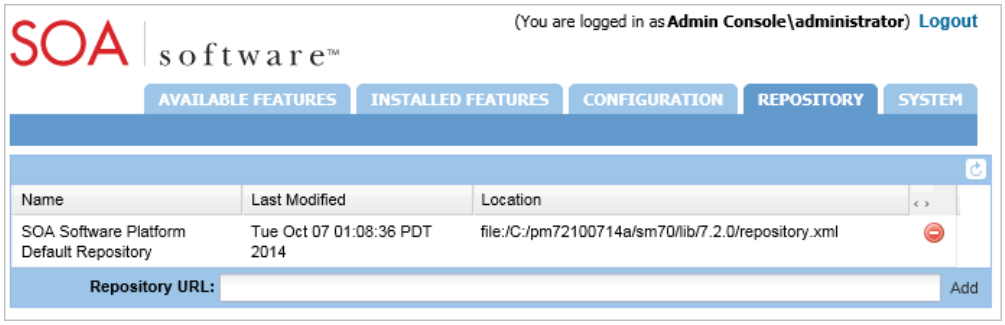
1.	Before launching the "SOA Software Administration Console," clear the browser cache or start a new session in a browser private window. This is necessary to ensure that user interface changes included in the Policy Manager update(s) display properly.

Step 10: Launch SOA Software Administration Console

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

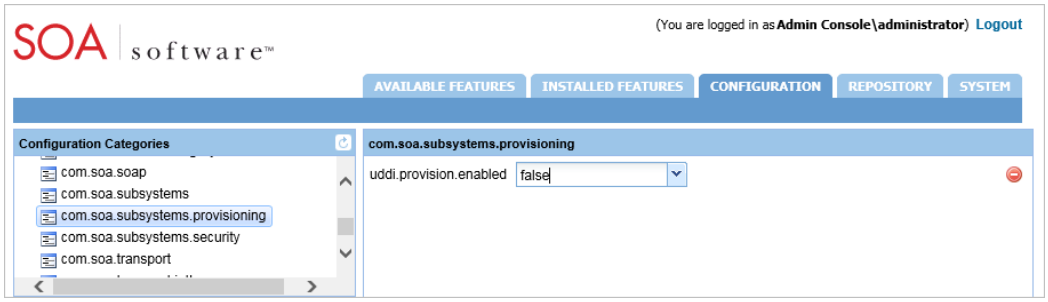
	 **Figure. SOA Software Administration Console—*Available Features Tab***

Step 11: Refresh Repository

1.	Select the "Repository" tab and verify that the repository for the installed update is present. If it is not, click Refresh to update the repository. The repository name is "SOA Software Platform Default Repository 7.2.0." 
2.	If your SOA Container *does not* have Policy Manager features (SOA Software Policy Manager Console and SOA Software Policy Manager Services) installed, the upgrade is complete. If your SOA Container *does* have Policy Manager features (SOA Software Policy Manager Console and SOA Software Policy Manager Services) installed, continue with Steps 12, 13, 14 (if applicable), 15, and 16.

Step 12: Disable UDDI Provisioning

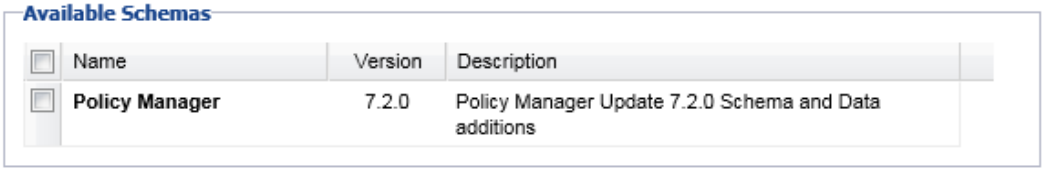
1.	Select the *Configuration* tab and set the **uddi.provision.enabled** property in the **com.soa.subsystems.provisioning category** must be set to **False**.



Step 13: Update Schemas (for SOA Containers with Policy Manager Features Installed)

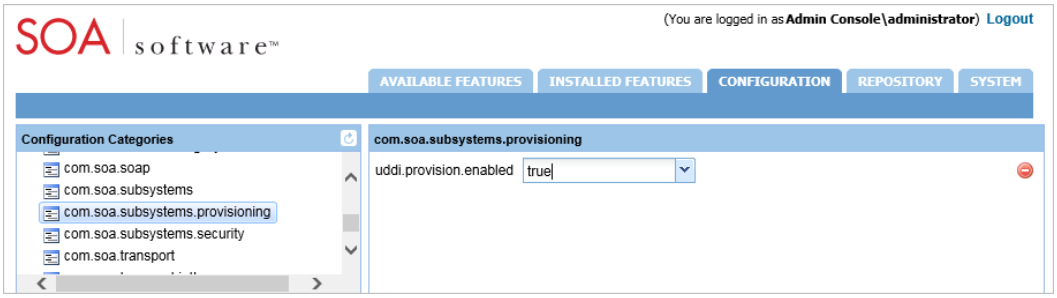
1. If you've installed and configured the Policy Manager features (SOA Software Policy Manager Console and SOA Software Policy Manager Services) on your SOA Container, go to *Installed Features* > *Pending Installation Tasks* and select **Complete Confirmation** to add the new schemas.

   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.



Step 14: Enable UDDI Provisioning

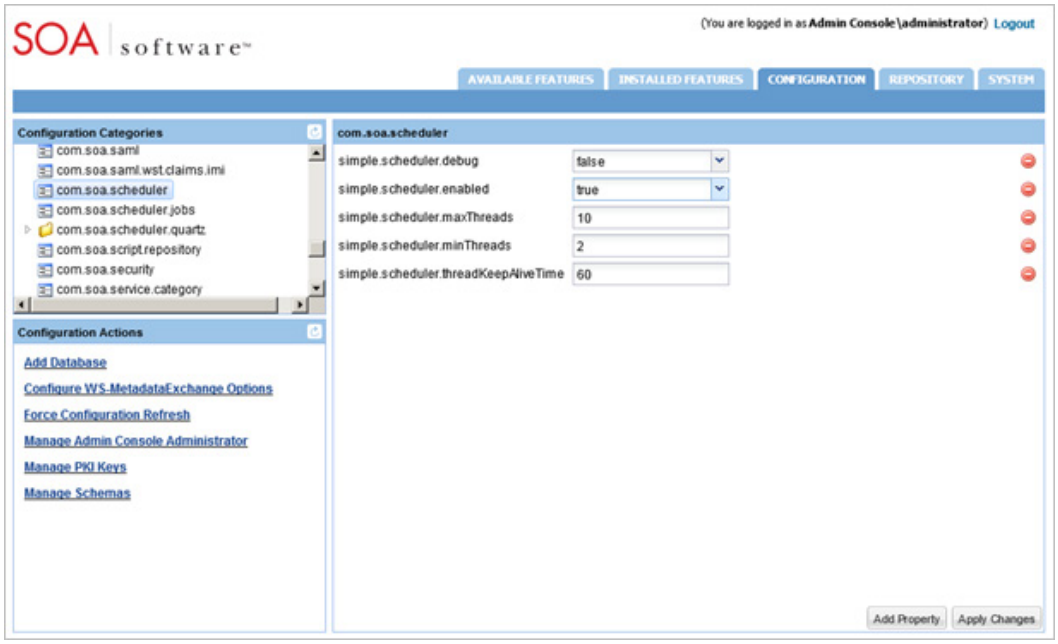
1. Select the *Configuration* tab and set the **uddi.provision.enabled** property in the **com.soa.subsystems.provisioning category** must be set to **True**.



Step 15: Turn on simple.scheduler.enabled Property (for updated PM72 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 PM72.
   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.



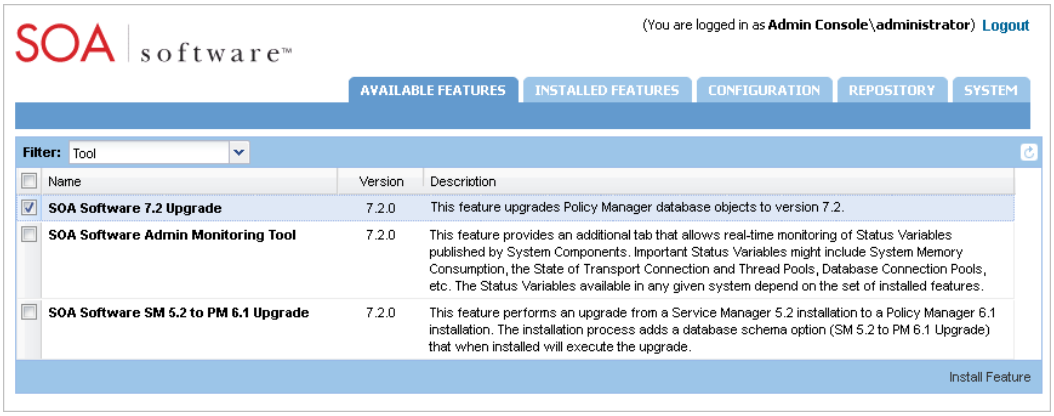
Step 16: Turn on com.soa.scheduler.quartz Property (for updated PM72 SOA Containers with Policy Manager Features Installed)

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

Step 17: Restart SOA Container (for SOA Containers with Policy Manager Features Installed)

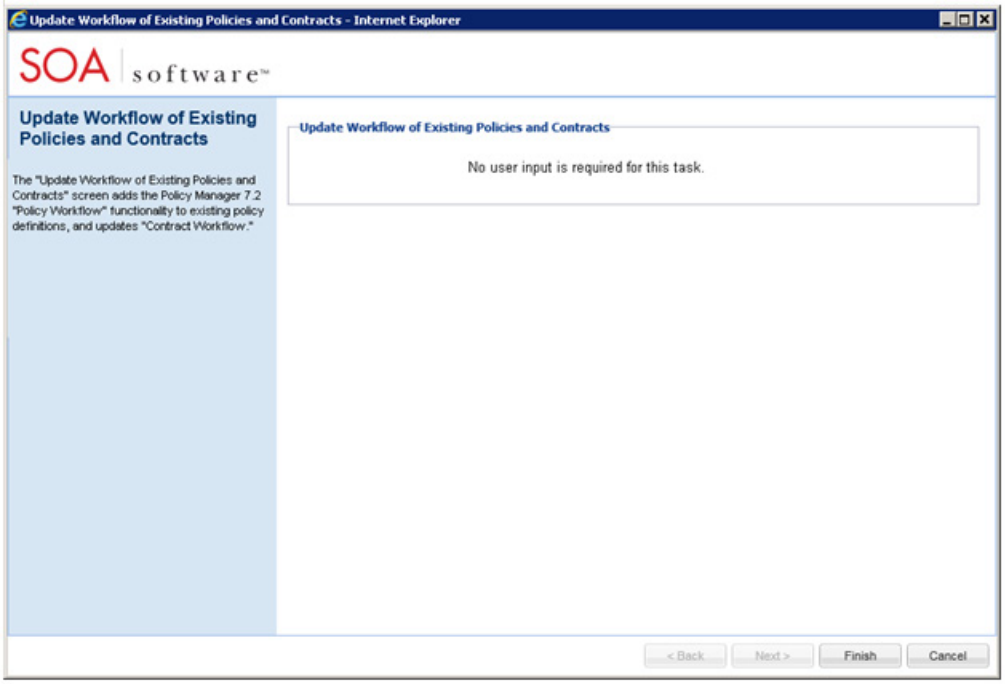
1.	Restart the container and continue to the next step.

Step 18: Install SOA Software 7.2 Upgrade

1.	After the SOA Container has successfully restarted, the next step is to upgrade the Policy Manager database. To do this: 1. Launch the *SOA Software Administration Console* for PM72. 2. Click the "Available Features" tab and select **Tool** from the *Filter* drop-down. 3. Select *SOA Software 7.2 Upgrade* and click **Install Feature**.  4. If the PM72 Schema is not yet installed the **Configure** button displays. Click it, select the PM72 schema and install it. 5. If the PM72 Schema is already installed the installation is complete. 6. Continue to the next step.

Step 19: Update Workflow of Existing Policies and Contracts

1.	The next step is to add the Policy Manager 7.2 "Policy Workflow" functionality to existing policies and update "Contract Workflow." To do this: 1. Launch the *SOA Software Administration Console* for PM72. 2. Click the "Configuration" tab. In the Configuration Actions section select the **Update Workflow of Existing Policies and Contracts** function.



3. To complete the task click **Finish**.
4. After the task is completed, restart the SOA container.

Step 20: Update Container Metadata

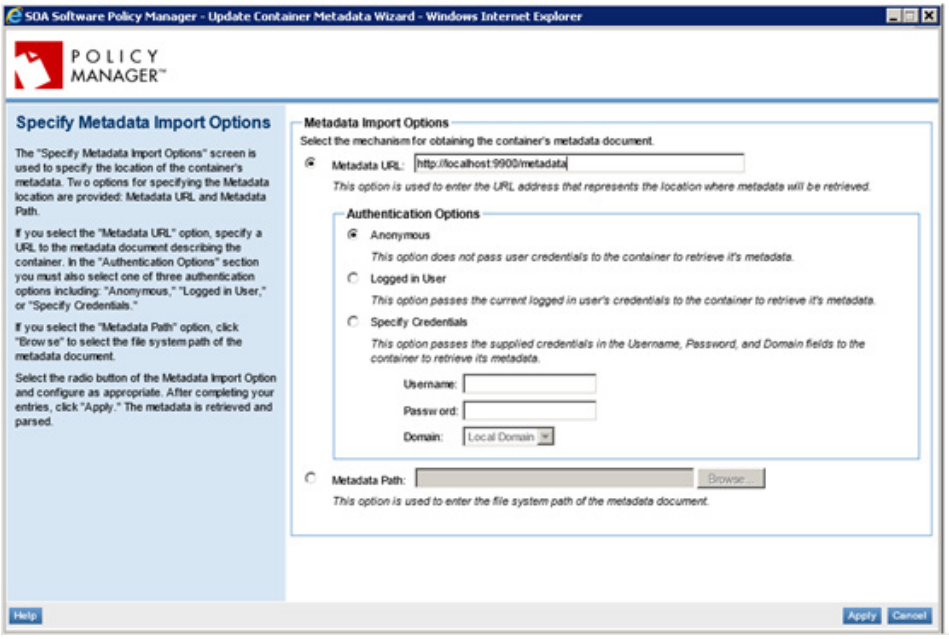
1. The final step in the upgrade process is the update the Metadata URL and Authentication Options of each container you upgraded (i.e., PM, ND, Agent). This is accomplished using the **Update Container Metadata** function in the "Containers" section of the *Policy Manager Management Console*. This process updates the container capabilities to support the latest features.

   From the *Containers* folder, select the PM72 container. From the "Actions Portlet" select **Update Container Metadata**.

   Enter the Metadata URL for the container being updated (i.e. http://<pm_host>:<pm_port>/metadata or http://<nd_host>:<nd_port>/metadata) or the Metadata Path.

   If Authentication options are being used or updated, select the authentication options.

   If the Metadata URL is not accessible from the Policy Manager, the metadata can be updated from a file by accessing the Metadata URL from a machine that has access to the container and saving the metadata document to a file.



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).

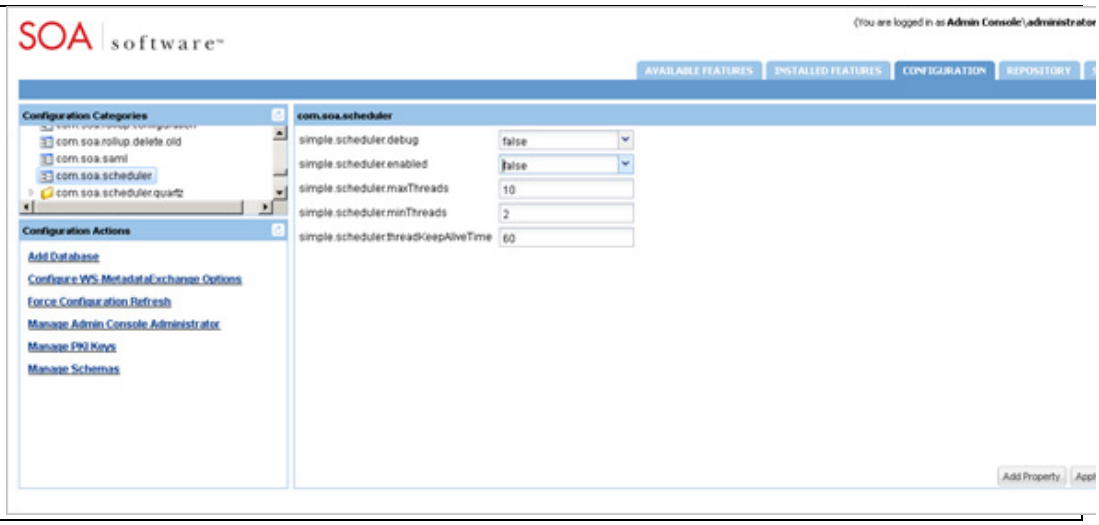
To upgrade, perform the following steps:

Step 1: Turn off com.soa.scheduler.quartz Property for PM70 Container (for SOA Containers with Policy Manager Features Installed)

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

Step 2: Turn off simple.scheduler.enabled Property (for PM70 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 **False**. To do this: 1. Launch the *SOA Software Administration Console* for PM70. 2. Click the "Configuration" tab. 3. In the "Configuration Categories" section select `com.soa.scheduler`. 4. For the `simple.scheduler enabled` property, select **False** from the drop-down list box. 5. Click **Apply Changes** to save your entry. **Note:** This task should be performed on the Policy Manager container instance only.

Step 3: Install Policy Manager 7.2

Install Policy Manager 7.2

Step	Procedure
5.	Backup your PM70 Database.
6.	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. *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.*
7.	Backup your PM70 Release Directory.
8.	Install the SOA Software Platform 7.2 application (e.g., <platform>-pm-7.2.xxxx-setup64.exe or <platform>-pm-7.2.xxxx-setup64.bin). • **For Scenario 1:** Install PM72 directly to the PM70 release directory. • **For Scenario 2:** Install PM72 into a new directory. *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 4: Copy PM70 Container Instances to PM72 (For Scenario 2 ONLY)

2.	*Note: If you installed PM72 directly to the PM70 directory (i.e., Scenario 1), skip this step.* From your PM70 backup directory, *manually* copy the PM70 container instances (sm70/instances/<pm_instance) to the PM72 container instances folder

	(sm70/instances/<pm_instance). This includes PM70, Network Director, and Agent container instances. **Note:** Do not include the PM70 `configurator` or the PM70 default container folder as part of the copy process.

Step 5: Clear Configurator Cache

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

Step 6: Upgrade Container Instance (For Scenarios 1 and 2)

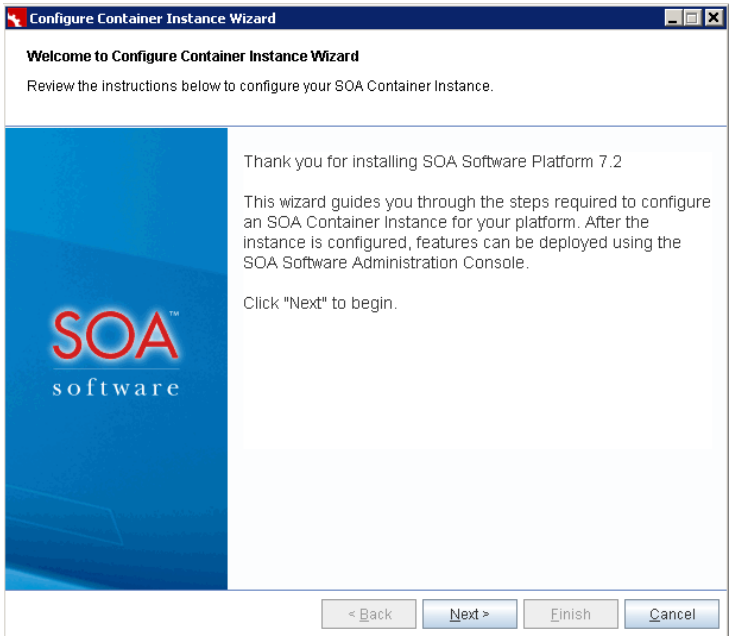
Perform the following update procedure on each SOA Container you would like upgraded to PM72 using the "Configure Container Instance Wizard." GUI, Silent, and Command Line procedures are provided.

Note: For Scenario 2, prior to performing the upgrade, verify that *Step 2: Copy PM70 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

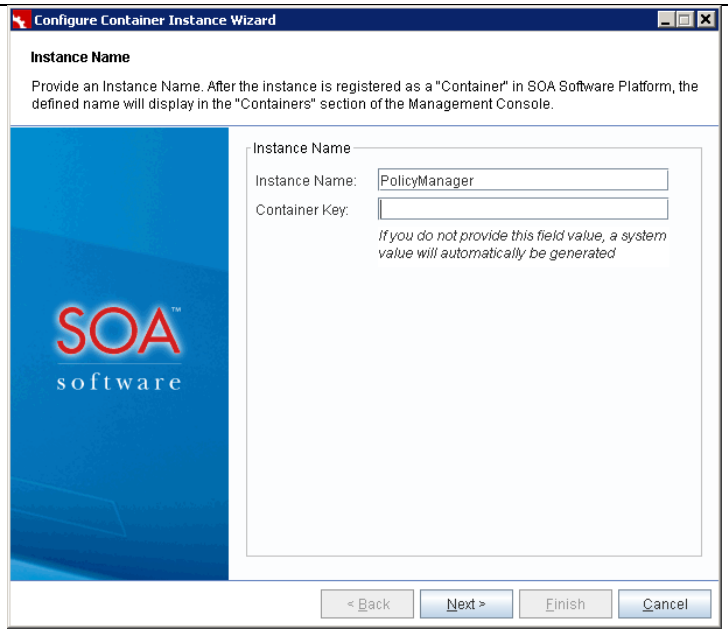
information and click **Next** to continue.



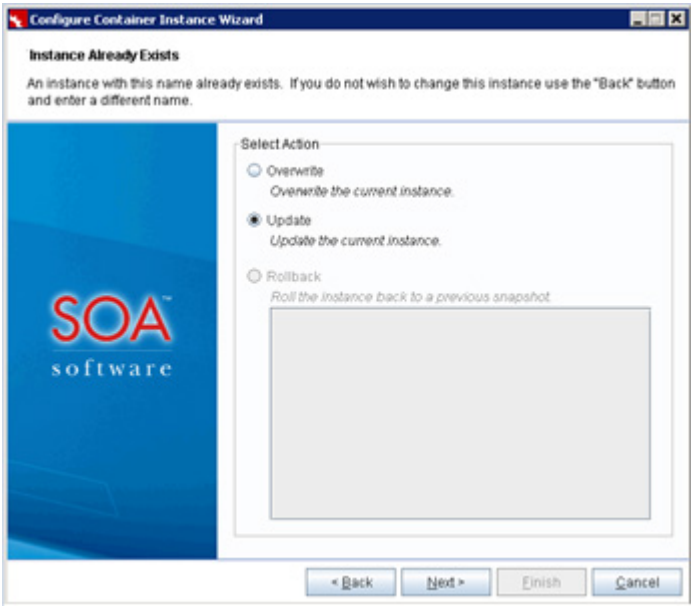
The "Instance Name" screen displays. Specify the name of the "SOA Software Container Instance" the upgrade will be applied to and click **Next** to continue.

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)

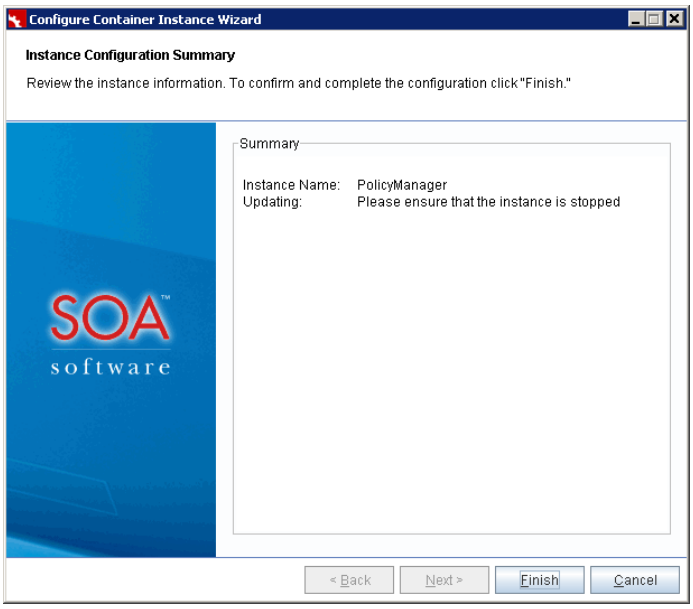


The "Instance Already Exists" screen displays. To apply the PM70 to PM72 Upgrade, click the **Update** radio button, and **Next** to continue.



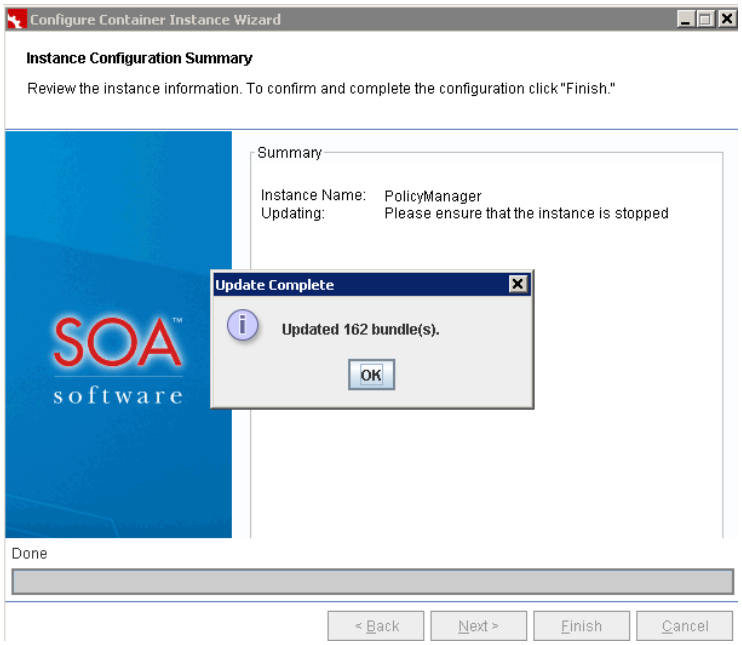
2.	The "Instance Configuration Summary" screen displays. To apply the update(s), click **Finish**. Note that the SOA Container Instance must be stopped prior to applying the update(s).

Upgrade SOA Container to Policy Manager 7.2 (GUI)



3. The SOA Container update process begins and a progress indicator displays. After the update process is complete the "Update Complete" dialog displays and indicates the number of bundles that have been updated.

> **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.



4. Click **OK** on the "Update Complete" dialog. The "Configure Container Instance Wizard"

Upgrade SOA Container to Policy Manager 7.2 (GUI)

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

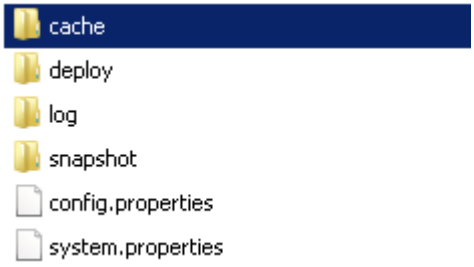
Upgrade SOA Container to Policy Manager 7.2 (Silent Upgrade)

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.
	Define Silent Upgrade Property File
	1) Define a properties file (e.g., `upgrade.properties`)
	2) Add the following default content:
	`container.instance.name=policymanager`
	`wizard.mode=update`
	Run Silent Configuration
	The "Configure Container Instance Wizard (Silent Update)" properties file accepts two system properties which together are used to perform the silent update:
	1. **silent** (If True, silent configuration will be performed)
	2. **properties** (location on filesystem of property file to be used for configuration)
	Windows:
	`\sm70\bin>startup.bat configurator "-Dsilent=true" "-Dproperties=<property file directory location>/upgrade.properties"`
	UNIX:
	`\sm70\bin>startup.sh configurator -Dsilent=true -Dproperties=opt/<property file directory location>/upgrade.properties`

2.	Run the silent upgrade.

Upgrade SOA Container to Policy Manager 7.2 (Silent Upgrade)

3.	After the silent upgrade is complete perform the following steps: 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. *Refer to SOA Software Customer Support for assistance installing the "Policy Manager 7.2.0" schema.* Users that will not be utilizing the SOA Software Administration Console can skip the remainder of this procedure.
4.	**Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 7.** Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance. 

Upgrade SOA Container to Policy Manager 7.2 (Command Line)

1.	You can also perform the upgrade process using a command line approach. Execute the following in the `sm70\bin` folder: **Windows:** startup.bat configurator "-Dsilent=true" "-Dcontainer.instance.name=<Instance name>" "-Dwizard.mode=update" **UNIX:** startup.sh configurator -Dsilent=true -Dcontainer.instance.name=<Instance name> -Dwizard.mode=update
2.	**Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 7.** Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance.

Step 7: Unregister and re-register the Windows Service

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

1.	Unregister the existing Windows Service ./sm70/bin/unregisterContainerService.bat <instance_name> Re-register the Windows Service ./sm70/bin/registerContainerService.bat <instance_name>

Step 8: Start 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.	Start the SOA Container. Start Process in Windows Navigate to `sm70\bin` and type `startup <instance name>` Start Process as Windows Service Launch Program Group (Settings /Control Panel/Administrative Tools/Services) Select `SOA Software Container Instance` - Note that the instance name is displayed as the Container Key. From "Actions" menu, select **Start**. Start Process in UNIX Navigate to `sm70/bin` and type `startup.sh <instance name>` Start Process in UNIX (Background)

	Navigate to `sm70/bin` and type `startup.sh <instance name> -bg`

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.

Step 10: Launch SOA Software Administration Console

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

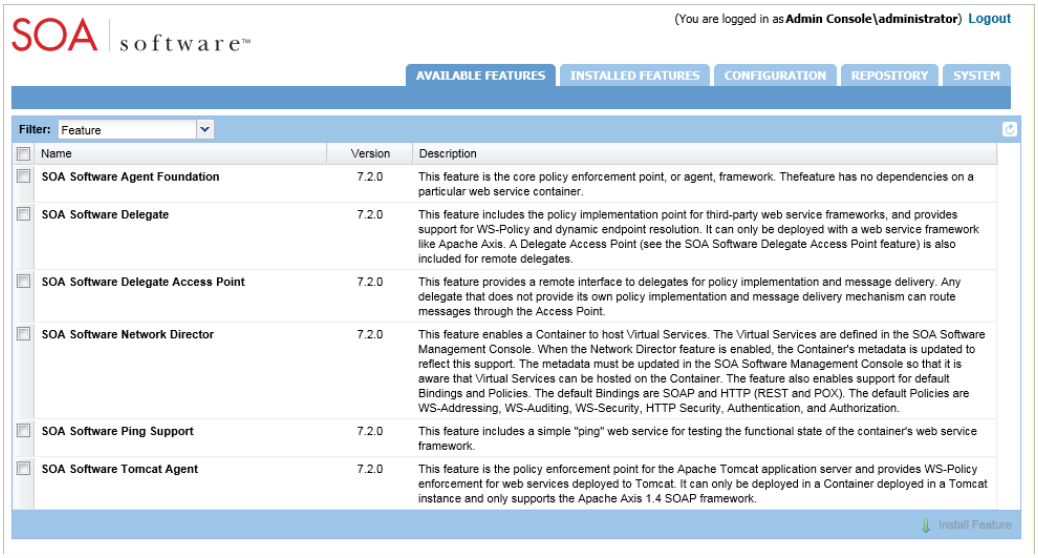
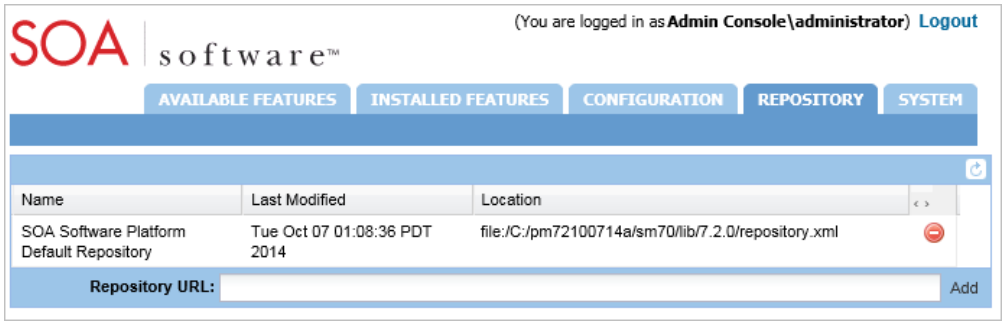


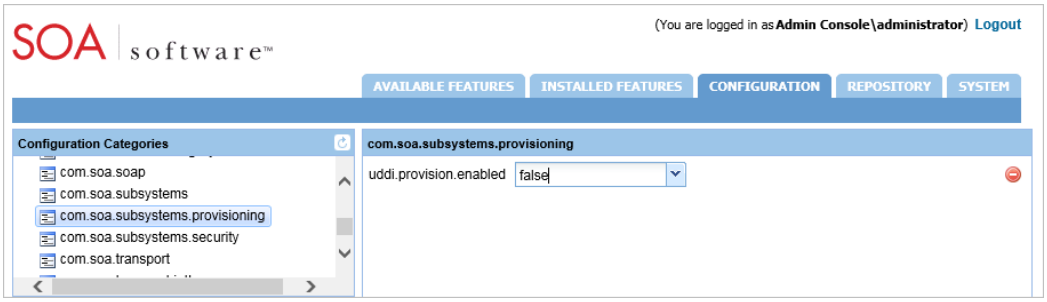
Figure. SOA Software Administration Console—*Available Features Tab*

Step 11: Refresh Repository

1.	Select the "Repository" tab and verify that the repository for the installed update is present. If it is not, click Refresh to update the repository. The repository name is "SOA Software Platform Default Repository 7.2.0." 
2.	If your SOA Container *does not* have Policy Manager features (SOA Software Policy Manager Console and SOA Software Policy Manager Services) installed, the upgrade is complete. If your SOA Container *does* have Policy Manager features (SOA Software Policy Manager Console and SOA Software Policy Manager Services) installed, continue with Steps 12, 13, 14 (if applicable), 15, and 16.

Step 12: Disable UDDI Provisioning

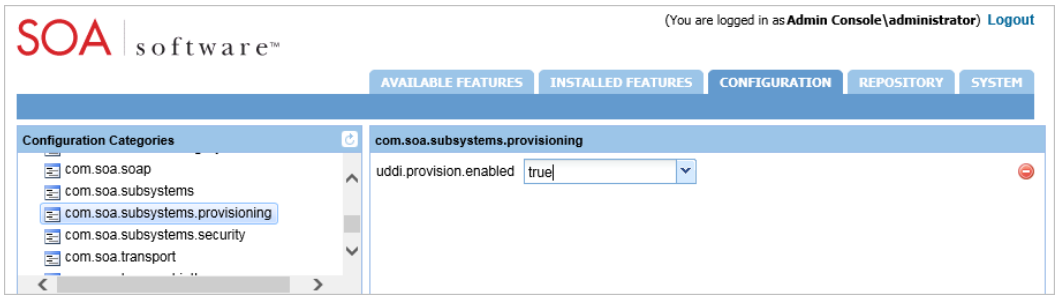
1.	Select the *Configuration* tab and set the **uddi.provision.enabled** property in the **com.soa.subsystems.provisioning category** must be set to **False**.

Step 13: 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** Name / Version / Description **Policy Manager** / 7.2.0 / Policy Manager Update 7.2.0 Schema and Data additions

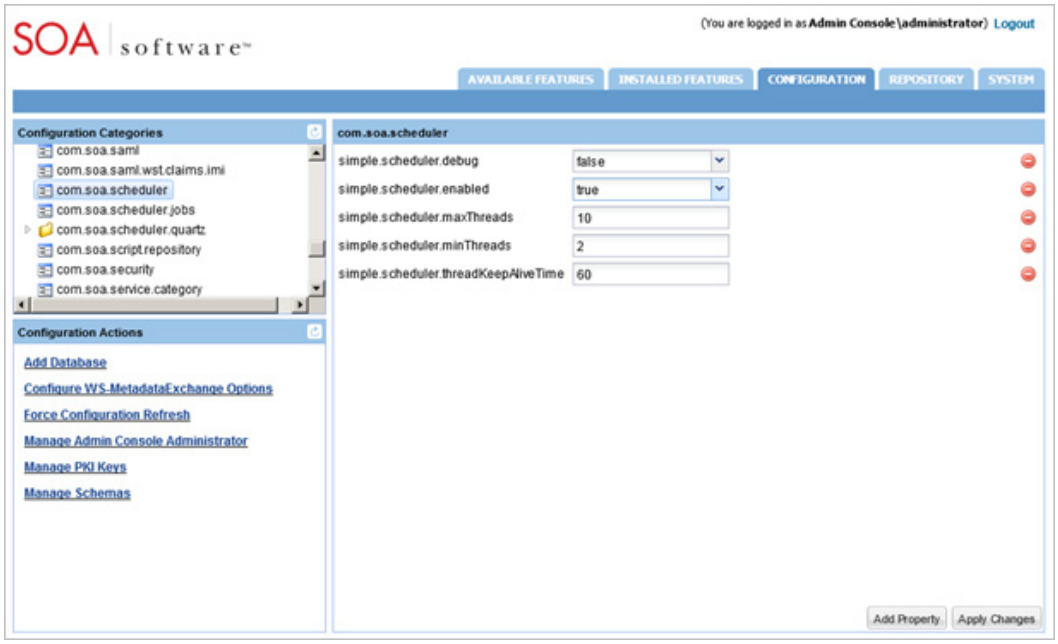
Step 14: Enable UDDI Provisioning

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

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

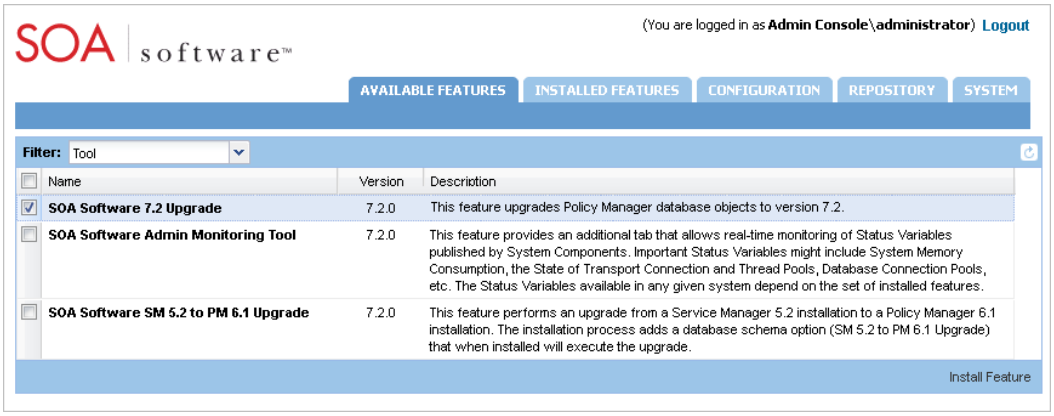
Step 16: Turn on simple.scheduler.enabled Property (for updated PM72 SOA Containers with Policy Manager Features Installed)

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 PM72. 2. Click the "Configuration" tab. 3. In the "Configuration Categories" section select `com.soa.scheduler`. 4. For the `simple.scheduler enabled` property, select **True** from the drop-down list box. 5. Click **Apply Changes** to save your entry. **Note:** This task should be performed on the Policy Manager container instance only. 

Step 17: Restart SOA Container (for SOA Containers with Policy Manager Features Installed)

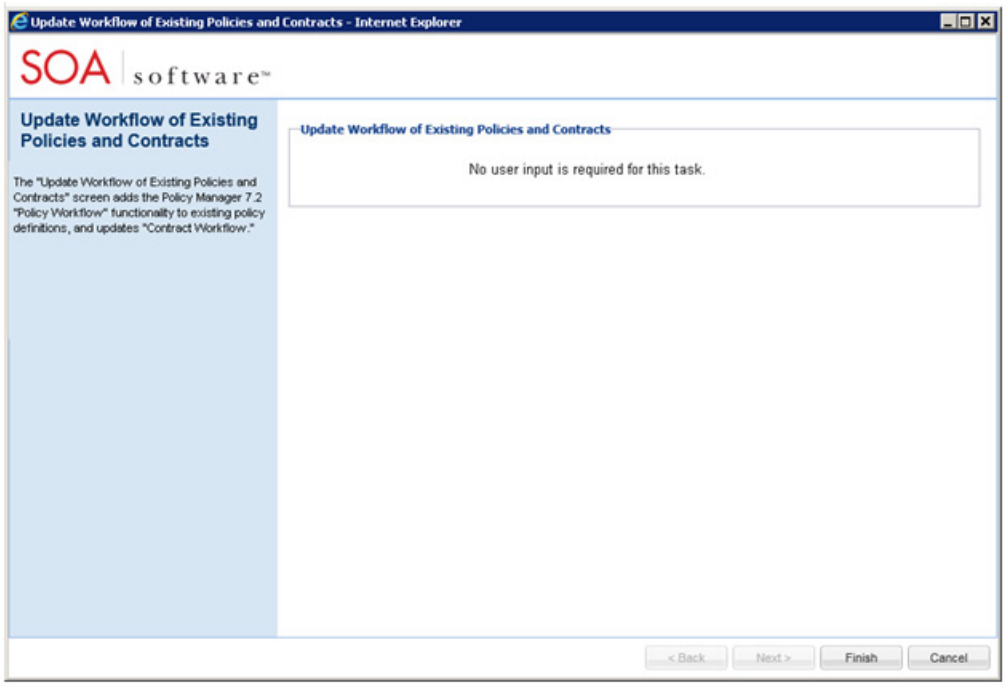
1.	Restart the container and continue to the next step.

Step 18: Install SOA Software 7.2 Upgrade

1.	After the SOA Container has successfully restarted, the next step is to upgrade the Policy Manager database. To do this: 1. Launch the *SOA Software Administration Console* for PM72. 2. Click the "Available Features" tab and select **Tool** from the *Filter* drop-down. 3. Select *SOA Software 7.2 Upgrade* and click **Install Feature**.  4. If the PM72 Schema is not yet installed the **Configure** button displays. Click it, select the PM72 schema and install it. 5. If the PM72 Schema is already installed the installation is complete. 6. Continue to the next step.

Step 19: Update Workflow of Existing Policies and Contracts

1.	The next step is to add the Policy Manager 7.2 "Policy Workflow" functionality to existing policies and update "Contract Workflow." To do this: 1. Launch the *SOA Software Administration Console* for PM72. 2. Click the "Configuration" tab. In the Configuration Actions section select the **Update Workflow of Existing Policies and Contracts** function.



3. To complete the task click **Finish**.
4. After the task is completed, restart the SOA container.

Step 20: Update Container Metadata

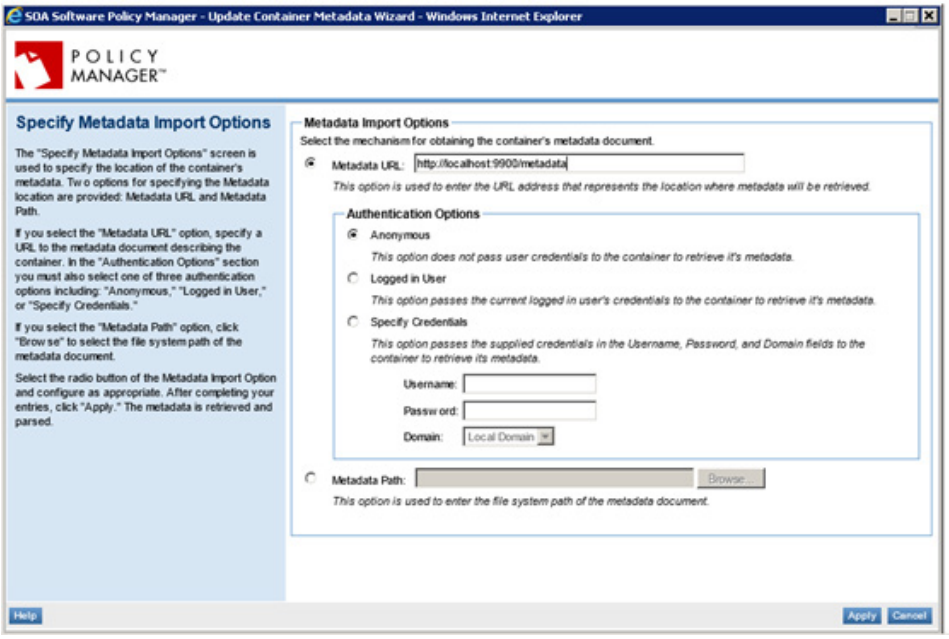
1. The final step in the upgrade process is the update the Metadata URL and Authentication Options of each container you upgraded (i.e., PM, ND, Agent). This is accomplished using the **Update Container Metadata** function in the "Containers" section of the *Policy Manager Management Console*. This process updates the container capabilities to support the latest features.

   From the *Containers* folder, select the PM72 container. From the "Actions Portlet" select **Update Container Metadata**.

   Enter the Metadata URL for the container being updated (i.e. http://<pm_host>:<pm_port>/metadata or http://<nd_host>:<nd_port>/metadata) or the Metadata Path.

   If Authentication options are being used or updated, select the authentication options.

   If the Metadata URL is not accessible from the Policy Manager, the metadata can be updated from a file by accessing the Metadata URL from a machine that has access to the container and saving the metadata document to a file.



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).

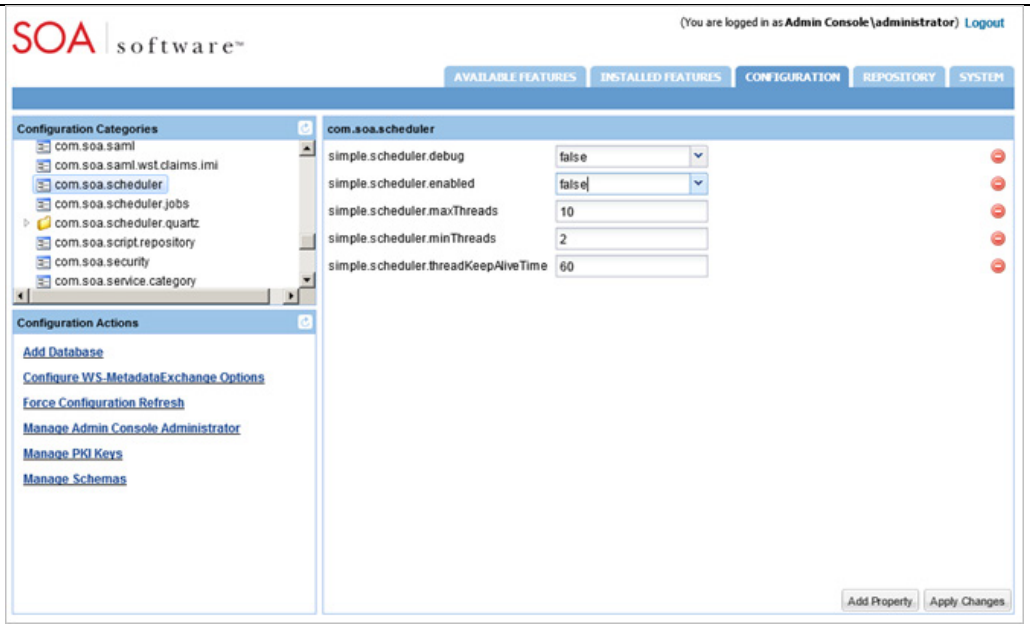
To upgrade, perform the following steps:

Step 1: Turn off com.soa.scheduler.quartz Property (for PM61 SOA Containers with Policy Manager Features Installed)

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

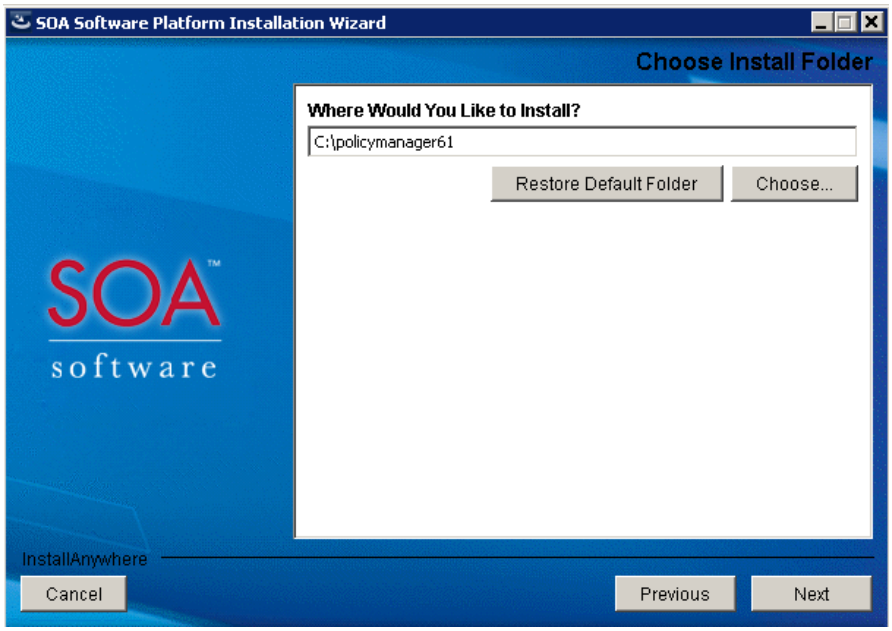
Step 2: Turn off simple.scheduler.enabled Property (for PM61 SOA Containers with Policy Manager Features Installed)

1.	Before you shut down your PM61 containers to begin the upgrade process, you must configure the `simple.scheduler.enabled` property to **False**. This will eliminate schema exceptions during startup, since the latest schema has not been installed. To do this: 1. Launch the *SOA Software Administration Console* for PM61. 2. Click the "Configuration" tab. 3. In the "Configuration Categories" section select `com.soa.scheduler`. 4. For the `simple.scheduler enabled` property, select **False** from the drop-down list box. 5. Click **Apply Changes** to save your entry. **Note:** This task should be performed on the Policy Manager container instance only.

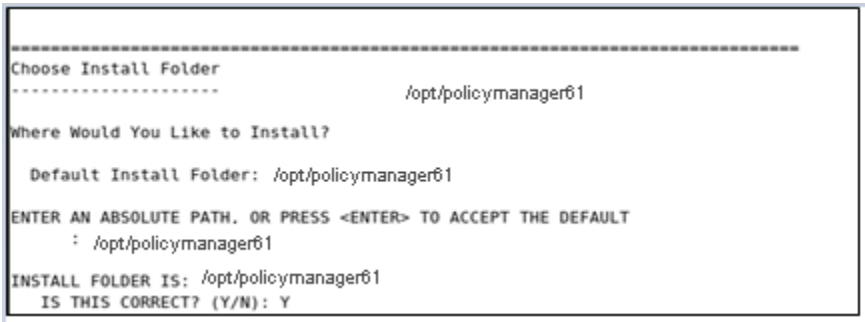
	

Step 3: Install Policy Manager 7.2

Step	Procedure
1.	Backup your PM61 Database.
2.	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. *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.*
3.	Backup your PM61 Release Directory.
4.	Delete the contents of the existing PM61 directory. Install the SOA Software Platform 7.2 application (e.g., <platform>-pm-7.2.xxxx-setup64.exe or <platform>-pm-7.2.xxxx-setup64.bin) and specify your PM61 Release Directory as the target directory. For example, if your PM61 installation is installed to the "c:\policymanager61" directory, enter that directory name: **Here for the GUI installation:**



Or here for the Console Installation:



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 4: 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 5: 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.

> **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:

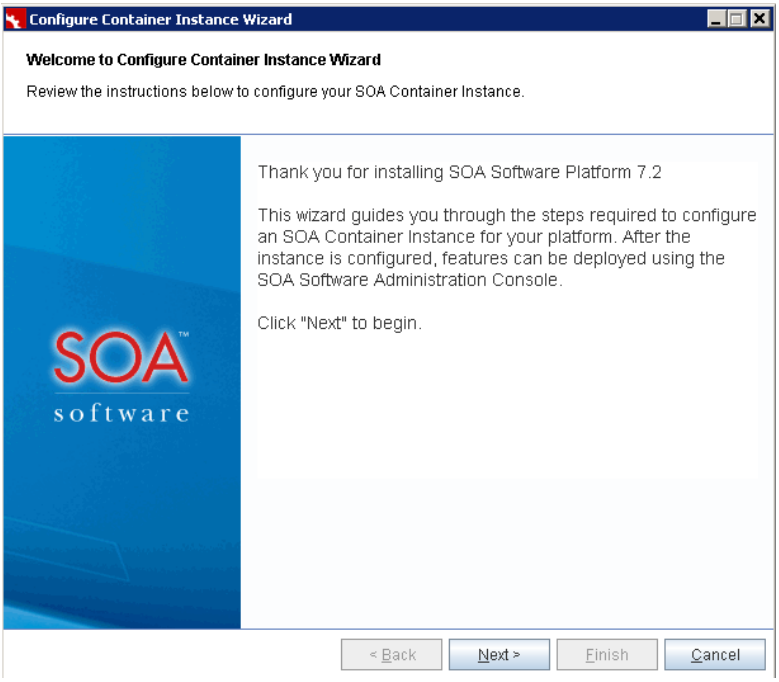
      Click the **Start** menu, navigate to the SOA Software Platform Program Group, and click **Configure Container Instance**.

   2) Perform a manual start:

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

      ```
      startup configurator
      ```

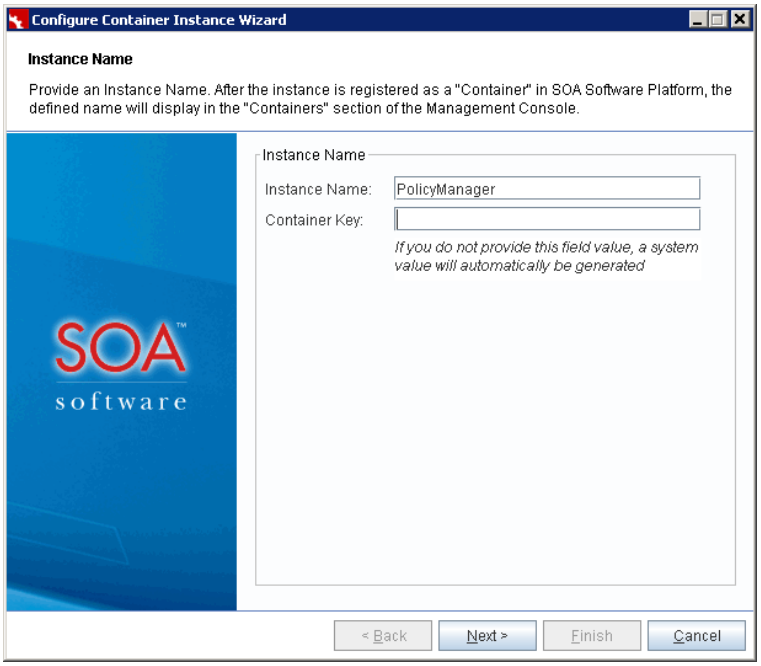
   The "Welcome to Configure Container Instance Wizard" screen displays. Review the information and click **Next** to continue.



   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.

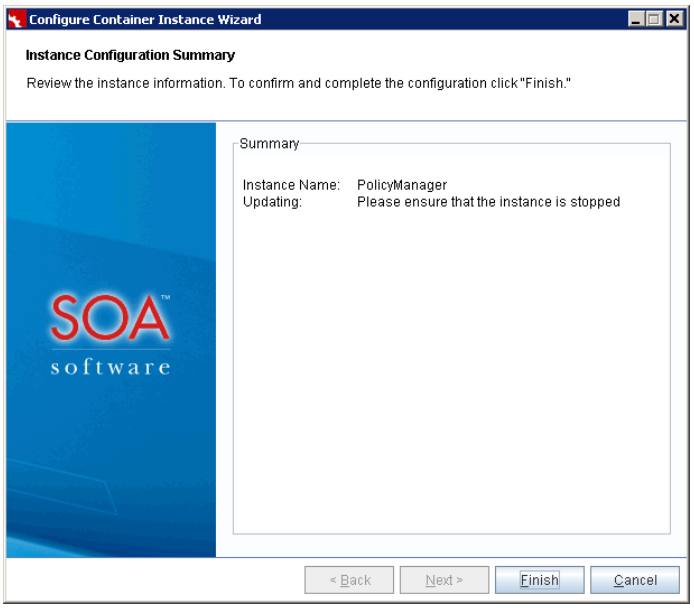
Upgrade SOA Container to Policy Manager 7.2 (GUI)

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.**

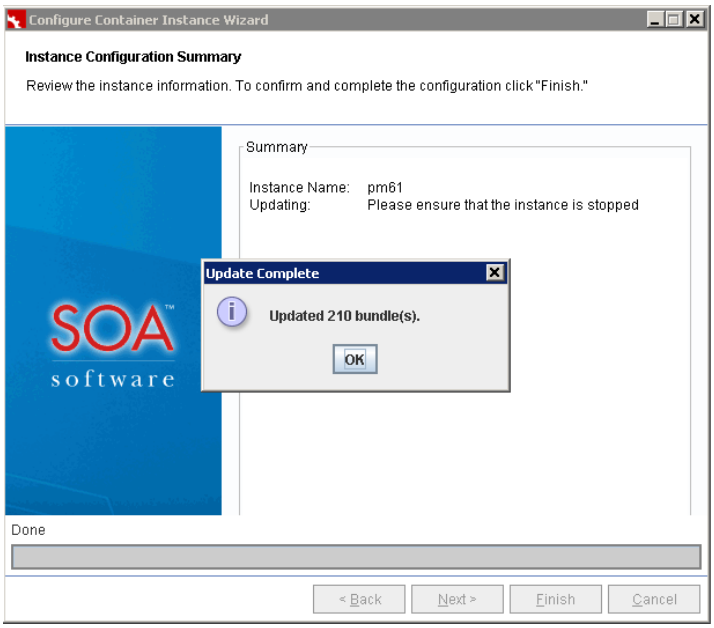
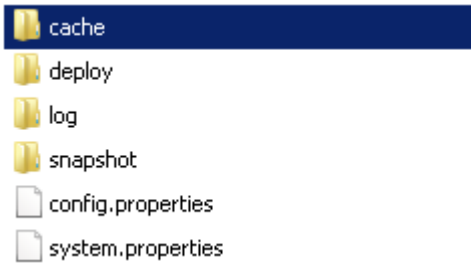


The "Instance Already Exists" screen displays. To apply the PM61 to PM72 Upgrade, click the **Update** radio button, and **Next** to continue.

Upgrade SOA Container to Policy Manager 7.2 (GUI)

	
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). 
3.	The SOA Container update process begins and a progress indicator displays. After the update process is complete the "Update Complete" dialog displays and indicates the number of bundles that have been updated. **Note:** The number of bundles displayed on the "Update Complete" message will vary based on your specific SOA Container configuration and

Upgrade SOA Container to Policy Manager 7.2 (GUI)

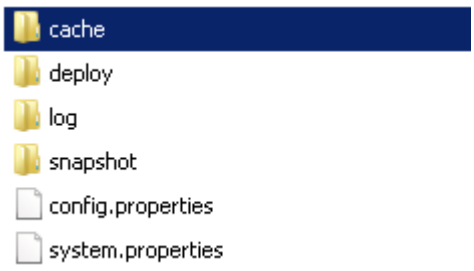
	number of updates being applied." 
4.	Click **OK** on the "Update Complete" dialog. The "Configure Container Instance Wizard" closes.
5.	**Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 5.** Note: You must clear (i.e., delete) the cache folder in the instances/configurator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

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)

	Define Silent Upgrade Property File
	1) Define a properties file (e.g., `upgrade.properties`)
	2) Add the following default content:
	`container.instance.name=policymanager`
	`wizard.mode=update`
	
	Run Silent Configuration
	The "Configure Container Instance Wizard (Silent Update)" properties file accepts two system properties which together are used to perform the silent update:
	1) **silent** (If True, silent configuration will be performed)
	2) **properties** (location on filesystem of property file to be used for configuration)
	
	Windows:
	`\sm70\bin>startup.bat configurator "-Dsilent=true" "-Dproperties=<property file directory location>/upgrade.properties"`
	UNIX:
	`\sm70\bin>startup.sh configurator -Dsilent=true -Dproperties=opt/<property file directory location>/upgrade.properties`

2.	Run the silent upgrade.
3.	After the silent upgrade is complete perform the following steps: 1) Users that will not be utilizing the SOA Software Administration Console can install the "Policy Manager 7.2.0" schema manually using a third-party Database Schema Management Tool. *Refer to SOA Software Customer Support for assistance installing the "Policy Manager 7.2.0" schema.* Users that will not be utilizing the SOA Software Administration Console can skip the remainder of this procedure.
4.	**Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 5.** Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance. 

Upgrade SOA Container to Policy Manager 7.2 (Command Line)

1.	You can also perform the upgrade process using a command line approach. Execute the following in the `sm70\bin` folder: **Windows:** startup.bat configurator "-Dsilent=true" "-Dcontainer.instance.name=<Instance name>" "-Dwizard.mode=update" **UNIX:** startup.sh configurator -Dsilent=true -Dcontainer.instance.name=<Instance name> -Dwizard.mode=update
2.	**Repeat this upgrade step on all Network Director or Agent Containers before continuing to Step 5.** Note: You must clear (i.e., delete) the cache folder in the instances/configurator folder before upgrading each instance. 

Step 6: 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 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. Note that the services must be uninstalled using the PM61 installation, and then reinstalled using the PM72 version.

1.	Unregister the existing Windows Service ./sm60/bin/unregisterContainerService.bat <instance_name>

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

Step 8: Start SOA Container

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

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

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.

Step 10: Launch SOA Software Administration Console

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

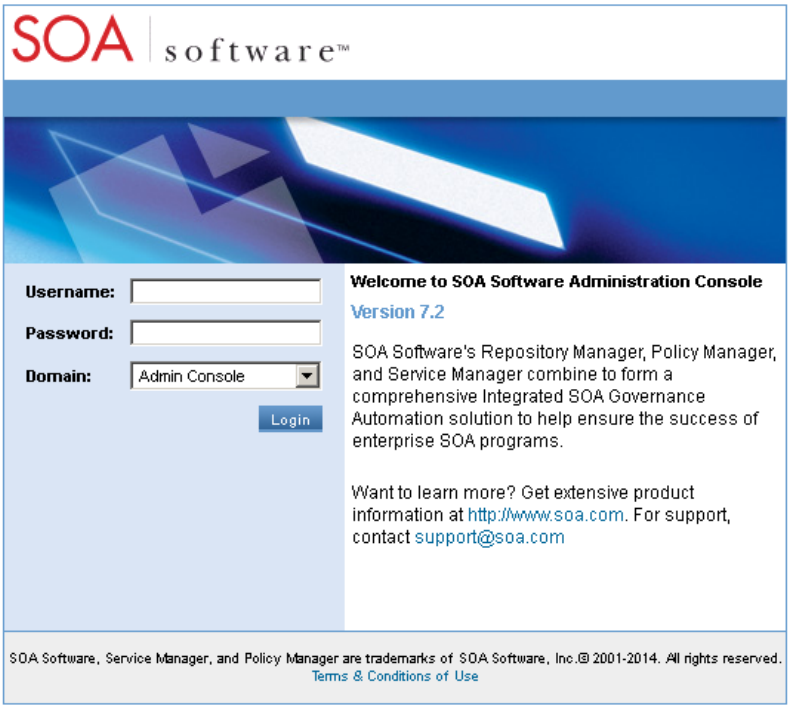


Figure. SOA Software Administration Console—*Login*

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

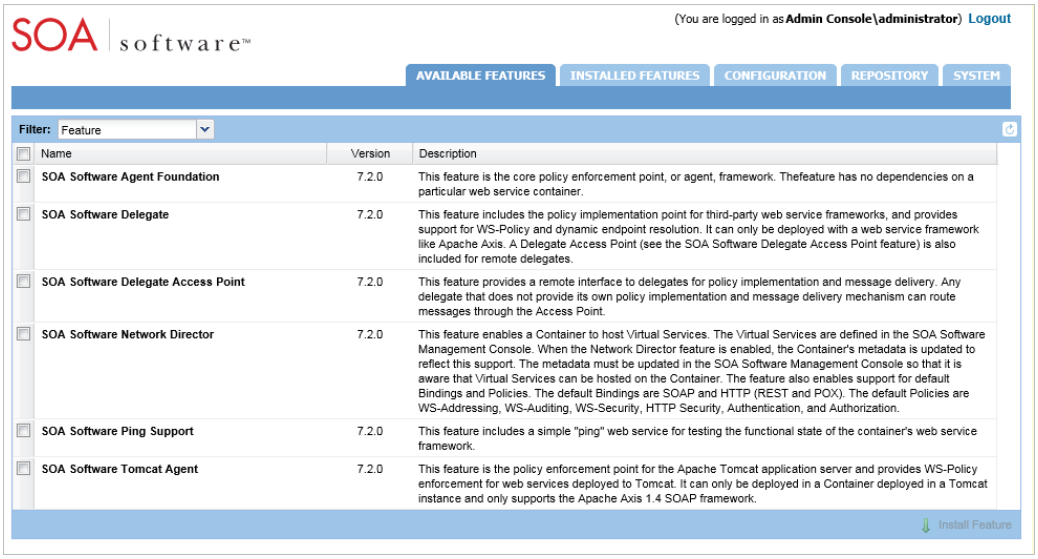
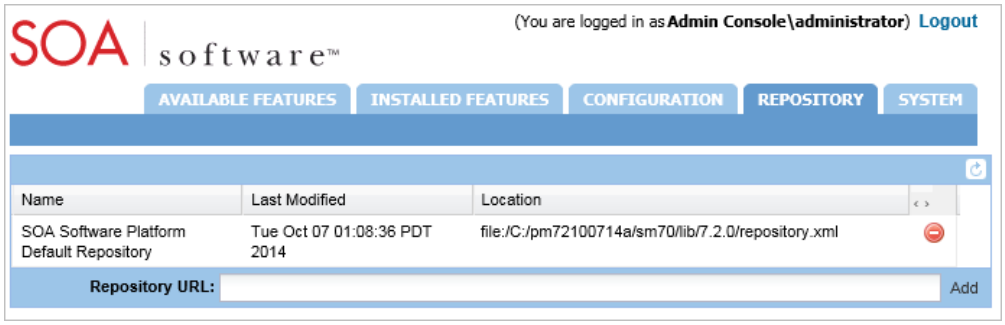
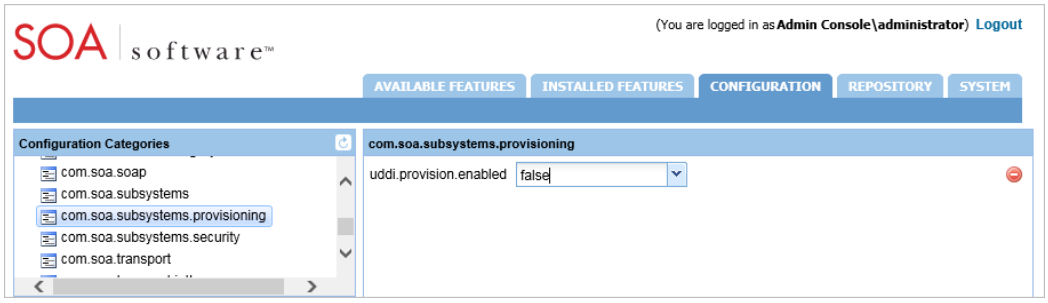


Figure. SOA Software Administration Console—*Available Features Tab*

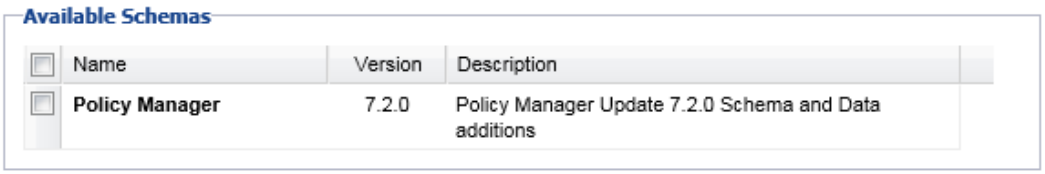
Step 11: Refresh Repository

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 11, 12 (if applicable), 13, 14, and 15.

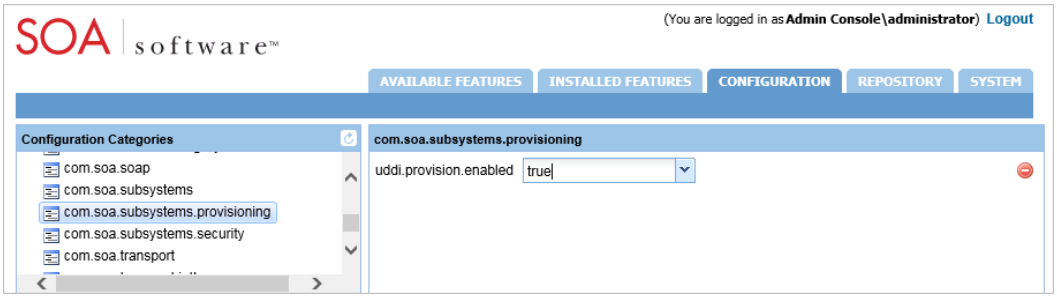
Step 12: Disable UDDI Provisioning

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

2.	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. 

Step 14: Enable UDDI Provisioning

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

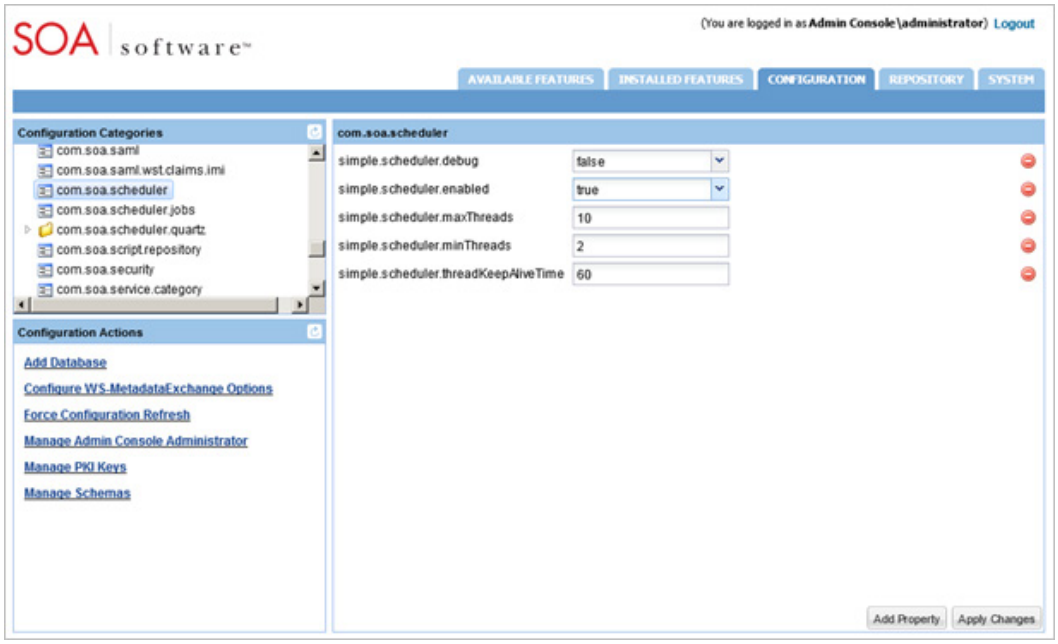
Step 15: Set Quartz Trigger Property to True--MSSQL only (for SOA Containers with Policy Manager Features Installed)

1.	If your PM72 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: • Launch the SOA Software Administration Console. • Select the *Configuration* tab and the **com.soa.scheduler.quartz** Configuration Category. • Change the **org.quartz.jobStore.acquireTriggersWithinLock** property to **True**.

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

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

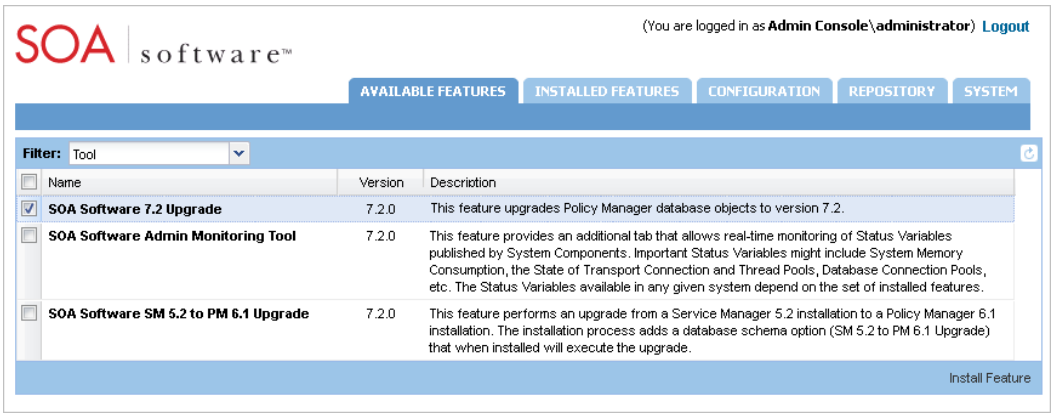
Step 17: Turn on simple.scheduler.enabled Property (for updated PM72 SOA Containers with Policy Manager Features Installed)

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 PM72. 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 18: Restart SOA Container (for SOA Containers with Policy Manager Features Installed)

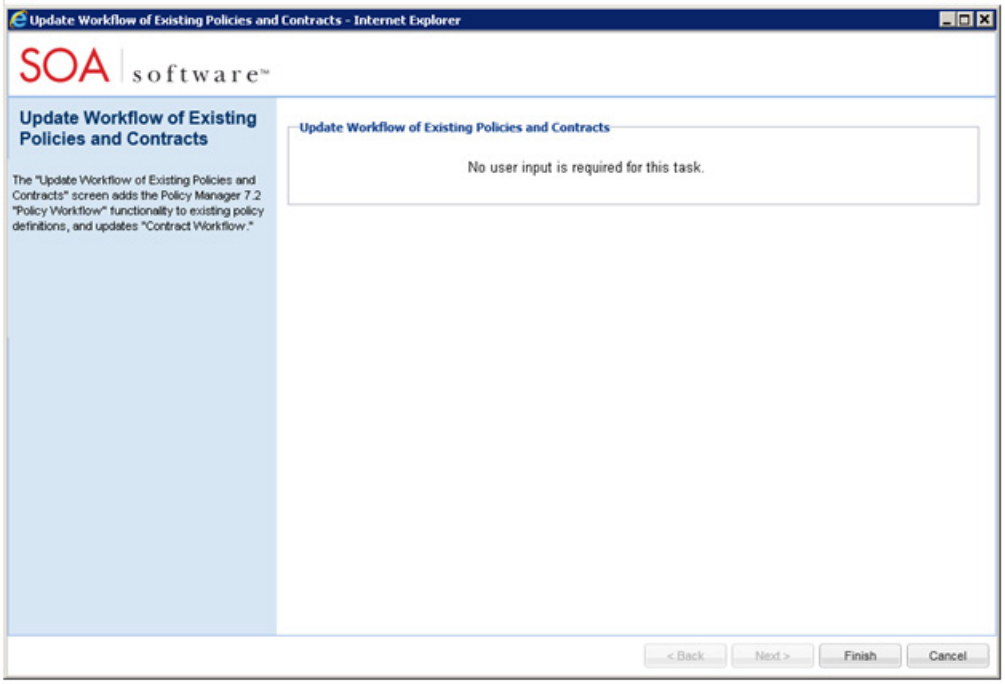
1.	Restart the container and continue to the next step.

Step 19: Install SOA Software 7.2 Upgrade

1.	After the SOA Container has successfully restarted, the next step is to upgrade the Policy Manager database. To do this: 1. Launch the *SOA Software Administration Console* for PM72. 2. Click the "Available Features" tab and select **Tool** from the *Filter* drop-down. 3. Select *SOA Software 7.2 Upgrade* and click **Install Feature**.  4. If the PM72 Schema is not yet installed the **Configure** button displays. Click it, select the PM72 Schema and install it. 5. If the PM72 Schema is already installed the installation is complete. 6. Restart the SOA Container and continue to the next step.

Step 20: Update Workflow of Existing Policies and Contracts

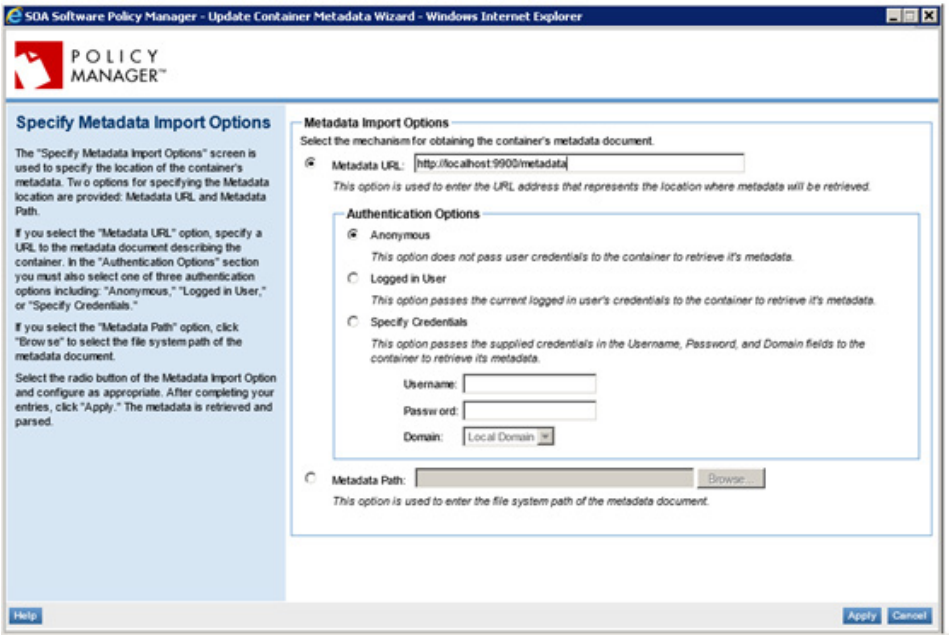
1.	The next step is to add the Policy Manager 7.2 "Policy Workflow" functionality to existing policies and update "Contract Workflow." To do this: 1. Launch the *SOA Software Administration Console* for PM72. 2. Click the "Configuration" tab. In the Configuration Actions section select the **Update Workflow of Existing Policies and Contracts** function.



3. To complete the task click **Finish**.
4. After the task is completed, restart the SOA container.

Step 21: Update Container Metadata

1.	The final step in the upgrade process is the update the Metadata URL and Authentication Options of each container you upgraded (i.e., PM, ND, Agent). This is accomplished using the **Update Container Metadata** function in the "Containers" section of the *Policy Manager Management Console*. This process updates the container capabilities to support the latest features. From the *Containers* folder, select the PM72 container. From the "Actions Portlet" select **Update Container Metadata**. Enter the Metadata URL for the container being updated (i.e. http://<pm_host>:<pm_port>/metadata or http://<nd_host>:<nd_port>/metadata) or the Metadata Path. If Authentication options are being used or updated, select the authentication options. If the Metadata URL is not accessible from the Policy Manager, the metadata can be updated from a file by accessing the Metadata URL from a machine that has access to the container and saving the metadata document to a file.



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.