

Upgrading webMethods and Intelligent Business Operations Products

Version 9.6

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This document applies to webMethods Product Suite Version 9.6 and to all subsequent releases.

Specifications contained herein are subject to change and these changes will be reported in subsequent release notes or new editions.

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About this Guide

This guide explains how to upgrade webMethods and Intelligent Business Operations products from 9.5, 9.0, or 8.2 to 9.6.

Document Conventions

Convention	Description
Bold	Identifies elements on a screen.
Narrowfont	Identifies storage locations for services on webMethods Integration Server, using the convention <i>folder.subfolder:service</i> .
UPPERCASE	Identifies keyboard keys. Keys you must press simultaneously are joined with a plus sign (+).
<i>Italic</i>	Identifies variables for which you must supply values specific to your own situation or environment. Identifies new terms the first time they occur in the text.
Monospace font	Identifies text you must type or messages displayed by the system.
{ }	Indicates a set of choices from which you must choose one. Type only the information inside the curly braces. Do not type the { } symbols.
	Separates two mutually exclusive choices in a syntax line. Type one of these choices. Do not type the symbol.
[]	Indicates one or more options. Type only the information inside the square brackets. Do not type the [] symbols.
...	Indicates that you can type multiple options of the same type. Type only the information. Do not type the ellipsis (...).

Documentation Installation

You can download the product documentation using the Software AG Installer. The documentation is downloaded to a central directory named `_documentation` in the main installation directory (SoftwareAG by default).

Online Information

You can find additional information about Software AG products at the locations listed below.

If you want to...	Go to...
<p>Access the latest version of product documentation.</p>	<p>Software AG Documentation website http://documentation.softwareag.com</p>
<p>Find information about product releases and tools that you can use to resolve problems.</p> <p>See the Knowledge Center to:</p> <ul style="list-style-type: none"> ■ Read technical articles and papers. ■ Download fixes and service packs (9.0 SP1 and earlier). ■ Learn about critical alerts. <p>See the Products area to:</p> <ul style="list-style-type: none"> ■ Download products. ■ Download certified samples. ■ Get information about product availability. ■ Access older versions of product documentation. ■ Submit feature/enhancement requests. 	<p>Empower Product Support website https://empower.softwareag.com</p>
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Upgrade Overview

This guide explains how to upgrade webMethods and Intelligent Business Operations products from 9.5, 9.0, or 8.2 to 9.6 using a side-by-side procedure. The tasks in the procedure are required for all releases unless specifically noted as being required for a certain release only.

Release Numbering

In most cases, products follow the product suite numbering, and you can only upgrade a product from its latest release. For example, if the latest release of a product in product suite 8.2 was 8.2 SP2, you can only upgrade that product from 8.2 SP2.

Exceptions are as follows:

- In product suite 9.6, the Terracotta release is 3.7.6. If you installed Terracotta 3.7.6 as part of your product suite 9.5, 9.0, or 8.2 installation, therefore, no upgrade is necessary. If your product suite 9.5, 9.0, or 8.2 installation includes a Terracotta release prior to 3.7.6, however, you must upgrade from those releases to 3.7.6.
- 8.2 upgrade: In product suite 8.2, the OneData release was 8.4. You can upgrade from that release.

Terms Used in this Chapter

For simplicity, this guide uses these terms:

- For most products, the product suite releases from which you can upgrade are referred to as 9.5, 9.0, or 8.2. However, you can upgrade to 9.6 only from the latest release of each 9.5, 9.0, or 8.2 product.
- The product suite release to which you can upgrade is referred to as 9.6. However, the instructions in this guide are for upgrading to the latest release of each 9.6 product.

Guides Needed to Perform Upgrades

You will always need the guides listed below to perform this procedure.

- *Using the Software AG Installer (April 2014 release)*
- *Installing webMethods and Intelligent Business Operations Products 9.6*
- *Using the Software AG Update Manager*

Depending on the products you are upgrading, you might need the 9.6 guides and other guides listed below to perform this procedure.

- *webMethods BPM Task Development Help*

- *Using Blaze Rules with BPM and CAF*
- CentraSite documentation
- *webMethods Deployer User's Guide*
- *webMethods Integration Server Administrator's Guide, webMethods Service Development Help, and webMethods Integration Server Clustering Guide*
- *Administering webMethods Optimize and Configuring BAM*
- Terracotta documentation

Requirements and Recommendations

- You must upgrade products and migrate data in the order the instructions are presented in this guide.
- Software AG strongly recommends that you upgrade in a controlled test environment and test that environment for proper operation before upgrading your production environment.
- Software AG tests migration across machines that have the same hardware and operating systems. Integration Server also tests migration across machines that have different hardware or different operating systems. However, for other products, migration across machines that have different hardware or operating systems might have unpredictable results, especially when one machine is Windows and the other UNIX.

Upgrades Not Covered in This Guide

- If you want to upgrade from a release earlier than 8.2, you must first upgrade to 8.2, 9.0, or 9.5 using the 8.2, 9.0, or 9.5 upgrade guide, respectively, and then upgrade from that release to 9.6 using this guide.
- If you want to install webMethods Broker 9.6 on a machine that is running a different operating system or has different hardware than the old machine, or if you want to upgrade webMethods Broker 8.2, 9.0, or 9.6 to 9.6 on an IBM System z machine that is running SUSE Linux Enterprise Server or Red Hat Enterprise Linux, you will need to create new storage, and then migrate Broker Server configuration information from the old storage to the new storage using the webMethods Broker export/import utilities. For instructions, see *Administering webMethods Broker 9.6*.
- If you want to install the CentraSite 9.6 Registry Repository or Application Server Tier over the old CentraSite Registry Repository or Application Server Tier, see the CentraSite 9.6 documentation for instructions.
- If you want to upgrade MashZone or Process Performance Manager, see the 9.6 product documentation.

- If you want to upgrade Mobile Designer, you can use an automatic update option. For instructions, see the Mobile Designer 9.6 documentation.
- If you want to upgrade Content Service Platform, contact Software AG Global Consulting Services.
- The procedure for upgrading Terracotta explains how to upgrade a Terracotta Server Array that has a single server or a mirror group consisting of an active server and a mirror server. If you want to upgrade any other setup, see the Terracotta 3.7.6 documentation.

2 Upgrading Products to the New Release

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Overview

This chapter explains how to upgrade products in product suite 9.5, 9.0, or 8.2 to 9.6 using a side-by-side procedure. For some products, you must perform additional tasks to complete the upgrade or to migrate data. Subsequent chapters provide instructions for those tasks.

Before You Install 9.6 Products

This section provides information to consider before installing the indicated products.

Before You Install CentraSite

If you want to install the CentraSite Application Server Tier and CentraSite Registry Repository on different machines, or in the same directory but at different times, you must install the Registry Repository first.

If you install CentraSite 9.6 on the same machine as the old CentraSite, you will not be able later to run both products at the same time, even if they use different ports, because of conflicts for IPC and shared memory resources.

Before You Install webMethods Broker

You can do the following for webMethods Broker:

- Install webMethods Broker 9.6 on the same machine as the old webMethods Broker.
- Install webMethods Broker 9.6 on a new machine that is running the same or higher operating system (for example, Windows 2008 from Windows 7, or Linux 6.3 from Linux 5.5) and has the same hardware (for example, both have AMD, or both have Intel) as the old machine.

In both cases, you will reuse your old storage.

Before You Install Integration Server

If you are going to upgrade a cluster of Integration Servers, Software AG recommends the procedure below.

- 1 Install a matching set of 9.6 Integration Servers. For example, if you have a cluster of three old Integration Servers named IS1_old, IS2_old, and IS3_old, with an external load balancer to distribute client requests, install IS1_new, IS2_new, and IS3_new.
- 2 Perform the steps in [“Prepare OneData” on page 20](#) for each Integration Server in the cluster.
- 3 Shut down IS1_old.

- 4 Migrate IS1_old data to IS1_new and customize the IS1_new startup files using the instructions in [“Completing the Integration Server and Hosted Products Upgrade” on page 47](#).
 - 5 Shut down IS2_old and IS3_old.
 - 6 Do the following for IS1_new:
 - a Start IS1_new.
 - b If IS1_old was not configured to use a Terracotta-based clustering solution, configure IS1_new to use a Terracotta-based clustering solution. Make sure IS1_new is processing client requests. For instructions, see *webMethods Integration Server Clustering Guide 9.6*.
-
- Important!** Support for Coherence was discontinued in release 9.0.
-
- c Update WSDLs, connect functions to database components, and set up central user management on IS_new as described in [“Completing the Integration Server and Hosted Products Upgrade” on page 47](#).
- 7 Repeat steps 4 and 6 for IS2_new and then for IS3_new.

Before You Install My webMethods Server

For your old release, you might have identified a default My webMethods Server installation in the global path of the installation’s host machine using the environment variable WM_HOME. If you are going to install the new release on the same machine as the old release, the existence of this variable could cause problems, so you must remove the environment variable from the global path.

Do not redefine the environment variable after installing My webMethods Server 9.6.

Install the 9.6 Products

If you are installing on the same machine as your old release, the installer often allows you to assign ports used by an old product to the new product as well, even if the old product is running. Assigning the same ports means you will not need to edit port values in assets and clients when you begin using the new release.

Follow the instructions in *Using the Software AG Installer* (April 2014 release) and *Installing webMethods and Intelligent Business Operations Products 9.6* to install your new products, with the additional guidelines below.

- 1 For installation directory, specify a new Software AG installation directory.
- 2 On the product tree, select the 9.6 products to install. If you are upgrading Universal Messaging, make sure Universal Messaging > Migration Utilities is selected. Also select Database Configuration and Update Manager.

Note: In product suite 8.2, the Blaze design tool is Blaze Advisor. In 9.0, it is a Blaze plug-in to Designer. In 9.5 and 9.6, for compatibility reasons, the Blaze plug-ins are delivered in a self-contained workbench that is based on Eclipse 3.6 and is separate from Designer 9.5 and 9.6, which is based on Eclipse 4.3.

- 3 For the product panels, follow the instructions in *Installing webMethods and Intelligent Business Operations Products 9.6*, with the additional guidelines below.

Product	Guidelines
ActiveTransfer Server	Point the database connection at the ActiveTransfer database component you want to use with ActiveTransfer Server 9.6.
webMethods Broker	Choose to <i>not</i> create a Broker Server configuration.
Integration Server	Point the database connection at the ISInternal database component you want to use with Integration Server 9.6.
My webMethods Server	Choose to <i>not</i> create a My webMethods Server instance. Note: You will migrate old server instances later in this procedure. You will also migrate the My webMethodsServer database component you want to use with My webMethods Server 9.6, then point to that database component later in this procedure.
OneData	Enter the values you noted earlier for port, repository ID, and repository name, and database component connection. Make sure the database connections point to the OneData database components you want to use with OneData 9.6. Note: Reusing port values means that Web service clients of the old OneData do not have to change URLs to access OneData 9.6.
Trading Networks	Point the database connection at the TradingNetworks database component you want to use with Trading Networks 9.6.
Universal Messaging	Enter the name that matches the name of a server instance in the old Universal Messaging installation and bind to that server instance's IP address and port. Point the data directory to a location in the new installation (that is, do not point to the old data directory). Note: If you accept the default location for the data directory, it will be migrated automatically later. If you use a different location, you will have to migrate it manually.

- 4 If you installed on a Windows system, and you installed products as Windows services, the default startup for the services is Automatic. Set the services to Manual. If you installed on a UNIX system, and you have scripts that automatically start daemons, disable the scripts.

Important! Do not start any 9.6 products at this point, or before migrating database components or data. Do not start 9.6 products before the instructions in this guide tell you to do so, or your database components could become corrupted.

Prepare the Old Environment for Upgrade

Prepare Databases

Some products, like CentraSite, Monitor, Optimize, and Trading Networks, offer features to archive or purge data from product database components. You can reduce the amount of time needed to back up and migrate the product database components by archiving or purging them first.

Apply Fixes

Apply the latest fixes to the old CentraSite, the old Optimize, and the old Infrastructure Data Collector using the Software AG Update Manager. For instructions, see *Using the Software AG Update Manager*.

Prepare CentraSite

- 1 If you changed settings for CentraSite Control from their defaults, note those settings so you can make the same changes in the new CentraSite installation.
- 2 8.2 upgrade: The metamodel that defines the internal structure of ApplinX object types changed in release 9.0 and is not compatible with the old metamodel. CentraSite 9.6 does not support the use of object type instances that are based on the old ApplinX object types. CentraSite 9.6 does not allow ApplinX object types or instances from old product releases to be imported, and there is no procedure to migrate old instances to the new metamodel. If you want to use ApplinX object type instances from the old product release in CentraSite 9.6, you will have to manually re-create the instances after you install CentraSite 9.6. Note the definitions of all your ApplinX object type instances.

Prepare Designer

Export Integration Server Definitions

- 1 In the old Designer, go to **Window > Preferences**. On the Preferences dialog box, in the left navigation bar, go to **Software AG > Integration Servers**.
- 2 Click **Export** and complete the dialog box. Designer will save the file with the extension `.properties`.

Export CloudStreams Server Definitions and Projects

- 1 In the old Designer, go to the **CloudStreams Development** perspective.
- 2 To export CloudStreams Server definitions, go to **Window > Preferences**. On the Preferences dialog box, in the left navigation bar, go to **Software AG > CloudStreams Servers**. Click **Export** and complete the dialog box. Designer will save the file with the extension `.properties`.
- 3 In the CloudStreams Governance list, right-click **CloudStreams Governance projects to export**, click **Export**, and complete the dialog box.
- 4 Repeat the previous step to export CloudStreams Provider projects.

Export Event Bus Console Configurations

- 1 In the old Designer, open the **File > Export** wizard. In the Select panel, go to **Run/Debug > Launch Configurations** and click **Next**.
- 2 In the tree, select the Event Bus Console configurations. In the **Location** field, specify the directory to which to export. Designer will save each file with the extension `.launch`.

Export Preferences

If you want to migrate your preferences to Designer 9.6, you export them from the old Designer and then import them into Designer 9.6. To export the preferences, do the following:

- 1 In the old Designer, open the **File > Export** wizard. In the Select panel, go to **General > Preferences** and click **Next**.
- 2 In the **To preference file** field, specify the name of the file to which to export your preferences. Designer will save the file with the extension `.epf`.

Prepare Integration Server

- 1 If you are using webMethods Broker, shut down Broker Monitor 9.6 if it is running. Then start the old Broker Monitor, and then start the old Broker Server.
- 2 Start the old Integration Server.

- 3 Suspend document retrieval for all triggers and make sure all guaranteed messages have finished processing, as follows:
 - a Open Integration Server Administrator and point to the old Integration Server.
 - b Go to Packages > Management. Click View Locked Elements, click Unlock Elements, select all elements of triggers, and then click Unlock Selected Elements.
 - c 8.2 or 9.0 upgrade: Go to the Settings > Messaging > Broker/Local Trigger Management page. In the Individual Trigger Controls area, in the Active column under Document Retrieval, click edit all and set Retrieval State to Suspended. Refresh the page until the Persisted Queue Counts field shows 0 for every trigger.
 - d 9.5 upgrade: Go to the Settings > Messaging > webMethods Trigger Management page. In the Individual Trigger Controls area, in the Active column under Document Retrieval, click edit all and set Retrieval State to Suspended. Refresh the page until the Current Queue Counts field shows 0 for every trigger.
- 4 If you are using webMethods Broker, make sure all outbound Broker messages in the client side queue have been sent, as follows:
 - a Make sure Integration Server is connected to the Broker.
 - b Go to the Settings > Resources > Store Settings page. In the Outbound Document Store area, make sure the Current Documents in Outbound Store field shows 0.
- 5 Make sure all outbound JMS messages in the client side queue have been sent, as follows:
 - a Make sure Integration Server is connected to the JMS providers.
 - b Go to the Settings > Messaging > JMS Settings page. In the JMS Connection Alias Definitions area, make sure the CSQ Count field shows 0 for every JMS connection alias.
- 6 If you are going to upgrade business processes, and you have business process models that use volatile transition documents and process instances of those models are in a Started state, allow the Started processes instances to complete or suspend them before you upgrade.

Important! If you do not allow Started process instances to complete or suspend before you upgrade, you could lose data.

Note: Started process instances of models that use guaranteed transition documents do not have to complete or be suspended before you upgrade.

Prepare OneData

- 1 In the old OneData, go to the **Home > Administer > Job Center** page. On the **Filter** page, for each job type, filter by **Active** or **Pending Active**. If a job has one of these statuses, terminate the job or wait for it to complete.
- 2 In the file system, go to the *old_Software* *AG_directory*\profiles\ODE\configuration\tomcat\conf directory and open the context.xml file. Note the connection prefix located at the beginning of the schema user name (for example, in the metadata schema user name dev2_md, the connection prefix is dev2). Also note the database connection parameters for the metadata, work area, and release area database schemas.
- 3 Note the port numbers, as follows:
 - a 8.4 upgrade: Go to the *old_Software* *AG_directory*\profiles\ODE\configuration\tomcat\conf directory and open the server.xml file. Note the HTTP and HTTPS port numbers in the port attribute of the **Default CTP HTTP Connector** and **Default CTP HTTPS Connector** files, respectively.
 - b 9.0 or 9.5 upgrade: Go to the *old_Software* *AG_directory*\profiles\ODE\configuration\com.softwareag.platform.config.prop loader director. Open the com.softwareag.catalina.connector.http.pid-port.properties and com.softwareag.catalina.connector.https.pid-port.properties files and note the port numbers.

Prepare Optimize

- 1 If you want to reuse your Central Configuration System (CCS) Environment definition, export the environment to an XML file. In **My webMethods**, go to the **Administration > System-Wide > Environments > Define Environments** page. Select the check box next to the environment, click **Export**, and provide a file name and location for the exported environment.
- 2 8.2 upgrade: If you have Integration Servers that are clustered using Oracle Coherence, you will reconfigure them later in this guide to use a Terracotta-based clustering solution instead. Prepare for this change as follows:
 - a If you are monitoring the clustered Integration Servers, stop monitoring them.
 - b If you have KPIs for the clustered Integration Servers, go to the **Applications > Administration > Analytics > Infrastructure Components > Monitored Components** page. In the **Monitored Components** list, click **IS Cluster**. Note the KPIs listed in the **Selected KPIs** box, delete the KPIs, and then click **Save**.

Note: KPI data that was gathered from the clustered Integration Servers will not be available in Optimize 9.6.

- 3 If you want to cluster Analytic Engines in the new installation, you will need a Terracotta Server Array. For planning information, see *Getting Started with the webMethods Product Suite and Terracotta 9.6*, *Configuring BAM 9.6*, and the Terracotta 9.6 documentation.

Shut Down the Old Products

Shut down your old products. For a UNIX system, use the instructions in the product documentation for your old release. For a Windows system:

Products running as...	Shut down from...
Services	Windows Services window. Services are listed as Software AG <i>product release</i> .
Applications	Windows Start menu. Applications are listed as Software AG > Stop Servers > <i>product</i> .

If you are upgrading a cluster of My webMethods Servers, shut down all cluster nodes. A cluster is defined as multiple nodes that point to the same MywebMethodsServer database component. Nodes can be My webMethods Server installations or server instances within a My webMethods Server installation.

If you are upgrading CentraSite, and the old and new CentraSite are on the same machine:

- 8.2 upgrade: Shut down all old Application Server Tiers by stopping the CentraSite Apache and Tomcat Server services.
- 9.0 or 9.5 upgrade: Shut down all old Application Server Tiers by stopping the Software AG Runtime services.
- Shut down the old Registry Repository by stopping its service.

If you are upgrading EntireX, also shut down all Brokers, RPC Servers, and customer applications that use EntireX libraries. See the instructions in the product documentation for your old release.

Migrate Database Components

Back Up the RDBMSs

Back up the RDBMSs that contain your database components using the vendor instructions for your RDBMS.

If you are upgrading My webMethods Server, back up the My webMethods Server installation directory at the same time you back up the MywebMethodsServer database component. If you have problems, you will need data from the backup to restore the database.

Upgrade the RDBMSs

Check your RDBMSs against *webMethods and Intelligent Business Operations System Requirements 9.6*. If the RDBMS version you are using is not supported by your 9.6 products, you must upgrade to a supported RDBMS version before you continue with the instructions in this chapter.

Shut Down Products that Connect to Database Components

If you have not already done so, shut down all old Integration Server, My webMethods Server, OneData, and Optimize instances that connect to database components.

8.2 or 9.0 Upgrade: Before You Migrate Trading Networks Database Components

- 1 Use your data editor to delete all data from the ARCHIVE_WORKTABLE table in the TradingNetworksArchive database component.
- 2 If you created custom indexes for your Trading Networks database components, check whether those custom indexes conflict with indexes that will be created when you run the Trading Networks migration scripts in the next step. If so, drop the custom indexes. The migration scripts are located in the *9.6_Software AG_directory*\common\db\scripts\RDBMS\tradingnetworks\migrate directory, under these directories:
 - 8.2 upgrade: Under the \39_40 and 40_to_45 directories.
 - 9.0 upgrade: Under the \40_to_45 directory.

Special Considerations for Migrating Other Database Components

If you are using business processes, you have stored information about in-progress, completed, or failed business process instances. This stored information is called business process run-time data. If you do not want to finish running in-progress process instances or resubmit completed or failed process instances from your old installation in product suite 9.6, do not migrate your business process run-time data (see table below).

If you are using Optimize with a DB2 RDBMS, there are special considerations for the URL you specify on the database component migration command. You must do the following:

- Specify the schema name in the URL using all capital letters.

- Specify the options `CreateDefaultPackage=true, ReplacePackage=true, and DynamicSections=3000`. These settings will affect all database components in the same schema or database.

Database Component Names

Database component names you might use in the migration command are as follows:

If you are migrating this data...	Specify these <i>database_component</i> values
ActiveTransfer Server	ActiveTransfer
Business process run-time	ProcessAudit, ProcessEngine, Archive, Staging, Reporting
Business rules	BusinessRules
Integration Server	ISInternal, ISCoreAudit, CrossReference, DocumentHistory, DistributedLocking
My webMethods Server	MywebMethodsServer
OneData	OneDataMetadata, OneDataReleaseArea, OneDataWorkArea
Optimize	Analysis, ProcessTracker, ProcessAudit, DataPurge
Trading Networks	TradingNetworks, TradingNetworksArchive

Migrate Database Components

Important! After you migrate database components to 9.6, you can no longer use them with your old environment.

On the machine on which you installed Database Configuration 9.6, open a command window, go to the `9.6_Software AG_directory\common\db\bin` directory, and migrate database components by running the commands below. After you run each command, check the log file `dcc_yyyymmddhhmmss` in the `9.6_Software AG_directory\common\db\logs` directory.

- If you want to migrate all your database components, run this command:

```
dbConfigurator.{bat|sh} -a migrate -d {oracle|sqlserver|db2|uw} -c all
-v latest -l db_server_URL -u existing_db_user -p password
```

Note: Since you most likely do not have all database components (because you do not have all products in the product suite), you will see messages in the log file that say migration failed for the database components you do not have. You can ignore these messages.

- If you do not want to migrate all your database components, run this command for each database component you need to migrate:

```
dbConfigurator.{bat|sh} -a migrate -d {oracle|sqlserver|db2|uw}  
-c database_component_name -v latest -l db_server_URL -u existing_db_user  
-p password
```

Complete the Side-by-Side Upgrade

To complete the side-by-side upgrade procedure, perform the steps in the product-specific chapters that follow. For many products, the steps you perform in these chapters include running a migration utility that automatically migrates data from the old installation to the new installation. The section below describes the general behavior of the migration utilities. Any exceptions to the general behavior are noted in the product-specific chapters.

Migration Utilities

Some migration utilities for some products run without prompting you for any information. Migration utilities for other products ask you to select the data to migrate, and offer these options:

- You can run a custom migration, in which you select the data to migrate. The utility gathers your settings through a series of prompts, then migrates the selected data. You can export your settings and use them in other upgrades.
- You can run a migration with imported settings. The imported settings can come from settings you exported from a custom migration, or from the default migration provided with the product installation. The settings for default migrations are described in the product-specific chapters.

Note: When you run migration utilities, you provide the full path to the old installation, and sometimes the path to the 9.6 installation. If you supplied a symbolic link as the installation directory when you installed the old or 9.6 product, the path you provide to the migration utility must be the same symbolic link path you supplied during installation.

If a migration utility fails to migrate a piece of data, the utility asks whether to continue with the next piece of data or abort the migration. If you choose to abort, the utility exits. The utility does not revert the 9.6 product installation. You can address the issue and rerun the utility.

Migration utilities write detailed migration information to the command window and to the migrationLog.txt file in the *9.6_Software AG_directory*\install\logs directory. By default, utilities write INFO, ERROR, and FATAL messages to the log. If you want to increase the logging level for a product's migration to DEBUG, go to the product directory that contains the log4j.properties file (for example, the *9.6_Software*

AG_directory\product\bin\migrate or *\migrate\bin* directory), open the file in a text editor, set the `log4j.logger.Migration` property to `DEBUG`, `MigrationFile`, and save and close the file.

Use of Zip File as Old Installation

If your old and new product installations are on different machines, you can use a Zip file of the old product installation as the source of the data to migrate. The instructions in this guide use the Java Archive tool to create the Zip file. Specify the location of the Java Archive tool in the `JAVA_HOME` and `PATH` system variables on the machine that hosts the old product installation. The tool is located in the *Software AG_directory\jvm\jvm\bin* directory.

Note: On some systems, the lower-level `jvm` directory name includes additional information, such as `\jvm\jvm160_32`, or `\jvm\jvm170`, or `\jvm\jvm_64`.

When you copy the Zip file to the 9.6 machine, use the binary file transfer mode/type. If you use another mode/type, the Zip file might become corrupted.

3 Complete Product Suite Infrastructure Upgrade

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Overview

Infrastructure components are automatically installed with many products. If you cannot find files that are referenced in the sections in this chapter, your products did not require those infrastructure components, and those steps are not necessary for your upgrade.

8.2 Upgrade: Complete the Infrastructure Upgrade

You complete the infrastructure upgrade by running Infrastructure migration utility and then migrating configurations and customizations. The utility migrates the following:

- The infrastructure configuration.
- If present, the Software AG Runtime configuration.
- Port and JAAS configurations, and user repository.

The Infrastructure migration utility supports migration from a Windows system to another Windows system, and from a UNIX system to another UNIX system that is using a JVM from the same vendor. The migration utility does not support migration from any operating system to a different operating system (for example, does not support Windows system to a UNIX system, or vice versa). For a list of systems supported by the 9.6 release of webMethods and Intelligent Business Operations, see the *webMethods and Intelligent Business Operations System Requirements*.

Run the Infrastructure Migration Utility

For a general description of migration utility behavior, see [“Migration Utilities” on page 24](#). The Infrastructure migration utility runs without prompting you for any information. If an error occurs, the utility exits.

- 1 Make sure all products in the old and new installations are shut down.
- 2 If the old and new installations are on different machines, see [“Use of Zip File as Old Installation” on page 25](#) and then create a Zip file that contains the necessary files from the old installation. On the old machine, open a command window, go to the old Software AG directory (for example, C:\SoftwareAG or /opt/softwareag), and run the command below.

```
jar cfM Zip_file_name.zip common\conf install\products profiles\CTP
```

Note: You might see the message `profiles\CTP: no such file or directory`. You can ignore this message.

Copy the Zip file to the 9.6 machine.

- 3 On the 9.6 machine, open a command window, go to the `9.6_Software AG_directory\common\migrate\osgi\bin` directory, and run this command:

```
migrate.{bat|sh}  
{-srcDir|-srcFile} full_path_to_{old_Software AG_directory|Zip_file}
```

```
-destDir full_path_to_9.6_Software AG_directory
-importFile full_path_to_9.6_Software
AG_directory\common\migrate\osgi\bin\migrate822sbs.dat
-silent true
```

- 4 If you see a *Software AG_directory\profiles\CTP* directory in both the old and the 9.6 installation directories, go to the *9.6_Software AG_directory\profiles\CTP\bin\migrate* directory and run this command:

```
migrate.{bat|sh}
{-srcDir|-srcFile} full_path_to_{old_Software AG_directory|Zip_file}
-destDir full_path_to_9.6_Software AG_directory
-importFile full_path_to_9.6_Software
AG_directory\profiles\CTP\bin\migrate\migrate822sbs.dat
-silent true
```

Migrate Configurations and Customizations

- 1 Migrate HTTP and HTTPS ports for System Management Hub. If you see an InstanceManager directory in both the old and the 9.6 Software AG directories, do the following:
 - a Open the login.htm files in the old and 9.6 *Software AG_directory\InstanceManager\smh* directories. If any port values in the two files are different, copy the old value over the 9.6 value.
 - b Open the login.htm files in the old and 9.6 *Software AG_directory\profiles\CTP\workspace\webapps\smh* directories. If any port values in the two files are different, copy the old value over the 9.6 value.
 - c Repeat the previous step for the index.html files.
- 2 Migrate the journal logger configuration. Open the log_config.xml files in the old and 9.6 *Software AG_directory\profiles\CTP\configuration\logging* directories. If any values in the two files are different, copy the old value over the 9.6 value.
- 3 Migrate the password manager configuration.
 - a Open the scPassMan.config.xml files in the old and 9.6 *Software AG_directory\profiles\CTP\configuration\security\passman* directories. If any values in the two files are different, copy the old value over the 9.6 value.
 - b Go to the *old_Software AG_directory\profiles\CTP\configuration\security\passman* directory and copy the defaultPassStore.dat and mpw.dat files to the same directory in the 9.6 installation.
- 4 You can customize the product Java Service Wrappers; for example, you might add Java arguments or configure memory settings or logging. Copy any customizations from the 8.2 wrapper_conf or custom_wrapper.conf files to the 9.6 custom_wrapper.conf file. The files are located in the *Software AG_directory\profiles\CTP\configuration* directory.

- 5 Migrate the Web Services Stack configuration. Go to the *old_Software AG_directory\profiles\CTP\workspace\wsstack\repository\conf* directory and copy the `axis2.xml` file to the same directory in the 9.6 installation. In the copied file, remove or comment out the `transportReceiver` element whose name attribute is `http` and the `transportReceiver` element whose name attribute is `https`.

9.0 or 9.5 Upgrade: Complete the Infrastructure Upgrade

Migrate Port Configurations

- 1 Migrate HTTP port configurations as follows:
 - a Go to the *old_Software AG_directory\profiles\CTP\configuration\com.softwareag.platform.config.propsloader* directory. If you see a single `com.softwareag.catalina.connector.http.pid-port.properties` file, open that file. If you see multiple files with that name, open the file that specifies the port you want to designate as the default port in 9.6.
 - b Go to the same directory in the 9.6 installation and open the `com.softwareag.catalina.connector.http.pid-port.properties` file.
 - c If any values in the two files are different, copy the old value over the 9.6 value.
 - d Check for additional `com.softwareag.catalina.connector.http.pid-port.properties` files for HTTP ports in the above-mentioned old directory. Copy all such files to the 9.6 directory and then add these elements to each copied file:
 - `alias=unique_identifier`. This Software AG-specific attribute uniquely identifies each connector when you view its configuration in the Platform Manager. The alias for the default HTTP connector you set up above is `defaultHttp`. You could use that alias as a base, and add a unique suffix to create the alias for each additional connector (`alias=defaultHttp2`, `alias=defaultHttp3`, and so on).
 - `enabled=true`. This Software AG-specific attribute and value are required for this connector to be started.
- 2 Repeat the previous steps to migrate HTTPS port configurations, but use the `com.softwareag.catalina.connector.https.pid-port.properties` file, and add `alias=defaultHttps` to the default HTTPS connector.
- 3 Migrate JMS port configurations. Open the `com.softwareag.jmx.connector.pid-port.properties` files in the old and 9.6 *Software AG_directory\profiles\CTP\configuration\com.softwareag.platform.config.propsloader* directories. If any values in the two files are different, copy the old value over the 9.6 value.

Migrate Other Configurations and Customizations

- 1 Migrate HTTP and HTTPS ports for System Management Hub. If you see an InstanceManager directory in both the old and the 9.6 Software AG directories, do the following:
 - a Open the login.htm files in the old and 9.6 *Software AG_directory*\InstanceManager\smh directories. If any port values in the two files are different, copy the old value over the 9.6 value.
 - b Open the login.htm files in the old and 9.6 *Software AG_directory*\profiles\CTP\workspace\webapps\smh directories. If any port values in the two files are different, copy the old value over the 9.6 value.
 - c Repeat the previous step for the index.html files.
- 2 Migrate the journal logger configuration. Open the log_config.xml files in the old and 9.6 *Software AG_directory*\profiles\CTP\configuration\logging directories. If any values in the two files are different, copy the old value over the 9.6 value.
- 3 Migrate the password manager configuration.
 - a Open the scPassMan.config.xml files in the old and 9.6 *Software AG_directory*\profiles\CTP\configuration\security\passman directories. If any values in the two files are different, copy the old value over the 9.6 value.
 - b Go to the *old_Software AG_directory*\profiles\CTP\configuration\security\passman directory and copy the defaultPassStore.dat and mpw.dat files to the same directory in the 9.6 installation.
- 4 Migrate the JAAS configuration. Go to the *old_Software AG_directory*\profiles\CTP\configuration directory and copy the jaas.config file to the same directory in the 9.6 installation. In the copied file, replace all references to *old_Software AG_directory*\common\conf\users.txt, roles.txt, and groups.txt with references to the same files in the 9.6 installation.
- 5 You can customize the product Java Service Wrappers; for example, you might add Java arguments or configure memory settings or logging. Copy any customizations from the old wrapper_conf or custom_wrapper.conf files to the 9.6 custom_wrapper.conf file. The files are located in the *Software AG_directory*\profiles\CTP directory.
- 6 Migrate the single sign-on service configuration.
 - a Go to the *old_Software AG_directory*\common\conf directory and copy the keystore.jks and platform_truststore.jks files to the same directory in the 9.6 installation.
 - b If you customized your single sign-on configuration, open the com.softwareag.sso.pid.properties files in the old and 9.6 *Software AG_directory*\profiles\CTP\configuration\com.softwareag.platform.config.propsloader directories. Copy your customizations from the old file to the 9.6 file.

- 7 Migrate the user repository. Go to the *old_Software AG_directory\common\conf* directory and copy the *users.txt*, *roles.txt*, and *groups.txt* files to the same directory in the 9.6 installation.
- 8 Migrate the Web Services Stack configuration. Go to the *old_Software AG_directory\profiles\CTP\workspace\wsstack\repository\conf* directory and copy the *axis2.xml* file to the same directory in the 9.6 installation.

4 Complete the Messaging Upgrade

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Complete the webMethods Broker Upgrade

Backward Compatibility

Broker Server 9.6 is compatible with webMethods Broker 9.5, 9.0, and 8.2 command-line utilities; Broker client APIs for C, C#, Java, and JMS; and clients for JMS.

Broker Server 9.5, 9.0, and 8.2 are compatible with webMethods Broker 9.6 command-line utilities, Broker client APIs for C, C#, and Java; and the webMethods Broker user interface in My webMethods.

8.2 Upgrade: Migrate Broker Assets from XML Format to ADL Format

In release 8.2 SP1 and SP2, webMethods Broker and Deployer stored Broker assets in XML format. Starting in release 9.0, webMethods Broker and Deployer began storing Broker assets in ADL format. You must use webMethods Broker 8.2 SP3 and Deployer 8.2 to migrate the assets from XML format to ADL format. For instructions on using Deployer in the steps below, see the *webMethods Deployer User's Guide* for the 8.2 and 9.6 releases.

- 1 If the assets are available only in the source .xml files and do not exist in webMethods Broker 8.2 SP3, use Deployer 8.2 to deploy the assets from the source .xml files to webMethods Broker 8.2 SP3.
- 2 Update the My webMethods Messaging user interface to 8.2 SP3. Go to the *old_Software AG_directory\MWS\bin* directory and run this command:

```
mws -s server_instance update -Dcomponents.overwrite=true
```
- 3 Export the assets to ADL format as follows:
 - a In My webMethods Messaging user interface 8.2 SP3, go to the **Administration > Messaging > Broker Servers > Servers** page and click the Broker Server from which to export assets.
 - b Click the **Brokers** tab, and then click the Broker from which to export assets. If the Broker does not appear in the list, use the search functionality to locate it.
 - c On the **Broker Details** page, click the **Export to File** tab, select the assets to export, and then click **Export to File**.
- 4 Start the Software AG Installer and install **Infrastructure > Libraries > Broker and JMS Libraries 8.2 SP3** in the installation directory that contains Deployer 8.2 and Asset Build Environment 8.2.
- 5 Use Deployer 8.2 to build the assets in ADL format for repository-based deployment. For instructions, see building assets for deployment in *Administering webMethods Broker 9.6* and *webMethods Deployer User's Guide 9.6*.
- 6 Use Deployer 9.6 to deploy the Broker assets in ADL format to webMethods Broker 9.6.

- 7 Shut down My webMethods Server 8.2 and the Integration Server 8.2 that hosts Deployer 8.2.

Create Broker Server 9.6 and Use the Old Storage

- 1 Back up the old data directory.
- 2 Go to the *old_Software AG_directory*\Broker\bin directory and back up the old awbrokermon.cfg file.
- 3 Stop the old Broker Server, go to the *old_Software AG_directory*\Broker\bin directory, and run this command:


```
server_config remove full_path_to_old_data_directory
```

When asked whether to remove the Broker Server from the Broker Monitor configuration, enter Y.
- 4 If you need to copy the data directory to a new location (for example, because the old and new webMethods Broker installations are on different machines), do the following:
 - a Copy the old data directory to the new location. If any storage files were located outside the data directory (for example, .stor and .data files), also copy those files.
 - b On the 9.6 machine, open a command window, go to the *9.6_Software AG_directory*\Broker\bin directory, and run the command below. If you also copied old storage files, specify the qs_map_file parameter for each file.

```
server_config relocate full_path_to_new_data_directory
[-qs_map_file full_path_to_old_file full_path_to_new_file]
```

- 5 Create a Broker Server 9.6. On the 9.6 machine, open a command window, go to the *9.6_Software AG_directory*\Broker\bin directory, and run the command below. Broker Server 9.6 details are automatically added to the Broker Monitor 9.6 startup configuration. Make sure the host name and port number for Broker Server 9.6 are the same as they were for the old Broker Server.

```
server_config add full_path_to_old_data_directory -k 9.6_license_file
-p old_release_port
```

- 6 Make sure Broker Server 9.6 is running as follows:

System	Steps
Windows	<ol style="list-style-type: none"> 1 Open the Windows Services window and make sure the status of the Software AG Broker Server 9.6(port) service is Started. 2 Right-click the service and click Properties. Make sure the Path to Executable field points to the awbroker file for 9.6.

System	Steps
UNIX	<ol style="list-style-type: none">1 Run the command <code>ps -ef grep awbroker</code>, which prints all running Broker processes including the path to the executable. Make sure the output text shows a line like this: <pre>full_path_to_9.6_Software AG_directory/Broker/bin/awbroker -d full_path_to_old_data_directory</pre>2 Make sure the awbroker process is running and that it is running from the 9.6 awbroker file.

Complete the Universal Messaging Upgrade

You complete the Universal Messaging upgrade by running the Universal Messaging migration utility.

When you install Universal Messaging, the installer creates a default server instance named `umserver`. After installing the old Universal Messaging, you might have created additional server instances. The migration utility migrates the data for the default server. Then, for each user-created server instance in the old installation, the utility creates a corresponding server instance in the 9.6 installation and migrates the old instance's data directory and license file to the 9.6 installation.

Before Migrating Data

- 1 Make sure all old Universal Messaging server instances are shut down. If any server instances are running in the 9.6 installation (for example, the default server instance `umserver`), make sure those are shut down as well.
- 2 If the old and 9.6 Universal Messaging installations are on different machines, see [“Use of Zip File as Old Installation” on page 25](#) and then create a Zip file of the contents of the old Universal Messaging installation. On the old machine, open a command window, go to the old Universal Messaging installation directory (for example, `C:\old_Software AG_directory\nirvana`) or `/opt/old_Software AG_directory/nirvana`) and enter this command:

```
jar cfM Zip_file_name.zip server lib
```

Copy the Zip file to the 9.6 machine.

Run the Universal Messaging Migration Utility

For a general description of migration utility behavior, see [“Migration Utilities” on page 24](#). The Universal Messaging migration utility does not offer a default migration.

Perform a Custom Migration

- 1 On the 9.6 machine, open a command windows, go to the *9.6_Software AG_directory\nirvana\tools\migrate* directory, and run the command `migrate.{bat|sh}`.
- 2 The utility asks for the full path to one of the following:
 - The old Universal Messaging installation (for example, *C:\old_Software AG_directory\nirvana* or */opt/old_Software AG_directory/nirvana*).
 - The Zip file you made earlier.
- 3 The utility asks whether to migrate each old server instance. If the utility cannot determine whether the instance was running as an application or service, it asks for that information as well.

If the data directory or license file for an old server instance is not in the default location (*Software AG_directory\nirvana\server\server_instance\data* and *Software AG_directory\nirvana\server\server_instance*, respectively), or the utility cannot determine where the data directory or license file is located, you will have to migrate them manually after the migration utility finishes, as explained later in this procedure.

If a server instance already exists in the 9.6 installation, the utility does the following:

- If the 9.6 instance has the same name as an old instance, the utility asks whether to migrate the old instance over the 9.6 instance. If you enter Y, the utility backs up the 9.6 instance to the *9.6_Software AG_directory\nirvana\migrationbackup* directory before migrating the old instance.
 - If the 9.6 instance has a different name than any of the old instances, the utility ignores the 9.6 instance.
- 4 The utility asks whether to export your settings. If you want to perform other migrations by importing the settings from this session, enter Y. If not, enter N.

Migrate Using Imported Settings

Imported settings come from settings you exported from a custom migration. These settings are stored in a file named `migrate.dat` in the *9.6_Software AG_directory\nirvana\tools\migrate* directory from which you ran the custom migration. Copy the `migrate.dat` file to any directory on machines that host Universal Messaging 9.6 installations to which you want to migrate data.

Migrating Using Imported Settings with Prompting

- 1 On the 9.6 machine, open a command windows, go to the *9.6_Software AG_directory\nirvana\tools\migrate* directory, and run the command `migrate.{bat|sh}`.
- 2 The utility asks for the full path to the old Universal Messaging installation or to the Zip file you made earlier.

- 3 The utility asks whether to import migration settings. Enter Y and, when prompted, provide the full path to the migrate.dat file.

Migrate Using Imported Settings without Prompting

On the 9.6 machine, open a command windows, go to the *9.6_Software* *AG_directory*\nirvana\tools\migrate directory, and run the command below. If an error occurs, the utility exits.

```
migrate.{bat|sh}  
{-srcDir|-srcFile} full_path_to_{old_Universal Messaging_directory|Zip_file}  
-importFile full_path_to_migrate.dat -silent true
```

Complete the Universal Messaging Upgrade

- 1 If you made any custom changes to the nserver.conf or nserverdaemon.conf file for an old server instance, make the same changes to the same file for the corresponding 9.6 server instance.
- 2 If the migration utility found that the old data directory for a server instance was not in the default location, it did not migrate the data directory, and you must migrate it to the 9.6 server instance manually. The same is true for the license file.
 - a To migrate the data directory, copy it from the old server instance to the 9.6 server instance. The default data directory location is *9.6_Software* *AG_directory*\nirvana\server\server_instance\data. Then do the following:

To run server instance as...	Edit this file to point to the new (copied) data directory...
Application	New server's nserver.conf file
Service	New server's nserverdaemon.conf file
 - b To migrate the license file, copy it from the old server instance to the 9.6 server instance. The default location is in the *Software* *AG_directory*\nirvana\server\server_instance directory.

5 Completing the My webMethods Server Upgrade

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Complete the My webMethods Server Upgrade

You complete the My webMethods Server upgrade by running the My webMethods Server migration utility. The utility migrates server instances within the old installation to the new installation.

Before Migrating Data

- 1 Make sure the old My webMethods Server is shut down.

If you are upgrading a cluster of My webMethods Servers, make sure all cluster nodes are shut down before migrating data for any My webMethods Server in the cluster. A cluster is defined as multiple nodes that point to the same MywebMethodsServer database component. Nodes can be My webMethods Server installations or server instances within a My webMethods Server installation.

- 2 If the old and new My webMethods Server installations are on different machines, do one of the following:
 - Copy the *old_Software AG_directory\MWS* directory and the *old_Software AG_directory\install\products* directory to the 9.6 machine, and recreate the old directory structure. For example, if the old directory structure was C:\SoftwareAG\MWS and C:\SoftwareAG\install\products, you could create the directory structure C:\oldMWS\MWS and C:\oldMWS\install\products on the 9.6 machine.
 - Map a drive on the 9.6 machine to the old machine.

Run the My webMethods Server Migration Utility

For a general description of migration utility behavior, see [“Migration Utilities” on page 24](#). Exceptions:

- The My webMethods Server migration utility does not offer a default migration.
- You cannot use a Zip file of the old product installation as the source of the data to migrate.
- The log4j.properties file for My webMethods Server is located in the *9.6_Software AG_directory\MWS\tools\migrate\resources* directory.

Perform a Custom Migration

- 1 On the 9.6 machine, open a command windows, go to the *9.6_Software* *AG_directory*\MWS\bin\migrate directory, and run the command `migrate.{bat|sh}`.
- 2 The utility asks for the full path to the old My webMethods Server installation (for example, *C:\old_Software AG_directory\MWS* or */opt/old_Software AG_directory/MWS*).
- 3 The utility asks whether to import migration settings. Enter N.
- 4 The utility asks about migrating server instances. If the installation has multiple server instances, the utility will ask separately about each instance.
 - a The utility asks whether to migrate a server instance in the old My webMethods Server installation. Enter Y.
 - b If the server instance name already exists in the My webMethods Server 9.6 installation directory, the utility asks whether to delete the 9.6 server instance so migration of the old server instance can proceed. Enter Y.
 - c The utility asks for the MywebMethodsServer database component to use with the migrated server instance. If you choose to use a copy of the production database, the utility prompts for the database URL, user name, and password.

Note: You cannot use a new database that contains no data.

- 5 The utility asks whether to export your settings from this session. If you want to perform other migrations by importing the settings from this session, enter Y. If not, enter N.
- 6 The utility asks whether to begin migration. If you want to exit the utility without migrating any data, enter N. If you want to migrate data, enter Y; the utility migrates the data you selected and prints progress messages to the command window and the migration log. If migration completes successfully, the utility also does the following:
 - Deletes old configuration files that are not used by My webMethods Server 9.6, and deletes old properties that are not used by My webMethods Server 9.6 from the 9.6 configuration files.
 - If the old My webMethods Server used the embedded database, copies the database tables from the old My webMethods Server to My webMethods Server 9.6 and converts the tables to the new format.
- 7 8.2 upgrade: If you are using CAF, and you added custom Jetty settings to the 8.2 *mws-web.xml* file for one or more CAF applications, the migration utility migrated those files. However, the schema and the name of the `WebApplicationContext` class in those files changed starting in 9.0, so you must manually migrate your custom Jetty settings.

For each CAF application, open the 8.2 *mws-web.xml* file and the 9.6 *jetty-mws.xml* file in the 8.2 and 9.6 *WEB-INF* directories. Copy the 8.2 custom Jetty settings to the Jetty section of the 9.6 file. Then configure the copied settings using the new schema

and the name of the `WebAppContext` class format. The following example shows how the Jetty setting `maxFormContentSize` was configured in 8.2, and how it should be configured in 9.6. The format for the rest of the custom Jetty settings will be similar.

Sample configuration setting in My webMethods Server 8.2:

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<!DOCTYPE Configure PUBLIC "-//Mort Bay Consulting//DTD Configure//EN"
"http://jetty.mortbay.org/configure.dtd">
<Configure class="com.webmethods.portal.webapp.jetty6.MwsWebAppContext">
  <Set name="maxFormContentSize">500000</Set>
</Configure>
```

Sample configuration setting in My webMethods Server 9.6:

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<!DOCTYPE Configure PUBLIC "-//Jetty//Configure//EN"
"http://www.eclipse.org/jetty/configure.dtd">
<Configure class="org.eclipse.jetty.webapp.WebAppContext">
  <Set name="maxFormContentSize">500000</Set>
</Configure>
```

Migrate Using Imported Settings

Imported settings come from settings you exported from a custom migration. These settings are stored in a file named `migrate.dat` in the *9.6_Software* `AG_directory\MWS\bin\migrate` directory. Copy the `migrate.dat` file to any directory on machines that host My webMethods Server 9.6 installations to which you want to migrate data.

Migrate Using Imported Settings with Prompting

- 1 On the 9.6 machine, open a command window, go to the *9.6_Software* `AG_directory\MWS\bin\migrate` directory, and run the command `migrate.{bat|sh}`.
- 2 The utility asks for the full path to the old My webMethods Server installation.
- 3 The utility asks whether to import migration settings. Enter Y and, when prompted, provide the full path to the `migrate.dat` file.

Migrate Using Imported Settings without Prompting

On the 9.6 machine, open a command window, go to the *9.6_Software* `AG_directory\MWS\bin\migrate` directory, and run the command below. If an error occurs, the utility exits.

```
migrate.{bat|sh} -srcDir full_path_to_old_My_webMethods_Server_directory
-importFile full_path_to_migrate.dat -silent true
```

Start and Restart My webMethods Server

- 1 Start My webMethods Server 9.6 by going to the `9.6_Software AG_directory\MWS\bin` directory and running the command `mws.{bat|sh} -s server_instance init`. The 9.6 components are deployed, and then My webMethods Server shuts down automatically.
- 2 Restart My webMethods Server.

Verify Host Names

If the old and new My webMethods Server installations are on different machines, verify the host names for the new installation as follows:

- 1 Log on to My webMethods Server 9.6 as Administrator and go to the **Administration > My webMethods > Cluster Settings > Advanced Web and Cluster Configuration for MWS** page.
- 2 If the host name is not correct in the **Host** field for each cluster node and in the **MWS Front End URL** field for all nodes, update the host names.
- 3 Go to the **Cluster Status and Control** page and restart all cluster nodes.

6 Completing the Event Driven Architecture Upgrade

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Complete the Event Driven Architecture Upgrade

You complete the event driven architecture upgrade by running the Event Driven Architecture migration utility. The utility migrates the following:

- Designer Event Bus Console connection configurations using EDA Orchestrator.
- The Event Type Store.
- 9.0 or 9.5 upgrade: Designer Event Bus Console connection configurations that use NERV.
- 9.0 or 9.5 upgrade: NERV configuration bundles, if you deployed any.

For a general description of migration utility behavior, see [“Migration Utilities” on page 24](#). The Event Driven Architecture migration utility runs without prompting you for any information. If an error occurs, the utility exits.

- 1 If the old and new EDA/NERV installations are on different machines, see [“Use of Zip File as Old Installation” on page 25](#) and then create a Zip file that contains the necessary files from the old EDA/NERV installation. On the old machine, open a command window, go to the old Software AG directory that contains the old EDA/NERV installation (for example, C:\SoftwareAG or /opt/softwareag), and enter the commands below. Specify the same Zip file name in all commands.

```
jar cfM Zip_file_name.zip install\products
jar ufM Zip_file_name.zip common\conf
jar ufM Zip_file_name.zip common\EventTypeStore
jar ufM Zip_file_name.zip common\nerv\bundles
```

Note: The bundles directory will exist only if you deployed NERV configuration bundles in the old release.

Copy the Zip file to the 9.6 machine.

- 2 On the 9.6 machine, open a command window, go to the *9.6_Software AG_directory\common\migrate\EDA\bin* directory, and run this command:

```
migrate.{bat|sh} {-srcDir|-srcFile} full_path_to_{old_Software
AG_directory|Zip_file}
-destDir full_path_to_9.6_Software AG_directory
-importFile full_path_to_migrate{822|901|951}sbs.dat -silent true
```

- 3 Open the *ConfigEDAOrchestrator.xml* file in the *9.6_Software AG_directory\common\conf* directory and the *com.softwareag.platform.eda.nerv.properties* file in the *9.6_Software AG_directory\profiles\EDA\configuration\com.softwareag.platform.config.propslo ader* directory.
 - a If the old and new EDA/NERV installations are on different machines, update the file system paths.
 - b Update JMS provider references to point to your 9.6 JMS provider.

7 Completing the Integration Server and Hosted Products Upgrade

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Complete the Upgrade for Integration Server and Hosted Products

You complete the Integration Server upgrade by running the Integration Server migration utility. The utility migrates user-defined packages, configuration files, and, starting in 9.5, custom jar files. If the old Integration Server hosted products (for example, Trading Networks) and those products also exist on Integration Server 9.6, the utility migrates data for those products.

If you are upgrading a Integration Server cluster, read [“Prepare Integration Server” on page 18](#) before you continue.

If you are upgrading an Integration Server that hosts Deployer, read [“Complete the Deployer Upgrade” on page 84](#) before you continue.

Before Migrating Data

In the 9.6 release, Integration Server introduced multi-instance support. The installer creates a default Integration Server 9.6 instance; you can create additional instances after installation. By default, the migration utility will migrate assets from the old Integration Server to the default instance. If you created additional instances and want to migrate assets to one of them instead of the default instance, you will have to modify the migration utility script as described below.

- 1 Make sure Integration Server is shut down.
- 2 If the old and new Integration Server installations are on different machines, see [“Use of Zip File as Old Installation” on page 25](#) and then create a Zip file that contains the necessary files from the old Integration Server installation. On the old machine, open a command window, go to the old Integration Server installation directory (for example, `C:\old_Software AG_directory\IntegrationServer` or `/opt/old_Software AG_directory/IntegrationServer`), and enter this command:

```
jar cfM Zip_file_name.zip *
```

Copy the Zip file to the 9.6 machine.

- 3 If you want to migrate to an Integration Server 9.6 instance you created rather than to the default instance, go to the `9.6_Software AG_directory\IntegrationServer\bin\migrate` directory and open the `migrate.{bat|sh}` file. On the `-Dwatt.installer.migrate.destDir` property, change `default` to the name of the instance you created (for example, `Dwatt.installer.migrate.destDir=$IS_DIR/instances/instance_name`).

Run the Integration Server Migration Utility

For a general description of migration utility behavior, see [“Migration Utilities” on page 24](#).

Perform a Custom Migration

- 1 On the 9.6 machine, open a command windows and go to the *9.6_Software AG_directory*\IntegrationServer\bin\migrate directory.
- 2 8.2 upgrade: If the old and new Integration Server installations are on different operating systems, run the appropriate command below.

When upgrading from...	Run this command...
Windows to UNIX/Linux	<code>export JAVA_TOOL_OPTIONS=-Dfile.encoding=Cp1252</code>
UNIX/Linux to Windows	<code>set JAVA_TOOL_OPTIONS=-Dfile.encoding=UTF-8</code>

- 3 Run the command `migrate.{bat|sh}`.
- 4 The utility asks for the full path to one of the following:
 - The old Integration Server installation (for example, *C:\old_Software AG_directory*\IntegrationServer or */opt/old_Software AG_directory/IntegrationServer*).
 - The Zip file you made earlier.
- 5 The utility asks whether to import migration settings. Enter N.
- 6 The utility asks whether to migrate Integration Server packages. You can migrate user-created packages (including run-time packages for business processes generated from Designer) and eStandards Module packages that contain IS documents and the schemas for those documents (*WmRNPips*, *WmChemPayloads*, and *WmPapinetPayloads*).

If you choose to migrate selected packages only, the utility lists each package and asks whether to migrate it. If you are going to migrate run-time data for business processes, you must migrate your business process run-time packages. The package names are the process model names or custom names you specified in the design tool, or names prefixed by *Wm* that you added to the `packages.cnf` file earlier.

- 7 The utility asks whether to migrate Integration Server configuration files. If you choose to migrate selected configuration files only, the utility lists each configuration file and asks whether to migrate it. There are about 50 configuration files. You must enter Y to all prompts that list `config\jdbc` files.
- 8 9.5 upgrade: The utility asks whether to migrate custom jar files. If you choose to migrate selected custom jar files only, the utility lists each custom jar file and asks whether to migrate it.
- 9 The utility asks you to specify the behavior to use for new Integration Server 9.6 properties and Integration Server 9.6 properties that have new defaults.

If you choose to select behavior, the utility lists each property and asks whether to use new behavior or preserve existing behavior.

- 10 If the Integration Server hosts other products (for example, ActiveTransfer, Mediator, adapters, and some eStandards Modules), the migration utility asks whether to migrate the data for those products.

Note: If the Integration Server hosts Deployer, the migration utility will ask whether to migrate Deployer data. Do not do so unless you have read [“Complete the Deployer Upgrade” on page 84](#) and completed all necessary pre-migration tasks.

- 11 The utility asks whether to migrate Trading Networks data. If you enter Y, the utility asks the following:
 - a Whether to migrate the Trading Networks configuration file. If you enter Y, the utility copies the configuration properties from the old Trading Networks installation directory, adds them to the new configuration properties in Trading Networks 9.6, and replaces the properties.cnf file in the *9.6_Software AG_directory\IntegrationServer\instances\instance_name\packages\WmTN\conf* directory.

Note: If you have a cluster of Trading Networks instances, you must migrate the configuration file for each instance.

- b 8.2 upgrade: Whether to migrate Trading Networks data. If you enter Y, the utility does the following:
 - Adds an onboarding IDTYPE to the IDTYPE table in the TradingNetworks database component. Trading Networks uses the new onboarding IDTYPE when you create partners using the Trading Networks Partner Onboarding feature.
 - Imports onboarding system template data into the TEMPLATE, TEMPLATEFIELD, TEMPLATEFIELDDEFS, and TEMPLATEFIELDGROUPDEFS tables in the TradingNetworks database component. The data appears in the default questionnaire templates that accompany invitations you send to new partners using the Partner Onboarding feature.

Note: If you have a cluster of Trading Networks instances, Trading Networks data is shared by all instances in the cluster, so only migrate the data for one instance.

- 12 The utility asks whether to export your settings. If you want to perform other migrations by importing the settings from this session, enter Y. If not, enter N.

Migrate Using Imported Settings

Imported settings can come from the following:

- Settings you exported from a custom migration. These settings are stored in a file named `migrate.dat` in the `9.6_Software AG_directory\IntegrationServer\bin\migrate` directory from which you ran the custom migration. Copy the `migrate.dat` file to any directory on machines that host Integration Server 9.6 installations to which you want to migrate data.
- Settings in the default migrations provided with Integration Server. For each old release, the settings are stored in a file named `migraterelasesbs.dat` file in the `9.6_Software AG_directory\IntegrationServer\bin\migrate` directory. The settings tell the migration utility to migrate the data listed in [“Complete the Upgrade for Integration Server and Hosted Products” on page 48](#). For Integration Server properties that are new or that have new defaults, the default migration chooses the behavior that best preserves backwards compatibility.

Migrate Using Imported Settings with Prompting

- 1 On the 9.6 machine, open a command windows, go to the `9.6_Software AG_directory\IntegrationServer\bin\migrate` directory, and run the command `migrate.{bat|sh}`.
- 2 The utility asks for the full path to the old Integration Server installation or to the Zip file you made earlier.
- 3 The utility asks whether to import migration settings. Enter Y and, when prompted, provide the full path to the `migrate.dat` file or the `migrate{822|901|951}sbs.dat` file.

Migrate Using Imported Settings without Prompting

On the 9.6 machine, open a command windows, go to the `9.6_Software AG_directory\IntegrationServer\bin\migrate` directory, and run the command below. If an error occurs, the utility exits.

```
migrate.{bat|sh}
{-srcDir|-srcFile} full_path_to_old_Integration_Server_directory/Zip_file}
-importFile full_path_to_{migrate.dat|migrate{822|901|951}sbs.dat} -silent true
```

Other Actions Performed by the Migration Utility

When migration completes successfully, the migration utility also does the following:

- Deletes old configuration files that are not used by Integration Server 9.6, and deletes old properties that are not used by Integration Server 9.6 from the 9.6 configuration files.
- If the old Integration Server used the embedded database, the utility copies the database tables from the old Integration Server to Integration Server 9.6 and converts the tables to the new format.
- Adds a new property named "Validate schemas using Xerces" to existing Web service descriptors, and sets the new property to the value the `watt.server.wsdl.validateWSDLSchemaUsingXerces` parameter had in the old

Integration Server. The new property replaces the functionality provided by that parameter. For information about the new property, see *webMethods Service Development Help 9.6*.

- If the old Integration Server was part of a cluster that used Coherence as its caching software, the utility removes the clustering settings so you can reconfigure the cluster to use a Terracotta-based solution. Support for Coherence was discontinued in release 9.0. For more information, see *webMethods Integration Server Clustering Guide 9.6*.
- 8.2 upgrade: Updates the SoftwareAG-IS-Core.xml caching file to include caches added for Integration Server 9.6.
- Sets the `watt.art.connection.nodeVersion` property=2, which means adapter passwords are stored unencrypted in the Integration Server passman store and the password handle is stored in the adapter connection. In the previous release, adapter connection passwords were encrypted and then stored in the adapter connection. If you want to return to the previous behavior, set the `watt.art.connection.nodeVersion` property=1.

Complete the Integration Server Upgrade

Customize Integration Server Startup Files

If you modified the old Integration Server `server.{bat|sh}` or `setenv.{bat|sh}` file, do the following:

- 1 Manually reproduce the changes in the corresponding 9.6 files. The old and 9.6 files are in the `old_Software AG_directory\IntegrationServer\bin` directory and the `9.6_Software AG_directory\IntegrationServer\instances\instance_name\bin` directory, respectively.
- 2 On a Windows system, if you installed Integration Server 9.6 as a service, unregister and re-register the service. For instructions, see *webMethods Integration Server Administrator's Guide 9.6*.

Update WSDLs

If you have Provider Web services that have an operation with field names starting with `xml` in the input signature, output signature, header, or faults, do the following:

- 1 Start Integration Server 9.6.
- 2 Review the `migrationLog.txt` file in the `9.6_Software AG_directory\install\logs` directory. If you see this error:

A property `watt.server.xml.ncname.encode.backward.compatibility` exists in `config/server.cnf` with value as `true`. Make sure you make the required changes as specified in the upgrade documentation. Not doing so could have adverse effects as support for this property may be dropped in a future release.

Update your WSDLs as follows:

- a Open Integration Server Administrator and point to Integration Server 9.6.
- b Go to the **Settings > Extended** page. If you have the extended setting `watt.server.xml.ncname.encode.backward.compatibility` and it is set to true, reset it to false.
- c Regenerate the clients for all Provider Web services that have an operation with field names starting with `xml` in the input signature, output signature, header, or faults.

Connect Integration Server Functions to Database Components and Improve Database Performance

- 1 Open Integration Server Administrator and point to Integration Server 9.6.
- 2 Go to the **Settings > JDBC Pools** page and connect Integration Server and the products it hosts to their database components. For instructions, see *Installing webMethods and Intelligent Business Operations Products 9.6*.
- 3 You can improve database performance by caching prepared statements. For each Pool Alias except the pool alias for Trading Networks, click **Edit** in the **Edit Pool Alias** column and add the DataDirect Connect connection option `MaxPooledStatements=35` to the **Database URL** field.

Note: Trading Networks caches its prepared statements using its own pooling mechanism.

- 4 Restart Integration Server 9.6.

Migrate the EDA Configuration

Go to the *9.6_Software*

AG_directory\profiles\IS_default\configuration\com.softwareag.platform.config.propsloader directory and open the `com.softwareag.platform.eda.nerv.properties` file. If the old and new installations are on different machines, update the file system paths. Update JMS provider references to point to your 9.6 JMS provider.

9.0 or 9.5 upgrade: Open the `com.softwareag.platform.eda.nerv.properties` file in the *old_Software*

AG_directory\profiles\IS\configuration\com.softwareag.platform.config.propsloader directory. With the exception of the cases listed above, if any values in this file are different from values in the 9.6 file, copy the old value over the 9.6 value.

Update Host Names

If the old and new Integration Server are on different machines, update the host names for 9.6 as follows:

- 1 If you want to resubmit failed business processes in the 9.6 installation, update the host name in the ISCoreAudit database component.
- 2 Go to the `9.6_Software AG_directory\IntegrationServer\config\audit` directory, open the `AuditConfig.xml` file, and update the `<server-id>` element to reflect the Integration Server 9.6 host name.
- 3 Update the host name in the TARGET column in the IS_USER_TASKS database table.
- 4 Update the SERVERID column in the IS_USER_TASKS, WMDOCUMENT, WMERROR, WMRULEDIST, WMSECURITY, WMSERVICE, WMSERVICE4X, WMSERVICEACTIVITYLOG, WMSERVICEASSOC, WMSERVICECUSTOMFLDS, WMSESSION, WMTXIN, WMTXOUT, and WMTXOUTWMCONTROL database tables.

Complete the ActiveTransfer Upgrade

- 1 Copy keystore files from the old installation to the 9.6 installation and update the keystore file paths. For instructions, see *Managing File Transfers with webMethods ActiveTransfer 9.6*.
- 2 When you configure ActiveTransfer 9.6, make sure that port values, host names and IP addresses, and local and remote file paths in event file operations and the virtual file system (VFS) are correct for the 9.6 installation. For instructions, see *Managing File Transfers with webMethods ActiveTransfer 9.6*.

Complete the CloudStreams Upgrade

Run the public service `pub.cloudstreams.migration:migrate` in the package `WmCloudStreams`. The service migrates CloudStreams artifacts in custom packages that depend on the `WmCloudStreams` package. Artifacts include SOAP and REST connector service nodes and connection nodes. The utility logs the results of migration to the Integration Server server log.

The input signature for the service is as follows:

Parameter	Description
<i>allPackages</i>	<p>Boolean string. Optional. Set to:</p> <ul style="list-style-type: none"> ■ <code>true</code> to migrate CloudStreams artifacts from all custom packages that are dependent on WmCloudStreams. ■ <code>false</code> to migrate CloudStreams artifacts from only custom packages specified on the <i>packages</i> parameter. This is the default.
<i>packages</i>	<p>Object. String array containing the names of custom packages to migrate. You must specify at least one package name.</p>

The output signature of the service is a parameter named `Result` that consists of an array of `iData` records. The array contains a record for each custom package specified in the input signature. The fields in each record are as follows:

Field	Description
<i>packageName</i>	String. Name of the custom package.
<i>success</i>	String. Value that indicates whether migration succeeded (<code>true</code>) or failed (<code>false</code>).
<i>message</i>	String. Information about the migration, such as number of CloudStreams artifacts found in the package and number of CloudStreams artifacts that were successfully migrated.
<i>info</i>	Object. Optional. If the service issued info messages during the migration, string array of the messages.
<i>errors</i>	Object. Optional. If the service issued errors during the migration, string array of the errors.

Complete Adapter Upgrades

If the old Integration Server hosted adapters and you installed the same release or a later release of those adapters on Integration Server 9.6, complete the tasks below.

webMethods Adapter for JDBC

If the adapter connects to an Oracle RDBMS using an OCI driver, set these environment variables on the Integration Server 9.6 machine:

Platform	Environment Variable Setting
Solaris	<code>LD_LIBRARY_PATH=/ORACLE_HOME/lib</code>
HP	<code>SHLIB_PATH=/ORACLE_HOME/lib</code>
AIX	<code>LIBPATH=/ORACLE_HOME/lib</code>

Platform	Environment Variable Setting
Linux	LD_LIBRARY_PATH=/ORACLE_HOME/lib

webMethods Package for Microsoft .NET

If you modified the `wmSystem.exe.config` file in the old installation, make the same changes to the same file in the new installation. The file is located in the *Software AG_directory*\IntegrationServer\DotNetHost directory.

webMethods PeopleSoft EnterpriseOne Adapter

If the adapter connects to an Oracle RDBMS, go to the *old_Software AG_directory*\IntegrationServer\lib\jars directory and copy the Oracle JDBC driver file to the *9.6_Software AG_directory*\IntegrationServer\lib\jars\custom directory.

webMethods SAP Adapter

- If the Integration Server 9.6 machine uses UNIX, set these environment variables on the machine:

Platform	Environment Variable Setting
Linux, Solaris	LD_LIBRARY_PATH
HP	SHLIB_PATH
AIX	LIBPATH

- Go to the *old_Software AG_directory*\IntegrationServer\lib directory and copy all files whose file name contains the phrase `*sapjco*.*` to the *9.6_Software AG_directory*\IntegrationServer\lib\jars\custom directory.
- If the Integration Server 9.6 machine uses Windows, go to the `C:\WINDOWS\system32\drivers\etc` directory on the old Integration Server machine, open the services file, and copy all entries that contain the phrase "sapgw" into the same file in the 9.6 installation. Examples of these entries are `sapgw00 3300/tcp`, `sapgw01 3301/tcp`, `sapgw02 3302/tcp`, `sapgw03 3303/tcp`, `sapgw04 3304/tcp`, and `sapgw05 3305/tcp`.

webMethods WebSphere MQ Adapter

If the adapter is installed on a Windows system, and the WebSphere MQ back end is installed on a remote machine, go to the *WebSphereMQ_directory*\java\lib directory and copy the `mjbndnn.dll` file into a local directory that is in your path system environment variable.

Complete eStandards Module Upgrades

If the old Integration Server hosted eStandards Modules and you installed the same release or a later release of those modules on Integration Server 9.6, complete the tasks below.

webMethods FIX Module

If you installed the same release of FIX Module on Integration Server 9.6, go to the *old_Software AG_directory*\IntegrationServer\packages and copy the WmFIXMessages package to the *9.6_Software AG_directory*\IntegrationServer\instances*instance_name*\packages directory.

webMethods SWIFT FIN Module

If you installed the same release of SWIFT FIN Module on Integration Server 9.6, go to the *old_Software AG_directory*\IntegrationServer\packages and copy the WmFINMessages package to the *9.6_Software AG_directory*\IntegrationServer\instances*instance_name*\packages directory.

webMethods SWIFTNet Module

Reconfigure the module. For instructions, see the *webMethods SWIFTNet Module Installation and User's Guide*.

8 Completing the Terracotta Upgrade

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Complete the Terracotta Upgrade

This procedure explains how to complete the upgrade for a pre-3.7.6 Terracotta Server Array that has a single server or a mirror group consisting of an active server and a mirror server. For all other setups, see the Terracotta 3.7.6 documentation.

- 1 Locate the `terracotta-license.key` file and the `tc-config.xml` file in your old Terracotta installation and copy it to the 9.6 installation. The default location for the `terracotta-license.key` file is the Terracotta installation directory, and the default location for the `tc-config.xml` file is the *Software AG_directory*\Terracotta\bin directory.
- 2 If the old and new Terracotta servers are on different machines, open the `tc-config.xml` file you copied to the 9.6 installation. In the `<servers>` element, set the host names to the host machines for the 9.6 server. For example:

```
<servers>
  <server host=host_name_for_9.6_server1 name="Server1">
    ...
  </server>
  <server host=host_name_for_9.6_server2 name="Server2">
    ...
  </server>
</servers>
```

- 3 If you modified the `start-tc-server.{bat|sh}` file in your old Terracotta installation (for example, you might have modified heap size or direct memory settings), go to the *9.6_Software AG_directory*\Terracotta\bin directory and make the same modifications in the 9.6 `start-tc-server.{bat|sh}` file.
- 4 If you have a single server, shut down your old Terracotta Server Array and start the 9.6 Terracotta Server Array. If you have a mirror group consisting of an active server and a mirror server, shut down the old mirror server and then shut down the old active server. Start active server 9.6 and then start mirror server 9.6.

9 Completing the Designer, Business Process Run-time, and Blaze Upgrades

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Migrate Designer Data

Before Migrating Data

- 1 Open Designer 9.6 and point to a new 9.6 workspace. For example, you can accept the default workspace96.
- 2 Install any third-party features you need (for example, support for Subversion). The Eclipse release installed with Designer 9.6 is Eclipse 4.3, so make sure any features you add are compatible with Eclipse 4.3.
- 3 If you are upgrading Events, do the following:
 - a 9.0 upgrade: Go to the File > Import wizard. In the Select panel, go to Run/Debug > Launch Configurations and click Next. In the From Directory field, go to the directory to which you exported your Event Bus Console configurations in “Export Event Bus Console Configurations” and select all files with the extension .launch. Click Finish.
 - b Go to the Events Development perspective, click the Run/Run Configurations menu option, and go to your Event Bus Console instance. You can choose to do either of the following:
 - In the Run Configurations dialog box, select the Event bus configuration file check box. In the Event Bus Configuration field, browse to the ConfigEDAOrchestrator.xml file the 9.6 Software AG_directory\common\conf directory, and then click Apply.
 - In the Run Configurations dialog box, click the Configure NERV Settings link. On the Preferences dialog box, in the NERV configuration file field, browse to the com.softwareag.platform.eda.nerv.properties file in the 9.6_Software AG_directory\profiles\EDA\configuration\com.softwareag.platform.config.propsloader directory. Click Apply and then click OK.
- 4 If you exported your preferences before upgrading, do the following:
 - a Go to the File > Import wizard. In the Select panel, go to General > Preferences and click Next. In the From preference file field, specify the .epf file to which you exported your preferences. Click Finish.
 - b Go to Window > Preferences. In the preferences window, go to the Java > Installed JREs > Execution Environments page, if multiple JREs are listed, make sure JRE 1.7 is selected as the default, or remove JRE 1.6 from the list. Also update settings that point to old product installations to point to 9.6 product installations instead. For example, for My webMethods Server, update the Server > Runtime Environments settings.

Migrate Business Process and Business Rule Projects

- 1 Start Designer 9.6.
- 2 If your projects are stored in a source control system, use the import wizard for that system (for example, **Import SVN > Project from SVN**). If your projects are stored in the Designer workspace, do the following:
 - a Go to the **File > Import** wizard.
 - b In the Select panel, go to **General > Existing Projects into Workspace** and click **Next**.
 - c In the Import Projects panel, do the following:
 - i Click **Select Root Directory** and go to the workspace that contains a type of project you want to import, or click **Select Archive File** and go to the directory that contains a type of project you want to import.
 - ii In the **Projects** box, select the projects to import. Select **Copy projects into workspace**. Click **Finish**.
- 3 Verify the following:
 - All imported business process projects appear in the **Solutions** tab under the **Processes** node.
 - All imported business rules projects appear in the **Solutions** tab under the **Rules** node.
- 4 If you imported business rule projects, right-click each project in the Rules Explorer and then click **Upgrade Project**.

Migrate Task Application Projects

- 1 In Designer 9.6, go to **Window > Preferences > Server > Runtime Environments**. If the **Installed server runtimes** list does not include a **My webMethods Server 9.6**, add one.
- 2 Go to **Software AG > Task Development**. In the preferences window, make sure all your other task-related Designer preferences are correct, and then click **OK**.
- 3 Go to the **File > Import** wizard.
 - a In the Select panel, go to **Software AG > Existing CAF Projects into Workspace** and then click **Next**.
 - b In the Import Projects panel, click **Select Root Directory** and go to the workspace or source control system that contains your task application projects, or click **Select Archive File** and go to the directory that contains your task application projects. In the **Projects** box, select the projects to import.
 - c Select **Copy projects into workspace** and then click **Finish**.
- 4 Make sure all imported task application projects appear in the **Solutions** tab, under the **Tasks** node.

- 5 If errors appear in the **Problems** tab, click the **Navigator** tab. Right-click each task application project, click **CAF Tools**, and click **Repair CAF Project**. If errors still appear, restart Designer.
- 6 Publish the migrated task application projects to My webMethods Server 9.6. For instructions, see *webMethods BPM Task Development Help 9.6*.

Migrate CloudStreams Server Definitions and Projects

- 1 Start Designer 9.6.
- 2 Import CloudStreams Server definitions as follows:
 - a Go to the **CloudStreams Development** perspective, then go to **Window > Preferences**. On the **Preferences** dialog box, in the left navigation bar, go to **Software AG > CloudStreams Servers**.
 - b Click **Import**, select the .properties file you exported, and click **Open**. Designer asks whether to overwrite existing servers. Click **OK**, and then click **OK** again to close the **Preferences** dialog box.
- 3 Import CloudStreams Governance projects as follows:
 - a Go to the **File > Import** wizard. In the **Select** panel, go to **Software AG > CloudStreams Governance Project** and then click **Next**.
 - b In the **Import CloudStreams Governance Project** panel, specify the directory that contains the projects you exported in the **Select Root Directory** field. In the **Projects** box, select the projects to import.
 - c Select **Copy projects into workspace** and then click **Finish**.
 - d In the **CloudStreams Development** perspective, make sure all imported governance projects appear in the **CloudStreams Governance** tab.
- 4 Repeat the previous step to import CloudStreams Provider projects.

Migrate Integration Server Definitions

- 1 In Designer 9.6, go to **Window > Preferences**. On the **Preferences** dialog box, in the left navigation bar, go to **Software AG > Integration Servers**.
- 2 Click **Import**, select the .properties file you exported, and click **Open**. Designer asks whether to overwrite existing servers. Click **OK**, and then click **OK** again to close the **Preferences** dialog box.

Complete the Business Process Run-time Upgrade

Note: If you have running process instances that are based on a process model created before you upgraded to 9.6, and you now want to regenerate that process model in Designer 9.6, change the version number of the process model to the next sequence number before regenerating it. If you do not do so, the process instances will not behave as expected. When you enable the new version of the process model for execution in My webMethods Server, you will be asked if you want to upgrade running processes; respond No.

- 1 If you migrated webMethods Broker to 9.6 using the instructions in [“Complete the Messaging Upgrade”](#), make sure the new Broker that will be used by the Process Engines has the same name in 9.6 that it had in the old release. To do so, open Integration Server Administrator and point to Integration Server 9.6. Go to the IS Settings > Messaging > webMethods Messaging Settings page and check the Broker name.
- 2 If you migrated process run-time packages using the instructions in [“Run the Integration Server Migration Utility” on page 48](#), make sure the packages exist in the `9.6_Software AG_directory\IntegrationServer\instances\instance_name\packages` directory. The package names are the project names or custom names you specified in Designer.
- 3 Open Integration Server Administrator and point to Integration Server 9.6. Go to the Settings > JDBC Pools page and connect the ProcessEngine and ProcessAudit functions to their database components. For instructions, see *Installing webMethods and Intelligent Business Operations Products 9.6*.
- 4 Make sure document retrieval for all webMethods messaging triggers is enabled on Integration Server 9.6. For instructions, see *webMethods Integration Server Administrator’s Guide 9.6*.

Update Host Names

If the old and new business process product installations are on different machines, update the host name in the SERVERID column in the PRTINSTANCEITER, PRTPROCESS, PRTPROCLOCK, PRTQUEUE, PRTSTEPLOCK, PRTSTEPSTATE, PRTSTEPSUSPENSION, WMCUSTOMLOOPDATA, WMCUSTOMPROCESSDATA, WMPROCESS, WMPROCESSASSOC, WMPROCESSBLOCKAGE, WMPROCESSSTEP, WMPROCESSSTEPLOOP, WMPROCESSTRANSITION, WMSTG_PROCESS_CONTROL, WMSTG_PROCESS_STEP, and WMRULEDIST database tables.

Complete the Blaze Rules Upgrade

Migrate Blaze rules using the instructions in *Using Blaze Rules with BPM and CAF 9.6*.

10 Completing the Command Central and Platform Manager Upgrades

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Complete the Command Central Upgrade

You complete the Command Central upgrade by migrating its infrastructure and then running the Command Central migration utility. The utility migrates the following:

- Environment configurations, which include metadata about the environment, nodes (installations), and products that Command Central is managing.
- Command Central Users, roles, and groups.
- 9.5 upgrade: License tools and templates.

Before Migrating Data

- 1 Make sure the old Command Central is shut down.
- 2 If the old and new Command Central installations are on different machines, see [“Use of Zip File as Old Installation” on page 25](#) and then create a Zip file that contains the necessary files from the old Command Central installation. On the old machine, open a command window, go to the old Software AG directory that contains the old Command Central installation (for example, C:\SoftwareAG or /opt/softwareag), and enter the commands below. Specify the same Zip file name in both commands.

```
jar cfM Zip_file_name.zip common\conf
jar ufM Zip_file_name.zip profiles\CCE
```

Migrate the Command Central Infrastructure

- 1 Migrate HTTP port configurations as follows:
 - a Go to the *old_Software AG_directory*\profiles\CCE\configuration\com.softwareag.platform.config.proploader directory. If you see a single com.softwareag.catalina.connector.http.pid-port.properties file, open that file. If you see multiple files with that name, open the file that specifies the port you want to designate as the default port in 9.6.
 - b Go to the same directory in the 9.6 installation and open the com.softwareag.catalina.connector.http.pid-port.properties file.
 - c Compare the property values in the two files. If any are different, copy the old value over the 9.6 value.
 - d Check for additional com.softwareag.catalina.connector.http.pid-port.properties files for HTTP ports in the above-mentioned old directory. Copy all such files to the 9.6 directory and then add these elements to each copied file:
 - `alias=unique_identifier`. This Software AG-specific attribute uniquely identifies each connector when you view its configuration in the Platform Manager. The alias for the default HTTP connector you set up above is

defaultHttp. You could use that alias as a base, and add a unique suffix to create the alias for each additional connector (`alias=defaultHttp2`, `alias=defaultHttp3`, and so on).

- `enabled=true`. This Software AG-specific attribute and value are required for this connector to start.
- 2 Repeat the previous steps to migrate HTTPS port configurations, but use the `com.softwareag.catalina.connector.https.pid-port.properties` file, and add `alias=defaultHttps` to the default HTTPS connector.
- 3 Migrate JMS port configurations. Open the `com.softwareag.jmx.connector.pid-port.properties` files in the old and 9.6 *Software AG_directory*\profiles\CCE\configuration\com.softwareag.platform.config.propsloader directories. If any values in the two files are different, copy the old value over the 9.6 value.
- 4 Migrate the journal logger configuration. Open the `log_config.xml` files in the old and 9.6 *Software AG_directory*\profiles\CCE\configuration\logging directories. If any values in the two files are different, copy the old value over the 9.6 value.
- 5 Migrate the password manager configuration.
 - a Open the `scPassMan.config.xml` files in the old and 9.6 *Software AG_directory*\profiles\CCE\configuration\security\passman directories. If any values in the two files are different, copy the old value over the 9.6 value.
 - b Go to the *old_Software AG_directory*\profiles\CCE\configuration\security\passman directory. Copy the `defaultPassStore.dat` and `mpw.dat` files to the same directory in the 9.6 installation.
- 6 You can customize the product Java Service Wrappers; for example, you might add Java arguments or configure memory settings or logging. Copy any customizations from the old `wrapper_conf` or `custom_wrapper.conf` files to the 9.6 `custom_wrapper.conf` file. The files are located in the *Software AG_directory*\profiles\CCE\configuration directory.
- 7 Open the `com.softwareag.platform.eda.nerv.properties` files in the old and 9.6 *Software AG_directory*\profiles\CCE\configuration\com.softwareag.platform.config.propsloader directories. If any values in the two files are different, copy the old value over the 9.6 value. Update any references to old installation directories to refer to 9.6 installation directories instead.

Run the Command Central Migration Utility

For a general description of migration utility behavior, see [“Migration Utilities” on page 24](#).

Perform a Custom Migration

- 1 On the 9.6 machine, open a command window, go to the *9.6_Software AG_directory\CCE\migrate\bin* directory, and run the command `migrate.{bat|}`.
- 2 The utility asks for the full path to one of the following:
 - The Software AG directory that contains the old Command Central installation (for example, *C:\old_Software AG_directory* or */opt/old_Software AG_directory*).
 - The Zip file you made earlier.
- 3 The utility asks whether to import migration settings. Enter N.
- 4 The utility asks whether to migrate environment configuration data.
- 5 The utility asks whether to migrate users, roles, and groups.
- 6 9.5 upgrade: The utility asks whether to migrate license tools and templates.
- 7 The utility asks whether to export your settings. If you want to perform other migrations by importing the settings from this session, enter Y. If not, enter N.

Migrate Using Imported Settings

Imported settings can come from the following:

- Settings you exported from a custom migration. These settings are stored in a file named `migrate.dat`. The file is stored in the *9.6_Software AG_directory\CCE\migrate\bin* directory from which you ran the custom migration. Copy the `migrate.dat` file to any directory on machines that host Command Central 9.6 installations to which you want to migrate data.
- Settings in the default migrations provided with Command Central. For each old release, the settings are stored in a file named `migraterelasesbs.dat` file in the *9.6_Software AG_directory\CCE\migrate\bin* directory. The settings tell the migration utility to migrate the data listed in [“Complete the Command Central Upgrade” on page 68](#).

Migrate Using Imported Settings with Prompting

- 1 On the 9.6 machine, open a command window, go to the *9.6_Software AG_directory\CCE\migrate\bin* directory, and run the command `migrate.{bat|}`.
- 2 The utility asks for the full path to the Software AG directory that contains the old Command Central installation or to the Zip file you made earlier.
- 3 The utility asks whether to import migration settings. Enter Y and, when prompted, provide the full path to the `migrate.dat` file or the `migrate{901|951}sbs.dat` file.

Migrate Using Imported Settings without Prompting

On the 9.6 machine, open a command window, go to the *9.6_Software AG_directory\CCE\migrate\bin* directory, and run the command below. If an error occurs, the utility exits.

```
migrate.{bat|}  
{-srcDir|-srcFile} full_path_to_{old_Software AG_directory|Zip_file}  
-importFile full_path_to_{migrate.dat|migrate{901|951}sbs.dat}  
-silent true
```

Complete the Platform Manager Upgrade

- 1 Migrate your configurations and customizations using the instructions in [“Migrate the Command Central Infrastructure” on page 68](#), but look for the files in the SPM directory rather than the CCE directory.
- 2 Migrate the Platform Manager user repository. Go to the *old_Software AG_directory\common\conf* directory. Copy the *user.txt*, *roles.txt*, and *groups.txt* files to the *9.6_Software AG_directory\profiles\SPM\configuration\security* directory.

11 Completing the CentraSite Upgrade

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Complete the CentraSite Upgrade

You complete the CentraSite upgrade by exporting configuration data from the old CentraSite and assets from the old Registry Repository into a Zip file, and then importing the data into CentraSite 9.6.

- 1 Make sure the old CentraSite is shut down.
- 2 On the old machine, open a command window, go to the *old_Software AG_directory/CentraSite/utilities* directory, and run this command:

```
sbsExport.{cmd|sh} /full_path_to_Zip_file
```

An example of this command is `./sbsExport.sh/tmp/sbs_cs82_data.zip`
- 3 If the old and new CentraSite installations are on different machines, copy the Zip file to any directory on the 9.6 machine.
- 4 Use the Software AG Update Manager you installed with the 9.6 products to apply the latest fixes to CentraSite 9.6. For instructions, see *Using the Software AG Update Manager*.
- 5 On the 9.6 machine, open a command window, go to the *9.6_Software AG_directory/CentraSite/utilities* directory, and run this command:

```
sbsImport.{cmd|sh}/full_path_to_Zip_file
```

An example of this command is `./sbsImport.sh/tmp/sbs_cs82_data.zip`
- 6 Change any settings in CentraSite Control that you noted in [“Prepare CentraSite”](#).
- 7 8.2 upgrade: If you want to use instances of ApplinX object types from CentraSite 8.2 in CentraSite 9.6, manually re-create them using the definitions you noted in [“Prepare CentraSite”](#).
- 8 If you installed plug-ins that are GUI extensions for CentraSite Control in the old CentraSite installation, install them in the CentraSite 9.6 installation.

12 Complete the OneData Upgrade

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Complete the OneData Upgrade

You complete the OneData upgrade by running the OneData migration utility. The utility migrates configuration data. For a general description of migration utility behavior, see [“Migration Utilities” on page 24](#). You cannot use a Zip file of the product installation as the source of the data to migrate.

- 1 Make sure the old OneData is shut down.
- 2 If the old and new OneData installations are on different machines, copy the *old_Software_AG_directory*\profiles\ODE\bin\onedata\config directory to the 9.6 machine, and recreate the old directory structure. For example, if the old directory structure was C:\SoftwareAG\profiles\ODE\bin\onedata\config, you could create the directory structure C:\oldOneData\profiles\ODE\bin\onedata\config on the 9.6 machine.

- 3 On the 9.6 machine, open a command window, go to the *9.6_Software_AG_directory*\profiles\ODE\bin\migrate directory, and run the command below.

```
migrate.{bat|sh} -srcDir full_path_to_old_Software_AG_directory
```

The utility asks for the release number for the old OneData.

- 4 You can customize the product Java Service Wrappers; for example, you might add Java arguments or configure memory settings or logging. Copy any customizations from the old *wrapper_conf* or *custom_wrapper.conf* files to the 9.6 *custom_wrapper.conf* file. The files are located in the *Software_AG_directory*\profiles\ODE\configuration directory.
- 5 8.4 upgrade: In OneData 8.4, log entries for an action might have been distributed across multiple files. Starting in OneData 9.0, to improve debugging, log entries for an action are written to a single file. You must enable the new method of logging for OneData modules. Follow the examples in the *sample_log4j_config.txt* file in the *9.6_Software_AG_directory*\profiles\ODE\bin\onedata\config directory.

13 Completing the Optimize Upgrade

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Configure and Start the Terracotta Server Array

If you are clustering Analytic Engines in release 9.6, you must configure and start the Terracotta Server Array. For instructions, see *Getting Started with the webMethods Product Suite and Terracotta 9.6*, *Configuring BAM 9.6*, and the Terracotta 3.7.6 documentation.

Migrate the Infrastructure Data Collector Infrastructure


You can customize the product Java Service Wrappers; for example, you might add Java arguments or configure memory settings or logging. Copy any customizations from the old `wrapper_conf` or `custom_wrapper.conf` files to the 9.6 `custom_wrapper.conf` file. The files are located in the *Software AG_directory*\profiles\InfraDC\configuration directory.

8.2 upgrade: The structure for JAAS configuration data changed starting in release 9.0. Go to the *old_Software AG_directory*\profiles\InfraDC\configuration directory and open the `jaas.config` file. If you made changes to the file, make the same changes to the new JAAS structure in the 9.6 installation.

9.0 or 9.5 upgrade: Migrate the JAAS configuration. Go to the *old_Software AG_directory*\profiles\InfraDC\configuration directory and copy the `jaas.config` file to the same directory in the 9.6 installation. In the copied file, replace any references to *old_Software AG_directory*\common\conf\users.txt, roles.txt, and groups.txt with references to the same files in the 9.6 installation (that is, *9.6_Software AG_directory*\profiles\InfraDC\configuration\security\users.txt, roles.txt, and groups.txt).

Update Connection to Process Engine

If you are using Optimize for Process, do the following:


- 1 Open Integration Server Administrator and point to an Integration Server 9.6 that hosts a Process Engine.
- 2 Go to the Packages > Management page and click  for the WmPRT package.
- 3 Click Settings in the left navigation bar and then click Edit Process Engine Settings.
- 4 In the JMS Server URL field, identify the JMS provider host name and port as follows:

JMS Provider	URL Format
webMethods Broker	broker://host:port/Broker_name. The default port is 6849.
Universal Messaging	nsp://host:port. The default port is 9000.

- 5 Click Submit and then reload the WmPRT package.
- 6 Repeat these steps for every Integration Server that hosts a Process Engine.

Update Connection to Optimize Support Package

If you are using Optimize built-in services, do the following:

- 1 Open Integration Server Administrator and point to the Integration Server 9.6 that hosts an Optimize Support package.
- 2 Go to the Packages > Management page and click  for the WmOptimize package.
- 3 Identify the Analytic Engine host machine and port. The default port is 12503.
- 4 In the JMS Server URL field, identify the JMS provider host name and port as follows:

JMS Provider	URL Format
webMethods Broker	broker://host:port/Broker_name. The default port is 6849.
Universal Messaging	nsp://host:port. The default port is 9000.

- 5 Click **Submit** and then reload the WmOptimize package.
- 6 Repeat these steps for every Integration Server that hosts an Optimize Support package.

Deploy the Optimize Environment

Unless otherwise noted, see *Configuring BAM 9.6* for detailed instructions on the Optimize steps in the sections below.

Note: You cannot migrate rule violation history for process intrinsic metrics to Optimize 9.6.

To Not Reuse the Old Optimize CCS Environment Definition

If you do not want to reuse your old Central Configuration System (CCS) Environment definition, start My webMethods Server 9.6, open My webMethods, and configure your Optimize 9.6 environment.



For Infrastructure Data Collector, when you define hosts, enter the same value in the **Host Name or IP Address** field of the Add/Edit Host dialog box that you had in the old release.

Note: If the 9.6 value is not identical to the old value, you will have to stop monitoring existing assets, rediscover them, and reselect them for monitoring after you finish upgrading.

Skip to the step for deploying the Optimize 9.6 environment, below.

To Reuse the Old Optimize CCS Environment Definition

To reuse the old CCS environment definition that you exported to file before installing Optimize 9.6, follow the steps below.

- 1 Start My webMethods Server 9.6 and open My webMethods.
- 2 Import the old CCS environment, as follows:
 - a Go to the **Applications > Administration > System-Wide > Environments > Define Environments** page.
 - b Click **Import Environment**. On the Import Environments dialog box, click **Browse**, go to the file to which you exported the old CCS environment, and click **OK**. When prompted, confirm the migration.
 - c When asked "Do you wish to migrate the environment to the latest version?", click **Yes**. The CCS imports the old environment and migrates it to Optimize 9.6 Logical Servers.
- 3 Update the database pool connection settings for the database pool definition associated with the environment you imported, as follows:
 - a Go to the **Applications > Administration > System-Wide > Environments > Database Pool Configuration** page.
 - b In the **Pool** column, click the imported database pool.
 - c In the **Pool Settings** area, set the **Minimum Connections** field to 8, and the **Maximum Connections** field to 60.
 - d Make sure the database connection information is correct. In the **Database Connection** area, click **Test** and make sure the message **Test Passed** displays at the bottom of the page.
 - e Click **Save**.
- 4 Go to the **Applications > Administration > System-Wide > Environments > Define Environments** page. Under **Environment Name**, click the environment you imported.
- 5 Validate the environment as follows:
 - a Click each tab that shows the icon  except the **Validate** tab. If you change any settings on a tab, and the tab has a **Save** button, click **Save**.
 - b When all tabs except the **Validate** tab show , click the **Validate** tab.
- 6 Click **Finish**.

Deploy the Optimize 9.6 Environment

- 1 Start the Optimize 9.6 components you installed. These components can include the Analytic Engine, Infrastructure Data Collector, and the Web Services Data Collector.
- 2 Deploy your Optimize 9.6 environment. For instructions, see *Configuring BAM 9.6*.

- 3 In My webMethods, go to the My webMethods > System Settings > Servers page.
 - If you have BPMS installed, select the **BPM and BAM** option and identify the upgraded Analytic Engine and the Integration Server that hosts Monitor. You can identify the hosts using DNS name or IP address.
 - If you have BPMS installed, but are not using BPM (that is, you are using only Optimize), select the **BAM only** option and identify the upgraded Analytic Engine. You can identify the host using DNS name or IP address.

Click **Check Server Status** and make sure the server is available (green icon). It might take some time for the server to become available (for example, 15 minutes). Then click **Save**.

8.2 Upgrade: Monitor Clustered Integration Servers

If you had Integration Servers that were clustered using Oracle Coherence, you reconfigured them earlier to use a Terracotta-based clustering solution instead. You can now rediscover the clustered Integration Servers you want to monitor, re-select the KPIs you noted in [“Prepare Optimize” on page 20](#), and restart monitoring. For instructions, see *Administering webMethods Optimize 9.6*.

Migrate Data Collected for SNMP Assets

If you monitored SNMP assets in your old Infrastructure Data Collector installation, migrate the collected data by running the Infrastructure Data Collector migration utility.

For a general description of migration utility behavior, see [“Migration Utilities” on page 24](#). You cannot use a Zip file of the old product installation as the source of the data to migrate. The migration utility runs without prompting you for any information.

If a file with the same name as a file that will be migrated already exists in the 9.6 Infrastructure Data Collector installation, the migration utility backs up the file to the `9.6_Software AG_directory\install\migrationbackup` directory before migrating the old file.

- 1 Make sure the old Infrastructure Data Collector is shut down.
- 2 If the old and new Infrastructure Data Collector installations are on different machines, copy the `old_Software_AG_directory\profiles\InfraDC` directory to the 9.6 machine, and recreate the old directory structure. For example, if the old directory structure was `C:\SoftwareAG\profiles\InfraDC`, you could create the directory structure `C:\oldInfraDC\profiles\InfraDC` on the 9.6 machine.
- 3 On the 9.6 machine, open a command window, go to the `9.6_Software AG_directory\infrastructuredc\bin\migrate` directory, and run this command:

```
migrate.{bat|sh}
-srcDir full_path_to_old_Software AG_directory
-importFile full_path_to_migrate{822|901|951}sbs.dat} -silent true
```

Use a New JMS Provider

If you were using webMethods Broker as your JMS provider in the old release, and are using Universal Messaging in 9.6, do the following:

- 1 Start Universal Messaging and open Universal Messaging Enterprise Manager.
- 2 Connect to a server instance, then click it.
- 3 Click the **Config** tab. Expand **Global Values** and set `AllowRealmAdminFullAccess` to `true`.

14 Completing the Asset Build Environment and Deployer Upgrades

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■ Complete the Deployer Upgrade	84

Complete the Asset Build Environment Upgrade

Go to the *old_Software AG_directory\common\AssetBuildEnvironment\master_build* directory and open the *build.properties* file. Copy the property values to the same file in the 9.6 installation.

Complete the Deployer Upgrade

You have two options for migrating Deployer data:

- You can migrate all Deployer global (default) settings, aliases, target groups, and projects using the Integration Server migration utility.
- You can choose whether to migrate global (default) settings, and you can choose which aliases, target groups, and projects to migrate using the Deployer migration feature.

Each option is explained below.

For instructions on tasks you must perform in Deployer, see the *webMethods Deployer User's Guide*.

Before Migrating Deployer Data

- 1 Make sure you have upgraded all source and target product servers that were defined in the old Deployer to their 9.6 releases, and have migrated all product data and assets to the 9.6 releases, as instructed in this guide.
- 2 Make sure you have upgraded the Integration Server 9.6 that hosts Deployer 9.6 and migrated its data using the instructions in this guide.
- 3 Make sure you are a member of the Administrators ACL, or of the Internal, Developer ACLs, and DeployerAdmin ACLs, for both the Integration Server that hosts the old Deployer and the Integration Server that hosts Deployer 9.6. For instructions, see *webMethods Integration Server Administrator's Guide 9.6*.
- 4 In the old Deployer, edit all connections to old source and target product servers to point to the new 9.6 source and target product servers. You do not have to supply user names and passwords if you do not know them.
- 5 If you installed Deployer 9.6 on the same machine as the old Deployer, you might want Deployer 9.6 to use the ports that were used by the old Deployer. If so, do the following:
 - a In Integration Server Administrator, point to the Integration Server that hosts the old Deployer and go to the **Security > Ports** page.
 - b Click **Add Port**, click **webMethods/HTTP**, and click **Submit**. Enter the port details, click **Yes** for **Enable**, click **WmRoot** under the package name, and click **Save Changes**.
 - c Click **Change Primary Port**, click the new port, and click **Update**.

- d In the **Access Mode** column of the new port, click **Edit**. In the **Edit Access Mode** page for the port, click **Set Access Mode to Allow by Default**. Click **OK** on the warning pop-up. The message **Successfully changed access mode for Port Service Access Settings** appears.
- e Disable the old port by clicking **Yes** in the **Enabled** column for that port.

Migrate All Deployer Data Using the Integration Server Migration Utility

In the previous section, you upgraded the Integration Server that hosts Deployer 9.6 and migrated its data. Do not start the host Integration Server before you migrate Deployer data. If you do, a file named `MIGRATION_DONE` is created in the `WmDeployer` package, and you will not be able to migrate Deployer data. If you did start the host Integration Server, delete this file.

Migrate Deployer data using the instructions in [“Completing the Integration Server and Hosted Products Upgrade” on page 47](#).

Migrate Selected Deployer Data Using the Deployer Migration Feature

Start the Old Deployer and Deployer 9.6 and Migrate Global (Default) Settings

- 1 Start the old Deployer and Deployer 9.6.
- 2 In Deployer 9.6, go to the **Tools > Migrate Data** page. In the **Host** and **Port** fields, identify the old Deployer to migrate from. In the **User** and **Password** fields, provide the user name and password to use to log onto the old Deployer.
- 3 Deployer 9.6 lists the aliases, target groups, or projects to migrate in the right-hand pane. In the **Page Size** list, click the number of aliases or projects to list at a time.
- 4 In Deployer, you set defaults for all projects, such as defaults for dependency checking, project locking, and general deployment. You also set defaults for Integration Server and Trading Networks projects, such as defaults for suspending assets during deployment, overwriting existing assets, and activating assets after deployment. If you want to migrate these default settings, in Deployer 9.6, click **Migrate Default Settings**.

Migrate Connection Information (Server Aliases)


You can choose the aliases to migrate. However, if you want to migrate a target group, you must either migrate all aliases in that target group, or remove the aliases you do not want to migrate from the target group.

- 1 In Deployer 9.6, click **Migrate Server Aliases**. In the **Select Server** list, click the type of server whose aliases to migrate.
- 2 In the **Select** column, select the check boxes next to the server aliases you want to migrate. In the **Point Selected Aliases to Servers** list, click **9.6**.
- 3 Click **Migrate Server Aliases**. Deployer migrates the selected aliases, then disables those rows and displays **Yes** in the **Migrate** column for the aliases.
- 4 Repeat the steps above for each type of server whose aliases to migrate.
- 5 You cannot migrate Integration Server HTTPS server aliases from Deployer. Manually recreate these aliases in the host Integration Server.

Migrate Target Groups

- 1 If you did not migrate all aliases in the target groups you want to migrate, in the old Deployer, remove those aliases from the target groups.


Important! If target groups include invalid aliases, deployment of projects that use those target groups fails.

- 2 In Deployer 9.6, click **Migrate Target Groups**. In the **Select Server** list, click the type of server whose target groups to migrate.
- 3 In the **Simulate Migration** column, click  in the row for each target group to migrate.
Deployer displays a message that indicates whether the aliases that are referenced by the target group have been migrated. If any aliases have not been migrated, migrate them or remove them from the indicated target group.
- 4 In the **Select** column, select the check boxes next to target groups to migrate. In the **Point Selected Aliases to Groups** list, click **9.6**.
- 5 Click **Migrate Target Groups**. Deployer migrates the selected target groups, then disables those rows and displays **Yes** in the **Migrate** column for the groups.

Migrate Deployment Projects

- 1 Start all 9.6 source product servers referenced by Deployer projects.

Note: If a server referenced by a Deployer project is not running, or the connection settings for a server referenced by a project are not correct, you will have to rebuild the project later. Deployer will display messages to this effect.

- 2 In Deployer 9.6, click **Migrate Projects**.
- 3 In the right-hand pane, in the **Simulate Migration** column, click  row for each project to migrate. Deployer displays a message that indicates whether the source servers that are referenced by the project are running. If the message indicates that any of the referenced source servers are not running, start those servers.

- 4 In the **Select** column, select the check boxes next to the projects to migrate, and then click **Migrate Projects**. Deployer displays a new window with a dynamic migration report. You can display the migration report for each project in the **Report** column in the original window. You can display the latest migration report by clicking **View Latest Migration Report**.

15 Completing Final Tasks for All Products, and Troubleshooting

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Complete Final Changes for All Products

- In each release, changes are made to product behavior, services, parameters, properties, and APIs. You might need to modify product files or assets to accommodate these changes. For detailed information about the changes, read the product readmes for each of the releases from your old release through the 9.6 release. For example, if you are upgrading from release 8.2, read the product readmes for releases 8.2, 9.0, 9.5, and 9.6. Also read the product release notes for those releases to understand new functionality. Readmes and release notes are available on the Software AG Documentation website.
- If you installed your 9.6 products on a different machine than your old products, make sure to update host names in your 9.6 products, in the connections between your products, and in your database tables, as indicated in this guide and in the product documentation. Also make sure any absolute paths in the 9.6 configuration files point to valid locations, or change them to be correct for the new machine. If the machine has different a different operating system or hardware, make sure your JVM settings are correct.
- Use the Software AG Update Manager you installed with the 9.6 products to apply the latest fixes to the 9.6 products you installed. For instructions, see *Using the Software AG Update Manager*.
- Configure your products as described in the 9.6 product documentation.
- After installation, you might have set Windows services for products to Manual, and disabled scripts that start UNIX daemons, to avoid automatically starting both old and new products. When your new environment is ready, after you stop running the old products and when you want to start running the new ones, you can reset the Windows services to Automatic, and re-enable the UNIX scripts.

Troubleshooting

If you encounter errors during the upgrade, try the troubleshooting methods below.

- Look in log files.

Type of Log	Location
Installation and uninstallation	9.6_ <i>Software AG_directory</i> \install\logs directory
Product	In a logs directory in the product file structure, or in the 9.6_ <i>Software AG_directory</i> \profiles\ <i>product</i> \logs directory.
Data migration	9.6_ <i>Software AG_directory</i> \install\logs directory and product directories indicated by the upgrade procedures
Database migration	9.6_ <i>Software AG_directory</i> \common\db\logs directory.

- Go to the [Knowledge Center](#) on the Empower Product Support Website and search using keywords such as upgrade.
- Look up error messages in the *webMethods Error Message Reference*.
- Go to the [Software AG Developer Community](#) and join the upgrade discussion forum.

If you cannot resolve the problem using the methods above, contact Software AG Global Support.

