

## **Oracle® Fusion Middleware**

Upgrade Guide for Oracle Portal, Forms, Reports, and  
Discoverer

11g Release 1 (11.1.1)

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Oracle Fusion Middleware Upgrade Guide for Oracle Portal, Forms, Reports, and Discoverer, 11g Release 1 (11.1.1)

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# Preface

This preface contains the following sections:

- [Audience](#)
- [Documentation Accessibility](#)
- [Related Documents](#)
- [Conventions](#)

## Audience

This manual is intended for Oracle Fusion Middleware system administrators who are responsible for installing and upgrading Oracle Fusion Middleware. It is assumed that the readers of this manual have knowledge of the following:

- Oracle Application Server 10g system administration and configuration
- The configuration and expected behavior of the system being upgraded

## Documentation Accessibility

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<http://www.fcc.gov/cgb/consumerfacts/trs.html>, and a list of phone numbers is available at <http://www.fcc.gov/cgb/dro/trsphonebk.html>.

## Related Documents

For more information, see the following related documentation available in the Oracle Fusion Middleware 11g documentation library:

- Related Upgrade Documentation
  - *Oracle Fusion Middleware Upgrade Planning Guide*
  - *Oracle Fusion Middleware Upgrade Guide for Java EE*
  - *Oracle Fusion Middleware Upgrade Guide for Oracle SOA Suite, WebCenter, and ADF*
  - *Oracle Fusion Middleware Upgrade Guide for Oracle Identity Management*
- *Oracle Fusion Middleware Installation Planning Guide*
- *Oracle Fusion Middleware Installation Guide for Oracle Portal, Forms, Reports and Discoverer*
- *Oracle Fusion Middleware Administrator's Guide*

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.



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# Summary of the Oracle Portal, Forms, Reports, and Discoverer Upgrade Process

This chapter provides a high-level summary of the steps required to upgrade an Oracle Portal, Forms, Reports, and Discoverer environment from Oracle Application Server 10g to Oracle Fusion Middleware 11g.

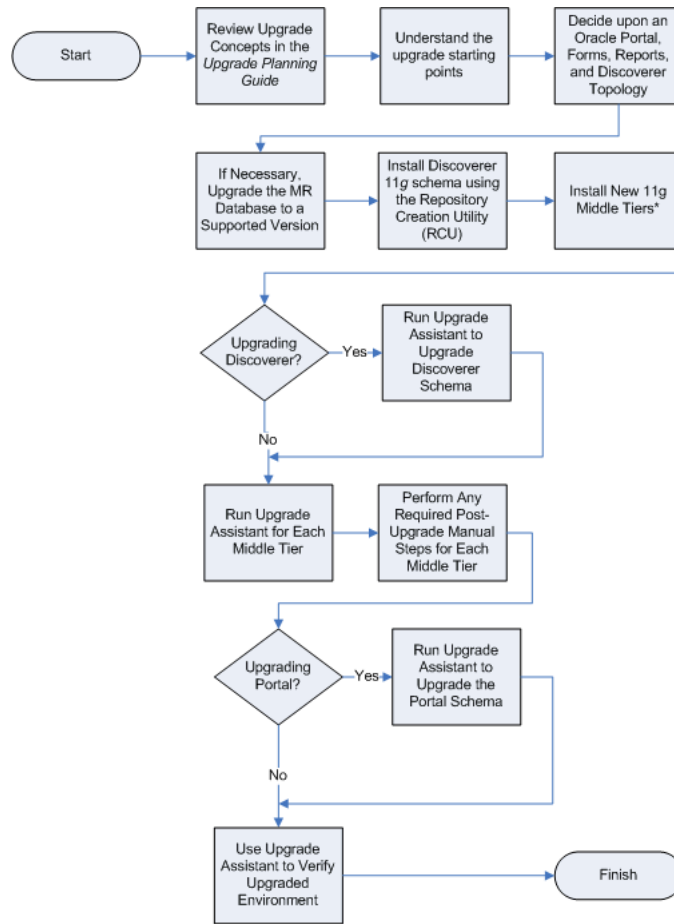
This chapter contains the following sections:

- [Flow Chart of the Oracle Portal, Forms, Reports, and Discoverer Upgrade Process](#)
- [Table Describing the Steps in the Oracle Application Server Upgrade Process](#)

## 1.1 Flow Chart of the Oracle Portal, Forms, Reports, and Discoverer Upgrade Process

[Figure 1–1](#) provides a flow chart of the Oracle Portal, Forms, Reports, and Discoverer upgrade process. Review this chart to get familiar with the steps you will be required to take, based on your existing Oracle Application Server environment.

**Figure 1–1 Flow Chart of the Oracle Portal, Forms, Reports, and Discoverer Upgrade Process**



\* During installation, configure Discoverer middle tiers to use the new 11g Discoverer schema; configure Portal middle tiers to use the existing 10g Portal schema.

## 1.2 Table Describing the Steps in the Oracle Application Server Upgrade Process

Table 1–1 describes each of the steps in the upgrade process flow chart, which is shown in Figure 1–1. The table also provides information on where to get more information on each step in the process.

**Table 1–1 Table Describing the Steps in the Oracle Application Server Upgrade Process**

Step	Description	More Information
Review Upgrade Concepts in the <i>Oracle Fusion Middleware Upgrade Planning Guide</i>	The <i>Oracle Fusion Middleware Upgrade Planning Guide</i> provides a high-level overview of how to upgrade your entire Oracle Application Server environment to Oracle Fusion Middleware, including compatibility information and instructions for upgrading any databases that support your middleware components.	<i>Oracle Fusion Middleware Upgrade Planning Guide</i>
Understand the upgrade starting points	Before planning your upgrade, you should be familiar with the supported starting points for an Oracle Portal, Forms, Reports, and Discoverer upgrade.	<a href="#">Task 1: Understand the Starting Points for Oracle Portal, Forms, Reports, and Discoverer Upgrade</a>
Decide upon an Oracle Portal, Forms, Reports, and Discoverer Topology	With the introduction of Oracle WebLogic Server, the topologies for Oracle Portal, Forms, Reports, and Discoverer have changed somewhat. Before you begin an upgrade, make sure you are familiar with the basic topologies in Oracle Fusion Middleware 11g.	<a href="#">Task 2: Decide Upon an Oracle Portal, Forms, Reports, and Discoverer Topology</a>
If necessary, upgrade the MR database to a supported database version	The Oracle Discoverer and Oracle Portal components require schemas that must be installed in a database. Before you can install or upgrade the schemas, you must make sure the database is a supported version.	<a href="#">Task 3: If Necessary, Upgrade the Database that Contains the Oracle Portal and Oracle BI Discoverer Schemas</a>
Install Discoverer 11g schema using the Repository Creation Utility (RCU)	Use the Oracle Fusion Middleware Metadata Repository Creation Utility to install the Oracle BI Discoverer 11g schema.  Note that there is no need to install the Oracle Portal 11g schema because you will be upgrading your existing 10g Portal schema.	<a href="#">Task 4: Use the Repository Creation Utility to Install the Oracle BI Discoverer Schema in the Database</a>
Install New 11g Middle Tiers	Use the Oracle Portal, Forms, Reports, and Discoverer installer to install your new Oracle Fusion Middleware middle tiers.  When prompted: <ul style="list-style-type: none"> <li>■ Configure Oracle Discoverer to use the new 11g Discoverer 11g schemas</li> <li>■ Configure Oracle Portal to use the existing 10g Portal schema.</li> </ul>	<a href="#">Task 5: Install and Configure Oracle Portal, Forms, Reports, and Discoverer Middle Tiers</a>
Run Upgrade Assistant to Upgrade Discoverer Schema	After you start the Upgrade Assistant, select the appropriate operation and follow the instructions on the screen.	<a href="#">Task 6b: Upgrade the Oracle BI Discoverer Schema</a>

**Table 1–1 (Cont.) Table Describing the Steps in the Oracle Application Server Upgrade Process**

Step	Description	More Information
Run Upgrade Assistant for Each Middle Tier	The Oracle Fusion Middleware Upgrade Assistant copies configuration data from your existing Oracle Application Server middle tiers to the newly installed Oracle Fusion Middleware middle tiers.	<a href="#">Task 6c: Upgrade the Oracle Portal, Forms, Reports, and Discoverer Middle Tiers</a>
Perform Any Required Post-Upgrade Manual Steps for Each Middle Tier	The Upgrade Assistant automates many of the upgrade tasks, but there are cases where you must manually modify the configuration settings after running the Upgrade Assistant.	<a href="#">Task 7: Perform Any Required Post-Upgrade Configuration Tasks</a>
Run Upgrade Assistant to Upgrade the Portal Schema	The Upgrade Assistant upgrades the Oracle Portal 10g schema to 11g.	<a href="#">Task 6d: Upgrade the Oracle Portal Schema</a>
Use Upgrade Assistant to Verify Upgraded Environment	The Upgrade Assistant provides a feature that will verify the upgraded environment to make sure specific components and URLs are functional.	<a href="#">Task 8: Verify the Oracle Portal, Forms, Reports, and Discoverer Upgrade</a>

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## Oracle Portal, Forms, Reports, and Discoverer for 10g Users

The following sections introduce some key concepts of the Oracle Portal, Forms, Reports, and Discoverer environment for Oracle Application Server 10g Release 2 (10.1.2) users:

- [Components of the Oracle Portal, Forms, Reports, and Discoverer Suite](#)
- [Basic Architecture of the Oracle Portal, Forms, Reports, and Discoverer Suite](#)
- [Considerations When Deciding Upon an Oracle Portal, Forms, Reports, and Discoverer Topology](#)

### 2.1 Components of the Oracle Portal, Forms, Reports, and Discoverer Suite

Oracle Application Server 10g Release 2 (10.1.2) provided users with updated versions of the following components:

- Oracle Portal
- Oracle Business Intelligence Discoverer
- Oracle Forms Services
- Oracle Reports
- Oracle HTTP Server (including `mod_plsql`)
- Oracle Web Cache
- Oracle Net Services, which includes the `tnsnames.ora`, `sqlnet.ora`, and `ldap.ora` configuration files

Oracle Fusion Middleware 11g provides updates to all these components. In Oracle Fusion Middleware, they are packaged as the Oracle Portal, Forms, Reports, and Discoverer software suite.

In Oracle Application Server 10g Release 2 (10.1.2), the Oracle Identity Management components, such as Oracle Internet Directory, Oracle Directory Integration Platform, Oracle Single Sign-On, and Oracle Delegated Administration Services were packaged with the Oracle Portal, Forms, Reports, and Discoverer components.

In Oracle Fusion Middleware 11g, your Oracle Identity Management components are packaged and installed separately, but they still provide the same resources and services.

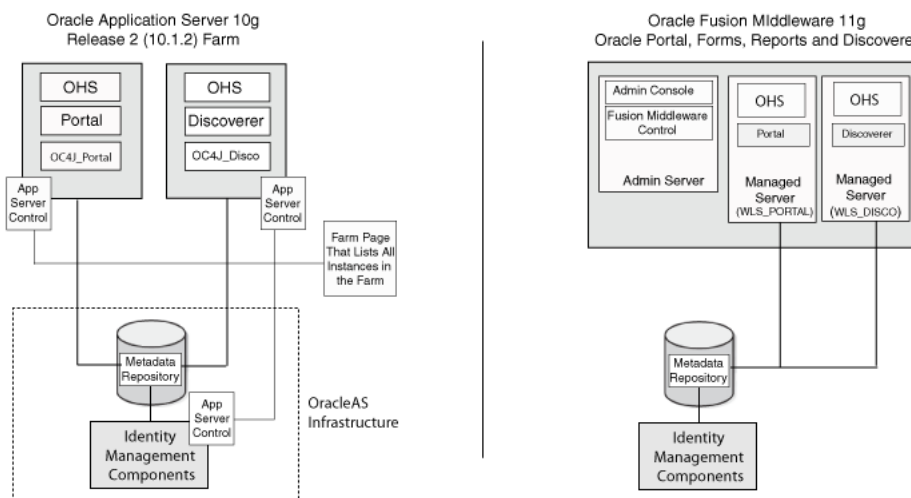
## 2.2 Basic Architecture of the Oracle Portal, Forms, Reports, and Discoverer Suite

The basic architecture of the Oracle Portal, Forms, Reports, and Discoverer components is the same as Oracle Application Server 10g, with one major difference. Instead of being based on Oracle Containers for Java EE (OC4J), the Oracle Fusion Middleware middle-tiers are based on Oracle WebLogic Server.

Figure 2–1 illustrates a basic Oracle Portal, Forms, Reports, and Discoverer topology in Oracle Application Server 10g Release 2 (10.1.2) and Oracle Fusion Middleware 11g. Notice how the system components are deployed to dedicated managed servers in the Oracle WebLogic Server domain.

In a more complex environment, you can also extend the domain to other hosts, so some of the Oracle Portal, Forms, Reports, and Discoverer components can be deployed on managed servers on remote hosts.

**Figure 2–1 Comparing the Oracle Portal, Forms, Reports, and Discoverer Topology in 10g Release 2 (10.1.2) and Oracle Fusion Middleware 11g**



## 2.3 Considerations When Deciding Upon an Oracle Portal, Forms, Reports, and Discoverer Topology

The following sections describe the general guidelines for configuring a new Oracle Fusion Middleware 11g topology in preparation for upgrade, as well as considerations for other alternative topologies:

- [General Guideline for Configuring Your Oracle Fusion Middleware Topology](#)
- [Understanding the Impact on Upgrade When Configuring an Alternative Topology](#)

### 2.3.1 General Guideline for Configuring Your Oracle Fusion Middleware Topology

In general, Oracle recommends that you upgrade your Oracle Application Server 10g environment to a similarly configured environment.

In other words, if your Oracle Application Server 10g environment consisted of a single Oracle home that contained all the Oracle Portal, Forms, Reports, and Discoverer components, then it is assumed you will be upgrading to an Oracle Fusion

Middleware domain that is configured in a similar manner: one Oracle home and one Oracle instance containing all the components.

If you follow this general guideline, you can use the Oracle Fusion Middleware Upgrade Assistant and the procedures documented in this guide to upgrade the components.

## 2.3.2 Understanding the Impact on Upgrade When Configuring an Alternative Topology

Oracle Fusion Middleware 11g provides a flexible architecture that does not prevent you from installing and configuring the Oracle Portal, Forms, Reports, and Discoverer components in separate Oracle instances.

You can, for example, install Oracle Portal and Oracle Forms Services and later extend the Oracle WebLogic Server domain to support Oracle Reports and Oracle BI Discoverer. The resulting topology will include two Oracle instances: one that contains Oracle Portal and Oracle Forms Services and one that contains Oracle Reports and Oracle BI Discoverer.

If you decide upon such an approach, note the following important restrictions and considerations:

- [Extending a Domain Creates Multiple Oracle Instances and Web Tier Components](#)
- [Impact of Multiple Web Tier Components in the Same Domain](#)
- [Impact of Multiple Oracle Instances on Upgrade](#)

### 2.3.2.1 Extending a Domain Creates Multiple Oracle Instances and Web Tier Components

Each time you extend a domain to include additional Oracle Portal, Forms, Reports, and Discoverer components, you create a new Oracle instance.

Depending upon the components you choose to configure in each Oracle instance, the configuration tool will create new Web tier components (Oracle HTTP Server and Oracle Web Cache instances) for the components that require them. For example, if you extend a domain to include Oracle Portal, then new Oracle HTTP Server and Oracle Web Cache instances are configured automatically to support Oracle Portal.

### 2.3.2.2 Impact of Multiple Web Tier Components in the Same Domain

If you configure multiple Web tier components in a single domain, then you must decide whether to maintain:

- Multiple Web tier components (for example, where each Oracle HTTP Server instance uses a different listening port and routes requests to specific components)
- OR
- A single set of Web tier components (for example, a single Oracle HTTP Server that routes requests to all the configured components in the domain).

Depending upon your decision, you might have to disable one set of Web tier components or reconfigure one Oracle HTTP Server instance to route requests to the other Oracle instance.

For more information about configuring Oracle HTTP Server to route requests to an Oracle WebLogic Server instance, see "Configuring the mod\_wl\_ohs Module" in the *Oracle Fusion Middleware Administrator's Guide for Oracle HTTP Server*.

### 2.3.2.3 Impact of Multiple Oracle Instances on Upgrade

If your Oracle Fusion Middleware domain contains multiple Oracle instances, then you must run the Upgrade Assistant at least twice (once for each 11g Oracle instance), and you must use care when selecting your upgrade options.

In particular, if you select the **Use source Oracle home ports in destination** option, note that you can run the Upgrade Assistant with this option selected only once for each host. Otherwise, you will likely encounter port conflicts, since no more than one component can listen on a single same listening port on a single host.

For more information, see [Section 3.6.3.2, "Important Notes When Using the Source Oracle Home Ports in the Destination Oracle Instance"](#)



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## Upgrading Your Oracle Portal, Forms, Reports, and Discoverer Environment

This chapter describes how to upgrade your existing Oracle Application Server 10g Release 2 (10.1.2) environment to Oracle Portal, Forms, Reports, and Discoverer 11g.

This chapter contains the following sections:

- [Task 1: Understand the Starting Points for Oracle Portal, Forms, Reports, and Discoverer Upgrade](#)
- [Task 2: Decide Upon an Oracle Portal, Forms, Reports, and Discoverer Topology](#)
- [Task 3: If Necessary, Upgrade the Database that Contains the Oracle Portal and Oracle BI Discoverer Schemas](#)
- [Task 4: Use the Repository Creation Utility to Install the Oracle BI Discoverer Schema in the Database](#)
- [Task 5: Install and Configure Oracle Portal, Forms, Reports, and Discoverer Middle Tiers](#)
- [Task 6: Use the Upgrade Assistant to Upgrade the Required Schemas and Middle Tiers](#)
- [Task 7: Perform Any Required Post-Upgrade Configuration Tasks](#)
- [Task 8: Verify the Oracle Portal, Forms, Reports, and Discoverer Upgrade](#)

### 3.1 Task 1: Understand the Starting Points for Oracle Portal, Forms, Reports, and Discoverer Upgrade

This document provides information about upgrading from:

- One of the following Oracle Application Server 10g Release 2 (10.1.2) installation types:
  - Portal and Wireless
  - Business Intelligence and Forms
  - Forms and Reports Services
- Oracle Application Server Portal 10g Release 2 (10.1.4)

Note that the procedures in this guide were tested against the latest 10g Release 2 (10.1.2) patch set. As a result, Oracle recommends that you upgrade your 10g Release 2 (10.1.2) environment to the latest patch set before starting this upgrade procedure.

This restriction is most important for Oracle Portal users. Specifically, if you are using Oracle Portal 10g Release 2 (10.1.2.0.1) Standard Edition One, you must upgrade to Oracle Portal 10g Release 2 (10.1.2.3) before you can upgrade the Oracle Portal schema to Oracle Portal 11g.

For the most up-to-date information about available Oracle Application Server 10g patch set, including the database versions required for Oracle Fusion Middleware 11g Release 1 (11.1.1), refer to My Oracle Support (formerly OracleMetaLink):

<http://metalink.oracle.com/>

After logging into My Oracle Support, click the **Patches and Updates** tab. From the resulting Web page, you can view the latest certifications by product, platform, and product availability.

## 3.2 Task 2: Decide Upon an Oracle Portal, Forms, Reports, and Discoverer Topology

Before you begin the upgrade process, consider whether you want to install the Oracle Portal, Forms, Reports, and Discoverer software in a single Oracle instance or in separate Oracle instances.

In Oracle Fusion Middleware 11g, you can create multiple Oracle instances from a single Oracle Portal, Forms, Reports, and Discoverer Oracle home. For example, you can install a single Oracle home and then run the Oracle Portal, Forms, Reports, and Discoverer installation and configuration tool multiple times to configure multiple Oracle instances.

For another example, you can configure Oracle Portal in one Oracle instance and Oracle Reports and Oracle Forms Services in another Oracle instance.

Note, however, that you must ensure that the destination Oracle instance has only a single instance of each component configured. For example, if the Oracle instance has two Oracle HTTP Server instances configured, only one of the Oracle HTTP Server instances will be upgraded.

For more information, see:

- "Understanding Oracle Fusion Middleware Concepts" in the *Oracle Fusion Middleware Administrator's Guide*
- [Section 2.3, "Considerations When Deciding Upon an Oracle Portal, Forms, Reports, and Discoverer Topology"](#)

## 3.3 Task 3: If Necessary, Upgrade the Database that Contains the Oracle Portal and Oracle BI Discoverer Schemas

If you are upgrading Oracle Portal or Oracle BI Discoverer, then you must ensure that the database that contains the Oracle Portal and Oracle BI Discoverer schemas is supported by Oracle Fusion Middleware 11g.

For instructions on verifying that your database meets the requirements of Oracle Fusion Middleware 11g, see "Upgrading and Preparing Your Databases" in the *Oracle Fusion Middleware Upgrade Planning Guide*.

## 3.4 Task 4: Use the Repository Creation Utility to Install the Oracle BI Discoverer Schema in the Database

As with Oracle BI Discoverer 10g, Oracle BI Discoverer 11g can be installed as a standalone product or associated with a database schema and Oracle Internet Directory instance.

For more information about the Oracle BI Discoverer 11g standalone configuration, see "About Oracle BI Discoverer installations" in the *Oracle Business Intelligence Discoverer Configuration Guide*.

When you installed Oracle BI Discoverer 10g, if you associated it with an Oracle Infrastructure 10g (database schema), then you must use the Repository Creation Utility to create the Oracle BI Discoverer 11g schema.

You install the Oracle BI Discoverer schema into the database that you identified and prepared in [Task 3: If Necessary, Upgrade the Database that Contains the Oracle Portal and Oracle BI Discoverer Schemas](#).

---

---

**Note:** There is no need to install the Oracle Portal 11g schema in the database.

For more information, see [Section 3.4.3, "Selecting the Oracle BI Discoverer Schema In Preparation for an Oracle Portal, Forms, Reports, and Discoverer Upgrade"](#)

---

---

For more information about installing the Oracle BI Discoverer schema, refer to the following sections:

- [Verifying that the Database Meets the Minimum Requirements for Oracle BI Discoverer 11g](#)
- [Running the Repository Creation Utility in Preparation for Upgrading Oracle BI Discoverer](#)
- [Selecting the Oracle BI Discoverer Schema In Preparation for an Oracle Portal, Forms, Reports, and Discoverer Upgrade](#)
- [Providing a Password for the Oracle BI Discoverer 11g Schema](#)

### 3.4.1 Verifying that the Database Meets the Minimum Requirements for Oracle BI Discoverer 11g

Before performing any installation you should read the system requirements and certification documentation to ensure that your environment meets the minimum installation requirements for the products you are installing.

Specifically, Oracle BI Discoverer has some specific database requirements that must be met before you install the Oracle BI Discoverer schema.

For more information, refer to "System Requirements and Prerequisites" in the *Oracle Fusion Middleware Installation Planning Guide*.

### 3.4.2 Running the Repository Creation Utility in Preparation for Upgrading Oracle BI Discoverer

To run the Repository Creation Utility to install the Oracle BI Discoverer schema in the database:

1. Mount the Oracle Fusion Middleware Metadata Repository Creation Utility CD-ROM.

Alternatively, you can download and unpack the Repository Creation Utility installation kit from the Oracle Technology Network (OTN):

<http://www.oracle.com/technology/>

In either case, the root directory of the CD-ROM or the directory where you unpacked the downloaded kit is referred to as the RCU\_HOME directory.

2. Start the Repository Creation Utility:

On UNIX systems:

```
RCU_HOME/bin/rcu
```

On Windows systems:

```
RCU_HOME\bin\rcu.bat
```

3. Follow the instructions on the Repository Creation Utility screens to connect to the database and create the required schemas.

Refer to the following resources for more information:

- For more information about which schemas to select when running the Repository Creation Utility, refer to [Section 3.4.3, "Selecting the Oracle BI Discoverer Schema In Preparation for an Oracle Portal, Forms, Reports, and Discoverer Upgrade"](#).
- For more information about providing passwords for the schemas you select, see [Section 3.4.4, "Providing a Password for the Oracle BI Discoverer 11g Schema"](#).
- For more detailed information about using the Repository Creation Utility, refer to the *Oracle Fusion Middleware Repository Creation Utility User's Guide*.

### 3.4.3 Selecting the Oracle BI Discoverer Schema In Preparation for an Oracle Portal, Forms, Reports, and Discoverer Upgrade

When you are upgrading Oracle Portal, Forms, Reports, and Discoverer, there is no need to install all the Oracle Fusion Middleware schemas. Instead, you can install only the schemas required for the Oracle Portal, Forms, Reports, and Discoverer upgrade.

[Figure 3–1](#) shows the options available in the Repository Creation Utility when you are prompted to select the schemas to install. Specifically, note the following when this screen appears:

- The only required schema for an Oracle Portal, Forms, Reports, and Discoverer upgrade is the **Discoverer** schema. This schema is required only if you associated Oracle BI Discoverer 10g with an Oracle Infrastructure 10g (database schema).

This schema is required at this point in the upgrade process because, unlike the Oracle Portal schema upgrade, the Discoverer schema is upgraded "out-of-place." This means that the Upgrade Assistant copies data from the Oracle Application Server 10g Discoverer schema to the new 11g Discoverer schema. As a result, you must install the Oracle BI Discoverer 11g schema; otherwise, you will not be able to install Oracle Business Intelligence Discoverer 11g or upgrade your 10g Discoverer schema.

- Do not select the **Portal** schema. When you later run the Upgrade Assistant, your existing Oracle Application Server 10g Portal schema will be upgraded "in-place" to 11g; as a result, there is no need to install a new Oracle Portal 11g schema.
- No schemas are required for Oracle Forms Services or Oracle Reports.

**Figure 3–1** *Selecting the Required Schemas for an Oracle Portal, Forms, Reports, and Discoverer Upgrade*

A Prefix groups the components associated with one deployment.

Select an existing Prefix: DMTDEV

Create a new Prefix: DEV

Prefix can contain only alpha-numeric characters. Prefix should not start with a number and should not contain any special characters.

Component	Schema Owner
<input type="checkbox"/> Oracle AS Repository Components	
<input type="checkbox"/> AS Common Schemas	
<input type="checkbox"/> Identity Management	
<input type="checkbox"/> ECM_SUITE	
<input type="checkbox"/> ODI_REPOSITORIES	
<input type="checkbox"/> WebLogic Communication Services	
<input type="checkbox"/> SOA Infrastructure	
<input type="checkbox"/> Webcenter Suite	
<input checked="" type="checkbox"/> Portal and BI	
<input type="checkbox"/> Portal	PORTAL
<input checked="" type="checkbox"/> Discoverer	DEV_DISCOVERER

### 3.4.4 Providing a Password for the Oracle BI Discoverer 11g Schema

After you select the Oracle BI Discoverer schema, the Repository Creation Utility prompts you to provide a password for the schema. You must provide a password for each schema you are installing in the database; otherwise, you will not be able to install the schemas.

Note that you will need to know the Oracle BI Discoverer schema passwords later, when you are prompted to connect to the database during the Oracle Portal, Forms, Reports, and Discoverer installation procedure.

Figure 3–2 shows the Repository Creation Utility Schema Passwords page, which appears after you have selected component schemas for an Oracle Portal, Forms, Reports, and Discoverer upgrade.

You can enter a different password for each schema, or use the same password for all the schemas.

**Figure 3–2 Repository Creation Utility Schema Passwords Page**

Please enter the passwords for the main and additional (auxiliary) schema users. Password can contain alphabets, numbers and the following special characters: \$, #, \_ . Password should not start with a special character.

Use same passwords for all schemas

Password

Confirm Password

Use main schema passwords for auxiliary schemas

Specify different passwords for all schemas

Component	Schema Owner	Schema Password	Confirm Password
Discoverer	DEV_DISCOVERER		
Auxiliary Schema	DEV_DISCOVERER_PS		

## 3.5 Task 5: Install and Configure Oracle Portal, Forms, Reports, and Discoverer Middle Tiers

The following sections describes how to install and configure new Oracle Fusion Middleware 11g middle tier instances in preparation for an upgrade to Oracle Fusion Middleware 11g:

- [Task 5a: Understand the Implications of Installing Oracle Portal Against the Oracle Application Server 10g PORTAL schema](#)
- [Task 5b: Consider the Impact of the Oracle Portal Upgrade on Oracle Web Agent \(OWA\) Packages](#)
- [Task 5c: Install Oracle WebLogic Server in Preparation for an Oracle Portal, Forms, Reports, and Discoverer Upgrade](#)
- [Task 5d: Install and Configure Oracle Portal, Forms, Reports, and Discoverer in Preparation for Upgrade](#)

### 3.5.1 Task 5a: Understand the Implications of Installing Oracle Portal Against the Oracle Application Server 10g PORTAL schema

To upgrade Oracle Portal, you must do the following:

1. Install Oracle Portal 11g against the existing Oracle Portal 10g schema.
2. Use the Upgrade Assistant to upgrade the middle tier.
3. Use the Upgrade Assistant to upgrade the PORTAL schema to 11g.

However, understand that after you install Oracle Portal 11g against the Oracle Portal 10g schema and upgrade the middle tier, you can use Oracle Portal 11g in only a limited capacity. Oracle Portal 11g will be operational, but you will not be able to take advantage of any Oracle Portal 11g features until you subsequently run the Upgrade Assistant and upgrade the Oracle Portal 10g schema to 11g.

Because of this limitation, be sure you have planned for the proper amount of down time to not only install Oracle Portal 11g, but also to upgrade the Oracle Portal middle tier to 11g, as described in [Section 3.6.3, "Task 6c: Upgrade the Oracle Portal, Forms, Reports, and Discoverer Middle Tiers"](#), and upgrade the PORTAL schema, as described in [Section 3.6.4, "Task 6d: Upgrade the Oracle Portal Schema"](#).

### 3.5.2 Task 5b: Consider the Impact of the Oracle Portal Upgrade on Oracle Web Agent (OWA) Packages

Oracle Fusion Middleware 11g includes a new version of the Oracle Web Agent (OWA) packages. Existing packages will be updated to the new version the first time either an Oracle Portal 11g repository is installed or when an existing Portal repository is upgraded to 11g.

When the OWA update takes place, packages from existing Portal schemas that reside in the same database will become invalid. The OWA update ends with an attempt to revalidate all invalid packages in all Portal schemas in the existing database instance.

The OWA update may fail if there are any sessions or jobs active in any of the existing Portal schemas. For this reason, a warning will be issued during the install or upgrade if the OWA update is necessary and if it will cause potential problems in existing Portal schemas.

For the seamless completion of the OWA update in cases where there are existing Portal schemas in the target database, make sure you perform the following steps before installing or upgrading the Oracle Portal repository:

1. Shut down all middle tiers associated with any of the existing Oracle Portal repositories in the target database.
2. Stop all jobs and sessions in those same Oracle Portal repositories.

### 3.5.3 Task 5c: Install Oracle WebLogic Server in Preparation for an Oracle Portal, Forms, Reports, and Discoverer Upgrade

Before you install the Oracle Portal, Forms, Reports, and Discoverer software, you must install the Oracle WebLogic Server software and create a Middleware home.

For more information about the Middleware home, see "Oracle Portal, Forms, Reports, and Discoverer Directory Structure" in the *Oracle Fusion Middleware Installation Guide for Oracle Portal, Forms, Reports and Discoverer*.

---

**Note:** You must install the Oracle WebLogic Server software on the same host as the Oracle Application Server 10g middle tiers you are upgrading.

---

To install the Oracle WebLogic Server software on disk, refer to "Install Oracle WebLogic Server and Create the Middleware Home" in the *Oracle Fusion Middleware Quick Installation Guide for Oracle Portal, Forms, Reports, and Discoverer*.

### 3.5.4 Task 5d: Install and Configure Oracle Portal, Forms, Reports, and Discoverer in Preparation for Upgrade

The following sections provide information about installing and configuring Oracle Portal, Forms, Reports, and Discoverer in preparation for upgrade:

- [Before You Install Oracle Portal, Forms, Reports, and Discoverer in Preparation for Upgrade](#)
- [About the Oracle Portal, Forms, Reports, and Discoverer Installation and Configuration Tool](#)
- [Running the Oracle Portal, Forms, Reports, and Discoverer Installation and Configuration Tool](#)



- [Specifying the PORTAL Schema Name and Password](#)
- [Specifying the DISCOVERER Schema Name and Password](#)
- [Locating the Oracle Portal 10g Schema Password in the Oracle Internet Directory](#)

#### **3.5.4.1 Before You Install Oracle Portal, Forms, Reports, and Discoverer in Preparation for Upgrade**

Before you begin installing the Oracle Portal, Forms, Reports, and Discoverer software, you must have the complete path to the Middleware home, which is created during Oracle WebLogic Server installation. The Middleware home contains the `wlserver` directory and the `user_projects` directory, where the Oracle WebLogic Server domains are configured.

#### **3.5.4.2 About the Oracle Portal, Forms, Reports, and Discoverer Installation and Configuration Tool**

The Oracle Portal, Forms, Reports, and Discoverer installer functions as an installation and configuration tool. It allows you optionally to separate the installation and configuration tasks. In other words, you can choose to install the software on disk into an Oracle home and configure the components later.

However, for the purposes of this upgrade procedure, it is assumed that you are installing and configuring the software in one integrated task.

For more information about your installation and configuration options, see the *Oracle Fusion Middleware Installation Guide for Oracle Portal, Forms, Reports and Discoverer*.

#### **3.5.4.3 Running the Oracle Portal, Forms, Reports, and Discoverer Installation and Configuration Tool**

After you install the Oracle WebLogic Server software and create the Middleware home, you can then install and configure the Oracle Portal, Forms, Reports, and Discoverer components.

To install and configure Oracle Portal, Forms, Reports, and Discoverer:

1. Insert the CD-ROM or download the installer from the Oracle Technology Network (OTN):

`http://www.oracle.com/technology/software/index.html`

2. Start the installer.

On UNIX systems:

```
> ./runInstaller
```

On Windows systems:

```
D:\ setup.exe
```

3. Follow the instructions on the screen to install and configure one or more of the Oracle Portal, Forms, Reports, and Discoverer components.

As you proceed through the installation screens, note the following:

- If you are upgrading to Oracle Portal 11g, then see [Section 3.5.4.4, "Specifying the PORTAL Schema Name and Password"](#).
- If you are upgrading Oracle Business Intelligence Discoverer, then see [Section 3.5.4.5, "Specifying the DISCOVERER Schema Name and Password"](#).



For other information about installing and configuring Oracle Portal, Forms, Reports, and Discoverer, refer to the following:

- For help on the options available on each screen, click **Help**.
- For more detailed information about the installation and configuration options, refer to the *Oracle Fusion Middleware Installation Guide for Oracle Portal, Forms, Reports and Discoverer*.

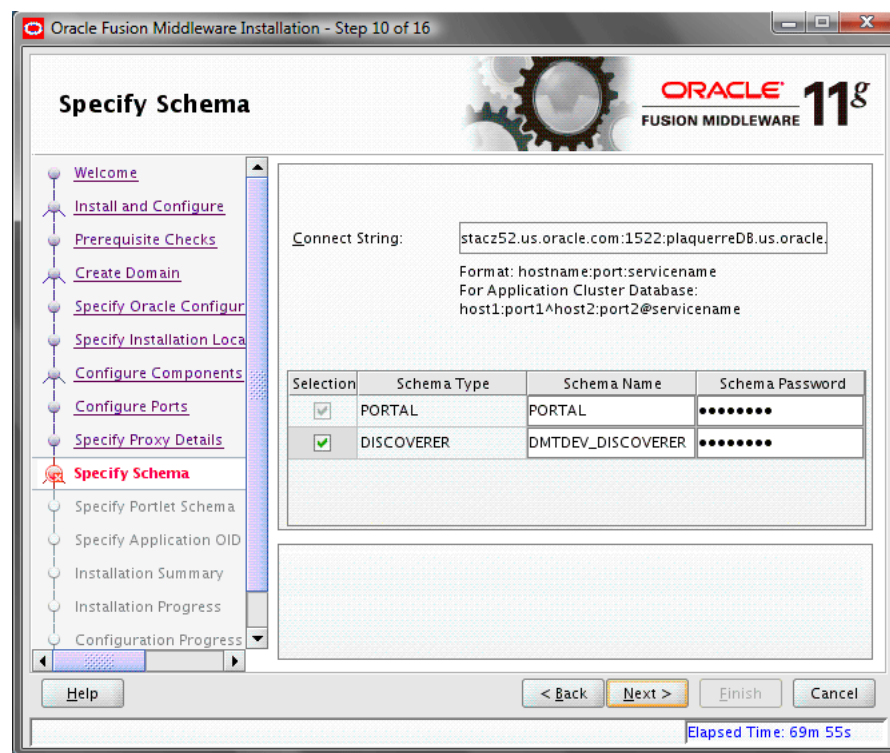
### 3.5.4.4 Specifying the PORTAL Schema Name and Password

If you are configuring Oracle Portal in preparation for an upgrade from Oracle Portal 10g, then the installer prompts you for the name and password of the Oracle Portal schema (Figure 3–3).

It is important that you enter the name and password of the Oracle Application Server 10g PORTAL schema, as follows:

- In the **Schema Name** column, enter PORTAL.
- In the **Schema Password** column, enter the password for the 10g PORTAL schema. For more information, see [Section 3.5.4.6, "Locating the Oracle Portal 10g Schema Password in the Oracle Internet Directory"](#)

**Figure 3–3 Specify Schema Screen From an Oracle Portal, Forms, Reports, and Discoverer Installation**



### 3.5.4.5 Specifying the DISCOVERER Schema Name and Password

If you are configuring Oracle BI Discoverer in preparation for an upgrade from Oracle BI Discoverer 10g, then the installer prompts you for the name and password of the Oracle Fusion Middleware 11g DISCOVERER schema (Figure 3–3).

It is important that you enter the name and password of the Oracle Fusion Middleware 11g DISCOVERER schema that you created using the Repository Creation

Utility in [Section 3.4, "Task 4: Use the Repository Creation Utility to Install the Oracle BI Discoverer Schema in the Database"](#).

Enter the following information about the DISCOVERER schema on the Specify Schema screen:

- In the **Schema Name** column, enter the schema name and prefix that you used when you created the schema with Repository Creation Utility. For example, DEV\_DISCOVERER.
- In the **Schema Password** column, enter the password that you provided for the DISCOVERER schema in Repository Creation Utility.

### 3.5.4.6 Locating the Oracle Portal 10g Schema Password in the Oracle Internet Directory

You can locate and view the password for an Oracle Application Server 10g component schema by using the following `ldapsearch` command on the Oracle Internet Directory.

If your password is in an Oracle Internet Directory instance, use this command syntax:

```
ORACLE_HOME/bin/ldapsearch -p oid_port -h oid_hostname -D "cn=orcladmin"
-w orcladmin_password -b "orclresourcename=schema_name,
orclreferencename=metadata_rep_global_db_name, cn=ias infrastructure databases,
cn=ias, cn=products, cn=oraclecontext" -s base "objectclass=*"
orclpasswordattribute
```

For example, on a Linux system, if your Oracle Internet Directory instance is on `host1`, the port is `13060`, the database name is `myDB`, and the `cn=orcladmin` password is `myPassword1`, then you would use this command:

```
ORACLE_HOME/bin/ldapsearch -p 13060 -h host1.example.com -D "cn=orcladmin"
-w myPassword1 -b "orclresourcename=PORTAL,
orclreferencename=myDB.example.com, cn=ias infrastructure databases,
cn=ias, cn=products, cn=oraclecontext" -s base "objectclass=*"
orclpasswordattribute
```

Alternatively, you can use Oracle Directory Manager (`oidadmin`) to locate the password:

1. Start Oracle Directory Manager by entering the following command in the `bin` directory of your Oracle Internet Directory Oracle home:

```
oidadmin
```

2. Connect to the Oracle Internet Directory instance using the `cn=orcladmin` super user account.
3. In Oracle Directory Manager, navigate to the Oracle Portal properties page by expanding the following nodes in the Directory Manager navigation tree and locate the `orclpasswordattribute` property:

```
> Entry Management > cn=OracleContext > Products > IAS
  > IAS Infrastructure Databases > orclReferenceName=db_service_name
    > orclresourcename=PORTAL
```

## 3.6 Task 6: Use the Upgrade Assistant to Upgrade the Required Schemas and Middle Tiers

The Oracle Fusion Middleware Upgrade Assistant automates the upgrade of many aspects of your Oracle Application Server 10g environment.

The Upgrade Assistant is installed automatically into the `bin` directory of your Oracle Fusion Middleware Oracle home.

---

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**Note:** The following sections describe how to use the Upgrade Assistant in graphical user interface mode. You can also use the Upgrade Assistant command line to perform these tasks.

For more information, see "Using the Upgrade Assistant Command-Line Interface" in the *Oracle Fusion Middleware Upgrade Planning Guide*.

---

---

The following sections provide more information:

- [Task 6a: Start the Upgrade Assistant for an Oracle Portal, Forms, Reports, and Discoverer Upgrade](#)
- [Task 6b: Upgrade the Oracle BI Discoverer Schema](#)
- [Task 6c: Upgrade the Oracle Portal, Forms, Reports, and Discoverer Middle Tiers](#)
- [Task 6d: Upgrade the Oracle Portal Schema](#)

### 3.6.1 Task 6a: Start the Upgrade Assistant for an Oracle Portal, Forms, Reports, and Discoverer Upgrade

To start the Upgrade Assistant using the graphical user interface:

1. Change directory to the `ORACLE_HOME/bin` directory of the Oracle Fusion Middleware installation.
2. Enter the following command to start the Upgrade Assistant.

On UNIX system:

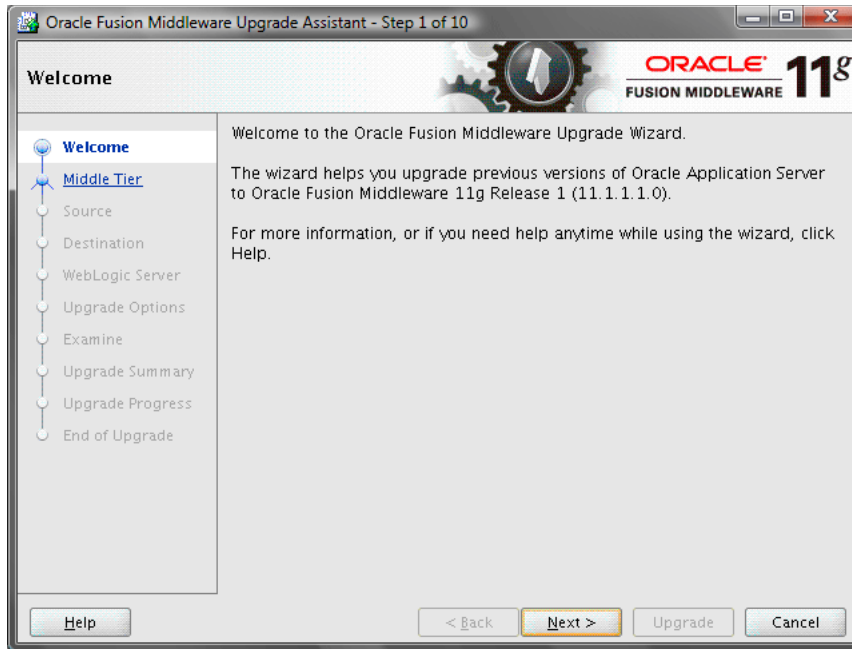
```
./ua
```

On Windows systems:

```
ua.bat
```

The Upgrade Assistant displays the Welcome screen as shown in [Figure 3–4](#).

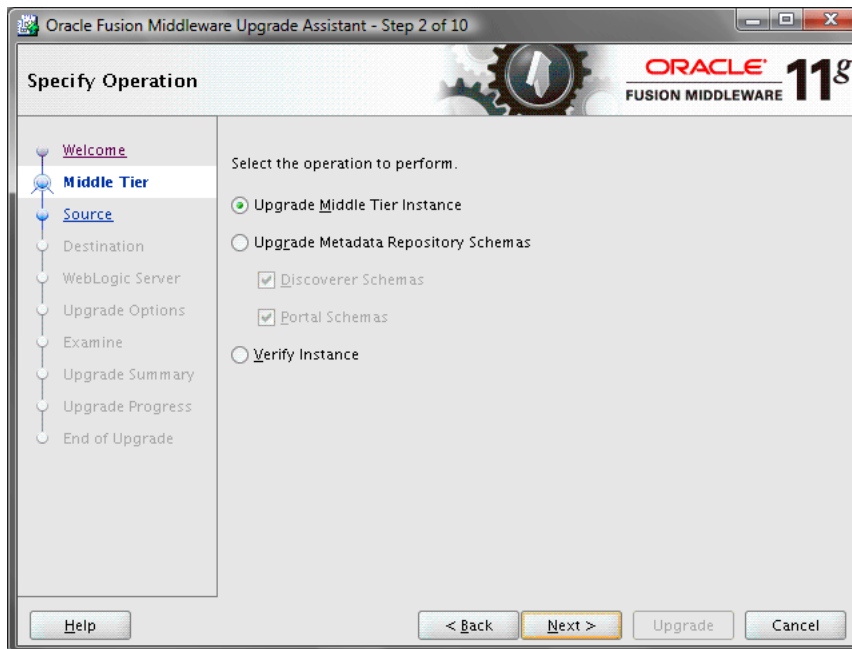
**Figure 3–4 Upgrade Assistant Welcome Screen**



3. Click **Next** to display the Specify Operation screen (Figure 3–5).

The options available in the Upgrade Assistant are specific to the Oracle home from which it started. For example, when you start Upgrade Assistant from an Oracle Portal, Forms, Reports, and Discoverer Oracle home, the options shown on the Specify Operation screen are the valid options for an Oracle Portal, Forms, Reports, and Discoverer Oracle home.

**Figure 3–5 Upgrade Assistant Select Operation Screen for an Oracle Portal, Forms, Reports, and Discoverer Upgrade**



## 3.6.2 Task 6b: Upgrade the Oracle BI Discoverer Schema

If you installed Oracle BI Discoverer as part of a standalone installation, then you can skip this step and proceed to [Task 6c: Upgrade the Oracle Portal, Forms, Reports, and Discoverer Middle Tiers](#). For more information about the Oracle BI Discoverer 11g standalone configuration, see "About Oracle BI Discoverer installations" in the *Oracle Business Intelligence Discoverer Configuration Guide*.

If you associated Oracle BI Discoverer 11g with an Oracle Infrastructure (database schema), then you must perform this step to upgrade the DISCOVERER schema to 11g. Refer to the following sections for more information:

- [Why Upgrade the Oracle BI Discoverer Schema First?](#)
- [Upgrading the Oracle BI Discoverer Schema](#)

### 3.6.2.1 Why Upgrade the Oracle BI Discoverer Schema First?

You must perform this step before upgrading your Oracle BI Discoverer middle tiers for the following reasons:

- At this point in the upgrade procedure, you have installed the new Oracle BI Discoverer middle tiers against the new and currently unused Oracle BI Discoverer schema. The new middle tiers and the new Oracle BI Discoverer schema are operational, but they contain none of your 10g configuration settings or data.
- The Oracle BI Discoverer 10g middle tiers are currently operational and working with the Oracle BI Discoverer 10g schemas. The middle tiers are operational and have access to your 10g configuration settings and data.
- If you upgrade the middle tiers first, then they will be upgraded to use the new Oracle BI Discoverer schema, which contains none of your 10g data. As a result, the middle tiers will be non-operational until you transfer your 10g data to the new schema by upgrading the schema to 11g.

For these reasons, Oracle recommends that you upgrade the Oracle BI Discoverer schema first. When the schema upgrade is complete, the middle tiers will still be operational and using the Oracle BI Discoverer 10g schema. Then, when you upgrade the middle tiers, the middle tiers will be reconfigured to reference the newly upgraded 11g schema, which has been updated and contains the 10g data they require.

Note that if you happen to upgrade the Oracle BI Discoverer middle tiers first, you will not necessarily lose any data, but the middle tiers will not be operational until you complete the Oracle BI Discoverer schema upgrade.

### 3.6.2.2 Upgrading the Oracle BI Discoverer Schema

To upgrade the DISCOVERER schema:

1. Start the Upgrade Assistant as described in [Task 6a: Start the Upgrade Assistant for an Oracle Portal, Forms, Reports, and Discoverer Upgrade](#).
2. Select **Upgrade Metadata Repository Schemas** and **Discoverer Schema** from the Specify Operation screen ([Figure 3-5](#)).
3. Follow the instructions on the screen to upgrade the Oracle BI Discoverer schema. Click **Help** for information about the options available on each screen.

### 3.6.3 Task 6c: Upgrade the Oracle Portal, Forms, Reports, and Discoverer Middle Tiers

The following sections describe how to use the Upgrade Assistant to upgrade your Oracle Portal, Forms, Reports, and Discoverer middle tiers:

- [Using the Upgrade Assistant to Upgrade the Oracle Portal, Forms, Reports, and Discoverer Middle Tier](#)
- [Important Notes When Using the Source Oracle Home Ports in the Destination Oracle Instance](#)

#### 3.6.3.1 Using the Upgrade Assistant to Upgrade the Oracle Portal, Forms, Reports, and Discoverer Middle Tier

To upgrade an Oracle Application Server 10g Release 2 (10.1.2) middle tier to Oracle Fusion Middleware 11g:

1. Start the Upgrade Assistant as described in [Task 6a: Start the Upgrade Assistant for an Oracle Portal, Forms, Reports, and Discoverer Upgrade](#).
2. Select **Upgrade Middle Tier Instance** on the Specify Operation screen ([Figure 3-5](#)).
3. Refer to [Table 3-1](#) for a description of the Upgrade Assistant screens that require input from you during a middle-tier instance upgrade and the options on each screen.

The Upgrade Assistant performs the following tasks and provides the progress on each task:

- Examines the components to be upgraded.
- Provides a summary of the components to be upgraded so you can verify that the Upgrade Assistant is upgrading the components you expect.
- Provides a progress screen so you can see the status of the upgrade as it proceeds.
- Alerts you of any errors or problems that occur during the upgrade.

**See Also:** Section B.1, "Troubleshooting Upgrade Assistant Problems and Issues" in the *Oracle Fusion Middleware Upgrade Planning Guide* for specific instructions for troubleshooting problems that occur while running the Upgrade Assistant

- Displays the End of Upgrade screen, which confirms that the upgrade was complete.

**Table 3-1 Upgrade Assistant Screens That Require Input During a Middle-Tier Instance Upgrade**

Upgrade Assistant Screen	Description
Specify Source Home	Select the 10g source Oracle home.  If the Oracle home you want to upgrade does not appear in the drop-down lists, see Section B.1.2.1, "Source Oracle Home Not Listed by the Upgrade Assistant" in the <i>Oracle Fusion Middleware Upgrade Planning Guide</i> .
Specify Destination Instance	Enter the complete path to the 11g Oracle instance, or click <b>Browse</b> to locate the instance directory.

**Table 3–1 (Cont.) Upgrade Assistant Screens That Require Input During a Middle-Tier Instance Upgrade**

Upgrade Assistant Screen	Description
Specify WebLogic Server	Enter the host and Administration Server port for the Oracle WebLogic Server you configured in <a href="#">Task 5c: Install Oracle WebLogic Server in Preparation for an Oracle Portal, Forms, Reports, and Discoverer Upgrade</a> .
Specify Upgrade Options	<p>Select the upgrade options you want to apply to the Oracle Portal, Forms, Reports, and Discoverer upgrade:</p> <ul style="list-style-type: none"> <li>■ <b>Use source Oracle home ports in destination:</b> If you want to migrate the port assignments used by your Oracle Application Server 10g Oracle home to your new Oracle Fusion Middleware Oracle instance. For more information, see <a href="#">Section 3.6.3.2, "Important Notes When Using the Source Oracle Home Ports in the Destination Oracle Instance"</a>.</li> <li>■ <b>Stop source components before upgrade:</b> By default, this check box is selected and all the components in the Source Oracle home will be stopped before the upgrade process begins. Stopping the source components is necessary to avoid any port conflicts when you select the Use source Oracle home ports in destination option.</li> <li>■ <b>Start destination components after successful upgrade:</b> If you want the Upgrade Assistant to automatically start the components in the destination Oracle home after a successful upgrade is complete. If you do not select this option, then you will have to manually start the destination instance after the upgrade. Note that this option works only if the upgrade is successful.</li> </ul> <p>Click <b>Help</b> to display more information about the upgrade options on this screen.</p>

### 3.6.3.2 Important Notes When Using the Source Oracle Home Ports in the Destination Oracle Instance

When you select the **Use Source Oracle home ports in destination** option in the Oracle Fusion Middleware Upgrade Assistant, note the following.

#### General Information and Restrictions

- If you select this option, then you will not be able to run both the 10g and 11g middle tiers at the same time; otherwise, port conflicts will occur.
- If you are upgrading to multiple instances of a particular Oracle Fusion Middleware 11g component, you can select this option only once for each component that you upgrade on a host.

For example, suppose you upgrade Oracle HTTP Server in one Oracle instance on MYHOST1.

If you use the option again while upgrading another Oracle HTTP Server instance in another Oracle instance on MYHOST1, then the same listening ports are assigned to the second Oracle HTTP Server instance. Two instances of Oracle HTTP Server on the same host cannot use the same listening ports.

#### Component-Specific Information and Restrictions

- When you use this option to upgrade an Oracle Portal middle tier, the option is enabled and you cannot disable it. As a result, you might end up with extra



partner applications displayed on the Oracle Single Sign-On Administration page in Oracle Portal 11g.

For more information, see [Section 4.1.5, "Removing Obsolete Partner Applications After Upgrade"](#).

- If you are upgrading Oracle Reports and you select this option, then Fusion Middleware Control may not be able to gather performance metrics about the Oracle Reports instance. This is because Oracle Enterprise Manager Fusion Middleware Control is using the new Oracle HTTP Server 11g port and not the Oracle HTTP Server 10g port to communicate with Oracle Reports.

To address this issue, modify the Agent-Monitored Target properties for the Oracle Reports component in Fusion Middleware Control. Change the following properties to reflect the 10g Oracle HTTP Server port information:

- The **HTTP Port** property
- The port identified in the **Servlet URL** property
- The **Server** property for the WLS\_REPORTS Java EE application. You must change this property because, during upgrade, the Oracle Reports 11g in-process server is renamed to use the same name as the 10g in-process server.

For information on changing the Agent-Monitored Target properties, see "Troubleshooting the Display of Performance Metrics and Charts in Fusion Middleware Control" in the *Oracle Fusion Middleware Administrator's Guide*.

- If you are using Oracle Single Sign-On, and you do not select this option (in other words, if you use a different set of port numbers than those used in Oracle Application Server 10g), then consider the following:
  - You will likely have to re-register your components (such as Oracle Business Intelligence Discoverer) with Oracle Single Sign-On.

For more information, see "Configuring and Administering Partner Applications" in the *Oracle Application Server Single Sign-On Administrator's Guide*, which is available in the Oracle Application Server 10g (10.1.4.0.1) documentation library on the Oracle Technology Network (OTN):

<http://www.oracle.com/technology/documentation/>

- You will have to verify the ports used for Oracle HTTP Server and Oracle Web Cache and re-register Oracle HTTP Server and Oracle Web Cache with Oracle Single Sign-On.

For more information, see [Section 4.5.2, "Web Tier Component Post-Upgrade Tasks When Using Oracle Single Sign-On"](#).

### 3.6.4 Task 6d: Upgrade the Oracle Portal Schema

If you are upgrading Oracle Portal, then use the following sections for information on upgrading the Oracle Portal schema. You must perform these steps after upgrading your Oracle Portal, Forms, Reports, and Discoverer middle tiers:

- [Understanding the Impact of the Oracle Portal Schema Upgrade](#)
- [Checking for Invalid Objects in the Database Where the Oracle Portal 10g Schema Resides](#)
- [Backing Up the Database Where the Oracle Portal 10g Schema Resides](#)



- [Verifying the Required Database Parameters for Oracle Portal 11g](#)
- [Verifying That the Database and Oracle Internet Directory Are Running](#)
- [Using the Upgrade Assistant to Upgrade the Oracle Portal Schema](#)

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**Important Note:** If your Oracle Portal repository is not stored in the Oracle Metadata Repository, and is instead installed in a separate database, then do not use the procedures in this section. Instead, refer to [Appendix A, "Upgrading an Oracle Portal Repository in a Customer Database"](#).

---

### 3.6.4.1 Understanding the Impact of the Oracle Portal Schema Upgrade

Before you upgrade the Oracle Portal to 11g, consider the impact of the upgrade on your existing Oracle Portal environment.

In particular, you should be aware that when you use the Upgrade Assistant to upgrade your Oracle Portal schema, the Upgrade Assistant performs the following tasks:

- Creates the upgrade framework objects and installs the Schema Validation Utility.
- Identifies all invalid objects before the upgrade proceeds. You can use this for troubleshooting purposes; all OracleAS Portal packages must be valid before an upgrade.
- Recompiles any invalid non-OracleAS Portal objects and displays warnings if any invalid non-OracleAS Portal objects remain in the database.
- Disables the directory provisioning profile, as a result event notifications in the Oracle Internet Directory instance to which the Oracle Portal instance has subscribed. The Upgrade Assistant later re-enables the directory providing profile.
- Disables triggers in the portal schema and re-enables them at the end of the upgrade.
- Disables the Database Management System (DBMS) jobs in the Oracle Portal schema and re-enables them at the end of the upgrade.
- Drops statistics gathered on all tables in the portal schema. Later in the process, the Upgrade Assistant gathers statistics supported by OracleAS Portal. Later in the process, the Upgrade Assistant creates the jobs for gathering statistics.
- Upgrades OWA packages if necessary.
- Drops and reloads all Java objects in the Oracle Portal schema. Note that any Java objects that do not belong to OracleAS Portal, but reside in the Oracle Portal must be reinstalled manually after the upgrade.
- Drops and reloads all product messages in all languages in the Oracle Portal schema. If any product messages were manually altered before the upgrade, then these changes will have to be manually reapplied.
- Upgrades the schema and compiles new OracleAS Portal packages.
- Updates the OracleAS Portal release if there are no fatal compilation errors.
- Searches for errors and warnings in the upgrade log file and displays a summary of the issues.

### 3.6.4.2 Checking for Invalid Objects in the Database Where the Oracle Portal 10g Schema Resides

Before you upgrade the schemas in your database, it is good practice to make sure that none of the database objects required by Oracle Fusion Middleware are invalid:

1. Connect to the Metadata Repository database.

For example:

```
ORACLE_HOME/bin/sqlplus "connect / as sysdba"
```

2. When prompted, enter the SYS password.
3. Issue the following SQL command:

```
SELECT owner, object_type, object_name
       FROM all_objects
       WHERE status='INVALID';
```

The query should not return any database objects that have an Oracle Application Server component schema (such as PORTAL, WIRELESS, and so on) in the 'owner' column.

If you find any invalid objects, run the `utlrp.sql` script from the SQL\*Plus command line to recompile the invalid objects:

```
@?/rdbms/admin/utlrp.sql
```

For more information about invalid objects, see "About Dependencies Among Schema Objects" in the *Oracle Database Administrator's Guide*.

### 3.6.4.3 Backing Up the Database Where the Oracle Portal 10g Schema Resides

Before you upgrade the Oracle Portal 10g schema to 11g, back up your database, in case you need to restore the database to its pre-upgrade state.

For more information, see "Backup Strategies for Upgrade" in the *Oracle Fusion Middleware Upgrade Planning Guide*.

### 3.6.4.4 Verifying the Required Database Parameters for Oracle Portal 11g

Before you upgrade the Oracle Portal schemas in the metadata repository, be sure to verify that the following database parameters are set correctly.

These settings are required for Oracle Portal 11g. If you do not set these parameters correctly, errors will appear in the Upgrade Assistant during the examination phase:

- Set the `aq_tm_processes` database parameter to a value of one (1) or higher to allow correct management of database queues.
- If you are upgrading the schema in Oracle Database 11g, then set the `compatible` database parameter to 11.0.0.0.0 or higher.
- If you are upgrading the schema in Oracle Database 10g, then set the `compatible` parameter to 10.2.0.0 or higher.
- Set the `shared_pool_size` database parameter to 20MB or higher.
- Set the `java_pool_size` database parameter to 20MB or higher.
- Set the `optimizer_mode` database parameter to CHOOSE.
- Set the `processes` database parameter to at least 500.

### 3.6.4.5 Verifying That the Database and Oracle Internet Directory Are Running

Before you proceed with the Oracle Portal schema upgrade, you must first ensure that the following processes are up and running and available:

- The database that hosts the Oracle Portal schema
- The listener for the database that hosts the Oracle Portal schema
- The Oracle Internet Directory instance where the Oracle Portal schema is registered

### 3.6.4.6 Using the Upgrade Assistant to Upgrade the Oracle Portal Schema

To upgrade the Oracle Portal schema:

1. Stop all the middle tiers associated with the metadata repository where the Oracle Portal schema resides.

This includes the `WLS_Portal` managed server in the Oracle WebLogic Server domain, as well as any Oracle HTTP Server and Oracle Web Cache instances associated with the middle tiers.

For more information, see "Starting and Stopping Oracle Fusion Middleware" in the *Oracle Fusion Middleware Administrator's Guide*.

2. Start the Upgrade Assistant as described in [Task 6a: Start the Upgrade Assistant for an Oracle Portal, Forms, Reports, and Discoverer Upgrade](#).
3. Select **Upgrade Metadata Repository Schemas** and then **Portal Schema** from the Specify Operation screen ([Figure 3-5](#)).
4. Follow the instructions on the screens to upgrade the Oracle Portal schema.  
Click **Help** for information about the options available on each screen.

## 3.7 Task 7: Perform Any Required Post-Upgrade Configuration Tasks

Refer to [Chapter 4, "Oracle Portal, Forms, Reports, and Discoverer Post-Upgrade Tasks"](#) for a description of the post-upgrade tasks you might need to perform for each of the Oracle Portal, Forms, Reports, and Discoverer components.

## 3.8 Task 8: Verify the Oracle Portal, Forms, Reports, and Discoverer Upgrade

To verify that your Oracle Portal, Forms, Reports, and Discoverer upgrade was successful:

1. Start the Oracle Portal middle tiers that are using the Oracle Portal schema you just upgraded.

This includes the `WLS_Portal` managed server in the Oracle WebLogic Server domain, as well as any Oracle HTTP Server and Oracle Web Cache instances associated with the middle tiers.

For more information, see "Starting and Stopping Oracle Fusion Middleware" in the *Oracle Fusion Middleware Administrator's Guide*.

2. Run the Upgrade Assistant again and select **Verify Instance** on the Specify Operation page.

Follow the instructions on the screen for information on how to verify that specific Oracle Fusion Middleware components are up and running.

3. Use the Fusion Middleware Control to verify that the Oracle Portal, Forms, Reports, and Discoverer components are up and running.

For more information, see "Getting Started Using Oracle Enterprise Manager Fusion Middleware Control" in the *Oracle Fusion Middleware Administrator's Guide*.

---

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## Oracle Portal, Forms, Reports, and Discoverer Post-Upgrade Tasks

This task involves completing the following component-specific upgrade steps:

- [Post-Upgrade Tasks for Oracle Portal](#)
- [Post-Upgrade Tasks and Information for Oracle BI Discoverer](#)
- [Post-Upgrade Tasks for Oracle Forms Services](#)
- [Post-Upgrade Tasks for Oracle Reports](#)
- [Post-Upgrade Tasks and Information for the Web Tier Components](#)

### 4.1 Post-Upgrade Tasks for Oracle Portal

Refer to the following sections for information about post-upgrade tasks for Oracle Portal:

- [Configuring Preference Stores in an Upgraded Oracle Portal 11g Environment](#)
- [Upgrading the PDK-Java Sample Application and Its Customizations from Oracle Portal 10g to 11g](#)
- [Removing the Community News Portlet](#)
- [Configuring End-to-End SSL for an Upgraded Oracle Portal Environment](#)
- [Removing Obsolete Partner Applications After Upgrade](#)
- [Relative Hypertext Links to Images and Documents May Break After Upgrade](#)
- [Resetting FILE\\_ACCESS\\_ROLE if Set Before Installing or Upgrading to Oracle Portal 11g](#)
- [Refreshing the Database Provider to Fix Missing Translated Content](#)
- [Refreshing OMNI, WebClipping, or Sample Producers After Upgrade](#)
- [Upgrading Sample WSRP Providers During a Portal Midtier Upgrade](#)
- [About OmniPortlet Repository Changes](#)

#### 4.1.1 Configuring Preference Stores in an Upgraded Oracle Portal 11g Environment

If are using the Oracle Portal Developer Kit-Java (PDK-Java) or Web Services for Remote Portlets (WSRP) to develop or deploy custom Oracle Portal applications, review the following information for configuration tasks you might have to perform after you upgrade to Oracle Portal 11g.

For more information about the PDK-Java, see "Creating Java Portlets" in the *Oracle Fusion Middleware Developer's Guide for Oracle Portal*.

#### 4.1.1.1 About the jdbc/portletPrefs Data Source

By default, PDK-Java, the Oracle Portal 11g installation and configuration procedure automatically creates a data source called the `jdbc/portletPrefs` data source in the Oracle Portal Oracle WebLogic Server domain. This data source is created by the configuration process, but it is not configured to reference any specific preference store.

Depending on how you configure the preference store for your PDK-Java and WSRP producer applications in Oracle Portal 10g, refer to the following sections for information on how use this data source in Oracle Portal 11g:

- [Oracle Portal Post-Upgrade Tasks If You Are Using One Database-Based Preference Store](#)
- [Oracle Portal Post-Upgrade Tasks If You Are Using Multiple Database-Based Stores](#)
- [Oracle Portal Post-Upgrade Tasks If You Are Not Using a Database-Based Preference Store](#)
- [Oracle Portal Post-Upgrade Tasks If You Are Using One or More File-Based Store](#)

#### 4.1.1.2 Oracle Portal Post-Upgrade Tasks If You Are Using One Database-Based Preference Store

If you are already using a single database-based preference store for WSRP or PDK-Java producer applications in Oracle Portal 10g, then modify the existing `jdbc/portletPrefs` data source so it references the existing preference store. You can use the Oracle WebLogic Server Administration Console to perform this task.

For more information, see "Create JDBC data sources" in the *Oracle Fusion Middleware Oracle WebLogic Server Administration Console Help*. Specifically, you must modify the database connection details on the Connection Properties page for the data source in the Administration Console.

#### 4.1.1.3 Oracle Portal Post-Upgrade Tasks If You Are Using Multiple Database-Based Stores

If you are using multiple database-based preference stores for your PDK-Java or WSRP producer applications in Oracle Portal 10g, then you must:

1. Identify one of your existing database-based preference stores, or create a new database-based preference store, that will serve as your single Oracle Portal 11g preference store.

To create a new Oracle Portal preference store, see [Section 4.1.1.6, "Creating a New Database Preference Store for PDK-Java or WSRP Applications"](#).

2. Use the PDK-Java Preference Store Migration and Upgrade Utility to migrate each of your existing Oracle Portal 10g preference stores to the Oracle Portal 11g database-based preference store you identified or created in Step 1.

For more information, see "Using the PDK-Java Preference Store Migration and Upgrade Utility" in the *Oracle Portal Administrator's Guide*.

3. Modify the existing `jdbc/portletPrefs` data source so it references your existing preference store. You can use the Oracle WebLogic Server Administration Console to perform this task.

For more information, see "Create JDBC data sources" in the *Oracle Fusion Middleware Oracle WebLogic Server Administration Console Help*. Specifically, you must modify the database connection details on the Connection Properties page for the data source in the Administration Console.

#### 4.1.1.4 Oracle Portal Post-Upgrade Tasks If You Are Not Using a Database-Based Preference Store

If you are not using a database-based preference store, you can use the Oracle WebLogic Server Administration Console to remove the `jdbc/portletPrefs` data source.

For more information, see "Delete JDBC data sources" in the *Oracle Fusion Middleware Oracle WebLogic Server Administration Console Help*.

#### 4.1.1.5 Oracle Portal Post-Upgrade Tasks If You Are Using One or More File-Based Store

If you are using one or more file-based preference stores for WSPR or PDK-Java applications, then use the Preference Store Migration and Upgrade Utility to migrate each of your existing Oracle Portal 10g preference stores to the an Oracle Portal 11g file-based preference store.

For more information, see "Using the PDK-Java Preference Store Migration and Upgrade Utility" in the *Oracle Portal Administrator's Guide*.

#### 4.1.1.6 Creating a New Database Preference Store for PDK-Java or WSRP Applications

A preference store is a mechanism for storing information like user preference data, portlet/provider settings, or even portlet data, while using Oracle Portal.

The information stored in the preference store is persistent in the sense that, even if you log out and log back in later, you can still access previously saved preferences. The preference store maintains the user preference information and invokes the user preferences whenever the user logs in again.

PDK-Java provides the `PrefStorePersonalizationManager`, which uses a `PreferenceStore` implementation to persist personalized data. Currently, PDK-Java has two `PreferenceStore` implementations: `DBPreferenceStore` and `FilePreferenceStore`. The `DBPreferenceStore` persists data using a JDBC compatible relational database and `FilePreferenceStore` persists data using the file system.

For more details of these implementations, refer to the Javadoc on the Oracle Technology Network (OTN), by clicking Java Doc API on the Portlet Development page available at:

[http://www.oracle.com/technology/products/ias/portal/portlet\\_development\\_10g1014.html](http://www.oracle.com/technology/products/ias/portal/portlet_development_10g1014.html)

**Example 4–1** shows some sample SQL code that demonstrates how you can create a preference store table in an Oracle database.

For more information about using preference stores, refer to the following resources:

- "Enhancing Java Portlets" in the *Oracle Fusion Middleware Developer's Guide for Oracle Portal*
- "Setting Up a Preference Store" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*

**Example 4-1 Sample SQL Code for Creating a New Oracle Portal Preference Store**

```

CREATE TABLE JPKD_PREFERENCE_STORE2 (
  PATH_TYPE          VARCHAR2 (60) NOT NULL,
  REFERENCE_PATH     VARCHAR2 (250) NOT NULL,
  SEARCH_PATH        VARCHAR2 (250) NOT NULL,
  DATA_CLASS         VARCHAR2 (250),
  LONG_VALUE         LONG RAW,
  CONSTRAINT JPS2_PK
  PRIMARY KEY ( REFERENCE_PATH, PATH_TYPE ) );

CREATE INDEX JPKD_PATH_TYPES2 ON
  JPKD_PREFERENCE_STORE2 (PATH_TYPE);

CREATE INDEX JPKD_SEARCH_PREFS2 ON
  JPKD_PREFERENCE_STORE2 (SEARCH_PATH);

```

**4.1.2 Upgrading the PDK-Java Sample Application and Its Customizations from Oracle Portal 10g to 11g**

If you are using the Oracle Portal Developer Kit-Java (PDK-Java), then any PDK-Java applications you used in Oracle Portal 10g, as well as the customizations used by the applications, are not upgraded to your new Oracle Portal environment.

For example, the sample PDK-Java application (`jpdk.ear`) is not installed in an upgraded middle tier. The following sections describe how to:

- Deploy the `jpdk.ear` sample application on the upgraded Oracle Portal 11g middle tier
- Migrate the sample application customizations from a Oracle Portal 10g file-based preference store to an Oracle Portal 11g file-based or database-based preference store.

Use one of the following procedures to accomplish this task:

- [Upgrading the `jpdk.ear` file and Its Customizations to an 11g File-Based Preference Store](#)
- [Upgrading the `jpdk.ear` file and Its Customizations to an 11g Database Preference Store](#)

**4.1.2.1 Upgrading the `jpdk.ear` file and Its Customizations to an 11g File-Based Preference Store**

To redeploy the `jdpk.ear` file and upgrade its customizations from Oracle Portal 10g to an Oracle Portal 11g file-based preference store:

1. Deploy the `jdpk.ear` file as an application to the WLS\_PORTAL managed server in the Oracle WebLogic Server domain that was created during the Oracle Portal 11g installation.

Note the following:

- The `jdpk.ear` file is located in the following directory of the Oracle Portal Oracle home:

```
PORTAL_ORACLE_HOME/archives/applications/
```

- For information, see "Install applications and modules" in the Oracle WebLogic Server Administration Console online help.



2. Edit the provider registration, which was registered in Oracle Portal 10g, to reference the new JPDK provider URL:

- a. Locate the provider.xml file for the JPDK sample:

```
WLS_HOME/servers/WLS_PORTAL/tmp/_WL_user/
    jpdk/byvlpj/war/WEB-INF/providers/sample/provider.xml
```

- b. Comment the following section in the provider.xml file:

```
oracle.portal.provider.v2.preference.FCFDBPreferenceStore
```

- c. Uncomment the following section in the provider.xml file:

```
oracle.portal.provider.v2.preference.FilePreferenceStore section
```

- d. Save and close the provider.xml file.

3. Restart the deployed JDPK application.
4. Use the PDK-Java Preference Store Migration and Upgrade Utility to change Oracle Portal preferences store to a file-based store.

[Example 4-2](#) shows the command you can use to perform this task.

For more information, see "Using the PDK-Java Preference Store Migration and Upgrade Utility" in the *Oracle Portal Administrator's Guide*.

**Example 4-2 Using the Preference Store Migration and Upgrade Utility to Upgrade the 10g JPDK Customizations to an Oracle Portal 11g File-Based Store**

```
java -classpath 11g_ORACLE_HOME/portal/jlib/pdkjava.jar:PORTAL_ORACLE_HOME/portal/jlib/ptlshare.jar
    oracle.portal.provider.v2.preference.MigrationTool
    -mode filetofile
    -remap language
    -countries GB,US
    -pref1UseHashing true
    -pref1RootDirectory 10g_ORACLE_HOME/j2ee/OC4JPortal/applications/
        jpdk/jpdk/WEB-INF/providers/sample
    -pref2RootDirectory WLS_HOME/domains/domain_name/servers/WLS_PORTAL/tmp/_WL_user/
        jpdk/byvlpj/war/WEB-INF/providers/sample
    -pref2UseHashing true
```

#### 4.1.2.2 Upgrading the jdpk.ear file and Its Customizations to an 11g Database Preference Store

To redeploy the jdpk.ear file and upgrade its customizations from Oracle Portal 10g to an Oracle Portal 11g database preference store:

1. Deploy the jdpk.ear file as an application to the WLS\_PORTAL managed server in the Oracle WebLogic Server domain that was created during the Oracle Portal 11g installation.

Note the following:

- The jdpk.ear file is located in the following directory of the Oracle Portal Oracle home:

```
PORTAL_ORACLE_HOME/archives/applications/
```

- For information, see "Install applications and modules" in the Oracle WebLogic Server Administration Console online help.

2. Restart the deployed JDPK application.

3. Identify an existing 11g database preference store, or create a new database preference store.
4. Note the database connection details for the preference store. For more information, see [Section 4.1.1.6, "Creating a New Database Preference Store for PDK-Java or WSRP Applications"](#).
5. Use the PDK-Java Preference Store Migration and Upgrade Utility to change Oracle Portal preferences store to a database-based store.

[Example 4–2](#) shows the command you can use to perform this task.

For more information, see "Using the PDK-Java Preference Store Migration and Upgrade Utility" in the *Oracle Portal Administrator's Guide*.

**Example 4–3 Using the Preference Store Migration and Upgrade Utility to Upgrade the 10g JPDK Customizations to Oracle Portal 11g Database Preference Store**

```
java -classpath 11g_ORACLE_HOME/portal/jlib/pdkjava.jar:11g_ORACLE_HOME/portal/jlib/ptlshare.jar:
             11g_ORACLE_HOME/jdbc/lib/ojdbc6.jar
             oracle.portal.provider.v2.preference.MigrationTool
-mode filetodb
-remap language
-countries GB,US
-pref1UseHashing true
-pref1RootDirectory 10g_ORACLE_HOME/j2ee/OC4J_Portal/applications/
                    jpdk/jpdk/WEB-INF/providers/sample
-pref2User <portal_schema_user>
-pref2Password <schema_passwd>
-pref2URL jdbc:oracle:thin:@<db_connect_string_in_host:port:sid_format
```

### 4.1.3 Removing the Community News Portlet

Starting with OracleAS Portal 10g (10.1.4) and later, the Community News portlet is no longer supported.

This portlet is still available on Oracle Portal pages, but when you attempt to edit this portlet, a blank page is displayed. You can manually delete the Community News portlet from portal pages, as follows:

1. Log in to Oracle Portal.
2. Navigate to the page from which you want to delete the portlet.
3. Click **Edit** at the top of the page to switch to Edit mode.
4. Click **Actions** next to the Community News portlet.
5. Click **Delete**.
6. On the confirmation page, click **Yes** to delete the portlet and return to the page.

### 4.1.4 Configuring End-to-End SSL for an Upgraded Oracle Portal Environment

After you upgrade to Oracle Portal 11g, you can configure end-to-end secure socket layer (SSL) security connections for all your Portal connections.

To configure SSL for Oracle Portal 11g:

1. Locate the following Oracle Portal configuration file:

```
ORACLE_INSTANCE/config/OHS/OHScompName/moduleconf/portal.conf
```

2. Add the `WLProxySSL ON` entry to the Oracle WebLogic Server routing information in the `portal.conf` files, as follows:

```
# WLS routing configuration
<Location /portal>
  SetHandler weblogic-handler
  WebLogicHost stbcw19-4.us.oracle.com
  WebLogicPort 9001
  WLProxySSL ON
</Location>
```

3. Add the Oracle Web Cache certificate to the Oracle WebLogic Server managed server keystore as follows:

```
keytool -import -trustcacerts -alias wc_cert -file wccert.txt -keystore cacerts
-storetype JKS
```

The `wccert.txt` file contains the Oracle Web Cache certificate.

Note that the `keytool` command shown in the above example is based on the assumption that the managed server keystore is Java Standard Trust.

You can find the location of the keystore from the Oracle WebLogic Server Administration Console:

- a. Log in to the Administration Console.
  - b. In the left pane of the Console, expand **Environment** and select **Servers**.
  - c. Select the **WLS\_PORTAL** managed server.
  - d. Select **Keystores > Trust > Java Standard Trust Keystore**.
4. Restart OPMN and the WebLogic servers.  
For more information, see "Starting and Stopping Oracle Fusion Middleware" in the *Oracle Fusion Middleware Administrator's Guide*.
  5. Import the Web Cache SSL certificate into the Portal Database Wallet's trust store.
  6. If you don't have a database wallet, you could create one using Oracle wallet manager or `orapki` utility in the installation where the database resides. Once you have the wallet, import the SSL certificate of web cache into the database wallet.
  7. This wallet location has to be registered into the Portal preference store using the `secwc.sql` script, located at `ORACLE_HOME/portal/admin/plsql/wwc`.

#### **Example 4–4 Registering the Wallet**

```
cd $ORACLE_HOME/portal/admin/plsql/wwc
sqlplus <portal_schema/<portal_pwd>@connectstring sql> @secwc.sql <wallet_
location> <wallet_pwd>
sql> @secwc.sql 'file:/u01/app/oracle/product/1021_prodee/dbwallet' 'welcome1'
```

### **4.1.5 Removing Obsolete Partner Applications After Upgrade**

If you select the **Use source Oracle home ports in destination** option when you upgrade to Oracle Portal 11g, then you will notice that, after the upgrade, some extra partner applications will appear on the SSO Administration page in the Oracle Portal 11g instance.

You can safely remove these extra partner applications after upgrade, since they are replaced by the upgraded partner applications.

For more information about the Use source Oracle home ports in destination option, see [Section 3.6.3, "Task 6c: Upgrade the Oracle Portal, Forms, Reports, and Discoverer Middle Tiers"](#).

For more information about viewing the partner applications in Oracle Portal 11g, see "Using the Oracle Portal Administer Tab" in the *Oracle Portal Administrator's Guide*. You use the Portal Administer tab to access the Oracle Single Sign-On administration features in Oracle Portal.

#### 4.1.6 Relative Hypertext Links to Images and Documents May Break After Upgrade

When upgrading to Oracle Portal 11g, relative hypertext links to images and documents may be broken. This can occur when the relative hypertext link uses a different case than the file name. For example, if a pre-upgrade image was uploaded to your portal with the name `PROCESS1.GIF`, and a hypertext link is referring to `process1.gif`, after the upgrade, the relative hypertext link to the image will be broken. You are most likely to encounter this in HTML templates or in documents that refer to images or other documents.

To address this issue, edit image and document names, making their case agree with the case used for the file names.

#### 4.1.7 Resetting FILE\_ACCESS\_ROLE if Set Before Installing or Upgrading to Oracle Portal 11g

If you have set the `FILE_ACCESS_ROLE` system parameter in the database before installing or upgrading to Oracle Portal 11g, then consider resetting it after the installation or upgrade.

The `FILE_ACCESS_ROLE` system parameter is used to specify the name of a database role that is authorized to create an index using the FILE or URL datastores. If the parameter is set, any user attempting to create an index using FILE or URL datastores must have this role otherwise the index cannot be created.

In database versions earlier than Oracle Database 11g Release 2, if the `FILE_ACCESS_ROLE` parameter was not set, users did not need to have a specific role to create indexes using the FILE or URL datastores. From Oracle Database 11g Release 2 onwards, if the `FILE_ACCESS_ROLE` parameter is not set, the URL and File datastore are disabled and indexes using the FILE or URL datastores cannot be created. For more information, see the Oracle Text documentation at <http://www.oracle.com/technology/products/text/index.html>.

When installing or upgrading to Oracle Portal 11g, into a database that is Oracle Database 11g or higher, the following events occur:

- The "PORTAL\_SEARCH\_FILE\_ACCESS\_ROLE" role is created.
- The "PORTAL\_SEARCH\_FILE\_ACCESS\_ROLE" role is granted to the portal schema.
- The `FILE_ACCESS_ROLE` system parameter set to "PORTAL\_SEARCH\_FILE\_ACCESS\_ROLE" regardless of whether the preference was originally set

If the `FILE_ACCESS_ROLE` system parameter was set before installing or upgrading to Oracle Portal 11g from a previous version, you may want to set it back to the original role. If you reset it to another role, you must grant that role to the Oracle Portal schema for Oracle Portal Search to function correctly.

### 4.1.8 Refreshing the Database Provider to Fix Missing Translated Content

After you upgrade to Oracle Portal 11g, language translations of some components or portlets will be missing (for example, survey builder, User Surveys, and so on).

To fix this issue, you must refresh the database provider. Log in to the Oracle Portal, then go to **Navigator, Providers, Registered Providers** and then select your database provider, and then click **Refresh**. After refreshing you should be able to see the translations.

### 4.1.9 Refreshing OMNI, WebClipping, or Sample Producers After Upgrade

After you upgrade to Oracle Portal 11g, you will not be able to refresh the tools producers (omni, webclip, or sample) that were registered from the previous release.

To fix this problem, log in to Oracle Portal, then go to **Administer**. Click **Portlets** tab, and enter the name of your registered producer (registered from the previous release) in the Remote Providers section. Click **Refresh**.

### 4.1.10 Upgrading Sample WSRP Providers During a Portal Midtier Upgrade

The Sample WSRP provider does not upgrade automatically during a Portal midtier and any instances of portlets on pages from that producer will give an error post upgrade. To upgrade the SampleWSRP Web Provider, do the following:

1. Deploy the `wsrp-samples.ear` file to the new Portal managed server (WLS\_PORTAL) instance using the Oracle WebLogic Server Administration Console.
2. Make the preference store that the old producer used available to the new instance. You can do this, by making the new producer use the same preference store (in scenario, where the data base preference store is used), or by migrating the preference store using the preference store migration utility.
3. Update the registration details in portal to point to the new location of the producer, by using the Edit Registration page within Portal.

### 4.1.11 About OmniPortlet Repository Changes

In Oracle Portal 11g, OmniPortlet connection details are stored in the Oracle Platform Security Service (OPSS) credential store. In earlier versions of Oracle Portal, connection details for OmniPortlet are stored in the Web Clipping repository.

After you upgrade any Oracle Portal application containing OmniPortlet, connection details for OmniPortlet are automatically upgraded from the Web Clipping repository when you run the OmniPortlet for the first time after upgrade.

The first time run of OmniPortlet can be either accessing the OmniPortlet Test Page or displaying an OmniPortlet instance on an application page. The migration process is recorded in the log file of Oracle WebLogic Server.

After the upgrade, in OmniPortlet's `provider.xml`, the `vaultId` tag is marked with the prefix `MIGRATED_FROM_VAULT_ID_old_vault_id`.

If there is any error during application migration, you may need to run the migration procedure again. For example, if application migration fails due to the Web Clipping repository being unavailable, you must ensure that the database is up and running and then migrate your application again.

To re-run the migration procedure for an application that contains an OmniPortlet:

1. From the OmniPortlet's `provider.xml`, remove the `MIGRATED_FROM_VAULT_ID_old_vault_id` prefix.
2. Restart the OmniPortlet producer.
3. Access the OmniPortlet Test Page by using the following URL format:  
`http://host:port/portalTools/omniPortlet/providers/omniPortlet`

Where, *host* and *port* refer to the host name and port number of the system where you installed Oracle Portal.

## 4.2 Post-Upgrade Tasks and Information for Oracle BI Discoverer

The following sections describe the post-upgrade tasks you should consider performing after you upgrade to Oracle BI Discoverer 11g:

- [About Using the Oracle BI Discoverer End User Layer in Oracle Fusion Middleware 11g](#)
- [Upgrading Oracle BI Discoverer Plus OLAP 10g User Privileges to 11g](#)
- [Configuring Application URLs in Fusion Middleware Control After Upgrading Using the 10g Ports](#)

### 4.2.1 Upgrading Oracle BI Discoverer Plus OLAP 10g User Privileges to 11g

After the upgrade to 11g, make sure that all your existing Oracle BI Discoverer Plus OLAP users have the proper access privileges to the Oracle BI Discoverer 11g Discoverer Catalog.

Oracle BI Discoverer provides command-line utilities to help you authorize new users and to update the privileges of existing users. For more information, see "Using the Discoverer Plus OLAP command line utility to manage the Discoverer Catalog" in the *Oracle Business Intelligence Discoverer Configuration Guide*.

Refer to the following sections for specific post-upgrade tasks to complete using the command-line utilities:

- [Authorizing a New User to Access the Discoverer Catalog](#)
- [Updating the Privileges of an Existing Discoverer Catalog User](#)

#### 4.2.1.1 Authorizing a New User to Access the Discoverer Catalog

Use the following commands to authorize one or more users so they can access the Discoverer Catalog:

```
java -classpath path_to_d4o_jar_file load .
java -classpath path_to_d4o_jar_file authorize -h hostname -po portname
      -sid database_SID -p d4osyspasswd -u user
```

For example:

```
java -classpath C:\temp\d4o.jar load .
java -classpath C:\temp\d4o.jar authorize -h sys42.example.com -po 1521
      -sid disco_db1 -p nPword432 -u jones
```

In this example, you must run the load command only once before authorizing any number of users. For example, if you want to authorize ten users, run the load command once, and then run the authorize command once for each user.

### 4.2.1.2 Updating the Privileges of an Existing Discoverer Catalog User

To update the user's privileges to access all private and shared folders, use the following command:

```
java -classpath path_to_d4o_jar_file updatePrivileges -h hostname -po portname
      -sid database_SID -p d4osyspasswd -u user
```

For example:

```
java -classpath C:\temp\d4o.jar updatePrivileges -h sys42.example.com -po 1521
      -sid disco_db1 -p nPword432 -u jones
```

In this example, if you provide the `-u` option, then the privileges will be upgraded only for that user. If you do not provide the `-u` option, then the privileges will be upgraded for all users.

## 4.2.2 About Using the Oracle BI Discoverer End User Layer in Oracle Fusion Middleware 11g

Oracle BI Discoverer 11g uses the same End User Layer version (5.1) as Oracle BI Discoverer 10g Release 2 (10.1.2).

For more information, see "Creating and maintaining End User Layers" in the *Oracle Business Intelligence Discoverer Administrator User's Guide*.

## 4.2.3 Configuring Application URLs in Fusion Middleware Control After Upgrading Using the 10g Ports

If you select the **Use Source Oracle home ports in destination** option while using the Upgrade Assistant to upgrade the Oracle BI Discoverer middle tier, then you must configure the application URLs that appear on the Oracle BI Discoverer Home page in Fusion Middleware Control.

For more information, see "How to configure application URLs displayed on the Fusion Middleware Control Discoverer Home page" in the *Oracle Business Intelligence Discoverer Configuration Guide*.

## 4.3 Post-Upgrade Tasks for Oracle Forms Services

Review the following list of manual tasks that you might have to perform after using the Upgrade Assistant to upgrade Oracle Forms Services 10g Release 2 (10.1.2) to Oracle Fusion Middleware 11g.

---

**Note:** For information on upgrading from Oracle Forms Release 6i, refer to "Upgrading to Oracle Forms Services" in the *Oracle Fusion Middleware Forms Services Deployment Guide*.

---

Refer to the *Oracle Fusion Middleware Forms Services Deployment Guide* for detailed information about performing these tasks in Oracle Forms Services 11g:

- Regenerate the Forms application files: fmx's, mmx's, and plx's to run on Oracle Forms Services 11g.
- If you deployed the Oracle Forms Services J2EE applications EAR file (formsapp.ear) on multiple OC4J instances for load balancing and high

availability purposes, then you deploy them in a similar manner on Oracle WebLogic Server.

Specifically, you can create additional managed servers and deploy the Oracle Forms Services J2EE application ear file on each server. The ear file is stored in the following location in Oracle Fusion Middleware 11g:

```
ORACLE_INSTANCE/config/Formscomponent/forms/provision/formsapp.ear
```

- If you deployed the Oracle Forms Services J2EE custom application ear file (`formsapp.ear`) file to override the context root or Forms servlet alias, then you should perform similar steps in the 11g Oracle WebLogic Server domain.
- Manually copy any customizations to the shell scripts in the source Oracle home to the equivalent shell scripts that reside Oracle Fusion Middleware 11g Oracle instance directory.
- The Upgrade Assistant copies the FMA utility configuration files (`converter.properties` and `search_replace.properties`) to the Oracle Fusion Middleware 11g destination Oracle instance and renames them so they have a `.10.1.2` suffix.

You can then manually copy the required entries from the `.10.1.2` configuration files into the Oracle Fusion Middleware 11g version of these files as needed.

## 4.4 Post-Upgrade Tasks for Oracle Reports

After you upgrade to OracleAS Reports Services 11g, review the following sections, which provide information about typical post-upgrade tasks for OracleAS Reports Services users:

- [Configuring Security After Upgrade to Oracle Reports 11g](#)
- [Additional Oracle Reports Post-Upgrade Tasks](#)

### 4.4.1 Configuring Security After Upgrade to Oracle Reports 11g

When you upgrade to Oracle Reports 11g, the security configuration is not upgraded. As a result, the security configuration of Oracle Reports 11g remains the same as it was before the upgrade.

For information about the security features available in Oracle Reports 11g and how to configure them, see "Securing Oracle Reports Services" in the *Oracle Fusion Middleware Publishing Reports to the Web with Oracle Reports Services*.

### 4.4.2 Additional Oracle Reports Post-Upgrade Tasks

The following sections describe some other common post-upgrade tasks to complete after upgrading to OracleAS Reports Services 11g:

- [Modifying Oracle Reports Shell Scripts After Upgrade](#)
- [Modifying Oracle Reports DAT Files After Upgrade](#)
- [About the In-process Server Target After Upgrade](#)
- [Viewing Cached Reports Output Files After Upgrade](#)

#### 4.4.2.1 Modifying Oracle Reports Shell Scripts After Upgrade

Any shell scripts that are stored in the bin directory of the Oracle Reports 10g Oracle home, such as `reports.sh`, `rwrnrun.sh`, and `rwserver.sh` are not upgraded



automatically during the upgrade process. Instead, you must change these scripts manually, as needed. After the upgrade, you can find these scripts in the following Oracle Fusion Middleware 11g directory:

```
ORACLE_INSTANCE/config/reports/bin
```

#### 4.4.2.2 Modifying Oracle Reports DAT Files After Upgrade

OracleAS Reports Services DAT files are upgraded during the upgrade process. However, if job command entries in the DAT files contain references to old Oracle Home path names or invalid path names, then those jobs will fail. Therefore, you must reschedule any such report jobs.

#### 4.4.2.3 About the In-process Server Target After Upgrade

In OracleAS Reports Services 10g, the in-process server target appears in the Oracle Enterprise Manager Application Server Control as `Reports Server`.

However, after you upgrade to OracleAS Reports Services 11g, the in-process server does not appear as `reports server` in Oracle Enterprise Manager Fusion Middleware Control. Instead, it appears as a Reports application, called `reports`, and you can manage the in-process server target and the Reports servlet on the Reports application page.

#### 4.4.2.4 Viewing Cached Reports Output Files After Upgrade

Cached Reports output files are not upgraded to Oracle Reports 11g.

## 4.5 Post-Upgrade Tasks and Information for the Web Tier Components

The Web tier components (Oracle HTTP Server and Oracle Web Cache) are required for Oracle Portal. For that reason, they are installed and configured automatically when you install and configure Oracle Portal.

Refer to the following sections for information about post-upgrade tasks you must perform after upgrading to Oracle Web Cache 11g:

- [Resetting the Oracle Web Cache Passwords in Oracle Web Cache and Oracle Portal After Upgrade](#)
- [Web Tier Component Post-Upgrade Tasks When Using Oracle Single Sign-On](#)

### 4.5.1 Resetting the Oracle Web Cache Passwords in Oracle Web Cache and Oracle Portal After Upgrade

For Oracle Fusion Middleware 11g, the Oracle Web Cache administration and invalidation passwords are saved in the Oracle Fusion Middleware credential store. In past releases, they were stored in the `webcache.xml` configuration file.

However, the Oracle Web Cache upgrade process is unable to update the passwords in the credential store. These passwords are used not only for Oracle Web Cache monitoring and invalidation, but they are also used by Oracle Portal for internal communications between the two components.

As a result, you should update the Oracle Web Cache passwords in two places as soon as possible after upgrade of your Oracle Portal and Oracle Web Cache components:

- Set the monitoring and invalidation passwords using the Oracle Web Cache management pages in Oracle Enterprise Manager Fusion Middleware Control.

For more information, see "Configuring Password Security" in the *Oracle Fusion Middleware Administrator's Guide for Oracle Web Cache*.

- Set the Oracle Web Cache invalidation credentials for Oracle Portal so that Oracle Portal uses the same invalidation password as the one you modified in Oracle Web Cache.

For more information, see "Managing Oracle Web Cache" in the *Oracle Portal Administrator's Guide*.

## 4.5.2 Web Tier Component Post-Upgrade Tasks When Using Oracle Single Sign-On

If you are using Oracle Single Sign-On, and you used the **Use Source Oracle home ports in destination** option in the Upgrade Assistant when you were upgrading any of your Oracle Portal, Forms, Reports, and Discoverer components, then you must perform an additional post-upgrade task.

Specifically, you must register `mod_osso` with Oracle Single Sign-On and update the port values in the `osso.conf` file:

1. Run the `ssoreg` script on the Single Sign On host to re-register `mod_osso`:

```
ORACLE_HOME/sso/bin/ssoreg.sh -oracle_home_path ORACLE_HOME
-config_mod_osso TRUE
-site_name hostname.com:port_number0
-remote_midtier
-config_file ORACLE_HOME/Apache/Apache/conf/osso/myosso.conf
-mod_osso_url http://hostname.com:port_number
```

2. Copy the new `osso.conf` to the following directory in the upgraded Oracle Fusion Middleware 11g instance directory:

```
ORACLE_INSTANCE/config/OHS/ohs_instance_name/
```

3. Perform one of the following tasks, depending upon whether or not your environment is configured to use Secure Socket Layer (SSL):
  - If you are not using SSL connections, then modify the `ServerName` entry in the Oracle HTTP Server 11g `httpd.conf` file by replacing the 10g Oracle Web Cache listening port with the 11g Oracle Web Cache listening port:

For example:

```
ServerName staeb56.us.oracle.com:8090
```

- If you are using SSL connections, then modify the `ServerName` entry in the Oracle HTTP Server 11g `ssl.conf` file by replacing the 10g Oracle Web Cache listening port with the 11g Oracle Web Cache listening port:

For example:

```
ServerName staeb56.us.oracle.com:443
```

4. Restart the OPMN in the instance:

```
opmnctl stopall
opmnctl startall
```

## 4.5.3 Additional Web Tier Component Post-Upgrade Tasks

For more information about tasks and information for Oracle HTTP Server and Oracle Web Cache after you upgrade to Oracle Fusion Middleware 11g, see "Task 5: Perform

Any Required Post-Upgrade Tasks for the Web Tier Components" in the *Oracle Fusion Middleware Upgrade Guide for Java EE*.



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# Upgrading an Oracle Portal Repository in a Customer Database

This appendix details the steps for upgrading an Oracle Portal repository stored outside of the OracleAS Metadata Repository.

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**Note:** If the OracleAS Portal instance was originally installed in release 3.0.9 or earlier, or if it was installed using the `ptlasst` utility, then the portal schema resides in a customer database configuration outside the OracleAS Metadata Repository and needs to be upgraded using the steps in this section.

---

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Refer to the following sections for more information:

- [General Information About Upgrading Oracle Portal](#)
- [Preparing to Upgrade the Oracle Portal Repository in a Customer Database](#)
- [Performing the Upgrade of the Oracle Portal Schema in a Customer Database](#)

## A.1 General Information About Upgrading Oracle Portal

General information on upgrading to Oracle Portal, as well as instructions for upgrading from other versions, is provided at:

<http://portalcenter.oracle.com/upgrades>

## A.2 Preparing to Upgrade the Oracle Portal Repository in a Customer Database

The following steps should be executed to prepare for the upgrade:

1. Ensure that the OracleAS Portal repository database is a version supported for Oracle Fusion Middleware 11g.

For more information about upgrading and preparing the database that hosts your schemas, see the *Oracle Fusion Middleware Upgrade Planning Guide*.

2. Upgrade the middle tiers that are using the Oracle Portal Repository to Oracle Oracle Fusion Middleware 11g, and test Oracle Portal using these middle tiers.

Perform this step for all middle tiers that are associated with the OracleAS Portal repository being upgraded. For instructions, refer to [Chapter 3.6.3, "Task 6c: Upgrade the Oracle Portal, Forms, Reports, and Discoverer Middle Tiers"](#).

## A.3 Performing the Upgrade of the Oracle Portal Schema in a Customer Database

To upgrade the portal schema residing in a customer database, you must use the `upgrade.bat` (Windows) or `upgrade` (UNIX) script. Perform the following steps to upgrade the portal schema residing in a customer database:

1. Set the `ORACLE_HOME` environment variable to the Oracle home of the midtier.
2. Add the Transparent Network Services (TNS) entry of the database containing portal schema to `Instance_Home\config` in Windows and `Instance_Home/config` in UNIX.
3. Set the `TNS_ADMIN` environment variable to the following location: `INSTANCE_Home/config` (UNIX).
4. Ensure that you are able to connect to database using portal schema.
5. Verify if you can connect to the portal schema in the database Oracle home by specifying the schema password and the TNS name using SQL\*Plus.

For example in UNIX:

```
sqlplus portal/portal@orcl
```

6. Change the directory to `ORACLE_HOME/upgrade/portal/admin/plsql` (UNIX).
7. Stop all Oracle Fusion middleware services in the middle-tier Oracle homes that are associated with the portal schema being upgraded.

For this, stop the `WLS_PORTAL` through the Oracle WebLogic Server Administration Console and run `INSTANCE_HOME/bin/opmnctl stopall` (UNIX).

8. Verify that the Oracle Internet Directory associated with the portal schema is up and running.
9. Run the upgrade script in precheck mode until there are no errors found.

On UNIX, run the script as follows:

```
ORACLE_HOME/upgrade/portal/admin/plsql/upgrade -precheck
```

When `-precheck` is specified, only the pre-upgrade checks are done and the upgrade exits after that. In this mode, the upgrade is not immediately terminated if a precheck fails. Instead, the errors for all prechecks are consolidated in the `upgrade.log` file.

This file is generated in the following directory:

```
ORACLE_HOME/upgrade/portal/admin/plsql
```

Look at the end of the log file to see a list of checks that failed. Run the upgrade in this mode until none of the prechecks fails. In this mode, the schema is not altered, so restoring from your backup is not necessary between runs.

Look up any errors found in the precheck log file. Contact Oracle Support Services for any errors that are not documented or that cannot be resolved by following documented actions.

10. After resolving all warnings and errors from the `precheck.log` file, run the upgrade script without any parameters.

On UNIX, run the script as follows:

```
ORACLE_HOME/upgrade/portal/admin/plsql/upgrade
```

The script prompts you for information about the system setup. Your answers are echoed for verification at the end of the script. However, if you discover that you have entered incorrect information before the end of the script, then you can exit before any changes are made by answering n to the last script inquiry.

The following are the questions from the script. Default answers to the questions are given in brackets.

- Have you backed up your database (y|n)? [y]:

If you have not backed up the database, then answer n, back up the database, and restart the script. If you have backed up the database, then answer y.

- Enter the name of the schema you would like to upgrade [portal]:

If the schema name is different from the default OracleAS Infrastructure 10g installation schema name of portal, then enter the schema name.

- Enter the password of the schema you would like to upgrade [portal]:

If the password is not the same as the schema name, then enter the portal schema password.

- Enter the password for the SYS user of your database [change\_on\_install]:

If the password is not change\_on\_install, then enter the database SYS password.

- Enter the TNS connect string to connect to the database [orcl]:

Provide the TNS connect string. This can be found in the INSTANCE\_HOME/config/tnsnames.ora file (UNIX).

11. When the script is complete, examine the upgrade log files in the current directory to make sure there are no errors reported at the end.
12. Now start the midtiers associated with this repository. Check that portal is accessible.





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