

# **Oracle® COREid Access and Identity**

# **Upgrade Guide**

**10g Release 2 (10.1.2)  
Part No. B19010-01**

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**ORACLE®**

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# Preface

This upgrade guide provides information about upgrading currently installed COREid components to the latest version of COREid on supported platforms. Included are considerations, prerequisites, checklists, and step-by-step instructions to help ensure your success.

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**Note:** Oracle *COREid* was previously known as *Obliv Netpoint*. All legacy references to *Obliv* and *NetPoint*, for example, in screen shots, illustrations, and documentation titles, should be understood to refer to Oracle and *COREid*, respectively.

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This Preface covers the following topics:

- “Audience” on page 11
- “COREid Documentation” on page 12
- “Typographical Conventions” on page 13
- “Contact Information” on page 13

## Audience

Read this guide if you will upgrade any COREid component to the latest version of COREid. If you have no version of NetPoint installed, see the *COREid Installation Guide*.

# COREid Documentation

The manuals that are available for this release include:

***Introduction to COREid***—Provides an introduction to COREid, a road map to COREid manuals, and a COREid glossary of terms.

***COREid Release Notes***—Provides up-to-the minute details about the latest COREid release.

***COREid Installation Guide***—Explains how to install and configure the COREid components.

***COREid Upgrade Guide***—Explains how to upgrade earlier versions of COREid to the latest version of COREid.

***COREid Administration Guide***—Explains how to configure COREid applications to display information stored in the directory, how to assign view and modify permissions for data displayed on the COREid applications, and how to assign access controls to users.

***COREid Deployment Guide***—Provides information for people who plan and manage the environment in which COREid runs. This guide covers capacity planning, system tuning, failover, load balancing, caching, and migration planning.

***COREid Customization Guide***—Explains how to change the appearance of COREid applications and how to control COREid by making changes to operating systems, Web servers, directory servers, directory content, or by connecting CGI files or JavaScripts to COREid screens. This guide also describes the Access Server API and the Authorization and Authentication Plug-in APIs.

***COREid Developer Guide***—Explains how to create AccessGates and how to develop plug-ins. This guide also provides information to be aware of when creating CGI files or JavaScripts for COREid.

***COREid Integration Guide***—Explains how to set up COREid to run with third-party products such as BEA WebLogic, the Plumtree portal, and IBM Websphere.

***COREid Schema Description***—Provides details about the COREid schema.

*Online Help* is available from each COREid screen.

# Typographical Conventions

COREid manuals use the following typographical conventions:

- When you are instructed to select elements sequentially, the actions are separated with angle brackets, as shown below:

Click System Admin > System Configuration > View Server Settings.

- Paths to a file are shown using syntax for either the Unix or Windows platform:

```
/COREid_install_dir/identity/oblix/logs/debugfile.lst
```

```
\COREid_install_dir\identity\oblix\logs\debugfile.lst
```

where *COREid\_install\_dir* refers to the directory where the component, in this case, the COREid Server, is installed.

## Contact Information

For a list of contacts including corporate offices world wide, sales, and other details, visit the Oracle Web site at:

<http://www.oracle.com>

You can contact Oracle with questions or comments as follows:

**Customer Care**—<http://www.oracle.com/support/contact.html>

## Corporate Headquarters

Oracle maintains offices world wide. Oracle corporate headquarters is located at:

500 Oracle Parkway  
Redwood Shores, CA 94065  
Phone: (650) 506-7000

## Before Contacting Customer Care

Before contacting Customer Care, please have available the following:

- Oracle product name and version number
- Type of computer and operating system you are using

## Accessing the Customer Care Knowledge Base

For more information about using COREid, see the Oracle Customer Care Knowledge Base. To access the Knowledge Base, you need a login name and password, which you can obtain from your Oracle sales representative.

### To access the Knowledge Base:

1. Enter the following URL in your browser and press Return.  
`http://www.oracle.com/support/contact.html`
2. Click the phrase, Login to the Oracle PremiumCare Online Portal.
3. Enter your user name and password in the box that appears, then click Login.
4. Under Oracle Support Tools, click Case Manager.
5. In the next screen, click Find Answers to gain access to the Knowledge Base.

# **SECTION I: UPGRADE PREPARATION**



# 1 Introducing the NetPoint Upgrade Process

Each major release of NetPoint provides enhanced product functionality, platform support, and regulatory compliance over previous major releases of NetPoint. When you have an older NetPoint version, you may upgrade to NetPoint 7.0 and make changes to your older installation available in the new version.

This chapter provides an important introduction to NetPoint 7.0 upgrade concepts, processes, and results. Topics include:

- “About Upgrading to NetPoint 7” on page 18
- “About the Upgrade Task and Processing” on page 25
- “Changes in the NetPoint Directory Structure” on page 37
- “Upgrade Modes” on page 44

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**Note:** While the NetPoint name is changing to COREid™, in manuals and within the product itself you will see the name NetPoint. NetPoint SAML Services have been renamed to SHAREid and are discussed in the *Oblix SHAREid Administration Guide*.

---

# About Upgrading to NetPoint 7

The term *upgrade* refers to the process of changing from one major version (*X*) of NetPoint to a later major version (*Y*) of NetPoint. The term *migration* is typically used for the process you must complete to push a NetPoint implementation from a test environment into a production environment. Despite these distinctions, you may see the term *migration* used in path names, tools, and messages on screen and in discussions below.

Major versions of NetPoint are identified with version numbers *x.x*. Major NetPoint versions provide significant product enhancements over previous NetPoint versions. In addition to new features and additional platform support, major NetPoint versions may include changes to the schema, data, parameter, or message files. For new features, see the *NetPoint 7.0 Release Notes*. For an overview of NetPoint, a road map to manuals, and a glossary of terms, see the *Introduction to NetPoint 7.0* book.

When you upgrade, the newer NetPoint version is installed over the existing version, while your existing data and configurations are made available to the new version. For example, suppose you have installed NetPoint 6.1.1 and added new object classes and panels, assigned or delegated administrative rights to key people, created workflows, protected resources with a policy domain, configured authentication schemes and authorization rules, customized the way NetPoint looks or operates, and modified message files. After the upgrade to NetPoint 7.0, you do not need to replicate all the work you had completed on the earlier version.

Upgrading to a higher major version differs from applying a minor version patch. Most often, minor version patches resolve an issue reported by a customer or discovered during testing. For more information on patches, see “Patch Paths” on page 23.

---

**Note:** You do *not* need to apply patches to your older installation before upgrading.

---

## Component Upgrade Requirements

To use NetPoint 7.0 features, you need to upgrade all older NetPoint COREid Servers, the WebPass, Access Managers, Access Servers, the Access Server SDK, APIs, and NetPoint connectors for third-party components such as Ready Realm for BEA.

You upgrade the older WebGates as you do other older components. Older NetPoint WebGates are compatible and may coexist with NetPoint 7.0 Access Servers. NetPoint 7.0 includes WebGates that may be added to your upgraded environment.

You also need to upgrade the Access Server SDK (where SDK represents the Software Developer's Kit), which consists of libraries, build instructions, and examples that you (or Oblix) can use to build a custom *AccessGate* for Web and non-Web resources. For details, see "Upgrading the Access Server SDK" on page 131.

If your COREid Server installation includes Oblix IDLink, you will be notified while upgrading the COREid Server and informed that you need to install the new version of Oblix IDLink separately. NetPoint 7.0 does not support Oblix IDLink. You may upgrade to NetPoint 7.0 and transition to provisioning using MIIS provisioning, as described in the *NetPoint Integration Guide*. Otherwise, you may retain the older NetPoint version and continue using Oblix IDLink.

The NetPoint Simple Network Management Protocol (SNMP) has not changed and does not require an upgrade.

Support for the Publisher application was dropped in NetPoint 6.0. You may maintain your pre-NetPoint 6.0 Publisher setup while upgrading the rest of your NetPoint implementation only up to 6.1. Publisher cannot operate at the same time as NetPoint 6.1 or later. If you want to maintain a pre-NetPoint 6.0 Publisher setup, you may upgrade only as far as NetPoint 6.0, as described in the *NetPoint 6.1 Installation Guide*.

The NetPoint Certificate Process Server (CPS) is not supported in NetPoint 7.0. If your older NetPoint installation includes the CPS, following the upgrade you will have to request and install any new certificates through a third-party vendor.

Support for NetPoint Associate Portal Services (APS) was deprecated in NetPoint 6.5 when NetPoint SAML Services became the preferred method to provide access privileges across multiple associated portals and DNS domains.

With the release of Oblix SHAREid, the preferred method to provide such access is now SHAREid. If your older version of NetPoint includes SAML Services, you can migrate these to SHAREid. For more information, contact Oblix Customer Care and see the *NetPoint SAML to SHAREid Migration Guide*.

APS remains deprecated in NetPoint 7.0 and is available only through Oblix Customer Care.

For system requirements, see the *NetPoint 7.0 Installation Guide* or:

[https://customers.oblix.com/shared/prodinfo/prod\\_roadmap.cfm](https://customers.oblix.com/shared/prodinfo/prod_roadmap.cfm)

## Upgrade Paths

When you have applied one or more patches to a major NetPoint version and then you upgrade, the patches version is treated like the major version of the same series. For example, during the upgrade process 5.2.x.x is equal to 5.2; 6.5.0.x and 6.5.x are equal to 6.5.

NetPoint 6.5.0.x installations may include Language Packs. To upgrade a NetPoint 6.5 multiple-language environment, you need the NetPoint 7.0 Language Packs. Otherwise, only the default language is upgraded and NetPoint uses only the default language. Contact Oblix for information about specific Language Packs.

---

**Note:** Support for Publisher was dropped in NetPoint 6.0. If you want to maintain an older NetPoint Publisher setup, you may upgrade only to NetPoint 6.1. For details, see the *NetPoint 6.1 Installation Guide*.

---

After preparing your environment, you may upgrade to NetPoint 7.0 directly from the older versions in Table 1 and Table 2.

**Table 1** Upgrade Paths from NetPoint 5.x through 6.1

From	To	Caveat
NetPoint 5.2	NetPoint 7.0	With Publisher, only to NetPoint 6.1
NetPoint 6.0.1	NetPoint 7.0	With Publisher, only to NetPoint 6.1
NetPoint 6.1 or 6.1.1	NetPoint 7.0	To retain Publisher, no further upgrade is possible
NetPoint 6.1.1 on AIX	NetPoint 7.0	Before the upgrade, download and extract specific files to your target <i>Component_install_dir</i> . See “v6.1.1 on AIX Caveat” on page 21

For information about upgrading with Publisher, see the *NetPoint 6.1 Installation Guide*.

If you have NetPoint 6.5 installed, you may upgrade to NetPoint 7.0 directly, as indicated in Table 2. Publisher is not supported with either NetPoint 6.5 or 7.0.

**Table 2** Upgrade Paths from NetPoint Series 6.5 Releases

From	To	Caveat
NetPoint 6.5.0.x is an international release (English, German, French)	NetPoint 7.0	Before the upgrade, download and extract specific files to your target <i>Component_install_dir</i> . See “v6.5.0.x Caveat” on page 21.
NetPoint 6.5.1 is an English-only release	NetPoint 7.0	None

**Table 2** Upgrade Paths from NetPoint Series 6.5 Releases

From	To	Caveat
NetPoint 6.5.2.x is an English-only release	NetPoint 7.0	Before the upgrade, you may need to download and extract specific files to your target <i>Component_install_dir</i> . See “v6.5.2.x Patch Caveat” on page 22.
NetPoint 6.5.3.x is an English-only WebGate release	NetPoint 7.0	None

## Caveats

Be sure to read about the special conditions that apply before you start to upgrade from one of the following NetPoint versions:

- “v6.1.1 on AIX Caveat” on page 21
- “v6.5.0.x Caveat” on page 21
- “v6.5.2.x Patch Caveat” on page 22

### v6.1.1 on AIX Caveat

During the upgrade to NetPoint 7.0, the latest version of the installer for each component creates a directory named “orig” and compares the environment to ensure appropriate files are upgraded. However, NetPoint v6.1.1 installers for WebPass and Access Manager releases for AIX platforms did not create a file named “orig”.

As a result, before you upgrade to this version of NetPoint, you must download and extract the following packages to your original *Component\_install\_dir*:

```
Netpoint_611_orig_WebPass_param.tar
Netpoint_611_orig_Access_Manager_param.tar
```

The files above are used during the upgrade from NetPoint v6.1.1.x only. No further action is required by you.

For additional information, see “Preparing a v6.1.1 WebPass or Access Manager on AIX” on page 61.

### v6.5.0.x Caveat

During the upgrade to NetPoint 7.0, the latest version of the installer for each component creates a directory named “orig” and compares the environment to ensure appropriate files are upgraded. NetPoint 6.5 releases did not provide an upgrade capability and, therefore, did not create a file named “orig”.

As a result, before you upgrade from NetPoint 6.5.0.x to a later version of NetPoint, you must download and extract the following packages to your original *Component\_install\_dir*:

Netpoint\_65\_orig\_en\_COREid\_Server\_msg.zip  
Netpoint\_65\_orig\_COREid\_Server\_param.zip  
  
Netpoint\_65\_orig\_en\_WebPass\_msg.zip  
Netpoint\_65\_orig\_WebPass\_param.zip  
  
Netpoint\_65\_orig\_en\_Access\_Manager\_msg.zip  
Netpoint\_65\_orig\_Access\_Manager\_param.zip  
  
Netpoint\_65\_orig\_en\_Access\_Server\_msg.zip  
Netpoint\_65\_orig\_Access\_Server\_param.zip  
  
Netpoint\_65\_orig\_en\_WebGate\_msg.zip  
Netpoint\_65\_orig\_WebGate\_param.zip

When your 6.5.0.x installation includes additional languages (French and/or German, for example), you also need to download and extract the original component message files for all languages installed previously:

Netpoint\_65\_orig\_fr\_COREid\_Server\_msg.zip  
Netpoint\_65\_orig\_de\_COREid\_Server\_msg.zip

The files above are used during the upgrade from NetPoint v6.5.0.x only. You will see a dialog seeking these files only during such upgrades. No further action is required by you.

---

**Important:** To upgrade a NetPoint 6.5.0.x multiple-language environment, you need NetPoint 7.0 Language Packs. If you upgrade a multi-language implementation without NetPoint 7.0 Language Packs, you will lose the multi-language functionality. Contact Oblix for information about specific Language Packs. See also multi-language implementations in “Compatibility with Previous Versions” on page 48.

---

For additional information, see “Preparing NetPoint 6.5 Environments” on page 62.

### **v6.5.2.x Patch Caveat**

As discussed above, during the upgrade to NetPoint 7.0 the latest version of the installer for each component creates a directory named “orig” and compares the environment to ensure appropriate files are upgraded. If you originally installed NetPoint 6.5.0.x, then patched it to a later version (excepting v6.5.1), you must download and extract the following packages to your original *Component\_install\_dir* before you upgrade to a later version of NetPoint. For example:

Netpoint\_652\_orig\_en\_COREid\_Server\_msg.zip  
Netpoint\_652\_orig\_COREid\_Server\_param.zip  
Netpoint\_652\_orig\_en\_WebPass\_msg.zip  
Netpoint\_652\_orig\_WebPass\_param.zip  
Netpoint\_652\_orig\_en\_Access\_Manager\_msg.zip  
Netpoint\_652\_orig\_Access\_Manager\_param.zip  
Netpoint\_652\_orig\_en\_Access\_Server\_msg.zip  
Netpoint\_652\_orig\_Access\_Server\_param.zip  
Netpoint\_652\_orig\_en\_WebGate\_msg.zip  
Netpoint\_652\_orig\_WebGate\_param.zip

The files above are used during the upgrade from NetPoint v6.5.2.x (or later) only. You will see a dialog seeking these files only during such upgrades. No further action is required by you.

For additional information, see “Preparing NetPoint 6.5 Environments” on page 62.

## Patch Paths

You can apply a minor version patch only to a NetPoint installation within the same series. For example, the NetPoint 6.1.1.12 patch may be added to any NetPoint 6.1.1 or 6.1.1.x installation, but cannot be added to a NetPoint v5.x, v6.0, v6.1, or 6.5 installation. For more information, see the patch notes that apply to the version of NetPoint that you have installed.

---

**Note:** You do *not* need to apply patches to your older installation before upgrading to NetPoint 7. When upgrading to NetPoint 7.0, a minor version is recognized as the major version of the same series.

---

NetPoint 7.0.x patches can be applied only to NetPoint 7.0 environments. Only after upgrading to NetPoint 7.0, can you install NetPoint 7.0.x patches.

## Minor Version Considerations

Before NetPoint 7.0, minor NetPoint versions did *not* include new features nor schema, data, parameter, or message changes. Starting with NetPoint v7.0.1, there are important changes:

- NetPoint 7.0.1 (and later) patch installers provide parameter and message updates. Going forward, new GIFs, XSL, HTML, images, or similar files can be included in a patch release.

---

**Note:** If you have an earlier version of NetPoint (as far back as v5.2.x), you may upgrade to NetPoint 7.0, then apply the v7.0.1 patch.

---

- NetPoint 7.0.2 is *not* a patch:  
NetPoint 7.0.2 provides full installation packages only (no patches) that you can use to upgrade an earlier NetPoint environment. New support is indicated below:
  - **IBM Directory Server**—When you have IBM Directory Server (formerly SecureWay) v4.x, you must first upgrade your IBM Directory Server v4.x directory server to IBM Directory Server v5.1 then upgrade NetPoint as described in this manual. For more information, see “IBM Directory Server Considerations” on page 56.
  - **VDE/COREid Data Anywhere**—When you have an earlier version of NetPoint installed with a native directory server you can upgrade, reconfigure, and integrate NetPoint with OctetString VDE to access additional user data directories and databases. For details, see “COREid Data Anywhere/VDE Considerations” on page 55 and the *NetPoint Integration Guide*.

# About the Upgrade Task and Processing

Upgrading, like installation, is an iterative task that you complete one component at a time. The order in which you upgrade NetPoint components is similar to the installation order for new components.

## Task overview: Upgrading to NetPoint 7.0

1. Prepare your current NetPoint environment for the upgrade, as described in “Preparing to Upgrade NetPoint” on page 47.
2. Upgrade the COREid System, as described in “Upgrading the COREid System” on page 67, including:

COREid Server

Publisher (*to retain this you may upgrade only to NetPoint 6.1*)

WebPass

Oblix IDLink

---

**Note:** NetPoint 7.0 does not support Oblix IDLink. You may upgrade to NetPoint 7.0 and transition to provisioning using NetPoint and configuring MIIS provisioning. Otherwise, you may retain the older NetPoint version and continue using Oblix IDLink.

---

3. Upgrade the Access System, as described in “Upgrading the Access System” on page 111, including:

Access Manager

Access Servers

WebGates

---

**Note:** Older WebGates can coexist with NetPoint 7.0 components. After upgrading, you may add NetPoint 7.0 WebGates. For more information about compatibility with previous versions, see “Compatibility with Previous Versions” on page 48.

---

4. Manually process the items below, as described in “Incorporating Workflows, Plug-Ins, and Custom Items” on page 91:
  - Stylesheets  
Images (including NetPoint.gifs)  
JavaScript files  
COREid Event API (PPP)
  - Authentication and Authorization plug-ins (see “Recompiling Plug-Ins” on page 130)
  - C++ Programs (see “Recompiling C++ Programs” on page 135)

5. Upgrade special components, as described in “Upgrading the Access Server SDK and Integration Components” on page 131.

- Ready Realm for BEA
- BEA WebLogic SSPI
- NetPoint Connector for WebSphere

6. Verify that your APIs are working properly, and recompile if needed, including:

- XPI (Identity XML)
- AccessGates
- COM+
- AMAPI

For more information, see the *NetPoint 7.0 Developer Guide*.

7. Upgrade NetPoint SAML Services to SHAREid by first contacting Oblix Customer Care for the utility and documentation to complete this task.

## About the Upgrade Process

In general, the upgrade process for each component begins automatically when you install a NetPoint 7.0 component on a machine that is hosting an older version of the same component *and* you specify the same (target) installation directory where the older (source) component resides:

**Sample Target Directory**—`\COREid_install_dir\identity`

In this case, the source component is detected and you are asked if you want to upgrade. When you accept the upgrade option, the source component directory is renamed with the addition of a time stamp (*yearmonthday\_hourminutesecond*):

**Sample Renamed Source Directory**—`\COREid_install_dir_20040422_141440\identity`

The renamed time-stamped source directory contains the original older files, which are sometimes accessed during the upgrade to compare content or extract information you have customized.

After the source directory is renamed, the target directory is created and new files are extracted to the target. New folders are created in the target directory as needed. While the directory structure for NetPoint 6.5 and 7.0 are the same, they differ from earlier versions. For details, see “Changes in the NetPoint Directory Structure” on page 37.

You may choose to have the upgrade process performed automatically or with your confirmation. Either way, Figure 1 and the description that follows it describe a typical upgrade process. During each phase of the upgrade, a log file is produced

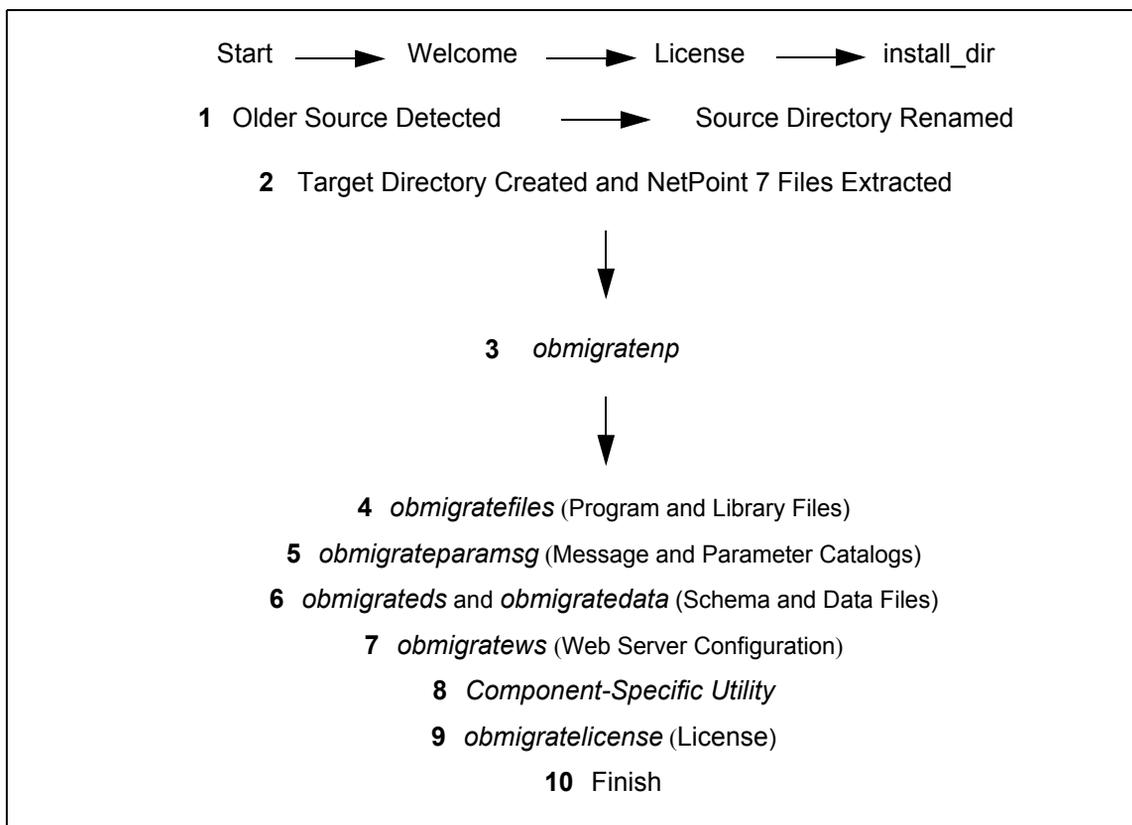
by the specific tool used during that sequence to inform you if any problem should arise. You can find upgrade log files in:

**Log File Path—**

`\Component_install_dir\identity\access\oblix\tools\migration_tools\toolname.log`

For additional information on the tools called and log files produced during the upgrade process, see “Introducing NetPoint Upgrade Utilities” on page 151.

**Figure 1** Events that Occur When You Initiate an Upgrade



**Process overview: When an older source is detected and you choose to upgrade**

1. The source directory is renamed with a time stamp.
2. The target directory is created and NetPoint 7 files are extracted into it. The latest version must be extracted to the original target path, and languages for the previous installation are detected.

The default language, English, is upgraded automatically. When you have 6.5.0.x installed with additional languages, you may upgrade those if

corresponding NetPoint 7.0 Language Packs are available in the component's source directory.

---

**Note:** If you upgrade a multi-language implementation without NetPoint 7.0 Language Packs, you will lose your multi-language functionality. Contact Oblix for information about specific Language Packs. For more information about multi-language implementations, see “Compatibility with Previous Versions” on page 48.

---

3. The *obmigratenp* utility is called, which determines the version you are migrating from as well as the version you are migrating to, and then it internally detects which features need to be upgraded for this particular component and which other utilities to use for those upgrades. When your installation includes multiple languages, *obmigratenp*:
  - a) Migrates message catalogs in the default language.
  - b) Migrates message catalogs in other selected languages when you have NetPoint 7.0 Language Packs in the component source directory.
  - c) Invokes general upgrades, as discussed below.

---

**Note:** For details about each utility and the log file generated by each utility, see “Introducing NetPoint Upgrade Utilities” on page 151.

---

For more information, see “Primary Utility: *obmigratenp*” on page 153.

4. The *obmigratefiles* utility is called to upgrade program and library files.
  - a) Required files are extracted to the target directory.
  - b) Required configuration and SSL-related files are *copied* from the renamed source directory to the target directory, and the new version of NetPoint is installed.

For more information, see “File Upgrade: *obmigratefiles*” on page 154.

5. The *obmigrateparamsg* utility is called to upgrade message and parameter catalog files.
  - a) Required (.xml and .lst) files are identified in renamed source area.
  - b) Files are modified for latest version and written to the target directory.

For more information, see “Message and Parameter Upgrade: *obmigrateparamsg*” on page 157.

6. The *obmigrateds* and *obmigratedata* utilities are called to initiate schema and/or data upgrades when needed:

#### **Schema Upgrade Utility—*obmigrateds***

- a) Determines the type of directory servers configured for user, NetPoint configuration, and policy data, and bind information.
- b) Uploads new attributes, object classes, and user-related data based on directory server type and version.
- c) Updates user entries for the ChallengeResponsePhrase value with RC6 encryption scheme, if needed.

For more information, see “Schema Upgrade: obmigrateds” on page 160.

#### **Data Upgrade Utility—obmigratedata**

- a) Connects to the target directory server.
- b) Reads and processes existing NetPoint configuration and policy data using mapping information in the map files.
- c) Applies the mapping data and upgrades object class and attribute mapping based on existing data in the old version.

For more information, see “Data Upgrade: obmigratedata” on page 162.

7. The *obmigratews* utility is called to perform a selective Web server configuration file and filter upgrade, if needed, to accommodate changes for newer versions of Access Manager, WebPass, and WebGate.

Changes are added to the Web server configuration file.

---

**Note:** The *obmigratepublisher* utility is called for Publisher-related installation. Publisher was supported in NetPoint 5.x. However, support was dropped in NetPoint 6.0. See “Deciding If You Want to Continue to Use Publisher” on page 64.

---

For more information, see “Web Server Upgrade: obmigratews” on page 165.

8. A component-specific utility is used to make changes to related registry entries for Windows, plug-ins, and other files.

For example:

- a) **COREid Server—*obMigrateNetPointOis***—Upgrades existing registry entry for the COREid Server to reflect newer version; modifies PPP catalog if needed; modifies password from password.xml and .lst, if needed; recreates proper uninstall\_info.txt.

**Note:** The password written in the NetPoint 5.2, password.xml and password.lst files is *not* encrypted; however, later versions of NetPoint encrypt this. The encryption occurs automatically during an upgrade.

- b) **WebPass—*obMigrateNetPointWP***—Upgrades existing registry entry for the WebPass to reflect newer version; modifies password from password.xml and password.lst, if needed.

c) **Access Manager**—*obMigrateNetPointAM*—Upgrades registry entry for Access Manager; modifies password encryption from password.lst, if needed; copies your custom plug-ins to the target installation directory from your renamed source directory.

d) **Access Server**—*obMigrateNetPointAAA*—Upgrades registry entry for Access Server; modifies password encryption, if needed; copies your custom plug-ins from your renamed source directory to the target installation directory; upgrades the following failover files:

AppDB.lst  
ConfigDB.lst  
Group.lst  
UserDB.lst  
WebResrcDB.lst

e) **WebGate**—*obMigrateNetPointWG*—Upgrades registry entry for the WebGate; modifies password encryption, if needed.

f) **ASDK**—*obMigrateNetPointASDK*—To accomplish an Access Server SDK upgrade, *obmigratenp* calls *obMigrateNetPointASDK*.

ASDK migration will be invoked automatically as the last step when upgrading components bundled with ASDK (COREid Server, NetPoint Ready Realm for BEA, and NetPoint Connector for WebSphere).

**Note:** If you decline the automatic ASDK upgrade, current ASDK configuration settings are not preserved and you must re-configure ASDK using the *configureAccessGate* tool, as described in the *NetPoint 7.0 Administration Guide Volume 2*.

For more information, see “Component-Specific Upgrades” on page 166.

9. The *obmigratelicense* utility is called to complete the license upgrade by removing Publisher related entries and changing the expiry date and keys. If an older version cannot be found, a demo license is made available for 60 days and up to 100 users.

---

**Note:** If you install a separate NetPoint 7 system, you cannot use the upgraded license key from any earlier version of NetPoint. Instead, you need to request and install permanent keys for NetPoint 7 within 60 days from the date that you installed NetPoint 7. For more information, see “License Upgrade: *obmigratelicense*” on page 166.

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10. The installer takes over following the license upgrade, which completes the upgrade process, and you finish as you would any installation.

For details about what must be handled manually, see “Items Requiring a Manual Process” on page 34.

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**Note:** Upgrades occur incrementally. This means that the sequence above begins and the older version is upgraded to the next-latest version. Following the component-specific upgrade, the sequence may repeat until all changes between your original version and the latest version are completed.

---

If you cancel an upgrade after being informed that the component has been installed, you need to complete the following steps to restore your NetPoint configuration to the original state.

### **To restore your environment to its original state after canceling the upgrade**

1. Uninstall the NetPoint component.
2. Rename the time-stamped NetPoint source directory.
3. Restart the upgrade, if needed.

## **Upgraded Items**

The following items will be upgraded, as discussed in the “Process overview: When an older source is detected and you choose to upgrade” on page 27:

- Program and library files
- Message and parameter catalogs
- The schema and NetPoint configuration and policy data
- Web server files and filters
- Component-specific information, including system environment settings such as registry entries for Win32, and configuration files, including:
  - **COREid**—sample\_failover.xml
  - **Access Server**—failover files
    - AppDB.lst
    - ConfigDB.lst
    - Group.lst
    - UserDB.lst
    - WebResrcDB.lst
  - **ASDK Configuration**

- License information

---

**Note:** Older licenses are converted to a NetPoint 7 license for upgraded components. If you install a separate NetPoint 7 system, you cannot use the upgraded license key from any earlier version. Instead, you must request and install permanent keys for NetPoint 7 within 60 days. See also, “License Upgrade: obmigratelicense” on page 158.

---

## Preserved Items

The items listed below are preserved in the renamed time-stamped directory and *copied* into the new target directory:

- certificate files (simple/cert mode)
- password.xml and .lst
- configuration files (.oblix/config, .oblix/data)
- obnavigation.xml
- oblixpppcatalog.lst
- cert7.db

---

**Note:** With NetPoint 7.0, the default certificate store format and name has changed from cert7.db to cert8.db. When you upgrade to NetPoint 7.0, you continue to use the old certificate store (cert7.db). When you run the configureAAAServer, setup\_ois, or setup\_accessmanager utilities, the certificate store format and name is automatically modified to cert8.db. NetPoint 7.0 works with both the cert7.db (upgraded environments) and cert8.db (new installations) certificate store.

---

## Directory Server Failover

Your earlier implementation of NetPoint may include failover between a NetPoint server and the directory server. You do *not* need to complete any special handling for failover or load balancing during upgrades.

For example, suppose your older NetPoint 6.1.0 environment includes directory server failover with the Access Server. Thanks to automated processing, the Access Server will handle multiple directory servers following data upgrades. Directory profiles for the Access Server are automatically created during the upgrade from NetPoint 6.1.0 to 6.5:

- Primary directory server information is stored in:  
*AccessServer\_install\_dir/access/oblix/config/UserDB.lst*

- Information for all the failover and load-balancing directory servers (primary and secondary) is stored in:

*AccessServer\_install\_dir/access/oblix/config/UserDBFailover.lst*

Upgrading to NetPoint 7.0 will occur as described earlier. When you have NetPoint configured for directory server failover, the following additional processes occur during the upgrade.

### **Process overview: During NetPoint 6.1.0 to 6.5.0. upgrades with directory server failover**

1. The `obmigrateds` tool creates a DB profile for the Access Server.
2. `obmigrateds` reads directory server information from the `UserDB.lst` and `UserDBFailover.lst` files and creates one DB instance each for all configured primary (and secondary) directory servers.

---

**Note:** At the end of data upgrades, the profile created for the Access Server will be able to handle multiple directory servers.

---

**For COREid Servers**—The COREid Server user profile has always resided in the directory server. Therefore, there is no migration of parameters from files to profiles as occurs with the Access Manager and Access Server. However the profile schema itself has changed since NetPoint 6.1, and some migration changes with respect to these changes will be performed during the upgrade.

**During Access Manager Upgrades**—From NetPoint version 6.1 to 6.5, profiles for the user and Oblix trees are created. When creating the User DB profile, directory server credentials are read from:

*AccessManager\_install\_dir/access/oblix/config/userDB.lst*

If the Oblix tree is in the user directory server and under the user node, then the Oblix DB profile is *not* created. Otherwise, the Oblix DB profile is created using directory server information from:

*AccessManager\_install\_dir/oblix/config/ldap/configdb.lst*

The Oblix DB profile that is created is marked to be used only by the Access Manager. However, profiles are *not* created for Access Manager failover servers. In the case of NetPoint v6.1, if the policy tree was on a separate directory server then a profile for policy existed.

**During Access Server Upgrades**—From NetPoint version 6.1 to 6.5, the user data DB profile is created for the master directory server as well as any failover directory servers. Profiles are not created for the Oblix (configuration) or policy trees.

---

**Important:** After upgrading to NetPoint 7.0, it is a good idea to verify that the failover configuration you had in the previous version operates as expected. For more information about failover and load balancing, see the *NetPoint 7.0 Deployment Guide*. See also “Connection Pool Details” on page 34.

---

## Items Requiring a Manual Process

The following discussions outline items that require a manual process following the upgrade to NetPoint 7.0:

- “C++ Programs” on page 34
- “Connection Pool Details” on page 34
- “Customized Styles” on page 35
- “Provisioned Attributes” on page 36
- “Plug-Ins” on page 36
- “Shared Secret” on page 37

## C++ Programs

You will need to recompile C++ programs that operate with the Access Server SDK following that upgrade, for the reasons stated in “Plug-Ins” on page 36.

## Connection Pool Details

As described in the *NetPoint 7.0 Deployment Guide*, when a COREid server starts, it opens the number of connections to the directory as specified by the *initialConnections* parameter on the Modify Database Instance page. More connections are opened as needed, until connections equal the number specified by *maxConnections* parameter. Connections remain open until the COREid Server shuts down or the directory server stops responding. Those connections are then pooled and used by the COREid server.

---

**Note:** NetPoint 7.0 consolidates connection pooling to support failover across the entire system. The directory connection pool does *not* depend on the directory type.

---

There is some impact when upgrading, depending on the configuration of your older version of NetPoint to each directory server that is configured:

- **No Connection Pools**—If your older NetPoint version was not configured for connection pools (by setting values for *Initial Connections* and *maxConnections*), the upgrade imposes a default of 1 connection to each directory server configured.

- **Connection Pools Match New Defaults**—If your older NetPoint version includes connection pool details (values for *Initial Connections* and *Maximum Connections*) that do *not* conflict with the defaults (1 connection to each directory server configured or 5 for an SQL profile), then older connection pools continue working as expected after the upgrade.
- **Connection Pools Do Not Match New Defaults**—If your legacy connection pools *conflict* with the default values of 1 connection to each directory server (configured by *Initial Connections* and *Maximum Connections*), the default is imposed. In this case, your connection pools will *not* operate as they did previously and you need to reconfigure *Initial Connections* and *Maximum Connections* as described in the *NetPoint 7.0 Deployment Guide*.
- **On NDS**—For concurrent authentication requests on NDS directory servers, Oblix recommends that you increase the connection pool size to something higher than the default (1) for the user directory profile using the NetPoint Administration Console.

For more information, see “Directory Server Failover” on page 32.

## Customized Styles

Default NetPoint stylesheets are periodically updated by Oblix to instantiate improvements. To support multiple languages, the location of java scripts, stylesheets and images have changed from earlier NetPoint versions. Upgraded NetPoint functionality depends, in part, on stylesheet files in the new version \style0 and \shared directories. If you changed any files in your older version NetPoint \style0 directory, you must manually edit newer version files in \style0 and \shared directories following the upgrade.

It is important to understand the new file hierarchy and stylesheet structure before you can successfully migrate custom images and stylesheets to NetPoint 7.0. If you simply copy your old stylesheets, images, JavaScript files, and related items to the new version, NetPoint may experience problems.

The following NetPoint files must be processed manually after the upgrade:

- XSL stylesheets
- Images (.gifs for NetPoint)
- JavaScript Files

For details, see “Incorporating Workflows, Plug-Ins, and Custom Items” on page 91. For details about the NetPoint 7 directory structure, see “Changes in the NetPoint Directory Structure” on page 37.

## Provisioned Attributes

If you are upgrading from NetPoint 5.2, `output_520_to_600_supplied_osd.txt` may be generated. Following the upgrade to NetPoint 7.0, check for this file and then check for 5.2 workflows and relevant steps with attributes marked as provisioned. These attributes need to be manually associated with an appropriate NetPoint 7.0 workflow. See “Associating Provisioned Attributes with Workflows” on page 91.

## Plug-Ins

Following the upgrade, Identity Event API (PPP) plug-ins and authentication and authorization plug-ins must be recompiled using GCC v3.3.2 C++ compiler. This is because NetPoint 7.0 components on Solaris and Linux are compiled using the GCC v3.3.2 C++ compiler to address multi-threading issues encountered with earlier compiler versions.

---

**Note:** Plug-ins implemented as executables or those using a scripting language, such as perl will *not* need any changes.

---

**Identity Event API (PPP) Plug-Ins**—This allows you to extend the business logic of the NetPoint COREid System by calling out to other systems before or after an event happens in the COREid System. For example, you may bring data from external systems back into NetPoint; do data validation; and pre-populate fields based on other information provided. Some plug-ins are copied during the upgrade; however, Identity Event API (PPP) plug-ins are not.

To facilitate future upgrades, Oblix recommends that you create a folder for your old NetPoint Identity Event API plug-ins in the top level of your Identity Event API directory. Following the upgrade, any PPP library plug-ins for the COREid Server must be recompiled using GCC v3.3.2. See “Recompiling Plug-Ins” on page 92.

**Authentication Plug-Ins**—Fundamental to any NetPoint authentication scheme are the plug-ins you add to it. You can also use custom plug-ins. Only the plug-ins you add to an authentication scheme can be used for any of its steps.

Following the NetPoint Access System upgrade, see “Recompiling Plug-Ins” on page 130. To add customized plug-ins and their parameters to an authentication scheme to be used for any of the scheme’s steps, see the *NetPoint 7.0 Administration Guide Volume 2*.

**Authorization Plug-Ins**—A shared library (.dll or .so) that the Access Server uses to make outbound calls to external business logic to determine user authorization privileges and actions. You must install a custom authorization plug-in on each application server you want to protect. You can create custom schemes that include custom plug-ins to perform different (or additional) tasks from those of the default scheme.

Following the upgrade to NetPoint 7.0, see “Recompiling Plug-Ins” on page 130. For more information about authorization plug-ins, see the *NetPoint 7.0 Administration Guide Volume 2*.

## Shared Secret

During an upgrade from NetPoint 5.2 to NetPoint 6.0, the shared secret location changes and the old shared secret is *not* copied to the new location. The encryption scheme has also changed, as described in “Compatibility with Previous Versions” on page 48.

Following the upgrade, you may need to generate a shared secret as described in the *NetPoint 7.0 Administration Guide Volume 2*.

---

**Note:** You must be a Master Access Administrator to create a shared secret key. You should generate a cryptographic key as soon as possible after the upgrade.

---

## Changes in the NetPoint Directory Structure

The NetPoint directory structure remained constant from NetPoint v5.2 to NetPoint v6.5. The NetPoint v6.5 directory structure is carried forward with NetPoint v7.0. This section discusses the previous NetPoint directory structure and the new directory structure for NetPoint.

With the release of NetPoint v6.5, a new directory structure was introduced to accommodate the addition of Language Packs that enable you to display static information to users in their native language. English is the default language for NetPoint, which requires no additional Language Pack.

## New Directories

There are several new directories with NetPoint 6.5 and 7.0, as shown below:

***COREid\_install\_dir\identity\oblix***

\access\_server\_sdk

\lang

\obsymbols

\reports

\scoreboard

***WebPass\_install\_dir\identity\oblix***

\lang

\logs

\obsymbols

\Webservices

***AccessManager\_install\_dir\access\oblix***

***AccessServer\_install\_dir\access\oblix***

***WebGate\_install\_dir\access\oblix***

\lang

\obsymbols

**\access\_server\_sdk**—In this NetPoint 7 directory, you can find a subdirectory for logs and oblix configuration. In contrast, the \AccessServerSDK directory under \identity includes subdirectories for config, lang, lib, logs, oblix, and tools.

**\lang and *LangTag* directories**—NetPoint 6.5 and 7.0 installations include a directory named \lang. The new \lang directory contains one or more directories named with a language-specific tag (*langTag*). For example, \en-us contains English-specific directories and files; when you install a French Language Pack you will see a directory named another for \fr-fr, and so on:

*COREid\_install\_dir\identity\oblix\lang\en-us*

*COREid\_install\_dir\identity\oblix\lang\fr-fr*

---

**Note:** Unless you are upgrading from a NetPoint 6.5.0.x international release to v7.0, your installation is English only. After upgrading to NetPoint 7.0, you may install Language Packs independently. For details, see the *NetPoint 7.0 Installation Guide*.

---

Each *LangTag* directory contains message catalog files for various applications that you may customize, as well as other files. In addition, each *LangTag* directory contains a \style0 directory.

The \lang directory also includes a \shared directory. For more information about stylesheets and PresentationXML directories, see “About Custom Items and Upgrades” on page 92.

**\logs**—This directory contains NetPoint log files.

**\obsymbols**—This directory contains .pdb files used for debugging crashes on Windows systems.

**\reports**—This directory contains a subdirectory for Crystal Reports that includes samples and templates.

**\scoreboard**—This directory contains the scoreboard files used by SNMP.

**\WebServices**—This directory, on the WebPass machine, contains an XMLSchema directory and file for specific applications. For details, see the *NetPoint 7.0 Customization Guide*.

---

**Note:** With the addition of the \lang directory in NetPoint 6.5 and 7.0, the \engine directory was removed. In NetPoint 6.5 \orig was removed, then returned in v7.0.

---

For more information, see:

- “COREid Server Directory Structure” on page 39
- “WebPass Directory Structure” on page 41
- “Access Manager Directory Structure” on page 42
- “Access Server Directory Structure” on page 43
- “WebGate Directory Structure” on page 44

## COREid Server Directory Structure

The following subdirectories and files are created in NetPoint:

*COREid\_install\_dir*\identity\oblix

where *COREid\_install\_dir* is the directory in which the COREid Server is installed.

6.5-7.0 Subdirectory	Previous Subdirectory	File type
\apps	\apps	Application subdirectories with related files
\config	\config	Configuration files
\data	\data	Runtime-related Oblix configuration files
\data.ldap	\data.ldap	LDAP-related Oblix configuration files
\include	\include	Include files for third-party integration

\lang		Language specific subdirectories, such as \en-us, and the \shared directory of stylesheets
\lib	\lib	Library files
\logs	\logs	Log files
\mail	\mail	Mail files
\migration	\migration	Files for upgrading from previous versions
\obsymbols		.pdb files used for debugging crashes on Windows systems
\orig	\orig	Copies of the parameter files with default settings Oblix Customer Care or Professional Services can use these files during troubleshooting to determine if customization of a file is causing a problem.
\reports		Crystal reports samples and templates
\scoreboard		Scoreboard files used by SNMP
\tools	\tools	Utility applications
\unsupported	\unsupported	Useful tools, utilities, and code examples that have not been tested by Oblix Quality Assurance

## WebPass Directory Structure

The following subdirectories and files are created in NetPoint:

*WebPass\_install\_dir*\identity\oblix

where *WebPass\_install\_dir* is the directory in which the WebPass is installed.

6.5-7.0 Subdirectory	Previous Subdirectory	File type
\apps	\apps	Application subdirectories and files, including the COREid System Administration files
\config	\config	Configuration files.
\lang		Language specific subdirectories, such as \en-us, and the \shared directory of stylesheets
\lib	\lib	Library files
\orig	\orig	A copy of all message and parameter files required for future migration to newer versions of NetPoint Oblix Customer Care or Professional Services can use these files during troubleshooting to determine if customization of a file is causing a problem
\obsymbols		.pdb files used for debugging crashes on Windows systems
\tools	\tools	Utility applications
\unsupported	\unsupported	Useful tools, utilities, and code examples that have <i>not</i> been tested by Oblix Quality Assurance
\Webservices		XML schema files for specific applications
6.5-7.0 Files	Previous Files	Description
.apacheconfig	.apacheconfig	Directives for Apache Web servers
.nsconfig	.nsconfig	Directives for Sun (formerly Netscape/iPlanet) Web servers to hide files in the NetPoint system that should not be viewable from a browser
index.htm	index.htm	Startup Web page with .htm extension
index.html	index.html	Startup Web page with .html extension

## Access Manager Directory Structure

The following subdirectories and files are created in NetPoint:

*AccessManager\_install\_dir*\access\oblix

where *AccessManager\_install\_dir* is the directory in which the Access Manager is installed.

<b>6.5-7.0 Subdirectory</b>	<b>Previous Subdirectory</b>	<b>File type</b>
\apps	\apps	Application subdirectories with related files
\config	\config	Configuration files
\data	\data	Runtime-related Oblix configuration files
\data.ldap	\data.ldap	LDAP-related Oblix configuration files
\lang		Language specific subdirectories, such as \en-us and the \shared directory of stylesheets
\lib	\lib	Library files
\logs	\logs	Log files
\obsymbols		.pdb files used for debugging crashes on Windows systems
\orig	\orig	A copy of all message and parameter files required for future migration to newer versions of NetPoint
\tools	\tools	Utility applications

## Access Server Directory Structure

The following subdirectories and files are created in NetPoint:

*AccessServer\_install\_dir*\access\oblix

where *AccessServer\_install\_dir* is the directory in which the Access Server is installed.

6.5-7.0 Subdirectory	Previous Subdirectory	File type
\apps	\apps	Application subdirectories with related files
\config	\config	Configuration files
\data	\data	Runtime-related Oblix configuration files
\data.ldap	\data.ldap	LDAP-related Oblix configuration files
\engine	\engine	Files used to create and audit messages
\lang		Language specific subdirectories, such as \en-us and the \shared directory of stylesheets
\lib	\lib	Library files
\logs	\logs	Log files
\obsymbols		.pdb files used for debugging crashes on Windows systems
\orig	\orig	Copies of the parameter files with default settings Oblix Customer Care or Professional Services can use these files during troubleshooting to determine if customization of a file is causing a problem.
\reports		Crystal reports samples and templates
\scoreboard		Files used by NetPoint SNMP
\sdk	\sdk	Software development kit files
\tools	\tools	Utility applications

## WebGate Directory Structure

In addition to the directories described in “Access Manager Directory Structure” on page 42, the separate `_ivmWebGate` and `_uninstWebGate` subdirectories are included and WebGate information is added to the `access\oblix` subdirectory in NetPoint:

```
WebGate_install_dir\access\oblix
```

where `WebGate_install_dir` is the directory in which the WebGate is installed.

## Upgrade Modes

You will need to choose from the following modes for your upgrade:

- “GUI vs. Console Mode Upgrades” on page 44
- “Automatic vs. Confirmed Mode Upgrades” on page 45

## GUI vs. Console Mode Upgrades

As discussed in the *NetPoint 7.0 Installation Guide*, you may choose to start an installation or upgrade using either GUI mode or Console mode:

**GUI Mode**—The default for Windows systems when you select the installation package. For example:

```
NetPoint7_0_win32_COREid_Server
```

GUI mode may also be used with Unix systems by appending one of the following parameters to the install command: `-gui` or `-awt`. For example:

```
./NetPoint7_0_sparc-s2_COREid_Server -gui  
./NetPoint7_0_sparc-s2_COREid_Server -awt
```

---

**Note:** When you start a GUI mode installation on a Unix system, you may receive warnings regarding fonts and scroll bars. These warnings refer to a purely cosmetic change and you may ignore them.

---

**Console Mode**—The default for Unix systems, for example:

```
./NetPoint7_0_sparc-s2_COREid_Server
```

Console mode may also be used with Windows systems when you use a command window and issue the command using the `-console` parameter:

```
NetPoint7_0_Win32_COREid_Server -console
```

**Either Mode**—Regardless of the method you choose, the process sequence and prompts are the same and are described in this manual. Any differences will be identified as they occur. If something does not apply to your environment, you may skip it.

Also, regardless of the method you choose initially, when you accept the upgrade you will be asked to choose between Automatic and Confirmed modes. For details, see “Automatic vs. Confirmed Mode Upgrades” on page 45.

## Automatic vs. Confirmed Mode Upgrades

During the upgrade, you will be presented with the following choices:

```
-----  
Please specify the mode for migration:  
'1' - Automatic (recommended)  
      Each step is performed automatically.  
      No interaction from the user is required.  
'2' - Confirmed  
      Each step needs confirmation from the user.  
Enter choice ( '1' or '2' ) : 1  
-----
```

**Automatic Mode**—Automatic mode is recommended and does not require confirmation of every step. Instead, you will see declarative messages about the upgrade as it progresses. For example:

```
Copying general configuration files  
OK.
```

**Confirmed Mode**—Confirmed mode presents a question before each step in the upgrade and requires your acceptance before execution of that step. For example:

```
Copy general configurations files?  
'1' - Yes  
'2' - No  
Enter choice ( '1' or '2' ) : 1  
OK.
```

Confirmed mode allows you to conditionally run, skip, or re-run certain aspects of the upgrade. For example, suppose an older NetPoint component resides on a machine with a Web server version that is not supported by NetPoint 7. In this case, you first upgrade only to the next NetPoint version. The NetPoint component is upgraded along with the Web server configuration. Then you upgrade the Web server to a version supported by the next NetPoint release and start the NetPoint upgrade again, as described in “Comparing Host Machines and NetPoint Requirements” on page 58.

Confirmed mode also allows you to conditionally re-run the step should a problem arise if, for example, you entered incorrect information during one or two steps. You can continue to type respond to prompts. When you see a prompt that you responded to incorrectly during an earlier attempt at upgrading, supply the correct information. For instance, if you forgot to change the schema domain during a first attempt at upgrading, you can fix the problem using Confirmed mode.

---

**Note:** In either mode, after making your choice, you are informed as the program completes each step of the upgrade process. For brevity, this guide provides information using the automatic mode.

---

# 2 Preparing to Upgrade NetPoint

This chapter provides important information you need to prepare your environment before you begin the upgrade process. Topics include:

- “Upgrade Prerequisites” on page 47
- “Compatibility with Previous Versions” on page 48
- “Preparing for the Upgrade” on page 52

## Upgrade Prerequisites

Before you attempt to upgrade any NetPoint component to v7.0, you can help ensure a successful upgrade by completing the following prerequisites.

---

**Note:** Failure to complete prerequisites may adversely affect your NetPoint upgrade.

---

### Task overview: Preparing to upgrade NetPoint

1. Confirm that your current NetPoint installation is working properly, as described in the suite of NetPoint manuals available for the release you have installed.
2. Read the chapter on preparing to install NetPoint in the *NetPoint 7.0 Installation Guide* and pay close attention to:
  - Installation Prerequisites
  - NetPoint Requirements
  - Directory Server Requirements
  - Platform Requirements
3. Familiarize yourself with the information in “Introducing the NetPoint Upgrade Process” on page 17.

4. Read “Compatibility with Previous Versions” on page 48.
5. Complete all tasks in “Preparing for the Upgrade” on page 52.

## Compatibility with Previous Versions

As discussed earlier, to use NetPoint 7.0 features, you need to upgrade all older instances of the NetPoint COREid Server, WebPass, Access Manager, Access Server, Access Server SDK, APIs, and connectors for third-party components such as Ready Realm for BEA. Compatibility considerations and guidelines are discussed below.

### Guidelines

Review the following guidelines before you start the upgrade.

- The platforms and versions in your environment must correspond to those supported by NetPoint 7.
- All additional COREid components must be upgraded to NetPoint 7.0 after the schema and data are upgraded.
- After the Access Manager is upgraded to NetPoint 7.0, all Access Servers configured against the same policy tree as the Access Manager should be upgraded to NetPoint 7.0.
- Older NetPoint WebGates are compatible and may coexist with NetPoint 7.0 Access Servers. AES encryption should be used only when all the WebGates and Access Servers have been upgraded to 7.0. For more information about shared secret encryption, see “Considerations” on page 48.
- NetPoint Ready Realm for BEA is supported only with NetPoint 7 Access Server with the Access Manager engine enabled.
- NetPoint 7.0 Access Server SDK and NetPoint 6 Ready Realm for BEA work with the NetPoint 6.1 WebGate.

### Considerations

There are a number of compatibility considerations to take into account before you begin the upgrade, as described below:

**ASDK**—The ASDK upgrade is invoked automatically as the last step when upgrading components bundled with the ASDK: COREid Server, NetPoint Ready Realm for BEA, and NetPoint Connector for WebSphere. Oblix recommends that you accept the automatic upgrade to preserve current ASDK configuration settings. Otherwise, you must re-configure ASDK later using the `configureAccessGate` tool, as described in the *NetPoint 7.0 Administration Guide Volume 2*.

**Data Storage**—NetPoint 6.5 included a namespace limitation such that when user data and configuration and/or policy data reside on separate directory servers, the namespaces should be unique.

When your older NetPoint environment includes the following:

- NetPoint 5.2, 6.0, or 6.1 with the Oblix tree (configuration data) or policy data stored in a different directory server than user data
- The namespace for the Configuration DN or policy base given during NetPoint setup matches the searchbase *and* you upgrade to NetPoint 7.0 without ensuring unique configuration and policy data namespaces, you cannot enable the multi-language capability in NetPoint 7.0. In such cases, before upgrading to NetPoint 7.0, Oblix recommends that you complete the task below to reconfigure namespaces.

### **Task overview: Reconfiguring namespaces to ensure uniqueness**

1. Ensure the namespace for configuration data is unique on the directory server and does not overlap any other namespace. See the documentation for your directory server for details.

---

**Note:** Ensure that namespaces do *not* overlap with other directory server profile namespaces. Overlapping namespaces result in duplicate entries. Exceptions to overlapping namespaces include a directory server profile for a Microsoft Active Directory sub-domain, and the directory server profile containing the Oblix configuration DN.

---

2. Ensure the namespace for policy data is unique on the directory server and does not overlap any other namespace. See the documentation for your directory server for details.
3. Configure LDAP Directory Server Profiles in the NetPoint System Console to enter unique namespaces for configuration data and policy data.

For example:

COREid System Console > System Admin > System Configuration > Configure Directory Options > *Profile\_Link* > *Unique\_Namespace*

For details about LDAP directory server profiles, see the *NetPoint 7.0 Administration Guide Volume 1*.

4. Restart COREid Servers.
5. Re-run COREid System setup, as described in the *NetPoint 7.0 Administration Guide Volume 1*.
6. Re-run Access Manager setup, as described in the *NetPoint 7.0 Administration Guide Volume 1*.

7. Re-run Access Server setup, as described in the *NetPoint 7.0 Administration Guide Volume 1*.

**Directory Server Support**—Before you begin a NetPoint upgrade, see important details in “Backing Up Data” on page 53.

**Failover Configurations**—When your older NetPoint installation includes directory server failover, see “All Directory Servers” on page 54.

**Multi-Language Implementations**—If your NetPoint 6.5.0.x installation includes Language Packs for a multi-language environment, you need to have NetPoint 7.0 Language Packs in the component source directory before you upgrade.

---

**Important:** If you upgrade a multi-language implementation without NetPoint 7.0 Language Packs, you will lose the multi-language functionality. Contact Oblix for information about specific Language Packs for NetPoint 7.0.

---

When your 6.5.0.x installation includes additional languages (French and/or German, for example), you need to download and extract the original component message files for all languages installed previously.

### **To prepare a 6.5.0.x installation with Language Packs**

1. Before starting the upgrade from, download *and* extract the following two bundles to your original `COREid_install_dir`:

For example:

Netpoint\_65\_orig\_en\_COREid\_Server\_msg.zip

Netpoint\_65\_orig\_COREid\_Server\_param.zip

2. Download and extract the original COREid Server message files for all languages installed previously:

For example:

Netpoint\_65\_orig\_fr\_COREid\_Server\_msg.zip

Netpoint\_65\_orig\_de\_COREid\_Server\_msg.zip

The files above are used during the upgrade. No further action is required by you. For more information, see “Caveats” on page 21.

**Oblix IDLink**—When your COREid Server installation includes Oblix IDLink, see “Deciding If You Want to Continue to Use Oblix IDLink” on page 64.

**Publisher**—When your older NetPoint installation includes Publisher, see “Deciding If You Want to Continue to Use Publisher” on page 64.

**SAML or Associate Portal Services**—When your NetPoint implementation includes these Services, see “Transitioning Certain NetPoint Services to SHAREid” on page 63.

**Shared Secret Encryption**—You should generate a cryptographic key as soon after the upgrade as possible, as described in the *NetPoint 7.0 Administration Guide Volume 2*. You must be a Master Access Administrator to create a shared secret key.

AES is a new encryption scheme introduced in NetPoint 7.0. Only NetPoint 7.0 WebGates can encrypt/decrypt using the AES scheme. RC6 encryption is deprecated in NetPoint 7.0, and its support will be dropped in future releases. When you upgrade to NetPoint 7.0, the older encryption scheme is retained:

- **RC4 Cipher**—If you have NetPoint 5.x and NetPoint 7.x WebGates co-existing, use RC4 as the encryption scheme.
- **RC6 Cipher**—If you have NetPoint 6.x and NetPoint 7.x WebGates co-existing, use RC6 as the encryption scheme.
- **AES Cipher**—If all the WebGates and Access Servers have been upgraded to NetPoint 7.0, use AES encryption only.

# Preparing for the Upgrade

Be sure to complete the following procedures before starting the upgrade.

## **Task overview: Preparing for the Upgrade includes**

1. Reviewing “Compatibility with Previous Versions” on page 48
2. “Confirming Free Disk Space” on page 52
3. “Changing Read Permissions on Password Files” on page 53
4. “Unprotecting the Default Logout Method” on page 53
5. “Backing Up Data” on page 53 includes important directory server considerations
6. “Deleting the vpd.properties File” on page 58
7. “Comparing Host Machines and NetPoint Requirements” on page 58
8. “Preparing NetPoint 6.5 Environments” on page 62
9. “Stopping Appropriate Servers and Services” on page 63
10. “Choosing Administrative Rights” on page 63
11. “Transitioning Certain NetPoint Services to SHAREid” on page 63
12. “Deciding If You Want to Continue to Use Publisher” on page 64
13. “Deciding If You Want to Continue to Use Oblix IDLink” on page 64

## **Confirming Free Disk Space**

You need enough disk space on the machine hosting the older component for both the older version and the new version.

### **To confirm you have enough disk space**

1. Check the *NetPoint 7.0 Installation Guide* for the disk space required for the new component.
2. On the machine hosting the component to be upgraded, check the amount of disk space required for the older installation that will be retained in a renamed time-stamped source directory.

## Changing Read Permissions on Password Files

If you are running the COREid System using Simple or Cert mode, your password.xml file in the *COREid\_install\_dir\identity\oblix\config* directory is not readable. The same issue applies to the Access system password.lst file in *install\_dir\access\oblix\config*.

### To prepare password files for the upgrade

1. For COREid System upgrades, assign read permissions to password.xml for the duration of the upgrade process. See also, “Choosing Administrative Rights” on page 63.
2. Reset password.xml to the desired permissions after the upgrade is complete.
3. For Access System upgrades, repeat the steps above on the password.lst file.

## Unprotecting the Default Logout Method

Before the upgrade, the default logout should be unprotected in the Access Manager. Otherwise, after the upgrade, users will be challenged when they click the Logout link.

### To prepare the default logout for an upgrade

1. Confirm that the default logout is unprotected in the Access Manager.
2. If you use oblogout.cgi for WebGate logouts, be sure that it is installed on the target server.

## Backing Up Data

Before starting an upgrade, Oblix recommends that you review the following considerations and back up all user data and NetPoint configuration and policy data in your current NetPoint installation.

During the upgrade you are asked if you want to complete an automatic or a manual schema and/or data update. Oblix recommends that you enable the automatic update for the schema, policy data, workflow data, and user data.

The ds\_conf\_update tool is used for schema updates. For more information, see “Introducing NetPoint Upgrade Utilities” on page 151

---

**Important:** Oblix recommends that you migrate your schema and data automatically during the upgrade.

---

## **Task overview: Prepare for the schema and data upgrade**

1. Ensure that data is not corrupted in any way.
2. Review the *NetPoint 7.0 Installation Guide* for details about supported directory servers and versions.
3. Review the following considerations and ensure that your environment meets all requirements:
  - “All Directory Servers” on page 54
  - “Active Directory Considerations” on page 55
  - “Active Directory Application Mode Considerations” on page 55
  - “COREid Data Anywhere/VDE Considerations” on page 55
  - “IBM Directory Server Considerations” on page 56
  - “Sun Directory Server Considerations” on page 57
  - “Workflows Stored on Multiple Directory Servers” on page 58
4. Back up all user data before starting the upgrade.
5. Back up all NetPoint configuration data before starting the upgrade.
6. Back up all NetPoint policy data before starting the upgrade.

## **All Directory Servers**

When your installation includes both the COREid System and Access System, both must be upgraded to NetPoint 7.0. You are asked about schema and data when upgrading a COREid Server, Access Manager, and Access Server. Oblix recommends that you upgrade the schema and data automatically during the upgrade. When upgrading a second COREid Server or a second Access Manager, you do *not* need to repeat the update to the schemas or data. You are not asked about schema and data during WebPass or WebGate upgrades.

**Schema Upgrades**—The bulk of this is accomplished when you upgrade the first COREid Server in your installation. With the Access Manager, a schema upgrade occurs only if the access policies are stored in a different directory server from the Oblix (NetPoint) configuration data. No schema upgrade occurs with the Access Server.

---

**Note:** To complete a schema and data upgrade, you must be logged in as a user with permissions to change information in the directory server. See “Choosing Administrative Rights” on page 63.

---

**Data Upgrades**—When the Oblix tree and policy node are in the same directory server, the COREid Server upgrade touches only configuration data. Policy data is upgraded only when the first Access Manager is upgraded. A data upgrade is needed for each instance of the Access Server. Upon completion, a profile is created in the directory server for the Access Server.

---

**Note:** If you have a large number of entries in the Oblix tree, directory migration may take a while to complete. For details about configured directory server failover, see “Directory Server Failover” on page 32.

---

**Read Access to All NetPoint Files**—Before upgrading, be sure to assign read permissions to all NetPoint files.

## Active Directory Considerations

When upgrading a second COREid Server, you do *not* need to repeat the update to schemas or data.

## Active Directory Application Mode Considerations

With ADAM as the directory server, there is no support for obsolete schema cleanup during the upgrade.

## COREid Data Anywhere/VDE Considerations

When you have an earlier version of NetPoint installed and setup with a native directory server, you can upgrade NetPoint and integrate it to use OctetString Virtual Directory Engine (VDE) to access additional user data directories and databases.

The overview below is provided for general information only. Before you begin, see the *NetPoint Integration Guide* for important details about this configuration.

### Task overview: Upgrading and integrating NetPoint with VDE

1. In your existing NetPoint installation, confirm that user data and Oblix (NetPoint configuration) data are stored on *separate* directory servers.
2. Download the DataAnywhere Toolkit when you download the NetPoint 7.0.2 installation packages, then unzip/untar the files, as usual.

*DNConversionTool\_install\_dir*\oblix\tools\DataAnyWhere

3. Upgrade your existing NetPoint installation with the native directory to NetPoint 7.0.2, as described in this manual.

4. Prepare any additional directories and databases to be integrated with VDE, as described in the *NetPoint Integration Guide*.
5. Install and configure VDE/DME, as described in the *NetPoint Integration Guide*.
6. Extend native directory and VDE schemas, as described in the *NetPoint Integration Guide*.
7. Use the Oblix-provided DN conversion tool to clean up existing NetPoint configuration and policy data in the native directory, as described in the *NetPoint Integration Guide*.
8. Using details in the *NetPoint Integration Guide*, re-run setup manually for the NetPoint COREid System.

## IBM Directory Server Considerations

During the upgrade between NetPoint 5.2 and 6.0, the user under whom the IBM SecureWay directory server runs must have read and write access to NetPoint 5.2 schema files and to the directory containing the schema files. During the upgrade, you are prompted to copy the schema files. The upgrade program provides instructions on where to copy them.

---

**Important:** NetPoint 7.0.2 provides support for *only* the IBM Directory Server v5.1 (formerly SecureWay). To ensure a successful upgrade when your environment includes IBM Directory Server v4.x, you need to follow the sequence below.

---

### Task overview: Upgrading NetPoint environments with IBM Directory Server 4.x

1. Upgrade your older IBM Directory Server v4.x data and schema to IBM Directory Server v5.1 using information on the IBM Web site below:  
<http://publib.boulder.ibm.com/infocenter/tiv2help/index.jsp?topic=/com.ibm.IBMDS.doc/ldapinst42.htm>
2. Use NetPoint v7.0.2 full installation packages below to upgrade from NetPoint v6.1.1 to v7.0.2 by following instructions in this guide:
  - NetPoint 7.0.2 Identity Server and Access Server on Windows 2000 Advanced Server SP4 or Windows Server 2003 Enterprise Edition with .NET framework, or Solaris 8 or 9.

- NetPoint 7.0.2 WebPass, Access Manager, WebGate on:

**Platforms**—Windows 2000 Advanced Server SP4 or Windows Server 2003 with .NET framework; or Solaris 8 or 9

**Web Servers**—Sun v6 (Solaris and Windows 2000 only), Apache 1.3.31 (Solaris only), Microsoft IIS v5 (Windows 2000 only) or v6 (Windows Server 2003 only)

## Sun Directory Server Considerations

The Sun (formerly iPlanet) 4.x directory server version is no longer supported; however, Sun Directory Server v5.2 is. You may upgrade directory server profiles in NetPoint and the directory server as described below, then upgrade to NetPoint 7.0.

### To prepare to upgrade to NetPoint 7.0

1. Install a NetPoint 7.0-supported directory server before starting the upgrade. See the *NetPoint 7.0 Installation Guide* for directory server support details.
2. In your older NetPoint installation, reconfigure directory server profiles (and DB instances within those profiles) before you start the upgrade to NetPoint 7.0.
3. Change the directory server specified in COREid System Console > System Admin > System Configuration > Configure Directory Server Options > Directory Server.
4. Re-run NetPoint setup, as described in the *NetPoint 7.0 Administration Guide Volume 1*, to ensure that configuration files are properly updated.
5. Verify that your older NetPoint version operates properly with the NetPoint 7.0-supported directory server.
6. Begin to upgrade NetPoint as described in this manual and take the following into account:

During the upgrade from NetPoint 5.2 to NetPoint 6.1, you need to manually update the indices in the Sun (formerly Netscape) 4.x directory server, as follows:

- a) Remove presence indexing and equality indexing for the objectClass attribute
- b) Remove sub-indexing for the obIsWorkflowProvisioned attribute
- c) Ensure that there are no include statements in the slapd.user\_oc or user\_at files. Put NetPoint schema information in line in these files.

## Workflows Stored on Multiple Directory Servers

Oblix recommends that you keep all workflows on one directory server. When workflows are stored on multiple directory servers, you cannot automatically upgrade schemas and data.

Because of the new design of subflows starting in NetPoint 6, provisioned attributes from NetPoint 5.2 are not migrated when you upgrade. You must check the following output file for NetPoint 5.2 workflow steps that had attributes marked as provisioned:

```
\COREid_install_dir\identity\oblix\tools\migration_tools\obmigratedata\
output_520_to_600_supplied_osd.txt
```

Content of this file is specific to the intermediate upgrade from NetPoint 5.2.x to NetPoint 6.x. After the upgrade, these need to be manually associated with the appropriate NetPoint 7.0 workflow, as described in “Associating Provisioned Attributes with Workflows” on page 91.

If your installation includes workflows on separate directory servers, you must manually upgrade your schemas and data. See “Manual Schema and Data Upgrades” on page 173.

## Deleting the vpd.properties File

If previous installations and upgrades have left behind a vpd.properties file, you may have trouble starting the upgrade process. You need to remove this file. On Windows NT, the location of this file is c:\WINNT.

### To remove the vpd.properties file

1. Locate the vpd.properties file.
2. Delete it.

## Comparing Host Machines and NetPoint Requirements

NetPoint 7.x provides new platform and version support. Before upgrading an older NetPoint component, you need to compare support requirements in the *NetPoint 7.0 Installation Guide* and *NetPoint Release Notes* against installed versions on the machine hosting the older version of NetPoint. See also, “Backing Up Data” on page 53 for more information.

**Same Third Party Versions**—When NetPoint 7.x supports most of the same third-party versions (Web Server or directory server) as the older release, you may run the NetPoint upgrade once and accept changes to third-party configuration files, such as a Web server configuration file. During the upgrade, only the delta is applied (the difference between changes for the old NetPoint version and the new version). Third-party configuration files are not updated in their entirety.

---

**Note:** You may *not* apply NetPoint-related Web server configuration changes to a new Web server instance.

---

**Different Third Party Versions**—When NetPoint 7 supports a different version of a third-party product than your earlier NetPoint installation, use the task overview below. For example, you may need to upgrade a Web server version to meet new NetPoint requirements. In this case, you must manually update the Web server configuration file for NetPoint following the upgrade, as described in the *NetPoint 7.0 Installation Guide*.

### **Task overview: Upgrading NetPoint and third-party versions**

1. Compare support requirements in the *NetPoint 7.0 Installation Guide* and latest *NetPoint Release Notes* against installed versions on the machine hosting the older NetPoint component.
2. Upgrade the third-party directory server to the new level supported by NetPoint 7.x, if this applies to your environment.
3. Upgrade the older NetPoint component (and accept changes to third-party files such as Web server configuration files), as described throughout this guide.
4. Upgrade the third-party Web server to the new level supported by NetPoint 7.x, if applicable.
5. Manually update the third-party Web server configuration file for NetPoint 7.x, as needed.

---

**Important:** When NetPoint 7.0 support does *not* include an older version Web Server or directory server, you need to upgrade NetPoint using one of the two methods below.

---

For example, the NetPoint 6.1 Access Manager supports the Sun (formerly iPlanet) 4.x Web server. However, from NetPoint 6.5 onward this Web server version is *not* supported. As a result, during the upgrade from NetPoint 6.1 to 6.5 the Sun (formerly iPlanet) Web server configuration files will not be automatically updated. Instead, you have to install the Sun 6.x Web server and run `EditObjConf` and `ManageObjConf` manually to update the Web server configuration files for NetPoint 6.5 and 7.0.

### **Task overview: Upgrading when Sun Web server support was dropped**

1. Upgrade to NetPoint 7.0, including all Web components: Webpass, Access Manager, and WebGate.
2. Create an instance of the Web server that is supported with NetPoint 7.0.

3. Run the EditObjConf tool for WebPass, Access Manager, then WebGate, as needed.

*WebComponent\_install\_dir\identity|access\oblix\apps\common\bin\EditObjConf.exe*

4. Run the ManageObjConf tool for WebPass, Access Manager, then WebGate, as needed.

*WebComponent\_install\_dir\identity|access\oblix\apps\common\bin\ManageObjConf.exe*

---

**Note:** In the following task, you use Confirmed mode to upgrade NetPoint in intervals, interspersed with third-party component upgrades.

---

The following method may be more difficult for some third-party products because there may be no NetPoint version that is compatible with both an older and newer version of the third-party component.

**Goal**—In any case, the goal of the following task is to:

- Start the NetPoint upgrade with the existing Web server version.
- Get NetPoint to a version that supports both the older and newer versions of the Web server.
- Migrate your older Web server to the newer version, which may involve a sequence of manual steps to *true up* the configuration files for the new instance.
- Continue the upgrade to NetPoint 7.0.

### **Task overview: Alternative upgrading when support was dropped**

1. Use Confirmed Mode for the upgrade, as described in “Upgrade Modes” on page 44.
2. Start upgrading NetPoint on the machine that meets older requirements.  
For example: NetPoint 5.2 WebPass, Sun ONE Web Server 4.1
3. Upgrade NetPoint *only* to the *next* version with the same older support requirements and accept changes to third-party files.  
For example: From NetPoint 5.2 to NetPoint 6.0
4. Upgrade the third-party component to levels supported by the interim NetPoint version.  
For example: Sun ONE Web Server 6.0 (NetPoint 6.0)

5. Upgrade NetPoint only to the *next* version that includes the same support requirements, and accept third-party (Web server or directory server) file changes.

For example: From NetPoint 6.0 to NetPoint 6.1

6. Repeat steps 4 and 5, if needed, until you reach NetPoint 7 and meet NetPoint 7 support requirements.

---

**Note:** See also “Upgrading Sun Web Server v4 to v6 on Windows 2000” on page 197.

---

## Preparing a v6.1.1 WebPass or Access Manager on AIX

To ensure success when upgrading a NetPoint 6.1.1 Access Manager or WebPass installation, you need to download and extract additional bundles in to your original *Component\_install\_dir*. If the packages for these components are *not* extracted to the correct location, the upgrade process may remain incomplete.

---

**Important:** Retrieve only the files that are relevant to your specific installation. Files for v6.1.1 include *\_611\_* in their name.

---

### To prepare a 6.1.1 AIX environment

1. Before upgrading see “v6.1.1 on AIX Caveat” on page 21.

2. Log in to the download site, as usual.

<https://customers.oblix.com/>

3. Download the appropriate packages for your installation.

For example:

*Netpoint\_611\_orig\_WebPass\_param.tar*

*Netpoint\_611\_orig\_Access\_Manager\_param.tar*

4. On each AIX machine hosting a NetPoint v6.1.1 Access Manager or WebPass, extract these files in to your *Component\_install\_dir*.

For example:

*Component\_install\_dir\identity*

*Component\_install\_dir\access*

A directory named “orig” is created during this process. For example:

*Component\_install\_dir\identity\oblix\orig*

*Component\_install\_dir\access\oblix\orig*

5. Start the upgrade as discussed in this guide.

## Preparing NetPoint 6.5 Environments

To ensure success when upgrading a NetPoint 6.5 installation (excepting v6.5.1), you need to download and extract additional bundles in to your original *Component\_install\_dir*.

During the upgrade, you are asked about the “orig” directory. If the appropriate packages for each component are *not* extracted to the correct location, the upgrade process may remain incomplete.

---

**Important:** Retrieve only the files that are relevant to your specific installation. Files for v6.5 include *\_65\_* in their name; files for v6.5.2 or later include *\_652\_* in their name.

---

### To prepare a 6.5.x environment before the upgrade

1. Before upgrading see “v6.5.0.x Caveat” on page 21 and/or “v6.5.2.x Patch Caveat” on page 22.

2. Log in to the download site, as usual.

<https://customers.oblix.com/>

3. Download the appropriate packages for your installation.

For example:

Netpoint\_652\_orig\_en\_COREid\_Server\_msg.zip

Netpoint\_652\_orig\_COREid\_Server\_param.zip

Netpoint\_652\_orig\_en\_WebPass\_msg.zip

Netpoint\_652\_orig\_WebPass\_param.zip

Netpoint\_652\_orig\_en\_Access\_Manager\_msg.zip

Netpoint\_652\_orig\_Access\_Manager\_param.zip

Netpoint\_652\_orig\_en\_Access\_Server\_msg.zip

Netpoint\_652\_orig\_Access\_Server\_param.zip

Netpoint\_652\_orig\_en\_WebGate\_msg.zip

Netpoint\_652\_orig\_WebGate\_param.zip

4. On each machine hosting a NetPoint v6.5.0, v6.5.2, or later component, extract or unzip these files in to your *Component\_install\_dir*.

For example:

*Component\_install\_dir*\identity

*Component\_install\_dir*\access

A directory named “orig” is created during this process. For example:

*Component\_install\_dir*\identity\oblix\orig

*Component\_install\_dir*\access\oblix\orig

5. Start the upgrade as discussed in this guide.

## Stopping Appropriate Servers and Services

Before you start to upgrade NetPoint, you must stop either the server or service on the machine hosting the component to be upgraded.

For example, if you use WebPass, you need to stop the Web server on which the WebPass is installed. For a COREid Server, you need to stop the NetPoint COREid Server service.

---

**Note:** IIS users need to stop the IIS Admin Service.

---

### To prepare the machine hosting the component

1. Locate the machine hosting the component you will upgrade.
2. Stop the Web server (WebPass, Access Manager, and WebGate) or the service (COREid Server and Access Server).

## Choosing Administrative Rights

Whether you upgrade or install a NetPoint component, you need to log in as a user with administrative rights. On Solaris, you need to run the upgrade as the user who installed the previous version of NetPoint, or as a user with higher privileges.

Whenever a schema and data upgrade is involved in the upgrade process, you need to login as a user who has permission to change the schema and data. In other words, the bind DN you use must have permission to update the schema.

### To prepare for the upgrade

1. Locate the machine hosting the component you will upgrade.
2. Log in as a user with administrative rights.

## Transitioning Certain NetPoint Services to SHAREid

NetPoint SAML Services provided Web browser users with single sign-on (SSO) capability across secure connections. With the release of Oblix SHAREid, the preferred method to provide such access is now SHAREid. If your older version of NetPoint includes SAML Services, you can migrate these to SHAREid. For more information, contact Oblix Customer Care.

When NetPoint SAML Services became the preferred method to provide access privileges across multiple associated portals and DNS domains, support for NetPoint Associate Portal Services (APS) was deprecated. APS remains deprecated in NetPoint 7.0 and is available only through Oblix Customer Care.

## **Deciding If You Want to Continue to Use Publisher**

The NetPoint 7.0 COREid System provides reporting, auditing, and logging enhancements. You can create, view, and configure reports within the User, Group, and Organization Manager applications. For more information, see the *NetPoint 7.0 Release Notes*.

NetPoint 6.0 and 6.1 operate with Publisher 5.2. Oblix expects to support a mixed environment containing Publisher 5.2 and NetPoint 6.x until August 31, 2004. For more information, see the *NetPoint 6.1 Installation Guide*.

## **Deciding If You Want to Continue to Use Oblix IDLink**

When your COREid Server installation includes Oblix IDLink, you will be notified while upgrading the COREid Server.

NetPoint 7.0 does not support Oblix IDLink. You may upgrade to NetPoint 7.0 and transition to provisioning using NetPoint and configuring MIIS provisioning, as described in the *NetPoint Integration Guide*. Otherwise, you may retain the older NetPoint version and continue using Oblix IDLink.

# **SECTION II: COREID SYSTEM UPGRADES**



# 3 Upgrading the COREid System

This chapter focuses on upgrading an existing NetPoint COREid Server to v7.0 and includes the following topics:

- “About COREid System Upgrades” on page 67
- “About the COREid Server and Upgrades” on page 68
- “Upgrading the COREid Server” on page 69
- “Upgrading WebPass” on page 82
- “Confirming the WebPass Upgrade” on page 88
- “Completing the COREid System Upgrade” on page 88

## About COREid System Upgrades

Starting with NetPoint version 5.2, you can upgrade directly to NetPoint 7.0. However if you have an earlier version of NetPoint, you must first upgrade to NetPoint 5.2 as described in the *NetPoint 5.2 Installation Guide*.

NetPoint 6.5.0 supported the installation of Language Packs. Unless you are starting to upgrade from a NetPoint 6.5.0.x international release, your installation is English only. After upgrading to NetPoint 7.0, you may install Language Packs independently, as described in the *NetPoint 7.0 Installation Guide*.

---

**Important:** To upgrade a NetPoint 6.5.0.x multiple-language environment, you need NetPoint 7.0 Language Packs. If you upgrade a multi-language implementation *without* NetPoint 7.0 Language Packs, you will lose the multi-language functionality. Contact Oblix for information about specific Language Packs.

---

Upgrading the COREid System includes several activities. You must complete all activities to ensure a successful upgrade.

## Task overview: Upgrading the COREid System

1. Complete all activities in “Preparing to Upgrade NetPoint” on page 47.
2. Upgrade your first COREid Server, including the schema and data upgrade, as explained in “Upgrading the COREid Server” on page 69.
3. Upgrade additional COREid Servers, which does not include schema or data upgrades.
4. Upgrade all WebPass components, as described in “Upgrading WebPass” on page 82.
5. Perform activities in “Completing the COREid System Upgrade” on page 88.
6. Complete all tasks in “Incorporating Workflows, Plug-Ins, and Custom Items” on page 91.
7. After upgrading to NetPoint 7.0, verify that any failover details are configured as described in the *NetPoint 7.0 Deployment Guide*. See also “Connection Pool Details” on page 27.

## About the COREid Server and Upgrades

The COREid Server must be the first NetPoint component you upgrade. For details about the COREid Server, see the *Introduction to NetPoint 7.0 Guide*.

Separate platform-specific installation packages are provided for the COREid Server in \win32 and \solaris subdirectories. You use the same installation packages both to install NetPoint 7.0 and upgrade to NetPoint 7.0.

You may complete the upgrade using either GUI mode or console mode. GUI mode is recommended; however, the upgrade process is similar regardless of the mode you choose or your operating system. Differences are noted as needed. Any caveats are identified and may be skipped when they do not apply to your environment. For example:

- **Windows**—If you are logged in with administrator rights, click Next.
- **Unix**—Specify the username and group that the COREid Server will use, then click Next.

If the target installation directory for the new version does not match the installed directory of the older version, the older component will *not* be detected *or* upgraded.

Upgrades occur incrementally. This means that your original version is upgraded to the next-major version, the resulting version is then upgraded, and so on until all changes between your original version and the latest version have been completed. To accomplish this, the upgrade transcript runs through certain sequences for each major version. For example, schema and data sequences repeat, as well as the Web server sequence.

Should an error occur or be detected in the information you supply, you receive information about the error, which is recorded in the relevant log file.

If you cancel the upgrade after being informed that the COREid server has been installed, you need to complete the following steps to restore the configuration to the original state.

### **To restore your environment after canceling an upgrade**

1. Uninstall the COREid server.
2. Rename the time-stamped original NetPoint folder.

For additional information, see “About the Upgrade Process” on page 26.

## **About Upgrading Multiple COREid Servers**

If your installation includes multiple COREid Servers, all associated with the same directory server, it is not necessary to repeat the schema and data upgrade with each additional COREid Server upgrade.

### **Task overview: Upgrading additional COREid Servers**

1. Upgrade your first COREid Server with the schema and data upgrade, as explained in this chapter.
2. After the schema and data are upgraded to NetPoint 7.0, upgrade other COREid Servers *without* schema and data upgrades.

COREid Servers associated with a different directory server represent a separate and distinct NetPoint installation that requires a separate upgrade.

## **Upgrading the COREid Server**

In this chapter, the COREid Server upgrade task has been divided into several functional procedures that you can use as a guide. You must complete all procedures for a successful COREid Server upgrade. When upgrading additional instances of the COREid Server, you do *not* need to repeat the update of schemas and data.

## Task overview: Upgrading the COREid Server

1. Complete all prerequisites, as discussed in “COREid Server Prerequisites Checklist” on page 70.
2. Start the upgrade like any NetPoint 7 COREid Server installation, as described in “Starting the COREid Server Upgrade Process” on page 71.
3. “Specifying the Target COREid Server Directory” on page 71
4. “Initiating the COREid Server Upgrade” on page 72
5. “Upgrading the Schema and Data” on page 75
6. “Upgrading the Language” on page 77
7. “Upgrading the COREid Server Component” on page 78
8. “Upgrading License Information” on page 80
9. “Finishing the Upgrade” on page 81

## COREid Server Prerequisites Checklist

Before you begin upgrading the COREid Server, check the tasks in Table 3 to ensure you have completed these tasks. Failure to complete prerequisites may adversely affect your NetPoint upgrade.

**Table 3** COREid Server Upgrade Prerequisites Checklist

Checklist	COREid Server Upgrade Prerequisites
	Prepare your environment for the upgrade, as described in “Preparing to Upgrade NetPoint” on page 47. <b>Notes on directory server types:</b> <ul style="list-style-type: none"><li>• <b>SecureWay</b>—If you have IBM SecureWay Directory Server v4.x, see also “IBM Directory Server Considerations” on page 56 before you continue.</li><li>• <b>Sun</b>—If you have Sun Directory Server v4.x, see also “Sun Directory Server Considerations” on page 57 before you continue.</li><li>• <b>VDE/COREid Data Anywhere</b>—If you want to use COREid Data Anywhere, see also “COREid Data Anywhere/VDE Considerations” on page 55.</li></ul>
	Review “About the COREid Server and Upgrades” on page 68.
	Stop the COREid Server service.
	Back up all user and configuration data in your current NetPoint installation. <b>Note:</b> Oblix recommends that you upgrade schemas and data automatically. If you need to migrate your user and NetPoint data manually, review “Manual Schema and Data Upgrades” on page 153 before you begin the COREid Server upgrade.
	Assign read permissions to all NetPoint files.
	If you originally installed NetPoint 6.5.0.x or patched it to a later 6.5.x version, see also “Preparing NetPoint 6.5 Environments” on page 57.

**Table 3** COREid Server Upgrade Prerequisites Checklist

Checklist	COREid Server Upgrade Prerequisites
	<p><b>With 6.5.0.x and Language Packs</b>—Ensure that any installed Language Pack and the corresponding NetPoint 7.0 Language Pack reside in the <i>component</i> source directory. <b>Note:</b> On Unix systems, ensure the Language Pack installer has execute permissions. For details, see the <i>NetPoint 7.0 Installation Guide</i>.</p>

The sample upgrade below starts from a NetPoint 6.1 installation. Should an error occur, you will be informed and see the log file name.

## Starting the COREid Server Upgrade Process

You can start the installer in either GUI or console mode. Following the program launch, one set of procedures is provided. This guide uses GUI mode because the sequence is similar regardless of your platform or preferred mode.

---

**Note:** Skip any details that do not apply to your installation.

---

### To start the COREid Server upgrade

1. Log in as a user with administrator privileges.
2. Locate the component installer and launch the program in either GUI mode or Console mode:

#### GUI Mode

**Windows**—NetPoint7\_0\_win32\_COREid\_Server.exe

**Solaris**—./NetPoint7\_0\_sparc-s2\_COREid\_Server -gui

#### Console Mode

**Solaris**—./NetPoint7\_0\_sparc-s2\_COREid\_Server

**Windows Command Window**—

NetPoint7\_0\_win32\_COREid\_Server.exe -console

The Welcome screen appears.

3. Dismiss the Welcome screen by clicking Next, then continue as described in “Specifying the Target COREid Server Directory” on page 71.

## Specifying the Target COREid Server Directory

During this sequence you must accept the terms of the license agreement and specify the same target directory for the new version as the older source version.

### To specify the target COREid Server directory

1. Read and accept the terms of the license agreement, then click Next to continue.
2. Respond to the next question based upon your platform. For example:

- **Windows**—If you are logged in with administrator rights, click Next (otherwise click Cancel, log in as a user with administrator privileges, then restart the installation).
- **Unix**—Specify the username and group that the Access Manager will use, then click Next. Typically, the defaults are “nobody.”

**Note:** For HP-UX, the defaults are WWW (username) and others (group).

You are asked to specify the target directory for the newer COREid Server. The target directory for the new version must be the older source directory.

3. Choose the directory where you installed the older version, then click Next and continue with “Initiating the COREid Server Upgrade” on page 72.

## Initiating the COREid Server Upgrade

When your target installation directory is the same as the older source directory, you are informed that a version of NetPoint already exists in this directory and asked if you want to upgrade to the latest version. If you did *not* receive this message, no older version was detected and an installation is performed rather than an upgrade.

When you accept the upgrade, the target directory is created and NetPoint 7 files are extracted into it. The latest version must be extracted to the original target path.

Languages for the previous installation are detected during the upgrade. The default language, English, is upgraded by default. When you have 6.5.0.x with additional languages installed, you need the corresponding NetPoint 7.0 Language Pack in the component’s source directory. If the NetPoint 7.0 Language Pack is missing from the source directory, a warning is given.

If your installation did not include additional Language Packs, you may move new Language Packs into the source directory before the upgrade. In this case, Language Packs are installed and NetPoint is upgraded to version 7.0. You may then add the new language after the upgrade, as described in the *NetPoint 7.0 Administration Guide Volume 1*.

### To accept the COREid Server upgrade

1. Accept the upgrade by clicking Yes, then click Next.

After accepting the upgrade, you are asked to select the language that you would like to upgrade. The default language is English. Additional languages are available only if you have installed them with NetPoint 6.5.0.x and you have the NetPoint 7.0 Language Pack in the source directory.

With English-only implementations, you may install NetPoint 7.0 Language Packs after upgrading to NetPoint 7.0. Contact Oblix for details about specific Language Packs.

2. Select English from the list, ensure that a check mark appears beside English and any other languages you have installed, then click Next.

You are presented with a list of languages that will be upgraded.

3. Confirm the items listed by clicking Next.

The next screen tells you that the existing installation has been saved and provides the name of the renamed, time-stamped source directory. The renamed, time-stamped source directory contains all files from the previous installation for reference.

4. Continue the upgrade by clicking Next.

A new screen confirms the installation directory for NetPoint 7 and tells you how much space is needed for the installation.

5. Start the file extraction into the target directory by clicking Next.

A status bar indicates the progress of the file extraction.

6. You complete activities below according to the mode you have chosen for the upgrade.

- **GUI Mode**—A new window appears asking you to specify either Automatic or Confirmed mode for the upgrade; skip to step 9.
- **Console Mode**—The installation script exits and a transcript appears containing information like that shown in the example below:

```
Installing Oblix NetPoint 6.1 COREid Server... Please wait.
|-----|-----|-----|-----|
0%          25%          50%          75%          100%
|||||
Creating uninstaller...
COREid Server migration
Please run
/export/home/COREid/COREidServer/oblix/tools/migration_tools/
start_obmigratenp -c ois -f 520 -t 610 -s /export/home/COREid/
COREidServer_20020821_144911 -d /export/home//COREid/
COREidServer -i /export/home/COREid/COREidServer
to complete the migration process.
Please press Enter to Continue
```

---

**Note:** On Solaris, you may find that the command above shows an older version number for the already-installed NetPoint. The version number may not match the exact “dot” release that is being upgraded. However, you can safely assume that the correct version is being upgraded.

---

7. **Console Mode**—Run the command displayed in the transcript, which will look slightly different on Windows than on Unix. On Unix, the command is printed to a file (start\_migration), and a message is printed to run this file.
8. Press Enter to continue.

You are asked to specify a mode for the upgrade process. For details about these modes, see “Automatic vs. Confirmed Mode Upgrades” on page 45.

```
-----  
Please specify the mode for migration:  
'1' - Automatic (recommended)  
      Each step is performed automatically.  
      No interaction from the user is required.  
'2' - Confirmed  
      Each step needs confirmation from the user.  
Enter choice ( '1' or '2' ) : 1  
-----
```

9. **Either Mode**—Enter the number that corresponds to the upgrade mode you prefer:

- **Automatic (recommended)**—Enter the number 1.
- **Confirmed**—Receive prompts you must respond to before each upgrade action by entering the number 2.

Regardless of your choice, you are informed as the program completes each step of the upgrade process. For brevity, this guide uses Automatic mode.

After choosing the mode, you are informed that folders are created, files are copied, and catalogs are upgraded, as shown below:

```
Creating original folders ...  
-----  
Copying general configuration files  
OK.  
-----  
Updating parameter catalogs ...  
OK.  
-----
```

When upgrading from NetPoint 6.0 to NetPoint 7.0, multiple entries with the same ParamName in mime\_types (.xml and .lst) files are not upgraded. For details, see “Multiple Entries with Same ParamName” on page 147.

When the upgrade program connects to the directory server, a message like the following one appears. As you can see in the example below, the upgrade started with version 6.1.0:

Starting migration (6.1.0 to 6.5.0)

-----  
NetPoint schema migration ...  
-----

10. Continue with “Upgrading the Schema and Data” on page 75.

## Upgrading the Schema and Data

If you have Active Directory, schema modifications may only be completed against a schema master, as described in “Changing the Active Directory Schema Master” on page 75.

Instructions for all other environments are in “Upgrading the Schema and Data” on page 76.

### Changing the Active Directory Schema Master

The following procedure may be completed on Windows 2000 platforms. Otherwise, see Microsoft KB 285172 “To Enable Schema Updates by Means of the Registry” on:

<http://support.microsoft.com/default.aspx?scid=kb;EN-US;285172>

---

**Note:** The article mentioned above was previously published by Microsoft under Q285172.

---

#### To change the Active Directory Schema Master

1. Open your Active Directory schema plug-in, which is often located in Administrative Tools.
2. Right-click the top node for the schema and select Operations Master to display the Change Schema Master dialog.
3. Select the “The Schema may be modified on this Domain Controller” check box and click OK.

When the upgrade program connects with the directory server, a transcript appears as shown in “Upgrading the Schema and Data” on page 76.

## Upgrading the Schema and Data

Oblix recommends that you upgrade the schema and data automatically. Aside from the instructions related to specific directory servers, the upgrade transcript is similar regardless of the *from* and *to* versions. Unless you are upgrading from NetPoint 6.5 to NetPoint 7.0, this portion of the transcript will repeat after the component-specific upgrade. For example if you are upgrading from NetPoint 6.0, this portion of the dialog will occur once to upgrade to version 6.5 and again to upgrade to NetPoint 7.

The following steps presume that you have chosen Automatic mode. Even so, you will be asked to respond to certain questions.

### To upgrade the schema and data

1. Review the information about the schema upgrade and note the *from* and *to* versions.

For example:

```
Starting migration (6.1.0 to 6.5.0)
```

```
-----  
NetPoint schema migration ...  
-----
```

```
Retrieving Oblix configuration parameters ...
```

```
OK.
```

```
The following directory server's schema will be updated:
```

```
Host:DNShostname.domain.com
```

```
Port: port#
```

```
Type:ns
```

```
NOTE:If you do not want to migrate schema at this time,  
type 'SKIP'.
```

```
Please type 'Yes' to proceed:
```

2. At the prompt, type the full word "yes" to load the schema.

The installation program updates the schema, retrieves user configuration parameters, and so on, while the transcript keeps you informed:

```
Updating schema. Please wait ...
```

```
OK.
```

During this step, NetPoint data is also migrated and you are informed in the transcript as shown below:

```
NetPoint data migration....
```

```
Retrieving Oblix configuration parameters...
```

```
OK.
```

```

Checking Oblix version...
Version not up to date. Performing Oblix data migration...
Updating Oblix migration parameters...
OK.
Converting Oblix data. Please wait...
.....
OK.
Removing old Oblix data. Please wait...
.....
OK.
Importing new Oblix data. Please wait...
OK.
-----
NetPoint data migration has completed successfully!
Press <Enter> to continue :

```

3. Press Enter as instructed, and continue as follows:

- **Upgrading to 6.5**—Continue with “Upgrading the Language” on page 77.
- **Upgrading from NetPoint 6.5 to 7.0**—Skip to “Upgrading the COREid Server Component” on page 78.

## Upgrading the Language

During the incremental upgrade of schema and data from NetPoint 6.1 to NetPoint 6.5, the multiple-language sequence occurs. During this sequence you may choose to enable the multiple-language capability in your upgraded installation, or not. In either case, the \lang directory structure is included in your upgraded environment.

If you have an English-only implementation and you choose to enable the multi-language capability, you may later install NetPoint 7.0 Language Packs and configure NetPoint to use them as described in the *NetPoint 7.0 Installation Guide*.

### To complete the language sequence during the COREid Server upgrade

1. Read the messages on language upgrades.

For example:

```

-----
NetPoint language migration....
Retrieving Oblix configuration parameters...
OK.
Support for multiple languages is not enabled.
Performing language migration...
Updating language migration parameters...

```

OK.

The following directory server's data will be updated to support multiple languages:

The following directory server's schema will be updated:

```
Host: DNShostname.domain.com  
Port: port#  
Type: ns
```

The default language (detected from your existing installation) is: en-us

NOTE: If you do not want to update data to enable multiple languages at this time, type 'SKIP'.

Please type 'yes' to proceed:

2. When you see the prompt, type the full word "yes".

For example:

Please type 'yes' to proceed: yes

The transcript continues:

Converting data for enabling multiple languages.

Please wait...

.....

OK.

Importing new language migration data. Please wait...

OK.

-----

NetPoint language migration has completed successfully!

Press <ENTER> to continue :

3. Press the Enter key and continue.

## Upgrading the COREid Server Component

Each upgrade includes a component-specific sequence.

### To complete a component-specific upgrade for COREid Server

1. Read the messages regarding the component upgrade.

For example:

Updating component-specific configuration files...

OK.

---

**Note:** The next on-screen message may repeat a schema and data upgrade sequence before continuing with another component-specific upgrade. If interim schema upgrade messages do not appear, skip to step 5 to complete the component-specific upgrade.

---

Starting migration ( 6.5.0 -> 7.0.0 )...

-----  
NetPoint schema migration....

Retrieving Oblix configuration parameters...

OK.

The following directory server's schema will be updated:

Host: *DNShostname.domain.com*

Port: *port#*

Type: *ns*

NOTE: If you do not want to migrate schema at this time,  
type 'SKIP'.

Please type 'yes' to proceed:

2. Complete the upgrade as follows:

- **If Interim Schema Upgrade Messages Do Not Appear**—Skip to step 5 to complete the component-specific upgrade.
- **If Interim Schema Upgrade Messages Appear**—Type the full word “yes,” as indicated on the screen, then review the next set of messages and proceed with step 3.

For example:

Updating schema. Please wait...

OK.

-----  
NetPoint data migration....

Retrieving Oblix configuration parameters...

OK.

Checking Oblix version...

Version not up to date. Performing Oblix data migration...

Updating Oblix migration parameters...

OK.

Converting Oblix data. Please wait...

..

OK.

Removing old Oblix data. Please wait...

Cleaning up obsolete schema from the directory.  
Updating schema. Please wait...

Importing new Oblix data. Please wait...  
OK.

-----  
NetPoint data migration has completed successfully!  
Press <ENTER> to continue :

3. Make a note of where the NetPoint data has been saved, then press the Enter key to continue, as indicated on the screen.
4. Review messages and respond.

-----  
Updating component-specific configuration files...  
OK.

5. Continue with “Upgrading License Information” on page 80.

## Upgrading License Information

The COREid Server, Access Manager, and Access Server upgrades include a license upgrade. WebPass and WebGate components do not include a license.

### To upgrade COREid Server license information

1. Review the message on the screen regarding license files.

For example:

-----  
Updating license files...  
OK.  
-----  
Migration has completed successfully!  
Press <ENTER> to continue :

2. Continue by pressing Enter, as instructed.
3. **Confirmed Mode**—Respond to the question below based on your environment.

NOTE: If you do not want to migrate the SDK at this time, you will

need to re-configure the SDK after migration has finished by running the 'configureAccessGate' program.

- '1' - Yes
- '2' - No

---

**Important:** Oblix recommends that you upgrade the ASDK now to preserve current ASDK configuration settings. In this case, the program will be launched automatically. See “To upgrade the Access Server SDK” on page 134, step 7. If you do not migrate the ASDK now, current ASDK configuration settings are not preserved. In this case, you must re-configure the ASDK later using the configureAccessGate tool, as described in the *NetPoint 7.0 Administration Guide Volume 2*.

---

This completes the upgrade sequence and the usual Oblix NetPoint ReadMe information appears.

4. Continue with “Finishing the Upgrade” on page 81.

## Finishing the Upgrade

You finish the upgrade as you do any NetPoint installation, as indicated below.

### To finish the COREid Server upgrade

1. Learn how to reach the documentation online and contact Oblix by scrolling through the ReadMe information.
2. Display the installation summary by clicking Next.  
The summary provides the details that you specified during this upgrade and instructs you to start the COREid Server when you finish this upgrade.
3. Write the details about this installation, if needed, then click Next.
4. **Automatic Mode**—Respond to the question about the ASDK upgrade based on your environment.

---

**Note:** If you do not migrate the ASDK now, current ASDK configuration settings are not preserved and you must re-configure the ASDK later using the configureAccessGate tool, as described in the *NetPoint 7.0 Administration Guide Volume 2*.

---

5. Complete the sequence by clicking Finish.
6. Proceed to the appropriate procedure below:
  - Start the COREid Server, then go to “Upgrading WebPass” on page 82.
  - Go to “Upgrading the Access Server SDK” on page 131 to preserve current ASDK configuration settings if this appropriate for your environment.

# Upgrading WebPass

There are no differences between upgrading the first WebPass and upgrading subsequent WebPass components. With WebPass, there are no schema updates.

---

**Important:** To upgrade a NetPoint 6.5.0.x multiple-language environment, you need NetPoint 7.0 Language Packs. If you upgrade a multi-language implementation *without* NetPoint 7.0 Language Packs, you will lose the multi-language functionality. Contact Oblix for information about specific Language Packs.

---

This discussion includes the procedures below to guide you through the upgrade.

## Task overview: Upgrading WebPass

1. Complete all prerequisites in “WebPass Upgrade Prerequisites Checklist” on page 82.
2. Start the upgrade like any NetPoint 7 WebPass installation, as described in “Starting the WebPass Upgrade Process” on page 83.
3. “Specifying the Target Directory” on page 84
4. “Initiating the WebPass Upgrade” on page 84
5. “Upgrading the WebPass Component” on page 86
6. “Finishing the WebPass Upgrade” on page 87
7. After upgrading to NetPoint 7.0, verify that failover and/or load balancing you had previously are configured as described in the *NetPoint 7.0 Deployment Guide*. See also “Connection Pool Details” on page 27.

## WebPass Upgrade Prerequisites Checklist

Before you begin upgrading the WebPass, check Table 4 to ensure you have completed all tasks. Failure to complete prerequisites may adversely affect your NetPoint upgrade.

**Table 4** WebPass Upgrade Prerequisites Checklist

Checklist	WebPass Upgrade Prerequisites
	Complete all tasks in “Preparing to Upgrade NetPoint” on page 47.
	Upgrade your COREid Servers.
	Stop the WebPass Web server. <b>With IIS</b> —Stop the IIS Admin Service.
	If you originally installed NetPoint 6.5.0.x or patched it to a later 6.5.x version, see also “Preparing NetPoint 6.5 Environments” on page 57.

**Table 4** WebPass Upgrade Prerequisites Checklist

Checklist	WebPass Upgrade Prerequisites
	<p><b>With 6.5.0.x and Language Packs</b>—Ensure that any installed Language Pack and the corresponding NetPoint 7.0 Language Pack reside in the <i>component</i> source directory. <b>Note:</b> On Unix systems, ensure the Language Pack installer has execute permissions. For details, see the <i>NetPoint 7.0 Installation Guide</i>.</p>

## Starting the WebPass Upgrade Process

You can start the installer in either GUI or console mode, as described earlier. Following the program launch, this manual provides one set of procedures because the sequence is similar regardless of your platform or preferred mode. This manual uses GUI mode.

---

**Note:** Skip any details that do not apply to your installation.

---

Again, the sample upgrade starts from a NetPoint 6.1 installation. Should an error occur, you will be presented with the name of the log file that contains information about the error.

### To start the WebPass upgrade

1. Log in as a user with administrator privileges.
2. Locate and launch the program in your preferred mode:

#### GUI Mode

**Windows**—NetPoint7\_0\_win32\_NSAPI\_WebPass.exe

**Solaris**—./NetPoint7\_0\_sparc-s2\_NSAPI\_WebPass -gui

#### Console Mode

**Solaris**—./NetPoint7\_0\_sparc-s2\_NSAPI\_WebPass

**Windows Command Window**—

NetPoint7\_0\_win32\_NSAPI\_WebPass.exe -console

The Welcome screen appears.

3. Dismiss the Welcome screen by clicking Next, then continue as described in “Specifying the Target Directory” on page 84.

## Specifying the Target Directory

Again, during this sequence you must accept the terms of the license agreement and specify a target installation directory for the new version, which must match the older version.

### To accept the license and specify a target WebPass directory

1. Read and accept the terms of the license agreement, then click Next to continue.
2. Respond to the next question based upon your platform. For example:
  - **Windows**—If you are logged in with administrator rights, click Next (otherwise click Cancel, log in as a user with administrator privileges, then restart the installation).
  - **Unix**—Specify the username and group that the Access Manager will use, then click Next. Typically, the defaults are “nobody.”

**Note:** For HP-UX, the defaults are WWW (username) and others (group).

You are asked to specify the target directory for the newer WebPass. The target directory for the new version must match the older source directory to complete the upgrade.

3. Choose the directory where you installed the older version, then click Next and continue with “Initiating the WebPass Upgrade” on page 84.

## Initiating the WebPass Upgrade

This is the same as the previous COREid Server upgrade. For brevity, some information won't be repeated.

### To initiate the WebPass upgrade and specify languages

1. Accept the upgrade by clicking Yes, then click Next.

After accepting the upgrade, you are asked to select the language that you would like to upgrade.
2. Select English from the list, ensure that a check mark appears beside English and any other languages you have installed, then click Next.

You are presented with a list of languages that will be upgraded.
3. Confirm the languages and click Next.

The next screen tells you that the existing installation has been saved and provides the name of the renamed, time-stamped source directory.

4. Continue the upgrade by clicking Next.  
A new screen confirms the directory for NetPoint 7 and tells you how much space is needed for the installation.
5. Start the file extraction into the target directory by clicking Next.  
A status bar indicates the progress of the file extraction.
6. You complete activities below according to the mode you have chosen for the upgrade.
  - **GUI mode**—A window appears asking which mode you prefer (automatic or confirmed); skip to step 8.
  - **Console Mode**—The script exits, and a transcript appears providing a command you need to run. On Solaris, the older version in the command may not match the exact “dot” release being upgraded. However, the correct version will be upgraded.
7. **Console Mode**—Run the command displayed in the transcript, which will look slightly different on Windows than on Unix, then press Enter.

On Unix the command is printed to a file (start\_migration), and a message is printed to run this file.

You are prompted to select Automatic or Confirmed mode.

```

-----
Please specify the mode for migration:
'1' - Automatic (recommended)
      Each step is performed automatically.
      No interaction from the user is required.
'2' - Confirmed
      Each step needs confirmation from the user.
Enter choice ( '1' or '2' ) : 1
-----

```

8. **Either Mode**—Specify the mode you prefer for the upgrade by entering a 1 (Automatic) or 2 (Confirmed).

For example:

```
1
```

Folders are created, files are copied, and catalogs are upgraded. For brevity, this guide will continue using the automatic mode as the example.

```
Creating original folders ...
```

```
-----
Copying general configuration files
OK.
```

-----  
Updating parameter catalogs ...  
OK.  
-----

When upgrading from NetPoint 6.0 to NetPoint 7.0, multiple entries with the same ParamName in mime\_types (.xml and .lst) files are not upgraded. For details, see “Multiple Entries with Same ParamName” on page 147.

With WebPass, there is no connection to a directory server nor any schema nor NetPoint data upgrades.

---

**Note:** This upgrade started from NetPoint 6.1. If you started with another version of NetPoint, version numbers in the following sequence will differ.

---

-----  
Starting migration (6.1.0 to 6.5.0)

9. Continue with “Upgrading the WebPass Component” on page 86.

## Upgrading the WebPass Component

During this sequence the component-specific upgrade is completed. With WebPass, this includes Web server configuration updates.

Again, unless you are upgrading from NetPoint 6.5, you will cycle through the upgrade transcript more than once. For example, this WebPass upgrade started from NetPoint 6.1 which requires a component-specific upgrade from NetPoint 6.1.0 to NetPoint 6.5.0, then another from NetPoint 6.5.0 to NetPoint 7.0.0.

### To upgrade WebPass and Web server configuration

1. Review the messages below and respond when needed:

-----  
Starting migration (6.1.0 to 6.5.0)  
-----

Updating component-specific configuration files...  
OK.  
-----

Starting migration ( 6.5.0 -> 7.0.0 )...  
-----

Updating web server configuration files...  
OK.  
-----

Updating component-specific configuration files...  
-----

OK.

-----  
Directory permissions copied...

(C:\NetPoint\webcomponent-iis\identity\_20040426\_163742\oblix )  
->

( C:\NetPoint\webcomponent-iis\identity\oblix )  
-----

**Windows**—The path to directory security permissions is logged in obmigratenp.log. NetPoint copies directory security permissions on certain files and folders for all Web server-dependent components on Windows systems (WebPass, Access Manager and WebGate). This is done because IIS Web servers require files that are accessed to have privileges for the IIS Web server, and these security permissions are not preserved during the file upgrade sequence.

Typically this occurs after component-specific and license upgrades. However WebPass and Webgate have no license to upgrade. In these cases, directory server permissions are copied immediately after completion of the component-specific upgrade.

-----  
Migration has completed successfully!

Press <ENTER> to continue :  
-----

2. Press Enter, as indicated.  
You are returned to the original installation dialog.
3. Continue with “Finishing the WebPass Upgrade” on page 87.

## Finishing the WebPass Upgrade

Again, you finish this upgrade as you do any NetPoint installation.

### To finish the WebPass upgrade

1. Review the ReadMe information and complete the sequence by clicking Next.
2. Apply Web server changes, if needed.
3. Stop the WebPass Web server instance.
4. Stop, then restart COREid Server service.
5. Start the WebPass Web server instance.
6. Proceed as indicated below:
  - “Confirming the WebPass Upgrade” on page 88

- “Completing the COREid System Upgrade” on page 88
- “Upgrading the Access System” on page 111

## Confirming the WebPass Upgrade

It is a good idea to confirm the WebPass and COREid System upgrade, as you usually do when installing NetPoint.

### To confirm your WebPass upgrade

1. Make sure your COREid Server and WebPass Web server are running.
2. Navigate to the NetPoint COREid System Console from your browser by specifying the appropriate URL.

For example:

```
http://hostname:port/identity/oblix
```

where *hostname* refers to machine that hosts the Web server; *port* refers to the HTTP port number of the WebPass Web server instance; */identity/oblix* connects to the COREid System Console.

The NetPoint COREid System main page should appear.

## Completing the COREid System Upgrade

The items below will help you complete the COREid System upgrade.

**Web Browser Caches**—Be sure to delete all Web browser caches once the upgrade is complete.

**ASDK Configuration Settings**—Oblix recommends that you upgrade the ASDK automatically to preserve current ASDK configuration settings. If you respond with “Yes” when asked if you want to upgrade the Access Server SDK, the program will be launched automatically. See “To upgrade the Access Server SDK” on page 134, step 7. If you do not upgrade ASDK when asked, current ASDK settings are not preserved. In this case, you must re-configure the ASDK later using the `configureAccessGate` tool, as described in the *NetPoint 7.0 Administration Guide Volume 2*.

**Customizations**—Customized .XSL style files, images, and JavaScript files are not migrated during the upgrade and must be incorporated in your new installation manually following the COREid Server and WebPass upgrades. In addition, you may need to recompile plug-ins to work with NetPoint 7.0. For more information, see “Incorporating Workflows, Plug-Ins, and Custom Items” on page 91.

**Connection Pools**—If your older NetPoint installation included connection pools, see “Connection Pool Details” on page 34 to see if you need to take any further action.

**Failover and Load Balancing**—After upgrading to NetPoint 7.0, verify that previous failover and/or load balancing are configured as described in the *NetPoint 7.0 Deployment Guide*.

**mime\_types**—When upgrading from NetPoint 6.0 to NetPoint 7.0, multiple entries with the same ParamName in mime\_types (.xml and .lst) files are not upgraded. For details, see “Multiple Entries with Same ParamName” on page 147.

**Oblix IDLink**—When your COREid Server installation includes Oblix IDLink, you may transition to provisioning by configuring MIIS provisioning as described in the *NetPoint Integration Guide*.



# 4 Incorporating Workflows, Plug-Ins, and Custom Items

A number of items are not upgraded automatically and require manual processing following the COREid System upgrade. This chapter focuses on those items that require a manual process and includes the following topics:

- “Associating Provisioned Attributes with Workflows” on page 91
- “Recompiling Plug-Ins” on page 92
- “About Custom Items and Upgrades” on page 92
- “Incorporating Customizations” on page 96

## Associating Provisioned Attributes with Workflows

As mentioned earlier, provisioned attributes available in NetPoint 5.2 workflows require manual processing following an upgrade to NetPoint 7.0.

During the intermediate upgrade from NetPoint 5.2 to NetPoint 6.0, the file `output_520_to_600_supplied_osd.txt` is generated. The upgrade continues from 6.0 to the next version and so on until you finish with NetPoint 7.0. Following the upgrade, you should view the content of `output_520_to_600_supplied_osd.txt` and modify your workflows accordingly before you start using NetPoint 7.0.

### **Task overview: Associating NetPoint 5.2 workflows with provisioned attributes**

1. After the upgrade to NetPoint 7.0, check for the output file below.  
`output_520_to_600_supplied_osd.txt`
2. Check within the file for older workflows and relevant steps with attributes marked as provisioned.

3. Associate provisioned attributes with an appropriate NetPoint 7.0 workflow by modifying the new workflow. See the *NetPoint 7.0 Administration Guide Volume 1* for details.

## Recompiling Plug-Ins

To address multi-threading issues encountered with earlier compiler versions, NetPoint 7.0 components on Solaris and Linux are compiled using the GCC v3.3.2 C++ compiler. Also, as mentioned earlier, Identity Event API (PPP) plug-ins are not copied during the upgrade.

---

**Note:** Plug-ins implemented as executables, or those using a scripting language such as perl, do not need any changes.

---

### To use Identity Event API (PPP) plug-ins

1. Create a folder for your old NetPoint Identity Event API plug-ins in the top level of your Identity Event API directory.
2. Following the upgrade, recompile any PPP library plug-ins for the COREid Server using GCC v3.3.2.
3. Complete any testing to ensure these are working properly with NetPoint 7.0.

Authentication and authorization plug-ins also need to be recompiled following the upgrade, as discussed in “Recompiling Plug-Ins” on page 130.

## About Custom Items and Upgrades

If your earlier NetPoint installation includes customized images, JavaScript files, and stylesheets, you need to complete manual processing to use these with NetPoint 7.0. Changes and customizations are *not* included when upgrading to NetPoint 7.0. If you have made significant changes to earlier XSL stylesheets, or if you use a style other than the NetPoint default Classic Style, you need to manually include those changes in NetPoint 7.0 stylesheets, images, and JavaScript files.

---

**Note:** If you simply copy earlier stylesheets, you might receive stylesheet bug reports or experience unpredictable behavior when using new features designed to work with new stylesheets. These types of problems can be difficult to troubleshoot.

---

When you view the Customize Styles page in the upgraded version of NetPoint, style names are listed to reflect the style definitions maintained in the directory server's Oblix (NetPoint) configuration. However, it is important to note that the customized style files themselves are not migrated, which is why the procedures in this chapter are required.

To illustrate this, suppose a system-level change was made to the NetPoint 7.0 basic.xsl stylesheet to accommodate a new feature. In this case, copying an older version of basic.xsl to replace the NetPoint 7.0 version of basic.xsl will *not* guarantee that the new feature will work because that new feature requires the 7.0 basic.xsl stylesheet.

### During the Upgrade to NetPoint 7.0

- Files in the older version \style0 directory are **replaced**, not migrated.
- The original files are saved in the renamed time-stamped source directory.

For example:

```
COREid_install_dir_timestamp\identity\oblix\apps\specific_app\ui\style0\name.xsl
```

- Any style directories that you have created in the older version are **saved**, not migrated, and are stored in the same time-stamped source directory created during the upgrade.

---

**Important:** Do *not* attempt to copy older stylesheets to upgraded locations. Instead, you must use procedures in this chapter to alter new stylesheets so they reflect changes in earlier stylesheets.

---

As discussed earlier, the directory structure has changed starting with NetPoint 6.5 to accommodate multiple languages. Of specific interest for activities in this chapter are the differences in the PresentationXML directories introduced below.

## PresentationXML Directories Before NetPoint 6.5

The PresentationXML library was provided under two directories and distributed depending upon how the files were likely to be used. For example, stylesheets that define the default NetPoint Classic Style are maintained in flat files in the filesystem directory:

```
\COREid_install_dir\identity\oblix\apps\AppName
```

For example:

```
\COREid_install_dir\identity\oblix\apps\userservcenter\ui\style0\style_name.xls
```

This pre-6.5 directory structure is summarized in Table 5:

**Table 5. Pre-6.5 COREid Server PresentationXML Libraries**

<i>COREid_install_dir</i> \identity\oblix\apps		
<i>COREid_install_dir</i> \identity\oblix\apps\ <i>AppName</i> (common, groupserver, etc.)		
bin	ui	xmlschema
Dynamically-loadable code for the application, and the registration file, message file(s) and parameter files specific to the application	Stylesheets for the application (in one or more style directories)	XML schema files specific to the application

The pre-6.5 WebPass directory structure is summarized in Table 6:

**Table 6. Pre-6.5 WebPass PresentationXML Libraries**

<i>WebPass_install_dir</i> \identity\oblix\apps	
<i>WebPass_install_dir</i> \identity\oblix\apps\ <i>AppName</i> (common, groupserver, etc.)	
bin	ui
JavaScript files	Stylesheets and GIFs specific to the application (in one or more style directories).

For more information, see the *NetPoint Customization Guide* for your older version.

## PresentationXML Directories with NetPoint 6.5 and Later

NetPoint default Classic Style stylesheets and the PresentationXML library are now stored as shown below and described in the *NetPoint 7.0 Customization Guide*:

```

COREid_install_dir\identity\oblix\apps\AppName\bin
COREid_install_dir\identity\oblix\lang\langTag
COREid_install_dir\identity\oblix\lang\langTag\style0
COREid_install_dir\identity\oblix\lang\shared

WebPass_install_dir\identity\oblix\lang\langTag
WebPass_install_dir\identity\oblix\lang\langTag\style0
WebPass_install_dir\identity\oblix\lang\shared
WebPass_install_dir\identity\oblix\WebServices\XMLSchema

```

The contents of the default COREid directories above are outlined in Table 7.

**Table 7** Default NetPoint 6.5 and Later COREid PresentationXML Libraries

Default COREid Directories	Contents
<i>COREid_install_dir</i> \identity\oblix\apps\ <i>AppName</i> \bin where <i>AppName</i> can be common, groupsvcenter, objsvcenter, usersvcenter, and so on.	Registration and parameter files specific to the application.
<i>COREid_install_dir</i> \identity\oblix\lang\ <i>langTag</i> where <i>langTag</i> represents an installed language, such as en-us (English) or fr-fr (French).	Message files for various applications.
<i>COREid_install_dir</i> \identity\oblix\lang\ <i>langTag</i> \style0	<ul style="list-style-type: none"> <li>• Wrapper stylesheets for applications point to templates in \shared</li> <li>• Common NetPoint images</li> </ul>
<i>COREid_install_dir</i> \identity\oblix\lang\shared	XSL stylesheet templates for various applications

The contents of the default WebPass directories identified earlier are outlined in Table 8.

**Table 8** Default NetPoint 6.5 and Later WebPass PresentationXML Libraries

Default WebPass Directories	Contents
<i>WebPass_install_dir</i> \identity\oblix\lang\ <i>langTag</i>	Contains message files for various applications
<i>WebPass_install_dir</i> \identity\oblix\lang\ <i>langTag</i> \style0	<ul style="list-style-type: none"> <li>• Image files used in presenting the page</li> <li>• Copies of style0 stylesheets for client-side processing only</li> </ul>
<i>WebPass_install_dir</i> \identity\oblix\lang\shared	<ul style="list-style-type: none"> <li>• JavaScript files</li> <li>• Copies of stylesheets for reference only</li> </ul>
<i>WebPass_install_dir</i> \identity\oblix\WebServices\XMLSchema	Contains XML schema files for specific applications

For more information about directories and their content, see the *NetPoint 7.0 Customization Guide*.

# Incorporating Customizations

For a successful stylesheet upgrade, you must complete all procedures in this chapter. The stylesheet upgrade task has been divided into several functional procedures that you can use as a guide.

## Task overview: Incorporating custom styles includes

1. Completing activities in the “Customization Prerequisites Checklist” on page 96.
2. “Recreating Custom Style Directories in NetPoint 7.0” on page 97.
3. “Customizing New Stylesheets” on page 98.
4. “Incorporating Custom Images” on page 100
5. “Using New Customized Styles” on page 103.
6. “Incorporating JavaScript Customizations” on page 103.
7. “Handling Language-Specific Message Catalogs” on page 104

## Customization Prerequisites Checklist

Before you begin upgrading stylesheets, check Table 9 to ensure you have properly prepared the environment for this task. Failure to complete prerequisites may adversely affect your NetPoint upgrade.

**Table 9** Customization Prerequisites Checklist

Checklist	Stylesheet Upgrade Prerequisites
	Finish a complete COREid System Upgrade, as described in “Upgrading the COREid System” on page 67.
	Confirm that your upgraded COREid System is working properly.
	Review “About Custom Items and Upgrades” on page 92.

## Recreating Custom Style Directories in NetPoint 7.0

As you recreate (add) custom style directories to NetPoint in following steps, you *must* use the same style names and the same style filesystem locations that were used before the upgrade. See the *NetPoint 7.0 Administration Guide Volume 1* for additional information.

### To recreate custom styles in NetPoint 7.0

1. Complete tasks in “Customization Prerequisites Checklist” on page 96.
2. Log in to the upgraded COREid System Console and navigate to the Configure Styles page.

For example:

COREid System Console > System Admin > System Configuration > Configure Styles

3. Enable Classic Style as the default stylesheet if this is not currently the default.
4. Delete the placeholders for your customized styles listed on the Customize Styles page.

---

**Note:** You cannot delete the Classic Style maintained in the \style0 filesystem directory because this style is required by the COREid System Console.

---

5. From the Customize Styles page, click the Add Style button.

The Add Styles page appears.

6. On the Add Style page, fill in the Name and (filesystem) Directory Name fields using the same style name and filesystem location used before the upgrade.

For example:

Name *Paste1*  
Directory Name *Paste1*

The next step enables NetPoint to create the appropriate filesystem directory structure automatically and copy the upgraded default stylesheets into it.

7. Select Classic Style in the Copy From list, then click the Save button.

For example:

Copy From **Classic style**  
Save

Your new custom style directory duplicates \style0 and contains wrapper stylesheets that point to default global stylesheets in the \shared directory (when you selected Copy From Classic Style).

8. Repeat steps 4 through 7, above, to recreate in NetPoint each customized style from the earlier installation.

For additional information, see the *NetPoint 7.0 Administration Guide Volume 1*.

The new style name is listed in the Customize Styles page and one or more directories were created to hold the new wrapper stylesheets.

9. Select a new style as your default style, as follows:
  - a) Click the Setup Default Style button to display the Set Default Style page.
  - b) Click the Make Default button beside your new style name, then click Save.
10. Check your filesystem for the new style directory name you specified.

You are ready to start the next procedure, “Customizing New Stylesheets” on page 98, to include older customizations in the new stylesheets.

## Customizing New Stylesheets

At this point, you must edit a copy of each new-default stylesheet using your own originally customized files as a guide. It is a good idea to take notes about your work as you go.

### Task overview: Customizing New Stylesheets

1. Complete the procedure “Recreating Custom Style Directories in NetPoint 7.0” on page 97.
2. Follow the steps “To customize new stylesheets” on page 99 to:
  - Locate, in the time-stamped source directory, a customized older stylesheet to use as a reference.
  - Locate, in your new custom directory, the wrapper stylesheet that corresponds to your older customized stylesheet.
  - Locate, in your upgraded \shared directory, the default stylesheet that corresponds to the new wrapper.
  - Overwrite the new wrapper stylesheet in your new custom style directory with the new-default stylesheet from the NetPoint 7.0 \shared directory.
  - Edit the new-default stylesheet using your older customized version as a guide.
3. Replace messages in stylesheets, as described in “Handling Language-Specific Message Catalogs” on page 104.

See the *NetPoint 7.0 Customization Guide* for more information about stylesheet structure and content, and how to customize these.

---

**Important:** Do *not* copy the original customized file into any upgraded directory. Do *not* copy content from the original customized file into any upgraded file. Do *not* attempt to copy all new-default stylesheets into your custom directory at once.

---

Remember, your new custom style directory duplicates `\style0` and contains wrapper stylesheets that point to default stylesheets in the `\shared` directory. You cannot be assured that a wrapper file will be called before the actual stylesheet because both the common registration file and the application's own registration file call stylesheets according to an internal ordering. In addition, the stylesheets in `\shared` are used with all languages and all applications and should be retained as is. Eventually your custom directory will contain all actual stylesheets, including those identified in the application's registration file and in `oblixbasereg.xml`. Even if you do not need to edit a stylesheet, it must be copied to your custom directory.

---

**Note:** For the NetPoint Access System, there are only JavaScript changes; no stylesheets.

---

### To customize new stylesheets

1. In the time-stamped source directory created during the upgrade, select and open one original customized stylesheet file.

For example:

```
\COREid_install_dir_timestamp\identity\oblix\apps\AppName\ui\style0\name.xml
```

2. In your new custom directory, locate and open the wrapper stylesheet that corresponds to your older customized stylesheet.

For example:

```
\COREid_install_dir\identity\oblix\lang\en-us\paste\name.xml
```

3. In the new wrapper stylesheet, review the “include href=” statements for files that are included and record these names and paths.

For example:

```
<?xml version="1.0" ?>
- <!-- Copyright (c) 1996-2001, Oblix Inc. All Rights Reserved. -->
- <xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform"
xmlns:oblix="http://www.oblix.com/">
  <xsl:include href="./name.xml" />
  <xsl:include href="../name.xml" />
  <xsl:include href="../../shared/name.xml" />
</xsl:stylesheet>
```

Next you need to overwrite the wrapper file in your new custom directory with a copy of the new-default stylesheet you intend to customize.

4. In the NetPoint 7.0 \shared directory, locate and copy the new-default stylesheet that corresponds to your original customized stylesheet, as indicated below:

**Copy From \shared**

```
\COREid_install_dir\identity\oblix\lang\shared\name.xsl
```

**Copy To new custom directory**

```
\COREid_install_dir\identity\oblix\lang\en-us\Paste\name.xsl
```

5. In your new custom directory, locate and edit the copied-default stylesheet to reflect changes made to the older customized version, and record your changes.
6. Repeat the steps above as you locate and copy each related default stylesheet to your new custom directory, then customize it to match changes in the older customized version.

Locating and selectively copying stylesheets is an iterative process that you complete one stylesheet at a time, as described in the *NetPoint 7.0 Customization Guide*, including:

- Base stylesheets
  - Stylesheets *included* in base stylesheets
  - Specific function-related stylesheets identified for the program in the application’s registration file
  - Stylesheets *included* in the function-related stylesheet
7. Ensure that filesystem access control for your new custom style directories and files is set to match the ownership and permissions of \style0.
  8. Restart the COREid Server.
  9. Continue with “Incorporating Custom Images” on page 100.

## Incorporating Custom Images

In earlier versions of NetPoint, images were distributed throughout the installation directory and referred to with respect to the application path. From NetPoint 7.0 onward, images are language *dependent* and are consolidated into a single directory. When installations include multiple languages, you will have multiple *langTag* directories. For directory details, see “Changes in the NetPoint Directory Structure” on page 37.

- **COREid System images** are in the directory below  

```
\WebPass_install_dir\identity\oblix\lang\langTag \style0
```
- **Access System images** are in the following directory:  

```
\install_dir\access\oblix\lang\langTag\style2
```

## gifPathName and jsPathName Variables

Due to the change in location of all image files, a new *gifPathName* variable is defined in wrapper stylesheet *style.xml*. In addition to *style.xml*, the *msgctlg.js* file also includes the *gifPathName* variable to mention the path for image locations:

```
COREid_install_dir\oblix\lang\langTag\style0\style.xml
COREid_install_dir\oblix\lang\langTag\msgctlg.js
```

A language independent stylesheet picks up the images from the modified image path mentioned by the *gifPathName* variable, which is important for two reasons:

- It prevents hard-coding of URLs in the stylesheets and makes it easier to re-use the same stylesheet across styles. When customizing stylesheets, you should use this global variable whenever constructing a URL path to a GIF or other image.
- It incorporates the current language and current style tag and generates the correct path.

---

**Note:** Stylesheets refer to the *gifPathName* variable to locate the image directory. JavaScript files refer to the *jsPathName* variable.

---

For more information about *msgctlg* files, see “Handling Language-Specific Message Catalogs” on page 104.

### Example—*style.xml* with variables highlighted

The *style.xml* wrapper resides in *\style0* and can reside in your custom directory:

```
COREid_install_dir\identity\oblix\lang\en-us\style0\style.xml
COREid_install_dir\identity\oblix\lang\en-us\Custom\style.xml
```

```
<?xml version="1.0" ?>
- <!-- Copyright (c) 1996-2002, Oblix Inc. All Rights Reserved.
  -->
- <xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform"
  xmlns:oblix="http://www.oblix.com/">
  <xsl:variable name="styleName">style0</xsl:variable>
  <xsl:variable name="localeName">en-us</xsl:variable>
- <xsl:variable name="gifPathName">
  ../../../../lang/
  <xsl:value-of select="$localeName" />
  /
  <xsl:value-of select="$styleName" />
  </xsl:variable>
  <xsl:variable name="jsPathName">../../../../lang/shared</xsl:variable>
  </xsl:stylesheet>
```

---

**Note:** You need to replace the image path in the NetPoint 7.0 stylesheet you are modifying.

---

In NetPoint 6.5 and later, be sure to reference images using the two variables (gifPathName and jsPathName) to make your customization language and style independent. To do so, modify your NetPoint 7.0 stylesheet with the corresponding “” reference.

For example, suppose the image source is mentioned in the NetPoint 6.1 stylesheet:

```
install_dir\oblix\apps\common\ui\style0\navbar.xsl
```

as:

```

```

You need to change the image path for NetPoint 7.0 as follows, using the variable gifPathName to refer to the image location:

```

```

## To incorporate custom images

1. Copy all custom images from the renamed source directory to the target:

**From**—*source\_directory\_timestamp*

**To target**—*WebPass\_install\_dir\identity\oblix\lang\langTag\style0*

2. Copy all custom images for the NetPoint Access System from the source directory to the target:

**From**—*source\_directory\_timestamp*

**To target**—*install\_dir\access\oblix\lang\langTag\style2*

3. Modify the image source path name in NetPoint 7.0 stylesheets in your custom directory:

For example:

```
\COREid_install_dir\identity\oblix\lang\Pastel
```

4. See also:

- “Using New Customized Styles” on page 103
- “Incorporating JavaScript Customizations” on page 103
- “Handling Language-Specific Message Catalogs” on page 104

## Using New Customized Styles

Before you can use the new customized style, you need to complete the task below.

---

**Note:** Due to extensive coverage in the *NetPoint 7.0 Customization Guide*. The specific details are not repeated here.

---

### Task overview: Using new customized styles

1. Copy images and styles to WebPass, to create a custom style directory structure on WebPass and include all images in this structure, as described in the *NetPoint 7.0 Customization Guide*.
2. Test your customized style, as described in the *NetPoint 7.0 Customization Guide*.
3. Propagate new stylesheets to other COREid Servers and WebPass hosts, as described in the *NetPoint 7.0 Customization Guide*.
4. Continue with:
  - “Incorporating JavaScript Customizations” on page 103
  - “Handling Language-Specific Message Catalogs” on page 104

## Incorporating JavaScript Customizations

In NetPoint 7.0, JavaScript files are located in:

```
WebPass_install_dir\identity\oblix\lang\shared
```

Like stylesheets, language-specific pop-up messages in JavaScript files are replaced with variables defined in:

```
install_dir\identity\oblix\lang\langTag\msgctlg.js
```

JavaScript files are not present in the `\lang\langTag` directory except in the `msgctlg.js` file. The steps needed to migrate JavaScript files are similar to those you used above to migrate stylesheet changes.

### To incorporate JavaScript files

1. In the time-stamped source directory created during the upgrade, locate your older customized JavaScript files on the machine hosting the upgraded WebPass.
2. In the NetPoint 7.0 `\lang\shared` directory on the WebPass, locate and copy your new-default JavaScript files to retain for future use.
3. Edit the NetPoint 7.0 JavaScript files in the `\lang\shared` directory on the WebPass to reflect changes made to the older version and record your changes, or see “Handling Language-Specific Message Catalogs” on page 104.

## Handling Language-Specific Message Catalogs

As discussed elsewhere, multiple languages are available for use with NetPoint 7.0. Messages that were once in stylesheets are language dependent and are now defined separately as variables in message catalogs.

The new NetPoint directory structure consolidates all message catalogs for JavaScript files, XSL, and HTML.

- As the name suggests any language-specific files will be located in `\lang\langTag`.
- Any non-language specific objects are located within `\lang\shared`.

All the stylesheets have a language-specific wrapper in `\lang\langTag\style0` which *includes* the main language-neutral version stylesheet in `\lang\shared`. This new wrapper segregates the main stylesheet functionality, which is language independent, from language-specific messages.

Language-specific messages are referred to through variables in message catalog files, as discussed below:

- “Handling XSL Stylesheet Messages” on page 104
- “Handling Messages for JavaScript” on page 106

## Handling XSL Stylesheet Messages

The messages for stylesheets are defined in the message catalog below:

```
\COREid_install_dir\identity\oblix\lang\langTag\msgctlg.xml
```

You need to ensure that all displayable strings in your older version stylesheets are placed in the NetPoint 7.0 stylesheet message catalog.

For example, suppose you have customized a NetPoint 6.1 stylesheet, `navbar.xml`, in:

```
\COREid_install_dir\identity\oblix\apps\common\ui\style0\navbar.xml
```

where a message reads as:

```
<xsl:text> &lt;&lt; Click here to return to the previous application(s). </xsl:text>
```

In the NetPoint 7.0 version of the stylesheet:

```
\COREid_install_dir\identity\oblix\lang\shared\navbar.xml
```

you need to modify the message to read:

```
<xsl:text> &lt;&lt; <xsl:value-of select="$MPprevAppln"/> </xsl:text>
```

and ensure that MPrevAppIn is defined in the NetPoint 7.0 message catalog:

```
\COREid_install_dir\install_dir\identity\oblix\lang\langTag\msgctlg.xml
```

as follows:

```
<xsl:variable name="MPrevAppIn">Click here to return to the  
previous application(s). </xsl:variable>
```

## To handle language-specific message catalogs for XSL stylesheets

1. Locate the older stylesheet containing the customized message.

For example:

```
\COREid61_install_dir\identity\oblix\apps\common\ui\style0\navbar.xml  
<xsl:text> &lt;&lt; Click here to return to the previous  
application(s). </xsl:text>
```

If you have already copied the stylesheet to your custom directory, skip to step 3.

2. If you have not yet overwritten the wrapper file with the corresponding stylesheet, copy the corresponding NetPoint 7.0 stylesheet to your custom directory.

For example:

### Copy from

```
\COREid_install_dir\identity\oblix\lang\shared\navbar.xml
```

### Copy to

```
\COREid_install_dir\identity\oblix\lang\langTag\Custom_dir\navbar.xml
```

3. In the NetPoint 7.0 stylesheet in your custom directory, modify the message to use the appropriate message catalog parameter.

For example:

```
<xsl:text> &lt;&lt; <xsl:value-of select="$MPrevAppIn"/> </  
xsl:text>
```

4. In the NetPoint 7.0 message catalog, ensure that the message parameter is defined.

```
\COREid_install_dir\identity\oblix\lang\langTag\msgctlg.xml  
<xsl:variable name="MPrevAppIn">Click here to return to the  
previous application(s). </xsl:variable>
```

5. Restart the COREid Server and WebPass so the changes take effect.

## Handling Messages for JavaScript

Language-specific pop-up messages in JavaScript are also replaced by variables, which are defined in:

```
\WebPass_install_dir\install_dir\identity\oblix\lang\langTag\msgctlg.js
```

This message catalog is divided into sections that show the messages for specific JavaScript files, several of which are named below:

```
misc.js  
miscs.js  
...  
atickets.js  
wfqs.js  
deactivateuser.js  
confirm.js  
...
```

You need to ensure that all displayable strings are placed in the message catalog, and the message catalog must be referenced through the I18N\_GetMsg function.

For example, the code in the older JavaScript file:

```
\install_dir\identity\oblix\apps\admin\bin\admin.js
```

that pops up a message:

```
alert("Room must have a name.")
```

now appears in:

```
\WebPass_install_dir\identity\oblix\lang\shared\admin.js
```

as:

```
alert(I18N_GetMsg('MRoomNameReq'))
```

where MRoomName is defined in:

```
\WebPass_install_dir\install_dir\identity\oblix\lang\langTag\msgctlg.js
```

as:

```
MESSAGE_CATALOG[ 'MRoomNameReq' ] = "Room must have a name.";
```

---

**Note:** Oblix recommends that you do not customize files in the `\shared` directory and, instead, copy files from `\shared` into your custom directory before customizing.

---

## To handle language-specific message catalogs for JavaScript files

1. Ensure that all displayable strings are placed in the NetPoint 7.0 message catalog:

*\WebPass\_install\_dir\identity\oblix\lang\langTag\msgctlg.js*

2. Ensure that the NetPoint 7.0 message catalog is referenced through the I18N\_GetMsg function (which is automatically loaded) located in:

*\WebPass\_install\_dir\identity\oblix\lang\shared\i18n.js*

3. Restart the COREid Server and WebPass so changes take affect.



# **SECTION III: ACCESS SYSTEM AND OTHER UPGRADES**



# 5 Upgrading the Access System

This chapter provides details about upgrading your Access System to NetPoint 7.0. Topics include:

- “About Access System Upgrades” on page 111
- “Upgrading the Access Manager” on page 112
- “Upgrading the Access Server” on page 120
- “Upgrading WebGate” on page 125
- “Confirming Failover and Load Balancing” on page 130
- “Generating a New Shared Secret” on page 130
- “Recompiling Plug-Ins” on page 130

## About Access System Upgrades

After upgrading the COREid System, you may upgrade the Access System. Again, your starting version determines the number of times you cycle through the process to move from your current version to NetPoint 7.0.

---

**Important:** To upgrade a NetPoint 6.5.0.x multiple-language environment, you need NetPoint 7.0 Language Packs. If you upgrade a multi-language implementation *without* NetPoint 7.0 Language Packs, you will lose the multi-language functionality. Contact Oblix for information about specific Language Packs.

---

If you have already upgraded the COREid System, the process is similar and should be familiar.

### **Task overview: Upgrading the Access System includes**

1. “Upgrading the Access Manager” on page 112.
2. “Upgrading the Access Server” on page 120.
3. “Upgrading WebGate” on page 125.
4. “Recompiling Plug-Ins” on page 130

Should an error occur during the upgrade, you will be presented with the name of the log file that contains information about the error.

## **Upgrading the Access Manager**

This discussion includes the procedures necessary to guide you through the upgrade. When upgrading the first instance of the Access Manager, you are asked if you want to make automatic schema and data updates. When upgrading additional instances of the Access Manager, you do not need to repeat the update of schemas and data.

### **Task overview: Upgrading the Access Manager**

1. Complete tasks in “Access Manager Prerequisites Checklist” on page 113.
2. “Starting the Access Manager Upgrade Process” on page 113
3. “Specifying the Target Access Manager Directory” on page 114
4. “Initiating the Access Manager Upgrade” on page 114
5. “Upgrading Policy Data” on page 116
6. “Upgrading the Web Server, Access Manager, and License” on page 117
7. “Finishing the Access Manager Upgrade” on page 120
8. Verify that previous failover and/or load balancing are configured as described in the *NetPoint 7.0 Deployment Guide*.

The sample upgrade below starts from a NetPoint 6.1 installation. Your starting version may differ.

## Access Manager Prerequisites Checklist

Before you begin upgrading the Access Manager, check the tasks in Table 10 to ensure you have completed these tasks.

Failure to complete prerequisites may adversely affect your NetPoint upgrade.

**Table 10** Access Manager Upgrade Prerequisites Checklist

Checklist	Access Manager Upgrade Prerequisites
	Complete all tasks in “Preparing to Upgrade NetPoint” on page 47.
	Upgrade the COREid System, as described in “Upgrading the COREid System” on page 67.
	Stop the Access Manager Web server.
	Back up all policy data in your current NetPoint installation. <b>Note:</b> Oblix recommends that you upgrade schemas and data automatically.
	Assign read permissions to all NetPoint files before upgrading.
	If you originally installed NetPoint 6.5.0.x or patched it to a later 6.5.x version, see also “Preparing NetPoint 6.5 Environments” on page 57.
	<b>With 6.5.0.x and Language Packs</b> —Ensure that any installed Language Pack and the corresponding NetPoint 7.0 Language Pack reside in the <i>component</i> source directory. <b>Note:</b> On Unix systems, ensure the Language Pack installer has execute permissions. For details, see the <i>NetPoint 7.0 Installation Guide</i> .

## Starting the Access Manager Upgrade Process

You can start the installer in either GUI or console mode, as described earlier. This guide provides one set of procedures will be provided in this guide because the sequence is similar regardless of your platform or preferred mode. This guide uses GUI model.

This guide starts from a NetPoint 6.1 installation. Your environment may vary. Should an error occur, the name of the log file that contains information about the error is identified.

---

**Note:** Skip any details that do not apply to your installation.

---

### To launch the Access Manager upgrade

1. Log in as a user with administrator privileges.
2. Locate and launch the program in your preferred mode:

#### GUI Mode

**Windows**—NetPoint7\_0\_Win32\_NSAPI\_AccessManager.exe

**Solaris**—./NetPoint7\_0\_sparc-s2\_NSAPI\_AccessManager -gui

### **Console Mode**

**Solaris**—./NetPoint7\_0\_sparc-s2\_NSAPI\_AccessManager

**Windows Command Window**—

NetPoint7\_0\_Win32\_NSAPI\_AccessManager.exe -console

The Welcome screen appears.

3. Dismiss the Welcome screen by clicking Next, then continue as described in “Specifying the Target Access Manager Directory” on page 114.

## **Specifying the Target Access Manager Directory**

During this sequence you must accept the terms of the license agreement and specify a target directory for NetPoint 7.

### **To specify the Access Manager target directory**

1. Read and accept the terms of the license agreement, then click Next to continue.
2. Respond to the next question based upon your platform. For example:
  - **Windows**—If you are logged in with administrator rights, click Next (otherwise click Cancel, log in as a user with administrator privileges, then restart the installation).
  - **Unix**—Specify the username and group that the Access Manager will use, then click Next. Typically, the defaults are “nobody.”

**Note:** For HP-UX, the defaults are WWW (username) and others (group).
3. Choose the directory where you installed the older version, then click Next and continue with “Initiating the Access Manager Upgrade” on page 114.

## **Initiating the Access Manager Upgrade**

When your target installation directory matches the older source directory, you are informed that a version of NetPoint already exists and asked if you want to upgrade. Again, after accepting the upgrade, you are asked to select the language that you would like to upgrade. After upgrading to NetPoint 7, you may add other languages to your installation.

### **To initiate the Access Manager upgrade**

1. Accept the upgrade by clicking Yes, then click Next.
2. Select English from the list, ensure that a check mark appears beside English and any other languages you have installed, then click Next.
3. Confirm the languages that will be upgraded and continue by clicking Next.
4. Review the time-stamped source directory name, then click Next to continue.

5. Note the amount of disk space required, then click Next to start the file extraction into the target directory.  
A status bar indicates the progress of the file extraction.
6. You complete activities below according to the mode you have chosen for the upgrade.
  - **GUI Mode**—A new window appears asking you to specify either Automatic or Confirmed mode for the upgrade; continue with step 8.
  - **Console Mode**—The script exits, and a transcript appears providing a command you need to run. On Solaris, the older version in the command may not match the exact “dot” release being upgraded. However, the correct version will be upgraded.
7. **Console Mode**—Run the command displayed in the transcript, which may look slightly different on Windows than on Unix, then press Enter.

---

**Note:** On Unix, the command is printed to a file (start\_migration) and a message is printed to run this file.

---

You are prompted to select Automatic or Confirmed mode.

8. **Either Mode**—Type a 1 to install in Automatic mode (or 2 for Confirmed mode), then review and respond to messages as they appear.

For example:

1

After making your choice, you are informed as the upgrade progresses. Folders are created, files are copied, and catalogs are upgraded, as shown below. The following example shows the transcript for Automatic mode.

```

Creating orig folders...
-----
Copying general configuration files...
OK.
-----
Updating parameter catalogs...
OK.
-----

```

---

**Note:** This upgrade started from NetPoint 6.1. If you started with another version of NetPoint, version numbers in the following sequence will differ.

---

```

-----
Starting migration ( 6.1.0 -> 6.5.0 )...

```

```

-----
NetPoint schema migration....
  Retrieving Policy configuration parameters...
  OK.
The following directory server's schema will be updated:
  Host: DNShostname.domain.com
  Port: port#
  Type: ns
NOTE: If you do not want to migrate schema at this time,
      type 'SKIP'.
Please type 'yes' to proceed:

```

## Upgrading Policy Data

You are asked to confirm the schema migration even when you are operating in Automatic mode, and must respond to proceed.

Oblix recommends that you upgrade the schema and data automatically.

### To upgrade Access Manager policy data

1. Type the full word “yes” to continue.

For example:

Please type 'yes' to proceed: **Yes**

```

-----
The transcript continues as shown below:

```

```

-----
Updating schema. Please wait...
C:\NetPoint\coreid61\webcomponent-iis\access\oblix/tools/
migration_tools/policy_
610_to_650_schema_ns.ldif:

```

2. Record the directory path when it appears.

```

-----
NetPoint data migration....
Retrieving Policy configuration parameters...
  OK.
Checking Access Policy version...
Version not up to date. Performing Access Policy data
migration...

```

```

Updating Access Policy migration parameters...
  OK.
Converting Access Policy data. Please wait...
  .....
OK.
Removing old Access Policy data. Please wait...
  .....
OK.
Importing new Access Policy data. Please wait...
OK.
-----
NetPoint data migration has completed successfully!
Press <ENTER> to continue :

```

3. Press the Enter Key when data migration has completed and continue with the retrieval of NetPoint configuration parameters and database profile creation, as shown below.

```

-----
Retrieving Oblix configuration parameters...
DBProfiles created.
-----

```

Next you are informed about a Web server configuration upgrade.

4. Continue with “Upgrading the Web Server, Access Manager, and License” on page 117.

## Upgrading the Web Server, Access Manager, and License

During this sequence the component-specific upgrade is completed. With the Access Manager, this includes Web server configuration updates and policy data configuration parameters. As with all other components, a license upgrade is also performed.

This upgrade started from NetPoint 6.1 which includes a second upgrade sequence from NetPoint 6.5.0 to NetPoint 7.0.0. The messages you see and sequence you complete next depends upon your starting point.

### To upgrade the Web Server, Access Manager, and license

1. Review messages and respond appropriately for your environment.

For example:

```

-----
Updating web server configuration files...
OK.
-----
Starting migration ( 6.5.0 -> 7.0.0 )...
-----
NetPoint schema migration...
Retrieving Policy configuration parameters...
OK.
The following directory server's schema will be updated:
  Host: DNShostname.domain.com
  Port: port#
  Type: ns
NOTE: If you do not want to migrate schema at this time,
      type 'SKIP'.
Please type 'yes' to proceed:
2. Type the full word "yes" to continue the upgrade.
Please type 'yes' to proceed: yes
The process continues, as indicated below.
Updating schema. Please wait...
C:\NetPoint\coreid61\webcomponent-iis\access\oblix/tools/
migration_tools/policy_
650_to_700_schema_ns.ldif:
-----
Data migration begins for this interval, as shown below.
NetPoint data migration...
Retrieving Policy configuration parameters...
OK.
Checking Access Policy version...
Version not up to date. Performing Access Policy data
migration...
Updating Access Policy migration parameters...
OK.
Converting Access Policy data. Please wait...
..
OK.
Removing old Access Policy data. Please wait...
.....

```

```
OK.  
Cleaning up obsolete schema from the directory.  
Importing new Access Policy data. Please wait...  
OK.
```

```
-----  
NetPoint data migration has completed successfully!  
Press <ENTER> to continue :  
-----
```

3. Press Enter following the data upgrade and Access policy importation occurs.

```
-----  
Importing new Access Policy data. Please wait...  
OK.
```

```
-----  
NetPoint data migration has completed successfully!  
Press <ENTER> to continue :  
-----
```

4. Press Enter following the data upgrade.

Web server configuration and component-specific upgrades occur next, including a license upgrade.

```
-----  
Updating web server configuration files...  
OK.
```

```
-----  
Updating component-specific configuration files...  
OK.
```

```
-----  
Updating license files...  
OK.
```

```
Directory permissions copied...
```

```
( C:\NetPoint\webcomponent-iis\access_20040426_164541\oblix )  
-> (  
C:\NetPoint\webcomponent-iis\access\oblix )  
-----
```

**Windows**—The path to directory security permissions is logged in obmigratenp.log.

Migration has completed successfully!

Press <ENTER> to continue :

-----

5. When the upgrade completes, press Enter as instructed, then proceed to “Finishing the Access Manager Upgrade” on page 120.

## Finishing the Access Manager Upgrade

Again, you finish the upgrade as you do with any NetPoint installation

### To finish the Access Manager upgrade

1. Click Next to display an installation summary.
2. Record the details, then click Next.
3. Click Finish.
4. Apply any changes to the Web server configuration file, if needed.
5. Start the Access Manager Web server.
6. Proceed to “Upgrading the Access Server” on page 120

## Upgrading the Access Server

This discussion includes the procedures needed to guide you through the upgrade.

### Task overview: Upgrading the Access Server

1. Complete tasks in the “Access Server Prerequisites Checklist” on page 121.
2. “Starting the Access Server Upgrade Process” on page 121.
3. “Specifying the Target Access Server Directory” on page 122
4. “Upgrading the Access Server” on page 122
5. “Finishing the Access Server Upgrade” on page 124
6. Verify that previous failover and/or load balancing are configured as described in the *NetPoint 7.0 Deployment Guide*.

## Access Server Prerequisites Checklist

Before you begin upgrading the Access Server, check the tasks in Table 11 to ensure you have completed these tasks. Failure to complete prerequisites may adversely affect your NetPoint upgrade.

**Table 11** Access Server Upgrade Prerequisites Checklist

Checklist	Access Server Upgrade Prerequisites
	Complete all tasks in “Preparing to Upgrade NetPoint” on page 47.
	Upgrade the Access Manager, as described in “Upgrading the Access Manager” on page 112.
	Assign read permissions to all NetPoint files before upgrading.
	If you originally installed NetPoint 6.5.0.x or patched it to a later 6.5.x version, see also “Preparing NetPoint 6.5 Environments” on page 57.
	<b>With 6.5.0.x and Language Packs</b> —Ensure that any installed Language Pack and the corresponding NetPoint 7.0 Language Pack reside in the <i>component</i> source directory. <b>Note:</b> On Unix systems, ensure the Language Pack installer has execute permissions. For details, see the <i>NetPoint 7.0 Installation Guide</i> .

## Starting the Access Server Upgrade Process

You start the upgrade process as you do any installation. Following the program launch, this guide provides one set of procedures and GUI mode is used. Skip any details that do not apply to your installation.

The sample upgrade below starts from a NetPoint 6.1 installation. Your environment may vary. Should an error occur, the name of the log file that contains information about the error is identified.

### To launch the Access Server upgrade

1. Log in as a user with administrator privileges.
2. Locate and launch the program in your preferred mode:

#### GUI Mode

**Windows**—`NetPoint7_0_Win32_AccessServer.exe`

**Solaris**—`./NetPoint7_0_sparc-s2_AccessServer -gui`

#### Console Mode

**Solaris**—`./NetPoint7_0_sparc-s2_AccessServer`

**Windows Command Window**—

`NetPoint7_0_Win32_AccessServer.exe -console`

The Welcome screen appears.

3. Dismiss the Welcome screen by clicking Next, then continue as described in “Specifying the Target Access Server Directory” on page 122.

## Specifying the Target Access Server Directory

You must accept the terms of the license agreement and specify a target installation directory for the new version, which must match the older version.

### To specify the target Access Server directory

1. Read and accept the terms of the license agreement, then click Next to continue.
2. Respond to the next question based upon your platform. For example:
  - **Windows**—If you are logged in with administrator rights, click Next (otherwise click Cancel, log in as a user with administrator privileges, then restart the installation).
  - **Unix**—Specify the username and group that the Access Manager will use, then click Next. Typically, the defaults are “nobody.”

**Note:** For HP-UX, the defaults are WWW (username) and others (group).
3. Choose the directory where you installed the older version, then click Next and continue with “Upgrading the Access Server” on page 122.

## Upgrading the Access Server

This sequence includes upgrading message and parameter catalogs, creating a db profile for the Access Server, and completing component-specific and license upgrades.

This upgrade started from NetPoint 6.1. If you started with another version of NetPoint, version numbers in the following sequence will differ. Certain sequences repeat for each major release between your version and NetPoint 7.0

### To upgrade the Access Server

1. Accept the upgrade by clicking Yes, then click Next.
2. Select English from the list, ensure that a check mark appears beside English and any other languages you have installed, then click Next.
3. Confirm the languages, and click Next.
4. Check the time-stamped source directory name, then click Next to continue the upgrade.
5. Start the file extraction into the target directory by clicking Next.
6. You complete activities below according to the mode you have chosen for the upgrade.
  - **GUI Mode**—A new window appears asking you to specify either Automatic or Confirmed mode for the upgrade; skip to step 8.

- **Console Mode**—The script exits, and a transcript appears providing a command you need to run. On Solaris, the older version in the command may not match the exact “dot” release being upgraded. However, the correct version will be upgraded.
7. **Console Mode**—Run the command displayed in the transcript, which looks slightly different on Windows than on Unix, then press Enter.

---

**Note:** On Unix, the command is printed to a file (start\_migration), and a message is printed to run this file.

---

You are prompted to select Automatic or Confirmed mode.

8. **Either Mode**—Type a 1 to install in Automatic mode (or 2 for Confirmed mode), then review and respond to messages as they appear.

For example:

```
1
```

```
Messages begin.
```

```
creating orig folders...
```

```
-----  
Copying general configuration files...
```

```
OK.
```

```
-----  
Updating parameter catalogs...
```

```
OK.
```

```
-----  
Starting migration ( 6.1.0 -> 6.5.0 )...
```

```
DBProfiles created.
```

```
-----  
Updating component-specific configuration files...
```

```
OK.
```

```
Please note the name of the NetPoint Access Server service :  
NetPoint AAA Server (aaa-viking)
```

```
OK.
```

```
-----  
Starting migration ( 6.5.0 -> 7.0.0 )...
```

```
-----  
Updating component-specific configuration files...
```

```
OK.
```

```
Please note the name of the NetPoint Access Server service :
NetPoint AAA Server (aaa-viking)
OK.
```

- 
9. Record the name of the Access Server service, then press Enter.

```
-----
Updating license files...
```

```
OK.
```

```
-----
Migration has completed successfully!
Press <ENTER> to continue:
```

- 
10. Press Enter.

This completes the upgrade sequence, and the usual Oblix NetPoint ReadMe information appears.

## Finishing the Access Server Upgrade

Again, you finish the upgrade as you do with any NetPoint installation

### To finish the Access Server upgrade

1. Click Next to display an installation summary.
2. Record details, then click Next.
3. Click Finish.
4. Start the Access Server service.

Certain command options may disable the hide option and cause a password to appear in the command line. If you do *not* store the server password in the password.lst file, use the following command:

```
start_access_server -P mypassword port -d -t 61
```

5. Provide the password at the prompt, if needed.

On an IBM SecureWay directory server, the next time you start the Access Server it may take a few minutes for the dialog requesting the PEM pass phrase to appear.

6. Continue with “Upgrading WebGate” on page 125

# Upgrading WebGate

This discussion includes the procedures needed to guide you through the upgrade. When upgrading additional instances of the WebGate, there is no update to schemas and data.

## Task overview: Upgrading the WebGate

1. Complete tasks in “WebGate Prerequisites Checklist” on page 125.
2. “Starting the WebGate Upgrade Process” on page 126
3. “Specifying the Target WebGate Directory” on page 126
4. “Upgrading the WebGate” on page 127
5. “Finishing the WebGate Upgrade” on page 129
6. Verify that previous failover and/or load balancing are configured as described in the *NetPoint 7.0 Deployment Guide*.

## WebGate Prerequisites Checklist

Before you begin upgrading the WebGate, check the tasks in Table 10 to ensure you have completed these tasks.

Failure to complete prerequisites may adversely affect your NetPoint upgrade.

**Table 12** WebGate Upgrade Prerequisites Checklist

Checklist	WebGate Upgrade Prerequisites
	Complete all tasks in “Preparing to Upgrade NetPoint” on page 47.
	Upgrade your Access Manager and Access Servers, as described above.
	If you originally installed NetPoint 6.5.0.x or patched it to a later 6.5.x version, see also “Preparing NetPoint 6.5 Environments” on page 57.
	Stop the WebGate Web server.
	<b>With 6.5.0.x and Language Packs</b> —Ensure that any installed Language Pack and the corresponding NetPoint 7.0 Language Pack reside in the <i>component</i> source directory. <b>Note:</b> On Unix systems, ensure the Language Pack installer has execute permissions. For details, see the <i>NetPoint 7.0 Installation Guide</i> .

## Starting the WebGate Upgrade Process

This is the same process as other upgrades you have completed. The sample below starts from a NetPoint 6.1 installation. Your environment may vary.

### To launch the WebGate upgrade

1. Log in as a user with administrator privileges.
2. Locate and launch the program in your preferred mode:

#### GUI Mode

**Windows**—NetPoint7\_0\_Win32\_NSAPI\_WebGate.exe

**Solaris**—./NetPoint7\_0\_sparc-s2\_NSAPI\_WebGate -gui

#### Console Mode

**Solaris**—./NetPoint7\_0\_sparc-s2\_NSAPI\_WebGate

**Windows Command Window**—

NetPoint7\_0\_Win32\_NSAPI\_WebGate.exe -console

The Welcome screen appears.

3. Dismiss the Welcome screen as instructed, then continue as described in “Specifying the Target WebGate Directory” on page 126.

## Specifying the Target WebGate Directory

You must accept the terms of the license agreement and specify a target installation directory for the new version, which must match the older version.

### To accept license terms and specify the target WebGate directory

1. Read and accept the terms of the license agreement, then click Next to continue.
2. Respond to the next question based upon your platform. For example:
  - **Windows**—If you are logged in with administrator rights, click Next (otherwise click Cancel, log in as a user with administrator privileges, then restart the installation).
  - **Unix**—Specify the username and group that the Access Manager will use, then click Next. Typically, the defaults are “nobody.”

**Note:** For HP-UX, the defaults are WWW (username) and others (group).
3. Choose the directory where you installed the older version, then click Next and continue with “Upgrading the WebGate” on page 127.

## Upgrading the WebGate

During this sequence you upgrade the WebGate component, which includes Web server configuration upgrades.

**Console Mode on Solaris**—If you are upgrading or installing a WebGate at the same directory level as the Access Manager, you will see messages like the one below:

```
Installing NetPoint 7.0.0 webGate. Please wait...
|-----|-----|-----|-----|
0%          25%          50%          75%          100%
|||||
1. Yes
2. Yes to All
3. No
4. No to All

/export/NetPoint70/webComponents/access/oblix/lang/en-us/
readme.txt
exists on this system and is newer than the file being installed.
Do you want to replace this file? [3] 2
||||
Creating uninstaller...
```

---

**Note:** Respond when asked. Renaming is no problem; renaming these files does *not* affect the operation of the WebGate:

---

### To upgrade the WebGate

1. Accept the upgrade, then continue.
2. Select English from the list, ensure that a check mark appears beside English and any other languages you have installed, then continue.
3. Confirm the languages that will be upgraded and continue.
4. Review the time-stamped source directory name, then continue.
5. Note the amount of disk space required, then click Next.  
File extraction into the target directory begins.
6. You complete activities below according to the mode you have chosen for the upgrade.
  - **In GUI Mode**—A new window appears asking you to specify either Automatic or Confirmed mode for the upgrade; skip to step 8.

- **Console Mode**—The script exits, and a transcript appears providing a command you need to run. On Solaris, the older version in the command may not match the exact “dot” release being upgraded. However, the correct version will be upgraded.

7. **Console Mode**—Run the command displayed in the transcript, which will look slightly different on Windows than on Unix, then press Enter.

On Unix the command is printed to a file (start\_migration), and a message is printed to run this file.

You are prompted to select Automatic or Confirmed mode.

8. **Either Mode**—Type a 1 to install in Automatic mode (or 2 for Confirmed mode), then review and respond to messages as they appear.

For example:

```
1
```

```
Messages scroll by as the process continues.
```

```
Creating orig folders...
```

```
-----  
Copying general configuration files...
```

```
OK.
```

```
-----  
Updating parameter catalogs...
```

```
OK.
```

```
-----  
Starting migration ( 6.1.0 -> 6.5.0 )...
```

```
-----  
Updating web server configuration files...
```

```
OK.
```

```
-----  
Updating component-specific configuration files...
```

```
OK.
```

```
-----  
Starting migration ( 6.5.0 -> 7.0.0 )...
```

```
-----  
Updating web server configuration files...
```

```
OK.
```

```
-----  
Updating component-specific configuration files...
```

```
OK.
```

```

-----
Directory permissions copied...
      (
C:\NetPoint\access\webcomponent-iis\access_20040426_164541\oblix
x ) -> (
C:\NetPoint\access\webcomponent-iis\access\oblix )
-----

```

**Windows**—The path to directory security permissions is logged in obmigratenp.log.

```

-----
Migration has completed successfully!
Press <ENTER> to continue:
-----

```

9. Press Enter.

A WebGate has no license to upgrade.

This completes the upgrade sequence and the usual Oblix NetPoint ReadMe information appears, as described next.

## Finishing the WebGate Upgrade

Again, you finish the upgrade as you do with any NetPoint installation

### To finish the WebGate upgrade

1. Click Next to display an installation summary.
2. Record the details about this installation, then click Next.
3. Click Finish.
4. Apply any changes to the Web server configuration file, if needed.
5. Start the WebGate Web server.
6. Confirm that your NetPoint 7.0 environment is working properly.
7. Continue with:
  - “Confirming Failover and Load Balancing” on page 130
  - “Generating a New Shared Secret” on page 130
  - “Recompiling Plug-Ins” on page 130

# Confirming Failover and Load Balancing

After the upgrade, it is a good idea to verify that any previous failover and/or load balancing are configured as described in the *NetPoint 7.0 Deployment Guide*.

## Generating a New Shared Secret

Older NetPoint WebGates may co-exist with NetPoint 7 WebGates. However, following the upgrade, you need to generate a new shared secret.

See the *NetPoint 7.0 Administration Guide Volume 2* for details about generating a shared secret and specifying AES as the cipher.

## Recompiling Plug-Ins

To address multi-threading issues encountered with earlier compiler versions, NetPoint 7.0 components on Solaris and Linux are compiled using the GCC v3.3.2 C++ compiler.

As mentioned earlier, authentication and/or authorization plug-ins in your previous NetPoint installation are *not* migrated during the upgrade process you just completed. Following the upgrade, all authentication and authorization library plug-ins (both standard and custom) must be recompiled using GCC v3.3.2.

---

**Note:** Plug-ins implemented as executables, or those using a scripting language such as perl, do not need any changes.

---

### To use authentication and authorization plug-ins

1. Locate your authentication and authorization plug-ins.
2. Following the upgrade, recompile the plug-ins using GCC v3.3.2.
3. Complete any testing to ensure these are working properly with NetPoint 7.0.

# 6 Upgrading the Access Server SDK and Integration Components

After upgrading the COREid and Access System, you can upgrade the Access Server SDK and NetPoint integrations. This chapter provides details about:

- “Upgrading the Access Server SDK” on page 131
- “Upgrading NetPoint Integrations” on page 136

---

**Important:** When your older NetPoint integrates with Ready Realm for BEA, or NetPoint Connector for WebLogic SSPI, or NetPoint Connector for WebSphere, you need to complete the steps in “Upgrading NetPoint Integrations” on page 136 *before* you upgrade the Access Server SDK. The process is similar to upgrading other NetPoint components.

---

If your older NetPoint environment includes SAML services, you can upgrade those to Oblix SHAREid. For the utility you need to accomplish this and for documentation, contact Oblix Customer Care.

## Upgrading the Access Server SDK

The upgrade procedure for Access Server SDK is similar to those for the other NetPoint components. If you have upgraded the COREid System and optional Access System, the upgrade for this component should be familiar.

ASDK migration will be invoked automatically as the last step when upgrading components bundled with ASDK (COREid Server, NetPoint Ready Realm for BEA, and NetPoint Connector for WebSphere).

- If you accepted the automatic update, skip to “To upgrade the Access Server SDK” on page 134, step 7.

- If you declined the automatic ASDK upgrade, current ASDK configuration settings are not preserved and you must re-configure ASDK using the configureAccessGate tool, as described in the *NetPoint 7.0 Administration Guide Volume 2*.

### Task overview: Upgrading the Access Server SDK

1. Complete tasks in “Access Server SDK Prerequisites Checklist” on page 132.
2. “Starting the Access Server SDK Process” on page 133
3. “Specifying the Target Access Server SDK Directory” on page 133
4. “Upgrading the Access Server SDK” on page 134
5. “Finishing the Access Server SDK Upgrade” on page 135
6. “Recompiling C++ Programs” on page 135

---

**Note:** If you have NetPoint integrations, complete those upgrades *first* as described in “Upgrading NetPoint Integrations” on page 136.

---

The sample upgrade below starts from a NetPoint 5.2 installation. Your version may differ.

## Access Server SDK Prerequisites Checklist

Before you begin upgrading the Access Server SDK, check the tasks in Table 13 to ensure you have completed these tasks.

Failure to complete prerequisites may adversely affect your NetPoint upgrade.

**Table 13** Access Server SDK Upgrade Prerequisites Checklist

Checklist	Access Server SDK Upgrade Prerequisites
	Prepare your environment for the upgrade, as described in “Preparing to Upgrade NetPoint” on page 47.
	Upgrade the COREid System, as described in “Upgrading the COREid System” on page 67.
	Upgrade the Access System, as described in “Upgrading the Access System” on page 111.
	<p><b>With 6.5.0.x and Language Packs</b>—Ensure that any installed Language Pack and the corresponding NetPoint 7.0 Language Pack reside in the <i>component</i> source directory.</p> <p><b>Note:</b> On Unix systems, ensure the Language Pack installer has execute permissions. For details, see the <i>NetPoint 7.0 Installation Guide</i>.</p>

## Starting the Access Server SDK Process

The sample upgrade below starts from a NetPoint 5.2 installation. Your environment may vary. Should an error occur, the name of the log file that contains information about the error is identified. Skip any details that do not apply to your installation.

### To launch the Access Server SDK upgrade

1. Log in as a user with administrator privileges.
2. Locate and launch the program in your preferred mode:

#### GUI Mode

**Windows**—`NetPoint7_0_Win32_AccessServerSDK.exe`

**Solaris**—`./NetPoint7_0_sparc-s2_AccessServerSDK -gui`

#### Console Mode

**Solaris**—`./NetPoint7_0_sparc-s2_AccessServerSDK`

**Windows Command Window**—

`NetPoint7_0_Win32_AccessServerSDK.exe -console`

The Welcome screen appears.

3. Dismiss the Welcome screen by clicking Next, then continue as described in “Specifying the Target Access Server SDK Directory” on page 133.

## Specifying the Target Access Server SDK Directory

This is the same as other NetPoint components.

### To specify the target Access Server SDK directory

1. Read and accept the terms of the license agreement, then continue.
2. Respond to the next question based upon your platform. For example:
  - **Windows**—If you are logged in with administrator rights, click Next (otherwise click Cancel, log in as a user with administrator privileges, then restart the installation).
  - **Unix**—Specify the username and group that the Access Manager will use, then click Next. Typically, the defaults are “nobody.”

**Note:** For HP-UX, the defaults are WWW (username) and others (group).
3. Choose the directory where you installed the older version, then click Next and go to “Upgrading the Access Server SDK” on page 134.

## Upgrading the Access Server SDK

This procedure is the same as other upgrades.

### To upgrade the Access Server SDK

1. Select Yes to accept the upgrade, then click Next.
2. Select English from the list, ensure that a check mark appears beside English and any other languages you have installed, then click Next.
3. Confirm the languages that will be upgraded and continue.
4. Review the time-stamped source directory name, then continue.
5. Record the amount of disk space required, then start the file extraction into the target directory.

```
|-----|-----|-----|-----|
0%          25%          50%          75%          100%
```

```
|||||
```

```
Creating uninstaller...
```

```
Access Server SDK migration
```

```
Please run
```

```
/export/home/migr_52_61/asdk/AccessServerSDK/oblix/tools/
migration_tools/start_obmigratenp -c asdk -f 520 -t 610 -s /
export/home/migr_52_61/asdk/AccessServerSDK_20020821_144911 -d
/export/home/migr_52_61/asdk/AccessServerSDK -i /export/home/
migr_52_61/asdk/AccessServerSDK
```

```
to complete the migration process.
```

```
Please press Enter to Continue
```

6. **Unix**—Run the command indicated in the message, then press Enter.
7. **Either Mode**—Specify either Automatic or Confirmed, then continue.

```
Please specify the mode for migration:
```

```
'1' - Automatic (recommended)
```

```
Each step is performed automatically. No interaction from the
user is required.
```

```
'2' - Confirmed
```

```
Each step needs confirmation from the user.
```

```
Enter choice ( '1' or '2' ) : 1
```

```
The information below starts scrolling by:
```

```
-----
Starting migration ( 5.2.0 -> 6.0.0 )...
```

```
-----
Copying general configuration files...
```

```
OK.
```

```
-----
Updating message catalogs...
```

OK.

-----  
Updating parameter catalogs...

OK.

-----  
Updating component-specific configuration files...

OK.

-----  
The sequence will repeat until NetPoint 7.0 is reached, then you will see the message below.

-----  
Migration has completed successfully!

Press <ENTER> to continue :

8. Press Enter, and continue with “Finishing the Access Server SDK Upgrade” on page 135.

## Finishing the Access Server SDK Upgrade

Again, you finish the upgrade as you do with any NetPoint installation

### To finish the Access Server SDK upgrade

1. Click Next to display an installation summary.
2. Record the details about this installation, then click Next.
3. Click Finish.
4. Go to “Recompiling C++ Programs” on page 135, if appropriate for your environment.

## Recompiling C++ Programs

To address multi-threading issues encountered with earlier compiler versions, NetPoint 7.0 components on Solaris and Linux are compiled using the gcc v3.3.2 C++ compiler.

Following the upgrade, all authentication and authorization library plug-ins (both standard and custom) must be recompiled using gcc v3.3.2.

---

**Note:** Plug-ins implemented as executables, or those using a scripting language such as perl, do not need any changes.

---

### To recompile your C++ programs

1. Locate your C++ programs.
2. Following the upgrade, recompile your C++ programs using gcc v3.3.2.
3. Complete any testing to ensure these are working properly with NetPoint 7.0.

# Upgrading NetPoint Integrations

When your environment includes one or more of the following integrations, you need to complete procedures here to ensure compatibility with NetPoint 7.0:

- Ready Realm for BEA
- BEA WebLogic SSPI
- NetPoint Connector for WebSphere

The task here is similar to other NetPoint 7.0 upgrades. The integration used in this example is Ready Realm for BEA. However, the procedures are similar for other integrations listed above.

For the latest information about NetPoint integrations, see the *NetPoint 7.0 Integration Guide*.

## Task overview: Upgrading NetPoint Integrations

1. Complete tasks in “Integration Upgrade Prerequisites Checklist” on page 136.
2. “Starting the Integration Upgrade Process” on page 137
3. “Upgrading BEA Realm” on page 138
4. “Finishing the BEA Realm Upgrade” on page 141

The sample upgrade below starts from a NetPoint 5.2 installation. Your version may differ.

## Integration Upgrade Prerequisites Checklist

Failure to complete prerequisites in Table 14 may adversely affect your NetPoint upgrade.

**Table 14** Integration Upgrade Prerequisites Checklist

Checklist	Integration Upgrade Prerequisites
	Prepare your environment for the upgrade, as described in “Preparing to Upgrade NetPoint” on page 47.
	Upgrade the COREid System, as described in “Upgrading the COREid System” on page 67.
	Upgrade the Access System, as described in “Upgrading the Access System” on page 111.

**Table 14** Integration Upgrade Prerequisites Checklist

Checklist	Integration Upgrade Prerequisites
	<p><b>With 6.5.0.x and Language Packs</b>—Ensure that any installed Language Pack and the corresponding NetPoint 7.0 Language Pack reside in the <i>component</i> source directory.</p> <p><b>Note:</b> On Unix systems, ensure the Language Pack installer has execute permissions. For details, see the <i>NetPoint 7.0 Installation Guide</i>.</p>

## Starting the Integration Upgrade Process

Should an error occur, the name of the log file that contains information about the error is identified. Skip any details that do not apply to your installation.

---

**Note:** The sample upgrade below starts from a NetPoint 5.2 installation that is integrated with Ready Realm for BEA. Your environment may vary.

---

### To launch the integration upgrade

1. Log in as a user with administrator privileges.
2. Locate and launch the program in your preferred mode:

#### GUI Mode

**Windows**—`NetPoint7_0_Win32_BEA_Realm.exe`

**Solaris**—`./NetPoint7_0_sparc-s2_BEA_Realm -gui`

#### Console Mode

**Solaris**—`./NetPoint7_0_sparc-s2_BEA_Realm`

**Windows Command Window**—

`NetPoint7_0_Win32_BEA_Realm.exe -console`

The Welcome screen appears.

3. Dismiss the Welcome screen by clicking Next, then continue as described in “Upgrading BEA Realm” on page 138.
4. Accept the terms of the license agreement, then click Next to continue.
5. Respond to the next question based upon your platform. For example:
  - **Windows**—If you are logged in with administrator rights, click Next (otherwise click Cancel, log in as a user with administrator privileges, then restart the installation).
  - **Unix**—Specify the username and group that the Access Manager will use, then click Next. Typically, the defaults are “nobody.”

**Note:** For HP-UX, the defaults are WWW (username) and others (group).

You are asked to specify the target directory. The target directory for the new version must be the older source directory.

6. Choose the directory where you installed the older version, then click Next and go to “Upgrading BEA Realm” on page 138.

## Upgrading BEA Realm

This procedure is the similar to other NetPoint upgrades though it does include several steps that are unique to Ready Realm for BEA.

### To upgrade Ready Realm for BEA

1. Accept the upgrade by clicking Yes, then click Next.
2. Complete any language questions, as described earlier, then click Next.
3. Review the time-stamped source directory name, then click Next.

A status screen appears to keep you informed about the process.

4. When the installation is complete, click Next.

A configuration screen appears:

Configuration requiring NetPointWebPass details

The policy domain name under which J2EERoles should be created

weblogic

Is NetPoint WebPass protected with NetPoint WebGate?

No  
 Yes

Is the Web server on which NetPoint WebPass is installed requires browsers to connect to it in SSL mode (transmitting data via https)?

No  
 Yes

InstallShield

< Back   Next >   Cancel

5. Answer the prompts on this screen.

All J2EE\_Roles must reside in the same policy domain. By default this policy domain is called “weblogic.” This domain is configured during installation of NetPoint BEA Ready Realm. You must also know whether you are running a WebGate for WebPass. Finally, you must know if the WebPass Web server is running in SSL mode.

6. Click Next.

A second configuration screen appears.

The screenshot shows a configuration window titled "Oblix NetPoint installation". The window has a header with the Oblix logo (Identity Based Security Solutions) and the product name "Oblix NetPoint installation". The main content area is titled "Configuration for various caches" and contains three sections:

- Enable caching of list of all users.**
  - Yes
  - No
- Please specify timeout for cache of list of all users.**
  - Text input field containing "3600"
- Enable caching of list of all groups and membership information for these groups.**
  - Yes
  - No
- Please specify timeout for cache of list of all groups.**
  - Text input field containing "3600"
- Please specify the login-id of the user to be mapped to guest user of weblogic.**
  - Text input field containing "guest"

At the bottom of the window, there are three buttons: "< Back", "Next >" (highlighted with a dashed border), and "Cancel". The "InstallShield" logo is visible in the bottom left corner.

If you specify that you want a caching list of all users, this caches all NetPoint users for the NetPoint BEA Ready Realm.

7. Respond to the prompts as follows:

- If you select yes, specify the timeout for the cache of listed users. The default is 3600 seconds. That is one hour before the cache is refreshed.
- Specify whether you want a caching list of all groups and membership information for these groups. NetPoint COREid System groups are not the same as WebLogic groups.

This caches all NetPoint J2EE\_Role and lists of all users who are members of these J2EE\_Roles for the NetPoint BEA Ready Realm. Use caution when changing the cache timeouts, as this can impact system performance.

- Specify the login ID of the user to be mapped to the guest user in WebLogic. The default is guest. You can, however, map that to any valid NetPoint User using the value for his or her login ID. The value you enter for your login ID varies depending on the attribute you selected as the Login for NetPoint. See

the *NetPoint Administration Guide Volume 1* for more information on configuration object classes.

8. Click Next.

The installation GUI exits, and a command-line window appears.

```
-----  
Starting migration ( 5.2.0 -> 6.0.0 )...  
-----  
Copying general configuration files...OK.  
-----  
Updating message catalogs...OK.  
-----  
Updating parameter catalogs...OK.  
-----  
Updating component-specific configuration files...  
Please enter the absolute path to a NetPointBEARealm.properties  
file for the 5.2 installation  
(e.g: C:\webLogic\NetPointBEARealm.properties) :  
e:\weblogic\NetPointBEARealm.properties
```

9. Enter a path to the NetPointBEARealm.properties file for the old installation and click Next.

A message is printed to confirm that the upgrade was successful.

Please read the following file for additional migration information/steps:

```
E:\NetPoint5.2\NetPointBEARealm\oblix\tools\migration_tools\bea  
_migration_readme.txt
```

```
-----  
Migration has completed successfully!  
Press <ENTER> to continue:
```

---

**Note:** Read the BEA readme file. It contains information that is critical to your BEA installation.

---

10. Press Enter to complete the upgrade.

At the end of this upgrade, you are prompted to upgrade the Access Server SDK, as described in “Finishing the BEA Realm Upgrade” on page 141.

## Finishing the BEA Realm Upgrade

Again, you finish the upgrade as you do with any NetPoint upgrade

### To finish the BEA Realm upgrade

1. Click Next to display an installation summary.
2. Record the details about this installation, then click Next.
3. Click Finish.
4. Go to “Upgrading the Access Server SDK” on page 131.



# **SECTION IV: TROUBLESHOOTING**



# 7 Troubleshooting During an Upgrade

This chapter provides details about troubleshooting during or after the upgrade process. Topics include:

- “Challenge Phrase Response May Not Convert Properly” on page 145
- “LDAP Add Errors” on page 146
- “Multiple Entries with Same ParamName” on page 147

## Challenge Phrase Response May Not Convert Properly

When manually migrating data during an upgrade from NetPoint 5.2 to NetPoint 6.x, the Challenge Phrase Response for lost password management may not convert properly.

The Challenge Phrase Response is keyed to the shared secret. NetPoint 6.x generates a shared secret using RC6 encryption. The new shared secret must match the shared secret in the NetPoint 5.2 environment, which uses RC4 encryption.

---

**Note:** If the Oblix tree moved and/or a different directory server is used in the NetPoint 6.x environment, the shared secrets do not match.

---

The Challenge Phrase encryption key contains two attributes, as shown below, where Attribute: obSharedSecret is a binary attribute.

```
DN:  
cn=CPResponseEncryptionKey,obcontainerId=encryptionKey,o=Oblix,<container>
```

```
Attribute: obSecretSize  
Attribute: obSharedSecret
```

### **To ensure the Challenge Phrase Response is properly converted**

1. Use caution with this attribute, which cannot be copied and pasted.
2. Manually copy the shared secret from the NetPoint 5.2 Oblix tree to the NetPoint 6.x Oblix tree.

For more information, see “Compatibility with Previous Versions” on page 48 and “Shared Secret” on page 37.

---

**Note:** Following the upgrade, you need to generate a shared secret as described in the *NetPoint 7.0 Administration Guide Volume 2*. You must be a Master Access Administrator to create a shared secret key.

---

## **LDAP Add Errors**

If you are upgrading from NetPoint 5.2.x on Windows 2000 SP3, you may receive LDAP add errors during the upgrade. If you receive these errors, you may need to set the replication agreements for the machines.

### **To see if this problem exists in your Windows environment**

1. Install the Support Tools from the Windows 2000 CD.
2. Run the dcdiag program, optionally using the /v command-line option.
3. Under the Replication test, check for failures.
4. If failures are reported, use the next procedure to troubleshoot LDAP add errors.

### **To troubleshoot LDAP add errors in a forest**

1. Confirm that the clocks are synchronized for the domain controllers.
2. On the command line for all domain controllers in the forest, enter the following:  

```
net time /setsntp:machine name
```

Use the same machine name so there is minimal clock skew.
3. Set the group policy for replication:
  - a) Open the Users and Computers tool.
  - b) Go to Domain Controllers, right click, and select Properties.
  - c) Under the Group Policy tab, select Default Domain Controllers Policy > Computer Configuration > Windows Settings.
  - d) Select Security Settings > Local policies > User Rights Assignment.

- e) From the right hand side, select Access this computer from the network.
  - f) Add ENTERPRISE DOMAIN CONTROLLERS to the access list.
4. Do a replication using the Sites and Services tool:
- a) Go to Sites > *Default-First-site-name* > Servers.
  - b) Select the server name.
  - c) Select NTDS settings.
  - d) Right click <automatically generated> on the right hand side, and select replicate now.
  - e) Enter dcdiag again on the command line to see if the replication test is now working.

After performing these steps, the schema migration should work properly.

## Multiple Entries with Same ParamName

When upgrading from NetPoint 6.0 to NetPoint 7.0, multiple entries with the same ParamName in mime\_types (.xml and .lst) files are not upgraded:

```
COREid_install_dir/identity/oblix/apps/admin/bin/mime_types.xml
COREid_install_dir/identity/oblix/apps/admin/bin/mime_types.lst
WebPass_install_dir/identity/oblix/apps/admin/bin/mime_types.xml
WebPass_install_dir/identity/oblix/apps/admin/bin/mime_types.lst
```

For example, if your original mime\_types.xml file in:

```
COREid_install_dir/identity/oblix/apps/admin/bin/mime_types.xml
```

contains the following NameValPair ParamNames:

```
<NameValPair ParamName="application/postscript" value="ai1"/>
<NameValPair ParamName="application/postscript" value="eps1"/>
<NameValPair ParamName="application/postscript" value="ps1"/>
```

the following entries will occur in the newly upgraded file:

```
<NameValPair ParamName="application/postscript" value="ai1"/>
(CORRECT)
<NameValPair ParamName="application/postscript" value="eps"/>
(INCORRECT)
<NameValPair ParamName="application/postscript" value="ps"/>
(INCORRECT)
```

For existing user entries, the MIME type is stored along with the user entry in the directory. As a result of the here is no impact on existing user entries and NetPoint installations after the upgrade.

---

**Note:** You may remove MIME types that are no longer needed or add new MIME types to be associated with the particular attribute for further use by editing the mime\_types files discussed above for the COREid Server and WebPass.

---

# **SECTION V: APPENDICES AND INDEX**



# A Introducing NetPoint Upgrade Utilities

This chapter provides information about the utilities that are called into operation during the upgrade process.

Topics in this chapter include:

- “About Upgrades and Migration” on page 152
- “Primary Utility: obmigratenp” on page 153
- “File Upgrade: obmigratefiles” on page 154
- “Message and Parameter Upgrade: obmigrateparamsg” on page 157
- “Schema Upgrade: obmigrateds” on page 160
- “Data Upgrade: obmigratedata” on page 162
- “Web Server Upgrade: obmigratews” on page 165
- “License Upgrade: obmigratelicense” on page 166
- “Component-Specific Upgrades” on page 166

---

**Note:** Running the tools manually is *not* recommended. Oblix strongly recommends that you complete the upgrade as described in “Upgrading the COREid System” on page 67 and “Upgrading the Access System” on page 111.

---

# About Upgrades and Migration

As discussed earlier, the term *upgrade* refers to the process of changing from one major version (*X*) of NetPoint to a later major version (*Y*) of NetPoint. The term *migration* is typically used for the process you must complete to push a NetPoint implementation from a test environment into a production environment. Despite these distinctions, you will see the term *migration* used in path names, tools (also known as *utilities*), on-screen messages, and in discussions below.

If directory names include spaces, a program may not be invoked properly unless you include quotation marks around each path name in any command you use. For example:

```
obmigratenp.exe -c ois -f 650 -t 700 -s  
"C:\Program Files\NetPoint\identity_20040519_134931"  
-d "C:\Program Files\NetPoint\identity"  
-i "C:\Program Files\NetPoint\identity"
```

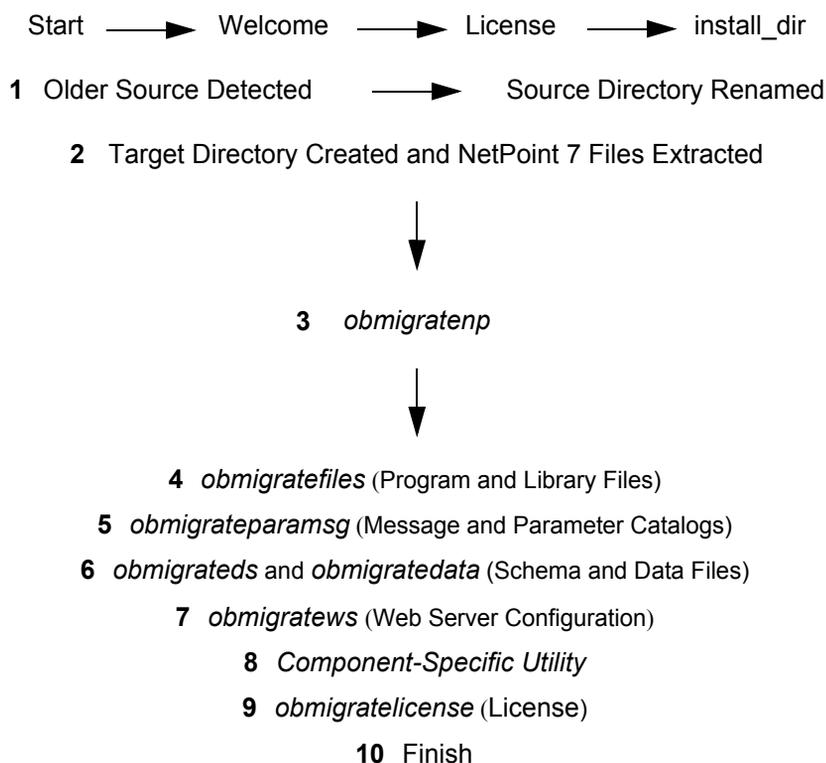
---

**Important:** If your directory names include spaces, be sure to include quotation marks around each path name in any command you use.

---

Figure 2 illustrates the process and highlights a number of utilities used and discussed in this chapter. See also, “About the Upgrade Process” on page 26.

**Figure 2** Events that Occur When You Initiate an Upgrade



## Primary Utility: obmigratenp

The main utility driving an *X* to *Y* upgrade is *obmigratenp*. This utility orchestrates the entire upgrade process for a component from a given major version *X* to a given major version *Y*, as described in Table 15.

**Table 15** The Upgrade Driver *obmigratenp*

Description	Function
<i>obmigratenp.exe</i>	<ul style="list-style-type: none"> <li>Decides and executes any intermediate incremental steps needed to reach a given target version for the component.</li> <li>Invokes other utilities to carry out functions to upgrade the specific component from major version <i>X</i> to major version <i>Y</i>.</li> </ul>
Path	<i>Component_install_dir</i> \identity\access\oblix\tools\migration_tools\obmigratenp.
Command Line	Run <i>obmigratenp.exe</i> without any parameters. This command prints usage along with the meaning of all input parameters.

**Table 15** The Upgrade Driver obmigratenp

Description	Function
Other Files Used	<ul style="list-style-type: none"> <li>• Invokes Language Pack extraction to upgrade the default language, determine which additional languages to upgrade and which will not be upgraded.</li> <li>• Reads the message catalog below, to print messages to the console or while writing to a log file:  <i>_install_dir\identity\access\oblix\tools\migration_tools\obmigratenpmsg.lst</i></li> <li>• Reads the parameter file below, which includes a section for every component and every x to y upgrade:  <i>_install_dir\identity\access\oblix\tools\migration_tools\obmigratenpparams.lst</i></li> </ul> <p>You can specify whether you want to have a certain type of upgrade for that component by setting flags to “true” or “false” to invoke or skip that function, respectively. When a flag is absent in this file, its value is presumed to be false.</p> <p><b>Flags include:</b></p> <ul style="list-style-type: none"> <li>• kMigrateWS decides whether obmigratews.exe is executed.</li> <li>• kMigrateData and kMigrateSchema determines if obmigrateds.exe. Setting either value to true invokes obmigrateds.exe.</li> <li>• kMigrateLicense decides whether obmigratelicence.exe is executed.</li> <li>• kMigrateASDK decides whether re-invocation of obmigratenp.exe is called for the Access Server SDK upgrade.</li> </ul>
Output	This utility drives the overall upgrade process by invoking various utilities and generating the log files described next.
Log File	<p>Generates the log file:  <i>install_dir\identity\access\oblix\tools\migration_tools\obmigratenp.log</i>, which typically contains the information below:</p> <ul style="list-style-type: none"> <li>• Component name, source, and target directory</li> <li>• Command line used to invoke each upgrade utility</li> <li>• Return status of each upgrade utility</li> <li>• Other error and informative messages</li> </ul>

## File Upgrade: obmigratefiles

obmigratefiles is called by the obmigratenp multiple times to carry out file and folder related upgrades.

File upgrades involve copying required files from the renamed source directory to the target installation directory. The obmigratenp tool calls the obmigratefiles tool, which works on a given map file that specifies:

- The files to be copied
- From which source
- To which target

For more information, see the process overview below.

## Process overview: **obmigratenp** calls **obmigratefiles**

1. **obmigratefiles** creates a folder of original files in the source directory in the two following circumstances, because the version 5.2.0 installer (and the 6.0.0 installer on Solaris) does not create a folder of original files:

- When you are upgrading from NetPoint 5.2.0
- When you are upgrading on Solaris from version 6.0.0

The map file that is used is *component\_Version\_orig\_files.lst*. For example:

```
ois_520_orig_files.lst  
or  
ois_600_orig_files.lst
```

This folder is further used for the message and parameter upgrade.

2. **obmigratefiles** creates a folder of original files for the current version in the current installation directory using the map file *component\_Version\_orig\_files.lst*.

For example:

```
ois_600_orig_files.lst
```

The next time an upgrade occurs from this version to a newer version, the folder of original files for this version will be available to use during the message and parameter upgrade.

3. **obmigratefiles** copies config files, SSL setup-related files, and the like from the renamed source directory to the target installation directory.

In this case, **obmigratefiles** works on a given *component\_base\_files*. For example:

```
ois_base_files.lst  
am_base_files.lst  
and so on
```

Base files contain the list of configuration files required for the upgrade. Typically, configuration files do not change. Files and directories in the base file are copied during the upgrade, including failover-related files. Any file and directory clean up occurs as needed. For example, if a particular NetPoint version deletes a file or introduces additional files, these will be treated appropriately. Suppose a file added in NetPoint 6.0 is not required in 6.5. In this case, the file will be deleted from the later installation.

- a) Upgrade all files listed in the base file.

- b) For all source versions from the base file version to the current source version, upgrade files listed in *component\_source-version\_files.lst* files.

For example, consider upgrading from NetPoint 5.2 to 7.0. Version-specific files exist for NetPoint 6.0 and 6.5. In this case, step 2 copies files listed in *ois\_610\_files.lst* and *ois\_650\_files.lst*. However, when upgrading from NetPoint 6.5 to 7.0, the current source version is the base file version, therefore step 2 doesn't occur.

---

**Note:** In case a deleted file exists in the base file, the deleted file will be removed from the base file list itself. Even if it existed in the earlier NetPoint version, it is no longer needed in the later version.

---

Additionally, version-specific files contain changes specific to only a particular *component\_source-version\_files.lst*; information that needs to be copied if you are upgrading from that version and there are some deviations. For example, suppose a file is added in NetPoint 6.0 and 6.5. In this case, you need files for:

*ois\_600\_files.lst*  
*ois\_650\_files.lst*

---

**Note:** If NetPoint v6.1 did not require any changes, *ois\_610\_files.lst* is not required.

---

Table 16 provides more information

**Table 16** File Upgrades with obmigratefiles

Description	Function
obmigratefiles.exe	<ul style="list-style-type: none"> <li>• Reads a given file for a specific component.</li> <li>• Copies files from the source directory to the target directory according to the list specified in the file.</li> <li>• Processes version-specific files as needed.</li> </ul>
Path	<i>Component_install_dir</i> \identity\access\oblix\tools\migration_tools\obmigratefiles.
Command Line	<p>Run obmigratefiles.exe without any parameters. This command prints usage along with the meaning of all input parameters.</p> <p><b>Options include:</b></p> <ul style="list-style-type: none"> <li>-m                Specifies name of map file to use</li> <li>-s [<i>source_dir</i>] Specifies the source directory.</li> <li>-d [<i>target_dir</i>] Specifies the target directory.</li> <li>-i                Specifies the install directory.</li> <li>-l                Specifies the language for Message migration.</li> <li>-p                Specifies the flag for Language Packs.</li> </ul>

**Table 16** File Upgrades with obmigratefiles

Description	Function
Other Files Used	To print messages to the console or while writing to a log file, reads the message catalog below: <code>_install_dir\identity\access\oblix\tools\migration_tools\obmigratefilesmsg.lst .</code>
Output	This utility copies files based on input parameters.
Log File	Generates the log file: <code>install_dir\identity\access\oblix\tools\migration_tools\obmigratefiles.log</code> , which typically contains the information below: <ul style="list-style-type: none"><li>• Parameters passed to this utility.</li><li>• Status of every copy-instruction mentioned in used map file.</li><li>• Error messages, if any.</li></ul>

## Message and Parameter Upgrade: obmigrateparamsg

The `obmigratenp` utility calls the `obmigrateparamsg` utility with the required file for a specific component.

**The Message Upgrade Process**—Allows you to upgrade older messages with new messages and add new messages for the later version. A customized message will be retained. However, if the number of parameters in the message has changed, only the new message is retained. For example:

**Original Message**—“Cannot copy file %1”

**Customized Message**—“Failed copy operation for file %1”

**New Message**—“Cannot copy file %1 from %2 to %3”

---

**Note:** In the example above, the new message is retained.

---

**The Parameter Upgrade Process**—Parameter upgrades occur in parameter files. When you have modified parameters in your older version of NetPoint and the new version has modified the same parameter, the `obmigrateparamsg` utility overwrites the older changes. See the log file for changes.

**Earlier NetPoint Versions**—Previous versions of NetPoint include files named as `component_FromVersion_to_ToVersion_msg|param.lst`. For example:

```
Component_install_dir\identity\access\oblix\tools\migration_tools
ois_520_to_600_msg.lst
ois_520_to_600_param.lst
```

use of `obmigrateparamsg` was an iterative process with upgrades occurring for each incremental release.

**NetPoint 7.0**—The migration of parameter and message catalogs is performed in a single process. NetPoint 7.0 includes files named `component_version_paramsg_files.lst`. For example:

```
am_700_files.lst
```

Optional hidden parameters from the older version are copied into the target. Hidden parameters are those which NetPoint supports and which you may want to add.

With NetPoint 7.0, a path within the `paramsg_files.lst` file includes a language ID to handle the multi-language feature available as of NetPoint 6.5. This looks like the example shown below:

```
file:/oblix/lang/%lang%/frontpagemsg.lst
```

When you specify the `-p` option, the `obmigrateparamsg` tool upgrades only message catalogs of the specified languages. The installer detects the language/ language of older version as per the following decision and pass it to `obmigratenp`:

- **For 5.2, 6.0 & 6.1**—Look into `globalparams.xml.lst` file for the language tag. For example, `language:En_US`.
- **For 6.5 and Later**—Look in `obnls.lst` for the list of languages.

Table 17 provides additional information about `obmigrateparamsg`.

**Table 17** Message and Parameter Upgrades with `obmigrateparamsg`

Description	Function
<code>obmigrateparamsg.exe</code>	<ul style="list-style-type: none"> <li>• Reads a given file for a specific component.</li> <li>• Processes given message/parameter files in the <code>.lst</code> file.</li> </ul> <p>For every message/parameter file, <code>obmigrateparamsg</code>:</p> <ul style="list-style-type: none"> <li>• Reads the old version message/parameter file from the renamed source directory.</li> <li>• Modifies the message/parameter file as needed.</li> <li>• Writes the modified file to the target directory where the new installer has extracted files.</li> </ul>
Path	<code>Component_install_dir\identity\access\oblix\tools\migration_tools\obmigrateparamsg</code>

**Table 17** Message and Parameter Upgrades with obmigrateparamsg

Description	Function
Command Line	<p>Run obmigrateparamsg.exe with the following parameters:</p> <pre>obmigratparamsg -s <i>source_dir</i> -d <i>target_install_dir</i> -f <i>component_oldversion_paramsg_files.lst</i> -t &lt; <i>component_newversion_paramsg_files.lst</i>&gt; -l &lt;<i>langids</i>&gt; [-p]</pre> <p><b>Where</b></p> <ul style="list-style-type: none"> <li>-s <i>source_dir</i> identifies the installation directory of the older NetPoint version.</li> <li>-d <i>target_install_dir</i> identifies installation directory of latest version of NetPoint.</li> </ul> <p><b>Note:</b> The <i>target_install_dir</i> can be on a different machine from <i>source_dir</i>.</p> <ul style="list-style-type: none"> <li>-f <i>component_oldversion_paramsg_files.lst</i></li> <li>-t <i>component_newversion_paramsg_files.lst</i></li> <li>-l <i>langids</i></li> </ul> <p>[-p] This parameter signifies the message catalog upgrade is to happen only for files under the /lang/<i>langTag</i> folder. To facilitate the migration of only message catalogs of the specified languages, this is used by Language Pack installers.</p>
Other Files Used	<p>To print messages to the console or while writing to a log file, reads the message catalog below:</p> <pre><i>install_dir</i>\identity\access\oblix\tools\migration_tools\obmigrateparamsgmsg.lst</pre>
Output	<p>This utility upgrades message/parameter files. The log contains all parameters forcefully overwritten/retained.</p>
Log File	<p>Generates the log file:</p> <pre><i>install_dir</i>\identity\access\oblix\tools\migration_tools\obmigrateparamsg.log,</pre> <p>which typically contains the information below:</p> <ul style="list-style-type: none"> <li>Parameters passed to this utility.</li> <li>Name of every parameter/message file mentioned in input file and actions taken on this file. For example, replaced the existing parameter/message value with new value, added/deleted parameter/message, and so on.</li> <li>Error messages, if any.</li> </ul> <p><b>Note:</b> When you modify a parameter/message in the older version and the current version includes a new parameter/message, you may want to look at these values because obmigrateparamsg has made decisions that you should be aware of.</p>

When upgrading from NetPoint 6.0 to NetPoint 7.0, multiple entries with the same ParamName in mime\_types (.xml and .lst) files are not upgraded:

```
COREid_install_dir/identity/oblix/apps/admin/bin/mime_types.xml
COREid_install_dir/identity/oblix/apps/admin/bin/mime_types.lst
WebPass_install_dir/identity/oblix/apps/admin/bin/mime_types.xml
WebPass_install_dir/identity/oblix/apps/admin/bin/mime_types.lst
```

For example, if your original mime\_types.xml file in:

```
COREid_install_dir/identity/oblix/apps/admin/bin/mime_types.xml
```

contains the following NameValPair ParamNames:

```
<NameValPair ParamName="application/postscript" value="ai1"/>
<NameValPair ParamName="application/postscript" value="eps1"/>
<NameValPair ParamName="application/postscript" value="ps1"/>
```

the following entries occur in the newly upgraded file:

```
<NameValPair ParamName="application/postscript" value="ai1"/>
(CORRECT)
<NameValPair ParamName="application/postscript" value="eps"/>
(INCORRECT)
<NameValPair ParamName="application/postscript" value="ps"/>
(INCORRECT)
```

For existing user entries, the MIME type is stored along with the user entry in the directory. As a result of the here is no impact on existing user entries and NetPoint installations after the upgrade.

---

**Note:** You may remove MIME types that are no longer needed or add new MIME types to be associated with the particular attribute for further use by editing the mime\_types files discussed above for the COREid Server and WebPass.

---

## Schema Upgrade: obmigrateds

Typically, the NetPoint schema is enhanced for each major NetPoint version. For example, when COREid Server functionality is enhanced it may refer to a greater number of schema attributes and object classes than previous versions.

During your upgrade, any differences between an older schema version and the next version are uploaded to your directory server using the required schema ldif file for your specific directory server. Every schema ldif file includes entries to modify the schema based on the difference between two versions. Schema ldif files use the following naming convention:

*DataType\_FromVersion\_to\_ToVersion\_schema\_DsType.ldif*

For example:

```
osd_650_to_700_schema_ad.ldif
policy_650_to_700_schema_nds.ldif
and so on
```

and reside in the directory below with various upgrade map files:

*Component\_install\_dir\identity\access\oblix\tools\migration\_tools*

During the upgrade, the obmigratenp utility reads the file below and calls obmigrateds to internally upload schema files when the kMigrateData kMigrateSchema flag is set to true in:

```
install_dir\identity\access\oblix\tools\migration_tools\obmigratenpparams.lst
```

Schema upgrades occur incrementally. This means that the older version is upgraded to the next-latest version, the resulting schema is upgraded to the next-latest version, and so on until all interim schema changes between your original version and the latest version are completed. Obsolete schema elements are deleted during the upgrade.

A schema upgrade may occur only with NetPoint components that interface with the directory server: COREid Server, Access Manager, and Access Server. Table 18 provides more information about obmigrateds.

**Table 18** Schema Upgrades with obmigrateds

Description	Function
obmigrateds.exe	<ul style="list-style-type: none"> <li>• Reads configuration files, assesses Oblix schema data (OSD), and determines possible directory servers with which NetPoint is communicating. For example, the directory server containing Oblix configuration (NetPoint) data, the directory server containing user data, and the directory server containing policy data.</li> <li>• Gathers the information required to connect and bind to those directory servers.</li> <li>• Locates the schema file for the specific data type, directory type, and the <i>from</i> and <i>to</i> versions, then uploads the appropriate Idif file to the directory server using the ds_conf_update.exe utility.</li> <li>• Using information read from the OSD (for example, 'o=oblix, ..'node) and configuration files, obmigrateds creates an input map file to be passed to obmigratedata.exe.</li> </ul> <p>For example:</p> <pre>data_FromVersion_to_ToVersion_osd.lst -- for osd, policy, and workflow upgrades data_FromVersion_to_ToVersion_user.lst -- for user data upgrade</pre> <ul style="list-style-type: none"> <li>• obmigrateds upgrades Oblix data using obmigratedata, which creates an output data file, then deletes the Oblix tree from the directory and uploads this output data file to the directory server. For more information, see “Data Upgrade: obmigratedata” on page 162</li> <li>• obmigrateds upgrades user data using obmigratedata.</li> </ul> <p><b>Note:</b> Starting with NetPoint version 6.0, and later, the upgrade includes user entries for the “ChallengeResponsePhrase” value with an RC6 encryption scheme. Earlier NetPoint versions used an RC4 encryption scheme for the same purpose.</p>
Path	<i>Component_install_dir</i> \identity\access\oblix\tools\migration_tools\obmigrateds
Command Line	Run obmigrateds.exe without any parameters. This command prints usage along with the meaning of all input parameters.

**Table 18** Schema Upgrades with obmigrateds

Description	Function
Other Files Used	<ul style="list-style-type: none"> <li>• Reads the message catalog here to print messages to the console or while writing to a log file: <i>install_dir\identity\access\oblix\tools\migration_tools\obmigratedsmsg.lst</i></li> <li>• Reads the parameter file below, gathers data, and determine which flags are set and which type of upgrade to perform: <i>install_dir\identity\access\oblix\tools\migration_tools\obmigratedsparams.lst</i>.</li> </ul> <p><b>Note:</b> obmigratedsparams includes a section for every component. Within every section is a subsection for the upgrade from x to y. For example, the obmigratedsparams section for 'ois' contains a subsection '520_to_600' that contains flags that determine which of the following upgrades to complete:</p> <pre>-- osd/user schema upgrade -- osd/policy/user data upgrade</pre> <p>Each subsection also includes path and filenames (LST or XML) from which obmigrateds can get details about directory servers with OSD, policy data, or user data.</p>
Output	This utility carries out schema and data migration by invoking appropriate utilities.
Log File	Generates the log file: <i>install_dir\identity\access\oblix\tools\migration_tools\obmigrateds.log</i>

## Data Upgrade: obmigratedata

When the newer version of NetPoint includes a new NetPoint-specific data organization or values, data upgrades occur in much the same way as the schema upgrade. The delta between the old and new versions is determined and the appropriate data ldifs are provided so they can be uploaded to the directory server. An incremental upgrade is performed between each major version and the next major version until you have completed the upgrade to NetPoint 7.0. After the upgrade, NetPoint can identify and use the data present in the directory and run smoothly.

A data upgrade may occur only with NetPoint components that interface with the directory server: COREid Server, Access Manager, and Access Server.

Files that contain both object-class and attribute mappings are provided. The object and attribute mapping files reside in:

*install\_dir\identity\access\oblix\tools\migration\_tools\obmigratedata*

The object-class mapping filename is *oc\_FromVersion\_to\_ToVersion\_map.lst*. For example:

oc\_520\_to\_600\_map.lst  
oc\_610\_to\_650\_map.lst  
oc\_650\_to\_700\_map.lst

---

**Note:** There is no data migration from NetPoint 6.0.0 v6.1.0. For this reason, there is no `oc_600_to_610_map.lst` file.

---

The attribute mapping filenames appear as:  
at `_FromVersion_to_ToVersion_map_DataType.lst`. For example:

- at `_520_to_600_map_osd.lst`—Oblix schema data
- at `_520_to_600_map_policy.lst`—NetPoint policy data
- at `_520_to_600_map_user.lst`—User data
- at `_520_to_600_map_wf.lst`—Workflow data

as well as files for 600 to 650 and 650 to 700. For example:

- at `_600_to_650_map_item.lst`
- at `_650_to_700_map_item.lst`

where *item* refers to *osd*, *policy*, *user*, or *workflow* attribute mapping files.

The `obmigrateds` utility invokes `obmigratedata` for data upgrading and passes a map file with initial information—OSD directory, bind DN, password, `personoc`, `groupoc`, and the like—to `obmigratedata`. This map file uses the naming convention:

- data `_FromVersion_to_ToVersion_osd.lst`
- data `_FromVersion_to_ToVersion_user.lst`

For example:

- data `_520_to_600_osd.lst`
- data `_520_to_600_psc.lst`
- data `_610_to_650_osd.lst`
- data `_610_to_650_psc.lst`
- data `_650_to_700_osd.lst`
- data `_650_to_700_psc.lst`

This is because the upgrade is carried out in steps. For example, if you start from version 520, data is first upgraded from 520 to 600, then from 610 to 650, and finally from 650 to 700.

---

**Note:** There is no data upgrade from 600 to 610.

---

See Table 19 for more information.

**Table 19** Data Upgrades with obmigratedata

Description	Function
obmigratedata.exe	<ul style="list-style-type: none"> <li>Accepts a file giving basic required information as input for the target directory server (connectivity details, person and group object classes, and so on). The input file instructs the utility about the file used to obtain object-class mapping.</li> </ul> <p><b>Note:</b> The object class mapping file identifies the file to be used for attribute-level mapping.</p> <ul style="list-style-type: none"> <li>Reads mapping files, connects to given directory, reads existing data, processes this data based on instructions in the object-class and attribute-mapping files, and creates an output ldif.</li> </ul> <p><b>Note:</b> All mappings file must be present in <i>install_dir\identity\access\oblix\tools\migration_tools\obmigratedata</i></p>
Path	<i>Component_install_dir\identity\access\oblix\tools\migration_tools\obmigratedata</i>
Command Line	<p>Run obmigratedata.exe with the following parameters.</p> <pre>obmigratedata -f ConfigFileName -i install_dir</pre> <p>where <i>ConfigFileName</i> is the full path of a file that provides all initially required information so this utility can connect to a given directory server. Additionally, this file contains other information such as the object-class mapping file name, log file name, name of the file giving a list of binary attributes, and so on.</p> <p>Also: <i>install_dir</i> is the target installation directory for this component.</p>
Other Files Used	<ul style="list-style-type: none"> <li>The object class mapping file defined in the input config file</li> <li>The attribute mapping file(s) as mentioned in the object class mapping file</li> <li>The file listing binary attributes (file name is mentioned in the input config file)</li> <li>The message catalog below, while printing to the console or writing to a file: <i>install_dir\identity\access\oblix\tools\migration_tools\obmigratedata\obmigratedatamsg.lst</i></li> </ul>
Output	This utility creates an output ldif file whose name is mentioned in the input config file.
Log File	<p>Generates the log file: <i>install_dir\identity\access\oblix\tools\migration_tools\obmigratedata</i></p> <p>The name of the log file is mentioned in the input config file. For example, <i>migration_log_file.lst</i>, which typically contains:</p> <ul style="list-style-type: none"> <li>Old and new DNs of entries migrated by this utility</li> <li>Success/failure messages for selected migration</li> <li>Other error messages if any</li> </ul>

# Web Server Upgrade: obmigratews

With NetPoint Access Manager, WebPass, and WebGate enhancements may come the need for changes in the supporting Web server configuration file. During the upgrade process, you are asked about automatic Web server configuration file updates. Oblix recommends that you update the Web server configuration file automatically, though you may do this manually following the upgrade.

The obmigratenp utility calls obmigratews to complete the Web server configuration update by passing a map file and other parameters to obmigratews. The map file is named and located as follows:

```
Component_FromVersion_to_ToVersion_ws_WebserverType.lst
install_dir\identity\access\oblix\tools\migration_tools
```

For example,

```
am_520_to_600_ws_nsapi.lst
```

Also, obmigratenp copies the file generated by obmigratews to the original Web server configuration file. Thus the Web server configuration file gets the required changes for the newer version of the component. See Table 20 for more information.

**Table 20** Web Server Configuration Upgrades with obmigratews

Description	Function
obmigratews.exe	<ul style="list-style-type: none"> <li>• Reads the input map file, modifies content of this file using input values of old and new installation directories.</li> <li>• Modifies the given input Web server configuration file according to the content created using the map file.</li> <li>• Writes the Web server configuration to a new output file whose name is passed to this utility as one of the parameters.</li> </ul>
Path	<i>Component_install_dir\identity\access\oblix\tools\migration_tools\obmigratews</i>
Command Line	Run obmigratews without any parameters. This command prints usage along with the meaning of all input parameters.
Other Files Used	To print messages to the console or while writing to a log file, reads the message catalog below: <i>_install_dir\identity\access\oblix\oblix\tools\migration_tools\obmigratewsmsg.lst</i>
Output	This utility creates a modified version of the Web server configuration file.
Log File	Generates the log file: <i>install_dir\identity\access\oblix\tools\migration_tools\obmigratews.log</i>

# License Upgrade: obmigratelicense

The license differs between each major NetPoint release. You cannot use the license from an older version with a newer version of NetPoint. During your upgrade to a new version of NetPoint, the existing license is modified so that it can be used with the newer version of NetPoint.

To accomplish this, obmigratenp calls obmigratelicense. See Table 21 for more information.

**Table 21** NetPoint License Upgrade with obmigratelicense

Description	Function
obmigratelicense.exe	<ul style="list-style-type: none"><li>• Reads the license in the directory below. <i>install_dir\identity\access\oblix\config\LICENSE</i></li><li>• If this file does not exist, one is generated for 60 days and 100 users</li><li>• If the license file already exists, this utility modifies the license file to remove publisher-related entries and to change the expiry date, other keys, and related items.</li></ul>
Path	<i>Component_install_dir\identity\access\oblix\tools\migration_tools\obmigratelicense</i>
Command Line	Run obmigratelicense without any parameters. This command prints usage along with the meaning of all input parameters.
Other Files Used	To print messages to the console or while writing to a log file, reads the message catalog below: <i>install_dir\identity\access\oblix\oblix\tools\migration_tools\obmigratelicensmsg.lst</i>
Output	This utility creates either a demo license for 60 days and 100 users or an upgraded license that can be used with upgraded product.
Log File	Generates the log file: <i>install_dir\identity\access\oblix\tools\migration_tools\obmigratelicense.log</i>

## Component-Specific Upgrades

Every component needs special treatment during the upgrade to accommodate specific registry changes, modifying specific files, and the like. As a result, obmigratenp.exe calls the appropriate utility depending upon the component selected for the upgrade. Typical actions taken during this sequence include:

- Copy/modify specific files
- Modify existing component specific registry entry
- Copy specific plug-ins

Each component-specific utility is described below:

- “COREid Server: obMigrateNetPointOis” on page 167
- “WebPass: obMigrateNetPointWP” on page 168
- “Access Manager: obMigrateNetPointAM” on page 168
- “Access Server: obMigrateNetPointAAA” on page 169
- “WebGate: obMigrateNetPointWG” on page 170
- “Access Server SDK: obMigrateNetPointASDK” on page 170
- “Ready Realm for BEA: obMigrateNetPointBEA” on page 171

## COREid Server: obMigrateNetPointOis

To accomplish a COREid Server upgrade, the obmigratenp tool calls the obMigrateNetPointOis tool. See Table 22 for more information.

**Table 22** NetPoint COREid Server Upgrade with obMigrateNetPointOis

Description	Function
obMigrateNetPointOis.exe	<ul style="list-style-type: none"> <li>• Upgrades the existing registry entry for the COREid Server to reflect the newer NetPoint version.</li> <li>• Modifies the PPP catalog file, if required, to ensure it is usable with the newer NetPoint version.</li> <li>• Encrypts the password written in password.xml, when upgrading from NetPoint 5.2.</li> <li>• Deletes <i>install_dir\identity\oblix\tools\setup\uninstall_info.txt</i>, if present ,and creates it again with proper information on Windows systems.</li> </ul>
Path	<i>install_dir\identity\oblix\tools\migration_tools\obMigrateNetPointOis</i>
Command Line	Run obMigrateNetPointOis without any parameters. This command prints usage along with the meaning of all input parameters.
Other Files Used	To print messages to the console or while writing to a log file, reads the message catalog below: <i>install_dir\identity\oblix\oblix\tools\migration_tools\obMigrateNetPointOismsg.lst</i>
Output	<ul style="list-style-type: none"> <li>• Modifies the registry entry for the COREid Server.</li> <li>• Modifies the PPP catalog file.</li> <li>• Modifies password.xml.</li> <li>• Creates proper uninstall_info.txt.</li> </ul>
Log File	Generates the log file: <i>install_dir\identity\oblix\tools\migration_tools\obMigrateNetPointOis.log</i> . Typically this file contains: <ul style="list-style-type: none"> <li>• Parameters passed to this utility.</li> <li>• Status of each action taken by this utility.</li> </ul>

## WebPass: obMigrateNetPointWP

To accomplish a WebPass upgrade, obmigratenp calls obMigrateNetPointWP. See Table 23 for more information.

**Table 23** NetPoint WebPass Upgrade with obMigrateNetPointWP

Description	Function
obMigrateNetPointWP.exe	<ul style="list-style-type: none"><li>Upgrades the existing registry entry for the WebPass to reflect the newer NetPoint version.</li><li>When upgrading from NetPoint 5.2, encrypts the password written in password.xml.</li><li>On Windows systems, deletes the file below, if present, and creates it again with proper information: <i>install_dir\identity\oblix\tools\setup\uninstall_info.txt</i></li></ul>
Path	<i>install_dir\identity\oblix\tools\migration_tools\obMigrateNetPointWP</i>
Command Line	Run obMigrateNetPointWP without any parameters to print usage and the meaning of all input parameters.
Other Files Used	To print messages to the console or while writing to a log file, reads the message catalog below: <i>install_dir\identity\oblix\tools\migration_tools\obMigrateNetPointWPmsg.lst</i>
Output	<ul style="list-style-type: none"><li>Modifies the registry entry for the WebPass.</li><li>Modifies password.xml.</li></ul>
Log File	Generates the log file: <i>install_dir\identity\oblix\tools\migration_tools\obMigrateNetPointWP.log</i>

## Access Manager: obMigrateNetPointAM

To accomplish an Access Manager upgrade, obmigratenp calls obMigrateNetPointAM. See Table 24 for more information.

**Table 24** NetPoint Access Manager Upgrade with obMigrateNetPointAM

Description	Function
obMigrateNetPointAM.exe	<ul style="list-style-type: none"><li>Upgrades the existing registry entry for the Access Manager to reflect the newer NetPoint version.</li><li>When upgrading from NetPoint 5.2, encrypts the password written in password.lst.</li><li>Modifies <i>install_dir\access\oblix\data\common\ldapuserdbparams.lst</i> if required.</li><li>Copies custom plug-ins from renamed source directory to target directory.</li></ul>
Path	<i>install_dir\access\oblix\tools\migration_tools\obMigrateNetPointAM</i>
Command Line	Run obMigrateNetPointAM without parameters to print usage.

**Table 24** NetPoint Access Manager Upgrade with obMigrateNetPointAM

Description	Function
Other Files Used	To print messages to the console or while writing to a log file, reads the message catalog below: <i>install_dir</i> \access\oblix\oblix\tools\migration_tools\obMigrateNetPointAMmsg.lst
Output	<ul style="list-style-type: none"> <li>• Modifies the registry entry for the Access Manager.</li> <li>• Modifies password.xml.</li> <li>• Copies custom plug-ins to target directory.</li> </ul>
Log File	Generates the log file: <i>install_dir</i> \access\oblix\tools\migration_tools\obMigrateNetPointAM.log

## Access Server: obMigrateNetPointAAA

To accomplish an Access Server upgrade, the obmigratenp utility calls the obMigrateNetPointAAA utility. See Table 25 for more information.

**Table 25** NetPoint Access Server Upgrade with obMigrateNetPointAAA

Description	Function
obMigrateNetPointAAA.exe	<ul style="list-style-type: none"> <li>• Upgrades the existing registry entry for the Access Server to reflect the newer NetPoint version.</li> <li>• When upgrading from NetPoint 5.2, encrypts the password written in password.lst.</li> <li>• Copies custom plug-ins from renamed source directory to target directory.</li> </ul>
Path	<i>install_dir</i> \access\oblix\tools\migration_tools\obMigrateNetPointAAA
Command Line	Run obMigrateNetPointAM without parameters to print usage.
Other Files Used	To print messages to the console or while writing to a log file, reads the message catalog below: <i>install_dir</i> \access\oblix\tools\migration_tools\obMigrateNetPointAAAmsg.lst
Output	<ul style="list-style-type: none"> <li>• Modifies the registry entry for the Access Server.</li> <li>• Modifies password.xml.</li> <li>• Copies custom plug-ins to target directory.</li> </ul>
Log File	Generates the log file: <i>install_dir</i> \access\oblix\tools\migration_tools\obMigrateNetPointAAA.log.

## WebGate: obMigrateNetPointWG

To accomplish an WebGate upgrade, obmigratenp calls obMigrateNetPointWG. See Table 26 for more information.

**Table 26** NetPoint WebGate Upgrade with obMigrateNetPointWG

Description	Function
obMigrateNetPointWG.exe	<ul style="list-style-type: none"><li>Upgrades the existing registry entry for the WebGate to reflect the newer NetPoint version.</li><li>Encrypts the password written in password.lst, when upgrading from NetPoint 5.2.</li></ul>
Path	<i>install_dir</i> \access\oblix\tools\migration_tools\obMigrateNetPointWG
Command Line	Run obMigrateNetPointAM without parameters to print usage.
Other Files Used	To print messages to the console or while writing to a log file, reads the message catalog below: <i>install_dir</i> \access\oblix\tools\migration_tools\obMigrateNetPointWGmsg.lst
Output	<ul style="list-style-type: none"><li>Modifies the registry entry for the WebGate.</li><li>Modifies password.lst.</li></ul>
Log File	Generates the log file: <i>install_dir</i> \access\oblix\tools\migration_tools\obMigrateNetPointWG.log.

## Access Server SDK: obMigrateNetPointASDK

To accomplish an Access Server SDK upgrade, obmigratenp calls obMigrateNetPointASDK. See Table 27 for more information.

**Table 27** NetPoint Access Server SDK Upgrade with obMigrateNetPointASDK

Description	Function
obMigrateNetPointASDK.exe	<ul style="list-style-type: none"><li>Upgrades the existing registry entry for the Access Server SDK to reflect the newer NetPoint version.</li><li>Encrypts the password written in password.lst, when upgrading from NetPoint 5.2.</li></ul>
Path	<i>install_dir</i> \access\oblix\tools\migration_tools\obMigrateNetPointASDK
Command Line	Run as obmigrateAccessSDK -fromver <oldVer> -tover <newVer> -srcdir <dir> -dstdir <dir>
Other Files Used	To print messages to the console or while writing to a log file, reads the message catalog below: <i>install_dir</i> \oblix\tools\migration_tools\obMigrateNetPointASDKmsg.lst

**Table 27** NetPoint Access Server SDK Upgrade with obMigrateNetPointASDK

Description	Function
Output	<ul style="list-style-type: none"> <li>Modifies the registry entry for the Access Server SDK.</li> <li>Modifies password.lst.</li> </ul>
Log File	Generates the log file: <i>install_dir\oblix\tools\migration_tools\obMigrateNetPointASDK.log</i>

## Ready Realm for BEA: obMigrateNetPointBEA

To accomplish a Ready Realm for BEA upgrade, obmigratenp calls obMigrateNetPointBEA. See Table 28 for more information.

**Table 28** NetPoint Ready Realm for BEA Upgrade with obMigrateNetPointAPS

Description	Function
obMigrateNetPointBEA.exe	<ul style="list-style-type: none"> <li>Upgrades the existing registry entry for the Ready Realm for BEA to reflect the newer NetPoint version.</li> <li>Reads given input BEA property file and updates it per map file in: <i>install_dir\oblix\tools\migration_tools\bea_FromVersion_to_ToVersion_properties.lst</i>.</li> <li>Creates temporary output file in: <i>install_dir/examples/Migrated_NetPointBEARealm.properties</i></li> <li>Backs up given input property file, then copies temporary output file as given input file name.</li> </ul>
Path	<i>install_dir\access\oblix\tools\migration_tools\obMigrateNetPointBEA</i>
Command Line	Run as obmigrateBEAWeblogic.exe -fromver <fromversion> -tover <toVersion> -srcdir <dir> -dstdir <dir> -f <path_to_propertiesFile>
Other Files Used	To print messages to the console or while writing to a log file, reads the message catalog below: <i>install_dir\oblix\tools\migration_tools\obMigrateNetPointBEAmsg.lst</i>
Output	<ul style="list-style-type: none"> <li>Updates the BEA property file.</li> </ul>
Log File	Generates the log file: <i>install_dir\oblix\tools\migration_tools\obMigrateNetPointBEA.log</i>



# **B** Manual Schema and Data Upgrades

This chapter provides information about the tools and utilities that are called into operation during the upgrade process described in “Process overview: When an older source is detected and you choose to upgrade” on page 27.

Topics in this chapter include:

- “About Upgrading Schema and Data Manually” on page 173
- “Upgrading the Schema Manually” on page 174
- “About Upgrading Data Manually” on page 175
- “Upgrading Data Manually” on page 175
- “Sample Default obmigratenpparams.lst File” on page 186
- “Sample data\_520\_to\_600\_xxx.lst” on page 190

## **About Upgrading Schema and Data Manually**

Oblix recommends that you upgrade the schema and data automatically, as described in “Upgrading the COREid System” on page 67. However, in the situations below, you may need to use these instructions for manual upgrades:

- If your existing NetPoint 5.2 workflows are on more than one directory server, you must manually upgrade your schemas and data.
- If errors occur during the upgrade process, you may need to perform an upgrade from one version to another manually.

Completing manual upgrades of the schema and data includes the use of specific utilities provided by NetPoint. For more information about these utilities, see “Introducing NetPoint Upgrade Utilities” on page 151.

# Upgrading the Schema Manually

When upgrading your schema manually, you need to select the appropriate schema file for your directory server and the specific version you are upgrading from and to, as shown in Table 29.

**Table 29** Schema Files

Directory Type	Schema Files
Active Directory	osd_520_to_600_schema_ad.ldif osd_600_to_610_schema_ad.ldif osd_610_to_650_schema_ad.ldif osd_650_to_700_schema_ad.ldif
ADAM	osd_650_to_700_schema_adam.ldif
IBM SecureWay	osd_520_to_600_schema_ibm.ldif osd_600_to_610_schema_ibm.ldif osd_610_to_650_schema_ibm.ldif osd_650_to_700_schema_ibm.ldif
Novell e-Directory	osd_520_to_600_schema_nds.ldif osd_600_to_610_schema_nds.ldif osd_610_to_650_schema_nds.ldif osd_650_to_700_schema_nds.ldif
Sun 4.x and 5.x	osd_520_to_600_schema_ns.ldif osd_600_to_610_schema_ns.ldif osd_610_to_650_schema_ns.ldif osd_650_to_700_schema_ns.ldif

## To upgrade the schema manually

1. Navigate to the upgrade directory below:  
`COREid_install_dir\identity\oblix\tools\migration_tools`
2. Locate the appropriate schema file for the directory server and specific *fromversion\_to\_version*.
3. Invoke the schema upgrade tool `ds_conf_update` using the command below.

For example:

```
COREid_install_dir\identity\oblix\tools\ldap_tools\ds_conf_update -f schema_file  
where schema_file is the name of the schema file from Table 29 above.
```

4. Respond to prompts for various options, such as host, port, userid, and password.

Any errors produced while running this tool are printed to stdout. This tool can be used for any directory server that is compatible with NetPoint 7.

# About Upgrading Data Manually

NetPoint includes several files that are called and used during the upgrade from NetPoint 5.2 to 7.0. You may copy and use these files as a template to display or suppress the prompts you see and respond to during the upgrade. For example, you can allow the prompts to enable automatic data upgrades or you can suppress the prompts to enable manual upgrades as explained below:

The template in “Sample Default obmigratenpparams.lst File” on page 186 determines which data upgrade prompts you see during the upgrade from NetPoint 5.2 to 7.x.

```
\COREid_install_dir\identity\oblix\tools\migration_tools\obmigratenpparams.lst
```

Included in this file are sections for 520\_to\_600, 600\_to\_610, 610\_to\_650, and 650\_to\_700 upgrades. A complete, *annotated* version of the obmigratenpparams.lst file is shown in “Sample Default obmigratenpparams.lst File” on page 186.

---

**Important:** The order of parameters in the file does *not* indicate the upgrade order.

---

The appropriate value must be supplied for each parameter in the file. For True/False values:

- A value of True triggers the automatic data upgrade prompt and program.
- A value of False suppresses the data upgrade prompt and program and can be used when you want a manual data upgrade.

---

**Important:** Although *not* recommended, you may suppress automatic upgrades of the Oblix data and user data, as described in “Suppressing Automatic Data Upgrades” on page 177. In that case, you must manually upgrade the Oblix data and user data as described in “Upgrading User Data Manually” on page 181.

---

## Upgrading Data Manually

Oblix recommends that you upgrade the schema and data automatically. However, when you must upgrade the schema and data manually use the overview below as a guide.

### **Task overview: Upgrading data manually**

1. “Suppressing Automatic Data Upgrades” on page 177
2. “Upgrading the Oblix Tree Manually” on page 177.

3. “Removing Obsolete NetPoint 6.5 Schema Elements” on page 178, if you want.
4. “Uploading the Generated LDIF” on page 181.
5. “Upgrading User Data Manually” on page 181.

---

**Important:** Oblix recommends that you upgrade the schema and data automatically.

---

When you choose manual data upgrades, two files provide parameters for the Oblix data and user data in the directory below:

```
\install_dir\identity\oblix\tools\migration_tools\obmigratedata
```

**data\_520\_to\_600\_osd.lst**—drives the manual upgrade of the Oblix data, for example:

```
osd_migration:true
policy_migration:true
wf_migration:true
user_migration:false
```

---

**Note:** A value of True upgrades data. A value of False suppresses the upgrade.

---

**data\_520\_to\_600\_user.lst**—drives the upgrade of user data, which occurs only during the upgrade from NetPoint 5.2.x to 6.0.0, for example:

```
osd_migration:false
policy_migration:false
wf_migration:false
user_migration:true
```

Both the `osd.lst` and `user.lst` files contain similar information. However, procedures must be completed for both user data and Oblix data and a specific value must be provided for each parameter in the files. See Table 21 on page 146. An *annotated* example is shown in “Sample `data_520_to_600_xxx.lst`” on page 190. See also, “Data Upgrade: `obmigratedata`” on page 162.

In addition to the two files mentioned above, NetPoint 7.0 provides the following files:

- **data\_610\_to\_650\_multi\_lang.lst**—`multi_lang_migration:true`
- **data\_610\_to\_650\_osd.lst**—defaults are *true*
- **data\_610\_to\_650\_psc.lst**—`psc_migration:true`
- **data\_650\_to\_700\_osd.lst**—defaults are *true*
- **data\_650\_to\_700\_psc.lst**—`psc_migration:true`

## Suppressing Automatic Data Upgrades

If you intend to upgrade data manually, you need to suppress automatic data upgrades.

### To suppress automatic data upgrades

1. Copy the file below and rename the original to retain it.

For example:

```
COREid_install_dir\identity\oblix\tools\migration_tools\obmigratenpparams.lst
```

2. Edit the ois section of the copy and set the values shown in bold, below, to “false” to prohibit automatic data upgrades.

For example:

```
ois
BEGIN:vCompoundList
  kMigrateLicense:True
  520_to_600:
  BEGIN:vNameList:
    kMigrateData>false
    kMigrateSchema>false
    kMigratePublisher>false
```

---

**Note:** See sections for 520\_to\_600, 600\_to\_610, 610\_to\_650, and 650\_to\_700 upgrades, in “Sample Default obmigratenpparams.lst File” on page 186.

---

3. Complete a manual data upgrade as described in “Upgrading the Oblix Tree Manually” on page 177.

## Upgrading the Oblix Tree Manually

You begin upgrading data manually by upgrading the Oblix (configuration) data tree. The following commands provide an example only. Your environment may vary.

### To upgrade the Oblix tree manually

1. Copy the data\_fromversion\_to\_version\_osd.lst file and rename it to retain the original.

For example:

#### From

```
\install_dir\identity\oblix\tools\migration_tools\obmigratedata\data_520_to_600_osd.lst
```

#### To

```
\install_dir\identity\oblix\tools\migration_tools\obmigratedata\config_data_520to600_osd.lst
```

2. Edit the file to provide the information for your environment based on the annotated sample in “Sample data\_520\_to\_600\_XXX.lst” on page 190.

3. Confirm that the Oblix tree and data parameter values are true.

```
osd_migration: true
policy_migration: true
wf_migration: true
```

4. Confirm that the user data migration parameter value is false.

```
user_migration: false
```

5. Back up (export) the old Oblix tree to an LDIF.

6. Locate the obmigratedata tool, then upgrade the Oblix tree by running obmigratedata and specifying the name of your updated file. For example:

```
\COREid_install_dir\identity\oblix\tools\migration_tools\obmigratedata\obmigratedata.exe
```

```
run obmigratedata.exe -f config_data_520to600_osd.lst -I install_dir
```

This program generates an LDIF based on the options selected in FunctionalityTBMigrated. The resulting LDIF file will be named as specified by the outputFileName parameter.

7. Delete the existing Oblix tree after the OSD upgrade completes.

8. **From 6.5 to 7.0**—When upgrading the COREid Server and Access Manager, if you want, before step 9, continue with “Removing Obsolete NetPoint 6.5 Schema Elements” on page 178.

9. **All Upgrades**—Complete the upgrade of Oblix (configuration) data with:

- “Uploading the Generated LDIF” on page 181
- “Upgrading User Data Manually” on page 181

## Removing Obsolete NetPoint 6.5 Schema Elements

During an upgrade from NetPoint 6.5 to NetPoint 7.0, you can use the procedures below to clean up the obsolete schema elements from the directory server. You may skip this procedure if you do not want to remove the obsolete schema from the directory server.

If you choose to do this, it must be done *after* the Oblix tree is deleted in the manual upgrade flow:

- During COREid Server upgrades
- During Access Manager upgrades

After schema cleanup, LDIF files are available for you to upload to the directory server. Schema files for the Oblix (configuration) schema and the policy schema are separate. As a result, there are two scenarios to consider when you clean up the obsolete schema:

- Are Oblix (configuration) and policy data stored in same directory server?
- Are Oblix and policy data stored in different directory servers?

Table 30 shows Oblix schema files for specific directory server types.

**Table 30** Oblix Data Schema Files

Directory Type	Schema Files
Active Directory	osd_650_to_700_schema_delete_ad.ldif
ADAM	osd_650_to_700_schema_delete_adam.ldif
IBM SecureWay	osd_650_to_700_schema_delete_sway.ldif
Novell e-Directory	osd_650_to_700_schema_delete_nds.ldif
Sun 4.x 5.x <b>Note:</b> NetPoint 7.0 does <i>not</i> support Sun 4.x directory servers. See “Sun Directory Server Considerations” on page 57.	osd_650_to_700_schema_delete_ns.ldif

Table 31 shows the policy data schema files for specific directory server types.

**Table 31** Policy Data Schema Files

Directory Type	Schema Files
Active Directory	policy_650_to_700_schema_delete_ad.ldif
ADAM	policy_650_to_700_schema_delete_adam.ldif
IBM SecureWay	policy_650_to_700_schema_delete_sway.ldif
Novell e-Directory	policy_650_to_700_schema_delete_nds.ldif
Sun 4.x 5.x <b>Note:</b> NetPoint 7.0 does <i>not</i> support Sun 4.x directory servers. See “Sun Directory Server Considerations” on page 57.	policy_650_to_700_schema_delete_ns.ldif

### To remove obsolete elements during COREid Server upgrades

1. Navigate to the upgrade directory below:

`COREid_install_dir/identity/oblrix/tools/migration_tools`

2. Locate the appropriate schema file for the directory server, as specified in the tables above.
3. Take the appropriate action for your environment:

- **Same Directory Server**—If Oblix data and policy data are in the same directory server, invoke the schema upgrade tool `ds_conf_update` using the command below:

```
COREid_install_dir/identity/oblix/tools/ldap_tools/  
ds_conf_update -f schema_file
```

where *schema\_file* is the name of the Oblix schema cleanup file from the tables above.

- **Different Directory Server**—If Oblix and policy data are in different directory servers, invoke the schema upgrade tool `ds_conf_update` twice: once for the Oblix schema and a second time for the policy schema as follows:

```
COREid_install_dir/identity/oblix/tools/ldap_tools/  
ds_conf_update -f schema_file
```

where *schema\_file* is the name of the Oblix/policy schema cleanup file from the tables above.

4. Respond to prompts for various options, such as host, port, userid, and password.
5. Continue the upgrade with “Uploading the Generated LDIF” on page 181.

### **To remove obsolete elements during Access Manager upgrades**

1. Navigate to the upgrade directory below:  
*AccessManager\_install\_dir*/identity/oblix/tools/migration\_tools
2. 2. Locate the appropriate schema file for the directory server as specified in the above tables.
3. Take the appropriate action for your environment:

- **Same Directory Server**—If Oblix data and policy data are in the same directory server, invoke the schema upgrade tool `ds_conf_update` using the command below:

```
AccessManager_install_dir/identity/oblix/tools/ldap_tools/  
ds_conf_update -f schema_file
```

where *schema\_file* is the name of the policy schema cleanup file from the tables above.

- **Different Directory Server**—If Oblix and policy data are in different directory servers, invoke the schema upgrade tool `ds_conf_update` twice:

once for the Oblix schema and a second time for the policy schema as follows.

```
AccessManager_install_dir\identity\oblix\tools\ldap_tools/  
ds_conf_update -f schema_file
```

where *schema\_file* is the name of the Oblix/policy schema cleanup file from the tables above.

4. Respond to prompts for various options such as host, port, userid, and password.

---

**Note:** The tool may generate errors of type Attribute/Object does not exist. These may occur when LDIF files contain a list of all obsolete schemas from NetPoint version 3.6 which might not be present in your directory server.

---

## Uploading the Generated LDIF

After upgrading the Oblix tree and optionally removing obsolete schema elements, you are ready to upload the generated LDIF.

### To upload the generated LDIF

1. Run ldapmodify to upload the generated LDIF. For example:

```
\COREid_install_dir\identity\oblix\tools\ldap_tools\ldapmodify  
run ldapmodify.exe -f generated_ldif
```

This program prompts for various options, such as host, port, userid, and password.

2. Upgrade user data, as described in “Upgrading User Data Manually” on page 181, then repeat all steps above using the next highest *data\_fromversion\_to\_version\_osd.lst* file, until you have upgraded all data to NetPoint 7.0.

## Upgrading User Data Manually

User data upgrades are required *only* while making a move, either a direct or an intermediate move, from NetPoint 5.2.x to NetPoint 6.x.

### To upgrade the user data manually

1. Copy the *data\_fromversion\_to\_version\_user.lst* file and rename it to retain the original.

For example:

#### From

```
\COREid_install_dir\identity\oblix\tools\migration_tools\obmigr  
atedata\data_520_to_600_user.lst
```

**To**

```
\install_dir\identity\oblix\tools\migration_tools\obmigratedata
\config_data_520to600_user.lst
```

- See Table 32 as you edit the keys in the file to provide the information for your environment based on the annotated samples below.

A complete, *annotated* version of the data\_520\_to\_600\_xxx.lst file is shown in “Sample data\_520\_to\_600\_xxx.lst” on page 190. Both the osd.lst and user.lst files contain similar information.

- Confirm that the Oblix tree and data parameter values are false.

```
osd_migration:false
policy_migration:false
wf_migration:false
```

- Confirm that the user data upgrade parameter value is true.

```
user_migration:true
```

---

**Note:** Although a user-data upgrade does not do anything with the Oblix tree, it is a good idea to complete step 5.

---

- Back up the Oblix tree.
- Upgrade user data by running obmigratedata.exe and specifying the name of your updated file. For example:

```
run obmigratedata.exe -f config_data_520to600_user.lst
```

**Table 32** Keys to Add or Edit

Key	Description
hostname: <i>host name</i>	Directory server host
portNo: <i>port number</i>	Directory server port
bindDN: <i>DS credentials</i>	The DN of the directory server administrator account. This can be found in <i>install_dir/oblix/config/ldap/AppDB.xml</i> .
password: <i>encrypted password</i>	Password of the directory server administrator account. This can be found in <i>install_dir/oblix/config/ldap/AppDB.xml</i> .
directoryType: NS AD NDS IBM	The type of directory server you are running
directoryMode: SSL OPEN	The mode of the directory server you are using. Values can be either SSL or Open.
Oblixnode: ou=Oblix o=Oblix	RDN of the Oblix tree
groupOC: <i>name of Group object class</i>	Example: group or groupOfUniqueNames

**Table 32** Keys to Add or Edit

PersonOC: <i>name of Person object class</i>	Example: user or inetOrgPerson
oldVersion: <i>version number</i>	Exact version number of the NetPoint 5.2 system. This can be found in ./oblix/config/np52_is.txt. Example: 5.2, 5.2.1.12.
oldVersionSearchBase: <i>searchbase</i>	The searchbase to use. Typically, this is the global searchbase.
binAttrFileName: at_520_to_600_binary.lst	Accept this file as shown. It contains important information for the upgrade program.
objclassMapFileName: oc_520_to_600_map.lst	Accept this file as shown. It contains important information for the upgrade program.
logFileName: <i>filename</i>	Name of the file to receive logging information during the conversion process.
outputFileName: <i>filename</i>	Name of the LDIF file to receive the converted data.
missedSuppliedAttrsDetailsFileName: <i>filename</i>	Name of the file to receive workflows containing Provisioned attributes in NetPoint 5.2. These workflows must be modified manually in the applet to associate the appropriate subflow with them.
WFDefContainer:	DN of the workflow definitions container. Example: obcontainerID=workflowDefinitions,OU=oblix,DC=company,DC=com.
WFInstanceContainer	DN of the workflow instance container. Example: obcontainerId=workflowInstances,OU=oblix,DC=company,DC=com
FunctionalityTBMigrated: BEGIN:vNameList	
osd_migration: true false	Perform data upgrades on the Oblix tree. <b>Note:</b> If you are running data upgrades because of errors in an earlier run: <ul style="list-style-type: none"> <li>• During COREid upgrades, ensure that values of osd_migration and wf_migration match (<i>true</i>). policy_migration value should be “false”.</li> <li>• During Access Manager upgrades, ensure that values of osd_migration and wf_migration match (<i>false</i>) while policy_migration value is “true”.</li> </ul>

**Table 32** Keys to Add or Edit

policy_migration: true false	Refer to details for osd_migration, above.
wf_migration: true false	<p>Perform data upgrades on workflow containers specified above.</p> <p><b>Note:</b> If you are running data upgrades manually because workflows are on a separate directory server and you want to upgrade them:</p> <ul style="list-style-type: none"> <li>• During COREid upgrades, ensure that osd_migration value is “false”; wf_migration value is “true”; policy_migration value is “false”.</li> </ul> <p>An output LDIF file is generated with workflow definition and instance containers, and migrated definitions and instances.</p> <ul style="list-style-type: none"> <li>• After COREid upgrade, remove the Workflow definition and instance containers from the directory server where they are present and upload the generated output LDIF file there.</li> <li>• During the Access Manager upgrade, there is nothing to do because the directory server contains only workflows and instances.</li> </ul>
user_migration: true false	<p>Perform data upgrades on User entries (non-Oblix data). For NetPoint 5.2 to NetPoint 7.0 upgrades, the Challenge Phrase Response encryption format is changed from RC-4 to RC-6.</p> <p>User data upgrade is performed inline by default. The user entries are modified directly without generating an intermediate LDIF.</p>
END:vNameList	
Additional_DS_Info:	If you are upgrading user data and you have multiple user directories, you may specify the additional directory servers in this section.
BEGIN:vCompoundList	
user_migration_ds_1:	For additional user directory servers, the format is user_migration_ds_n Where <i>n</i> is 1, 2, 3, and so on.
BEGIN:vCompoundList	
hostname: <i>host name</i>	Directory server host

**Table 32** Keys to Add or Edit

portNo: <i>port number</i>	Directory server port
bindDN: <i>DS credentials</i>	The DN of the user data directory server administrator account, which can be found in <i>installdir/oblix/config/ldap/AppDB.xml</i> . <b>Note:</b> If you have user data stored separately from Oblix (configuration data), the AppDB.xml file may not contain the appropriate bind DN and encrypted password for the user data directory.
password: <i>encrypted password</i>	The Password of the user data directory server administrator account, which can be found in <i>installdir/oblix/config/ldap/AppDB.xml</i> .
directoryType: NS AD NDS IBM	The type of directory server you are running.
directoryMode: SSL OPEN	The mode of the directory server you are using: Values can be either SSL or Open.
oldVersionSearchBase: <i>searchbase</i>	The searchbase to use. Typically, this is the global searchbase. <b>Note:</b> Every directory server in “Additional DS” in the config.lst file once had the searchbase given with keyword 'oldVersionSearchbase' . With NetPoint 7.0, there will be no 'oldVersionSearchBase' keyword present in additional directory server sections. Instead, the keyword will be 'searchbase'. The value of this keyword need not always be the global searchbase. One additional directory server (for example, user_migration_ds_1) represents one directory-profile from the Oblix tree. The 'searchbase' keyword from this section will give you the 'Namespace' covered by this directory-profile.
END:vCompoundList	
END:vCompoundList	

# Sample Default obmigratenpparams.lst File

```
BEGIN:vCompoundList
  am: Access Manager Parameters
  BEGIN:vCompoundList
    kMigrateLicense:true
    520_to_600:
    BEGIN:vNameList:
      kMigrateWS:true
      kMigrateData:false
      kMigrateSchema:true
    END:vNameList
    600_to_610:
    BEGIN:vNameList:
      kMigrateWS:false
      kMigrateData:false
      kMigrateSchema:false
    END:vNameList
    610_to_650:
    BEGIN:vNameList:
      kMigrateWS:true
      kMigrateSchema:true
    END:vNameList
    650_to_700:
    BEGIN:vNameList:
      kMigrateWS:false
      kMigrateData:true
      kMigrateSchema:true
    END:vNameList
  END:vCompoundList

wg:
  BEGIN:vCompoundList
    520_to_600:
    BEGIN:vNameList:
      kMigrateWS:true
```

```
END:vNameList
600_to_610:
BEGIN:vNameList:
    kMigrateWS:false
END:vNameList
END:vCompoundList
```

wp:

```
BEGIN:vCompoundList
    520_to_600:
        BEGIN:vNameList:
            kMigratePublisher:true
        END:vNameList
    600_to_610:
        BEGIN:vNameList:
            kMigratePublisher:false
        END:vNameList
    610_to_650:
        BEGIN:vNameList:
            kMigratePublisher:false
        END:vNameList
END:vCompoundList
```

aaa: *(Access Server) Authentication, Authorization, Auditing Parameters*

```
BEGIN:vCompoundList
    520_to_600:
        BEGIN:vNameList:
            kMigrateData:true
            kMigrateSchema:true
        END:vNameList
    600_to_610:
        BEGIN:vNameList:
            kMigrateData:false
            kMigrateSchema:false
        END:vNameList
    610_to_650:
```

```
BEGIN:vNameList:
    kMigrateSchema:false
END:vNameList
END:vCompoundList
```

```
bea:
BEGIN:vCompoundList
    600_to_610:
    BEGIN:vNameList:
        kMigrateASDK:true
    END:vNameList
END:vCompoundList
```

```
idlk:
BEGIN:vCompoundList
    kMigrateLicense:true
END:vCompoundList
```

ois: *COREid Server Parameters: True triggers automatic data migration*

```
BEGIN:vCompoundList
    kMigrateLicense:true
    520_to_600:
    BEGIN:vNameList:
        kMigrateData:true
        kMigrateSchema:true
        kMigratePublisher:true
    END:vNameList
```

```
600_to_610:
BEGIN:vNameList:
    kMigrateASDK:true
    kMigrateData:false
    kMigrateSchema:false
    kMigratePublisher:false
```

```
kASDKSubDir:/AccessServerSDK
```

```
END:vNameList

610_to_650:
BEGIN:vNameList:
kMigrateASDK:true
    kMigrateSchema:true
    kMigrateData:true
    kMigratePublisher:false

    kASDKSubDir:/AccessServerSDK

END:vNameList

650_to_700:
BEGIN:vNameList:
    kMigrateASDK:true
    kMigrateData:true
    kMigrateSchema:true
    kMigratePublisher:false

    kASDKSubDir:/AccessServerSDK

END:vNameList
END:vCompoundList

END:vCompoundList
```

## Sample data\_520\_to\_600\_xxx.lst

Both the osd.lst and user.lst files contain similar information. For additional details, see Table 21 on page 146. User migration occurs only during the upgrade from NetPoint 5.2.x to NetPoint 6.0.0. When you have ADAM as the directory server with NetPoint 6.5.1 or later, the directory type to be used is ADAM.

```
BEGIN:vCompoundList
```

```
hostName:<hostName>
portNo:<portNo>
bindDN:<bindDN>
password:<password> Copy encrypted credentials from
\NetPoint\identity\oblix\config\ldap\AppDB.xml
directoryMode:<directoryMode> Open or SSL
directoryType:<directoryType> NS or AD or NDS or IBM

oldConfigDN:<oldConfigDN> o=company,c=us
oldVersionSearchbase:<oldVersionSearchbase>Global Searchbase

binAttrFileName:at_520_to_600_binary.lst
objclassMapFileName:oc_520_to_600_map.lst

logFileName:output_520_to_600_osd.log Okay to change
outputFileName:output_520_to_600_osd.ldif Okay to change

missedSuppliedAttrsDetailsFileName:output_520_to_600_supplied_o
sd.txt

oblixnode:o=oblix For AD use ou=oblix
groupOC:<groupOC> Your Group
personOC:<personOC>
doUTFConversion:<doUTFConversion> True or False

oldVersion:5.2.1.7 Must be specific
newVersion:6.0.0 Use proper version
encryptionType:oblix Changes the encryption scheme from RC4 to RC6;
use Oblix unless you have a customized encryption scheme

#We want to know wf-containers names Workflow definition containers
WFDefContainer:<wfdefcontainer>
WFInstanceContainer:<wfdefcontainer>
```

FunctionalityTBMigrated: *In the parameters below, True migrates automatically  
False does not*

BEGIN:vNameList

osd\_migration:true *Oblix tree migration (True or False)*

policy\_migration:true

wf\_migration:true

user\_migration:false *User data (True migrates data, False does not)*

END:vNameList

END:vCompoundList



# C NetPoint Upgrade Summary

You may upgrade to NetPoint 7.0 from older versions as shown in Table 33 and Table 34. For details about upgrading with Publisher, see the *NetPoint 6.1 Installation Guide*.

**Table 33. Upgrade Paths from Older Versions to NetPoint 7.0**

From	To	Caveat for Publisher
NetPoint 5.2	NetPoint 7.0	With Publisher, only to NetPoint 6.1
NetPoint 6.0.1	NetPoint 7.0	With Publisher, only to NetPoint 6.1
NetPoint 6.1 or 6.1.1	NetPoint 7.0	To retain Publisher, no further upgrade is possible

When you have NetPoint 6.5 installed, you may upgrade to NetPoint 7.0 as indicated in Table 34. Publisher is *not* supported.

**Table 34. Upgrade Paths from NetPoint Series 6.5 Releases**

From	To	Caveat
NetPoint 6.5.0.x is an international release (English, German, French)	NetPoint 7.0	Before the upgrade, download and extract specific files to your target COREid_install_dir. See “v6.5.0.x Caveat” on page 21.
NetPoint 6.5.1 is an English-only release	NetPoint 7.0	None
NetPoint 6.5.2.x is an English-only release	NetPoint 7.0	Before the upgrade, you may need to download and extract specific files to your target COREid_install_dir. See “v6.5.2.x Patch Caveat” on page 22.
NetPoint 6.5.3.x is an English-only WebGate release	NetPoint 7.0	None

## Task overview: Upgrading to NetPoint 7.0

1. Prepare your current NetPoint environment for the upgrade, as described in “Preparing to Upgrade NetPoint” on page 47.
2. Upgrade the COREid System, as described in “Upgrading the COREid System” on page 67, including:

COREid Server

Publisher (*to retain this you may upgrade only to NetPoint 6.1*)

WebPass

Oblix IDLink

---

**Note:** NetPoint 7.0 does not support Oblix IDLink. You may upgrade to NetPoint 7.0 and transition to provisioning using NetPoint and configuring MIIIS provisioning. Otherwise, you may retain the older NetPoint version and continue using Oblix IDLink.

---

3. Upgrade the Access System, as described in “Upgrading the Access System” on page 111, including:

Access Manager

Access Servers

WebGates

---

**Note:** Older WebGates can coexist with NetPoint 7.0 components. After upgrading, you may add NetPoint 7.0 WebGates. For more information about shared secrets and encryption, see “Compatibility with Previous Versions” on page 48.

---

4. Manually process the items below, as described in “Incorporating Workflows, Plug-Ins, and Custom Items” on page 91:

- Stylesheets

Images (including NetPoint.gifs)

JavaScript files

COREid Event API (PPP)

- Authentication and Authorization plug-ins (see “Recompiling Plug-Ins” on page 130)
- C++ Programs (see “Recompiling C++ Programs” on page 135)

5. Upgrade special components, as described in “Upgrading the Access Server SDK and Integration Components” on page 131.

Ready Realm for BEA

BEA WebLogic SSPI

NetPoint Connector for WebSphere

6. Verify that your APIs are working properly, and recompile if needed, including:

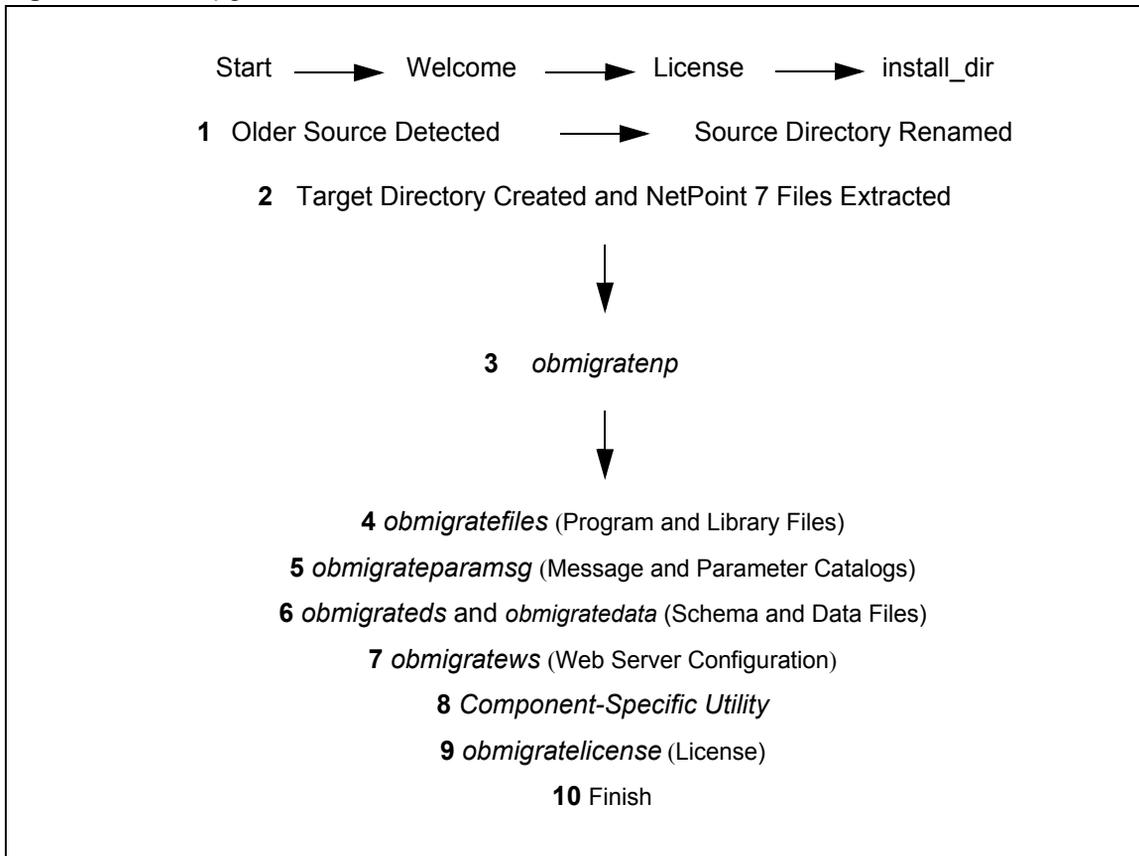
- XPI (Identity XML)
- AccessGates
- COM+
- AMAPI

For more information, see the *NetPoint 7.0 Developer Guide*.

7. Upgrade NetPoint SAML Services to SHAREid by first contacting Oblix Customer Care for the utility and documentation to complete this task.

For more information, see Figure 3. For the process overview, see “About the Upgrade Process” on page 26.

**Figure 3** Upgrade Process and Tools



For more information about what is upgraded, what is preserved, what you need to manually process, and the directory structure of NetPoint 6.5 and 7.0, see “Introducing the NetPoint Upgrade Process” on page 17.



# D Upgrading Sun Web Server v4 to v6 on Windows 2000

You need to ensure that you are upgrading NetPoint using a supported Web server version. If your older NetPoint environment includes Sun (previously iPlanet) Web server version 4.x, which has been discontinued, you may use the example below to upgrade to Sun Web server version 6.0 on Windows 2000.

- “Upgrading Sun Web Server v4.x to v6” on page 197
- “Configuring the New Web Server Instance” on page 198
- “Troubleshooting” on page 203

## Upgrading Sun Web Server v4.x to v6

The new Web server version should be in a separate area of the Windows 2000 filesystem. Be sure that the Web server 4.1 service is stopped and that the service control window is closed. Otherwise, the 4.1 service will be disabled and marked for deletion, and the new service will not be created. In this state, neither the 4.1 nor the 6.0 Admin Console can operate the server.

---

**Note:** This procedure provides details for only Windows 2000 and Sun Web server 4.1 to 6.0 upgrades. This is an example only.

---

### To upgrade Sun (iPlanet) 4.x Web Server to Sun v6

1. Install a Sun Web server version 6 on the same Windows 2000 machine that is currently hosting iPlanet 4.1 and the older version of NetPoint.
2. Make a copy of the older `magnus.conf` and `obj.conf` files for future reference.
3. Stop Sun Web server 4 using either the Services Window or the Sun Web Server Administration Console, then close the service control window.
4. Open the Sun Web server 6 Administration Console, then click the Migrate Server link.

5. In the Sun 6.0 Admin Console, enter the Server Root for the Sun Web server 4 and click the Search button.

The list of server instances under the root node appears.

6. Select the instance you want to migrate, then click the Migrate button
7. Select the Document Root option shown below, then click Migrate:

For example:

Use the new server's document root > Migrate

---

**Note:** If you choose the same document root as the old server, migration will create some incorrect entries in your configuration file. For example, if your Web server contains entries for WebGate, the server's document root will be changed to the WebGate directory and accessing the root using `http://server:port/` will show you a directory listing with `webgate.dll` as the only file. More details about correcting the document root are given later.

---

The migration starts and status messages appear. The old configuration is assimilated into a newly created instance for Sun 6.0.

8. Close this browser window and continue with “Configuring the New Web Server Instance” on page 198.

## Configuring the New Web Server Instance

The following things need to be done manually:

- “Configuring `magnus.conf`” on page 198
- “Configuring `obj.conf`” on page 199

### Configuring `magnus.conf`

You need to define the `logs/access` path in `magnus.conf` for the newly installed Web server instance, as described in the procedure below.

#### To configure the new Web server instance in `magnus.conf`

1. In the `config` directory of the migrated instance (6.0 instance area), locate the `magnus.conf` file.
2. Search for `logs/access` in `magnus.conf`; the path still refers to the old area.
3. In the `magnus.conf`, update the `logs/access` path appropriately.

For example, suppose your 4.1 area is `D:\NSWS\Server4` and the 6.0 area is `G:\iPlanet6WS`, you need to make the following change:

### From

```
Init fn=flex-init access="D:/NSWS/Server4/https-hostname/logs/  
access" format.access="%Ses->client.ip% - %Req->vars.auth-user%  
[%SYSDATE%] \"%Req->reqpb.clf-request%\"  
%Req->srvhdrs.clf-status% %Req->srvhdrs.content-length%
```

### To

```
Init fn=flex-init access="G:/iPlanet6WS/https-hostname/logs/  
access" format.access="%Ses->client.ip% - %Req->vars.auth-user%  
[%SYSDATE%] \"%Req->reqpb.clf-request%\"  
%Req->srvhdrs.clf-status% %Req->srvhdrs.content-length%
```

---

**Note:** In this newly created 6.0 Web server, the access log location is defined as a variable in server.xml. For example: <VARs accesslog="G:/iPlanet6WS/https-*hostname*/logs/access" />.

---

If you use this method to add this variable to server.xml, you would have to replace the line in magnus.conf as follows:

### From

```
Init fn=flex-init access="D:/NSWS/Server4/https-hostname/logs/  
access" format.access="%Ses->client.ip% - %Req->vars.auth-user%  
[%SYSDATE%] \"%Req->reqpb.clf-request%\"  
%Req->srvhdrs.clf-status% %Req->srvhdrs.content-length%
```

### To

```
Init fn=flex-init access="$accesslog"  
format.access="%Ses->client.ip% - %Req->vars.auth-user%  
[%SYSDATE%] \"%Req->reqpb.clf-request%\"  
%Req->srvhdrs.clf-status% %Req->srvhdrs.content-length%
```

4. Continue with “Configuring obj.conf” on page 199.

## Configuring obj.conf

In the migrated obj.conf file (in the config directory), the document-root directives are all set improperly. For example, suppose the section below appears in the obj.conf file for your Web server 4.x instance before the migration. Note that the values of the various document-root(s) differ. For example, there is a document root for the Web server (D:/NSWS/Server4/docs) and others for individual objects, shown in bold:

### Sample obj.conf 4.x before Migration to 6.0

```
NameTrans fn="NSServletNameTrans" name="servlet"  
NameTrans fn="pfx2dir" from="/servlet" dir="D:/NSWS/Server4/  
docs/servlet" name="ServletByExt"  
NameTrans fn=pfx2dir from=/ns-icons dir="D:/NSWS/Server4/  
ns-icons" name="es-internal"
```

```

NameTrans fn=pfx2dir from=/mc-icons dir="D:/NSWS/Server4/
ns-icons" name="es-internal"
NameTrans fn="pfx2dir" from="/help" dir="D:/NSWS/Server4/
manual/https/ug" name="es-internal"
NameTrans fn="pfx2dir" from="/manual" dir="D:/NSWS/Server4/
manual/https" name="es-internal"
NameTrans fn=document-root root="D:/NSWS/Server4/docs"
PathCheck fn=nt-uri-clean
PathCheck fn="check-acl" acl="default"
...
...
<Object name="access_lost_pwd_mgmt">
NameTrans fn="document-root" root="G:/52/webpass/access/oblix/
apps/lost_pwd_mgmt/bin"
ObjectType fn="type-by-extension"
ObjectType fn="force-type" type="text/html"
Service fn="OBlost_pwd_mgmt_Service" method="(POST|GET)"
</Object>
# Oblix Access Manager Objects #AMOBJECTS
# Oblix webGate Objects start #WGOBJECTS
<Object name="access_web_gate">
NameTrans fn="document-root" root="G:/52/webpass/access/oblix/
apps/webgate/bin"
ObjectType fn="type-by-extension"
ObjectType fn="force-type" type="text/html"
Service fn="OBWebGate_Control" method="(POST|GET)"
</Object>

```

During migration you were asked to choose to continue with the old document root or a new Web server document root. When you chose a new document root, a new location (for example, G:/iPlanet6WS/docs) is assigned to each document-root in the obj.conf file. Thus the section of the obj.conf file shown above would look something like this in the 6.0 version after migration:

### **Sample obj.conf after Migration to 6.0**

```

NameTrans fn="NSServletNameTrans" name="servlet"
NameTrans fn="pfx2dir" from="/servlet" dir="D:/NSWS/Server4/
docs/servlet" name="ServletByExt"
NameTrans fn=pfx2dir from=/ns-icons dir="D:/NSWS/Server4/
ns-icons" name="es-internal"

```

```

NameTrans fn=pfx2dir from=/mc-icons dir="D:/NSWS/Server4/
ns-icons" name="es-internal"
NameTrans fn="pfx2dir" from="/help" dir="D:/NSWS/Server4/
manual/https/ug" name="es-internal"
NameTrans fn="pfx2dir" from="/manual" dir="D:/NSWS/Server4/
manual/https" name="es-internal"
NameTrans fn=document-root root="G:/iPlanet6WS/docs"
PathCheck fn=nt-uri-clean
PathCheck fn="check-acl" acl="default"
...
...
<Object name="access_lost_pwd_mgmt">
NameTrans fn="document-root" root="G:/iPlanet6WS/docs"
ObjectType fn="type-by-extension"
ObjectType fn="force-type" type="text/html"
Service fn="OBlost_pwd_mgmt_Service" method="(POST|GET)"
</Object>
# Oblix Access Manager Objects #AMOBJECTS
# oblix webGate Objects start #WGOBJECTS
<Object name="access_web_gate">
NameTrans fn="document-root" root="G:/iPlanet6WS/docs"
ObjectType fn="type-by-extension"
ObjectType fn="force-type" type="text/html"
Service fn="OBwebGate_Control" method="(POST|GET)"
</Object>

```

You use the procedure below to validate and/or correct these.

## To configure the new Web server instance in obj.conf

1. In the config directory of the migrated instance (6.0 instance area), locate the obj.conf file.
2. Locate and verify the document roots point to the version 6 Web server instance.

---

**Note:** The following line in obj.conf may still refer to the old location:  
NameTrans fn="pfx2dir" from="/servlet" dir="D:/NSWS/Server4/docs/servlet" name="ServletByExt"

In the newly created version 6.0 Web server, this entry is as follows:  
NameTrans fn="pfx2dir" from="/servlet" dir="\$docroot/servlet" name="ServletByExt"  
when the variable document root is defined in server.xml as shown below:

---

3. Locate and verify that the variable document root is defined in server.xml as follows.

For example

```
-<VSCLASS id="defaultclass" objectfile="obj.conf"
rootobject="default" acceptlanguage="off">
  <VARS docroot="g:/iPlanet6WS/docs" />
  <VS id="https-hostname" connections="group1" mime="mime1"
urlhosts="lucerne.persistent.co.in" aclids="acl1">
    <VARS webapps_file="web-apps.xml" webapps_enable="on" />
    <USERDB id="default" database="default" />
  </VS>
</VSCLASS>
```

Alternatively, you can change obj.conf without updating server.xml by replacing the line from obj.conf by the following one -

```
NameTrans fn="pfx2dir" from="/servlet" dir="G:/iPlanet6WS/docs/
servlet" name="ServletByExt"
```

4. Search the migrated obj.conf for any mention of the old install area (in this example, D:/NSWS/Server4) to ensure that the v 6.0 instance of the Web server does *not* refer to the old install area in any way.
5. Continue with “Troubleshooting” on page 203, if needed.

# Troubleshooting

There are several potential issues that may occur after upgrading to Sun v6.0 Web server and upgrading to the NetPoint 7.0 COREid System.

During the upgrade to NetPoint 7.0, the following entries are added to obj.conf:

```
NameTrans fn="pfx2dir" from="/identity/oblix" dir="G:/70/
webpass/identity/oblix" name="idoblix"
...
...
<Object name="idoblix">
  PathCheck file=".nsconfig" fn="load-config" descend="1"
</Object>
```

However, in the NetPoint 5.2 COREid System installed on a v4.1 Web server, the obj.conf does *not* contain the entries underlined above. Even when the v4 Web server is migrated to v6 and NetPoint is upgraded to 7.0, these entries are not included in obj.conf.

- **If you have enabled cgi for the 4.1 iPlanet instance**, the URL prefix and script directory settings are carried over exactly during migration. If this directory is under the v4.1 document root, you might want to change this directory by:
  - Either using the v6.0 Web server Admin Console (Class manager > Programs)
  - Or by hand editing the appropriate line in obj.conf

For example, an example line in the 6.0 obj.conf is shown below:

```
NameTrans fn="pfx2dir" from="/cgi-bin" dir="D:/NSWS/Server4/
docs/cgi-bin" name="shellcgi"
```

---

**Note:** It is a good idea to search the migrated obj.conf for the old install area (in this case D:/NSWS/Server4) to make sure that the 6.0 instance of the server does not refer to the old install area in any way.

---

- **In the file jvm12.conf in the Web server config directory**, the following line can be found after migration. This property contains references to the old (4.1) bits i.e. is not correctly migrated:

```
jvm.classpath=D:/NSWS/Server4/plugins/samples/servlets/
beans.10/SDKBeans10.jar;D:/NSWS/Server4/plugins/samples/
servlets/beans/SDKBeans.jar;D:/NSWS/Server4/bin/https/jar/
Bugbase.jar;D:/NSWS/Server4/bin/https/jar/Calljsac.jar
```

This line should be replaced by the following:

```
jvm.classpath=G:/iPlanet6WS/plugins/servlets/examples/legacy/beans.10/SDKBeans10.jar
```

---

**Note:** The other jars are not to be included in the v6.0 Web server configuration and have been intentionally left out.

---

- **Any files and/or folders that were in your old document-root** need to be copied manually to the same structure in the new document-root. This is important if you want the new Web server instance to behave exactly as the old one.
- **As noted earlier, both Admin Consoles (v4.1 and v6.0) can operate the server**, which work using the 6.0 binaries. The Admin Consoles simply use the Windows NT service to start/stop the server.

From the 4.1 Console, if you delete the old instance the result is deleting the service and the v4.1 files. If this happens, even the 6.0 Console cannot operate the instance, because the service has been deleted. Since this is not desirable, the following steps are required:

- a) Stop the server (from either the v4.1 or the v6.0 console or using the NT service)
- b) If you want to preserve the logs and the like, back up the old logs directory manually.
- c) Delete the v4.1 instance directory manually.
- d) Restart the v4.1 Admin Console.

**Note:** The upgraded server is no longer available for the v4.1 Admin Console to manage.

This completes the process.

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