

Oracle[®] COREid Federation

COREid Federation Upgrade Guide

**10g Release 2 (10.1.2)
Part No. B19018-01**

May 2005

ORACLE[®]

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* This product includes cryptographic software written by Eric Young
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Contents

	Preface	9
	Intended Audience	9
	Documentation	10
	Typographical Conventions	11
	Contact Information.....	11
	Corporate Headquarters	11
	Before Contacting Customer Care	12
	Accessing the Customer Care Knowledge Base	12
Chapter 1	About Upgrading COREid Federation	13
	About COREid Federation Versions	13
	Upgrade Paths and Requirements.....	14
	About the Upgrade Task and Processing	15
	Features Not Supported by the Upgrade	19
	Upgrade Options.....	20
	GUI vs. Console Mode Upgrades	20
	Automatic vs. Confirmed Mode Upgrades	20
	About Restoring COREid Federation 2.0	21
Chapter 2	Upgrading COREid Federation.....	23
	Preparing for the Upgrade	23
	Choosing Administrative Rights	24
	Comparing Compatibility with Previous Versions	24
	Confirming Available Disk Space	25
	Confirming the Active Directory DNS Entry	25
	Deleting the vpd.properties File	25
	Ensuring COREid Federation 2.0 can be Restored	26
	Preparing Existing COREid Federation Directories and Files	26
	Stopping COREid Federation Services	27
	Prerequisites Checklist	27
	Upgrading a COREid Federation Server	27
	Starting the Upgrade Process	29
	Initiating the Upgrade	30
	Finishing the Upgrade	32

	Confirming Your Upgraded Environment.....	33
	Upgrading a COREid Federation Proxy Server	34
	Restoring COREid Federation 2.0.....	36
Appendix A	Introducing COREid Federation Upgrade Utilities	37
	About Upgrades.....	37
	About COREid Federation Upgrade Utilities	39
	Files Used by the Utilities	39
	Log Files Produced by the Utilities	40
	Index	41

Preface

The *COREid Federation 2.5 Upgrade Guide* provides information about upgrading a COREid Federation 2.0 installation to COREid Federation 2.5.

Note: Oracle *COREid Federation* was previously known as Oblix *SHAREid*. All legacy references to Oblix and SHAREid should be understood to refer to Oracle and COREid Federation, respectively.

This Preface covers the following topics:

- “Intended Audience” on page 9
- “Documentation” on page 10
- “Typographical Conventions” on page 11
- “Contact Information” on page 11

Intended Audience

This guide is intended for administrators who are responsible for upgrading a COREid Federation 2.0 installation to COREid Federation 2.5.

This document assumes that you are familiar with your LDAP directory and Web servers and the COREid Federation product.

Documentation

The product previously marketed as Oblix *SHAREid* is now named Oracle COREid Federation. Any legacy references to Oblix or SHAREid in this documentation or the associated software interface (including illustrations and screen shots) should be understood to refer to Oracle and COREid Federation, respectively. The manuals that are available for this release include:

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

COREid Federation 2.5 Guide—Provides COREid Federation concepts and considerations, product installation and configuration, to help you create a Federated identity management system that provides cross-domain SSO to connect your partners and customers to your systems while reducing compliance risks.

COREid Federation 2.5 Upgrade Guide—Explains about preparing your COREid Federation 2.0 environment (previously known as SHAREid) and upgrading it to COREid Federation 2.5.

COREid Federation 1.0 to COREid Federation 2.0 Guide—Provides information about migrating COREid SAML Services (COREid Federation 1.0) to COREid Federation 2.0.

Documentation is also available for Oracle COREid (also previously known as NetPoint), including:

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.

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 will run. 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.

Typographical Conventions

COREid Federation 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:

`\SHAREid_install_dir\oblix\tools\migration_tools\shareid\logs`
`/SHAREid_install_dir/oblix/tools/migration_tools/shareid/logs`

where *SHAREid_install_dir* refers to the directory where the component, in this case, the COREid Federation 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
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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 Federation, 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.

1 About Upgrading COREid Federation

This chapter introduces the COREid Federation upgrade process. Topics here include:

- “About COREid Federation Versions” on page 13
- “Upgrade Paths and Requirements” on page 14
- “About the Upgrade Task and Processing” on page 15
- “Upgrade Options” on page 20
- “Features Not Supported by the Upgrade” on page 19
- “About Restoring COREid Federation 2.0” on page 21

About COREid Federation Versions

The latest version of Oracle COREid Federation is v2.5. When your environment includes an older version of COREid Federation, you may upgrade to the latest version as follows:

- **COREid Federation 2.0**—Use the information in this guide.
- **COREid Federation 1.0**—*Also known as NetPoint 6.x SAML Services*—Transition NetPoint 6.x SAML Services to COREid Federation 2.0 as described in the *COREid Federation 1.0 to COREid Federation 2.0 Guide*, then return to this guide to complete the upgrade.

The term *upgrade* refers to the process of changing from one major version (*X*) of COREid Federation to a later major version (*Y*) of COREid Federation. The term *migration* is typically used for the process you must complete to push a COREid Federation 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 COREid Federation are identified with version numbers *x.x* (2.0 or 2.5, for example). Major COREid Federation versions provide significant product enhancements over previous versions. In addition to new features and additional platform support, major COREid Federation versions may include changes to the parameter or message files. However, COREid Federation 2.5 provides only file and registry upgrades. See the latest *COREid Federation Release Notes* for details of each release. There are also maintenance versions and patches:

- Maintenance versions are identified with versions numbers *x.x.x* (2.0.1, for example) and typically include new platform support.
- Minor version patches are numbered *x.x.x.x* and most often resolve an issue reported by a customer or discovered during testing.

When upgrading, a minor version or patch version is recognized as the major version of the same series.

All 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 more than once. Files may be compared and/or updated more than once before the process is complete.

When you upgrade, the newer COREid Federation version is installed and the older version is saved in a backup directory. Your older configurations are made available to the new version.

Upgrade Paths and Requirements

To use COREid Federation 2.5 features, you need to upgrade all older COREid Federation components. After preparing your environment, you may upgrade to COREid Federation 2.5 as described in Table 1.

Table 1 Upgrade Paths for COREid Federation 2.5

From	To	Actions
COREid Federation 2.0	COREid Federation 2.5	Use the information in this guide.
COREid Federation 1.0 (also known as NetPoint 6.x SAML Services)	COREid Federation 2.5	Transition NetPoint 6.x SAML Services to COREid Federation 2.0 as described in the COREid Federation 1.0 to COREid Federation 2.0 Guide, then return to this guide to complete the upgrade.

For the latest system requirements, see the *Oracle COREid Federation 2.5 Guide* or *COREid Federation Release Notes*.

About the Upgrade Task and Processing

There are two primary activities that you must complete when you upgrade COREid Federation, as outlined below.

Task overview: Upgrading COREid Federation

1. Prepare your current COREid Federation environment for the upgrade, as indicated below:
 - **COREid Federation 2.0**—Use the information in “Preparing for the Upgrade” on page 23.
 - **COREid Federation 1.0**—Also known as NetPoint 6.x SAML Services—Transition NetPoint 6.x SAML Services to COREid Federation 2.0 as described in the *COREid Federation 1.0 to COREid Federation 2.0 Guide*, then return to this guide to “Preparing for the Upgrade” on page 23.
2. Upgrade COREid Federation as described in “Upgrading COREid Federation” on page 23.

The COREid Federation upgrades consist of the following processes:

- **File Transitions**—During the upgrade, files are copied from the backup directory to the new directory.
- **File Modification**—After files are copied, they are modified to suit the new version of COREid Federation.
- **Windows Registry Modification**—removes entries in registry for v2.0 replacing with v2.5 entries provided by the v2.5 installer

Note: You start all upgrades in the same way whether you are upgrading a COREid Federation source domain, destination domain, or Proxy server.

In general, the upgrade process begins automatically when you install COREid Federation 2.5 on a machine that is hosting an older version COREid Federation *and* you specify the same (target) installation directory where the older (source) component resides:

Sample Target Directory—\SHAREid_install_dir

In this case, the source is detected and you are asked if you want to upgrade. When you accept the upgrade, the source directory is renamed and existing files are preserved as a backup in a new directory of the same name with time stamp (yearmonthday_hourminutesecond):

Sample Renamed Source Directory—
\SHAREid_install_dir_20050122_141440
In this manual—\backup_install_dir

Original files may be accessed during the upgrade to compare content or extract information you have customized.

After the source directory is renamed as a backup, the target directory is created and new files are extracted to the target. New subdirectories are created in the target directory as needed.

The COREid Federation 2.5 directory structure is the same as that of COREid Federation 2.0 with one difference to accommodate the upgrade framework. The entire upgrade framework resides in the COREid Federation 2.5 directory below:

New Directory—`\SHAREid_install_dir\oblix\tools\migration_tools\shareid`

You may choose to have the upgrade performed either automatically or with your confirmation. Oracle recommends that you use the Automatic upgrade mode. Either way, Figure 1 on page 17 illustrates a typical upgrade process.

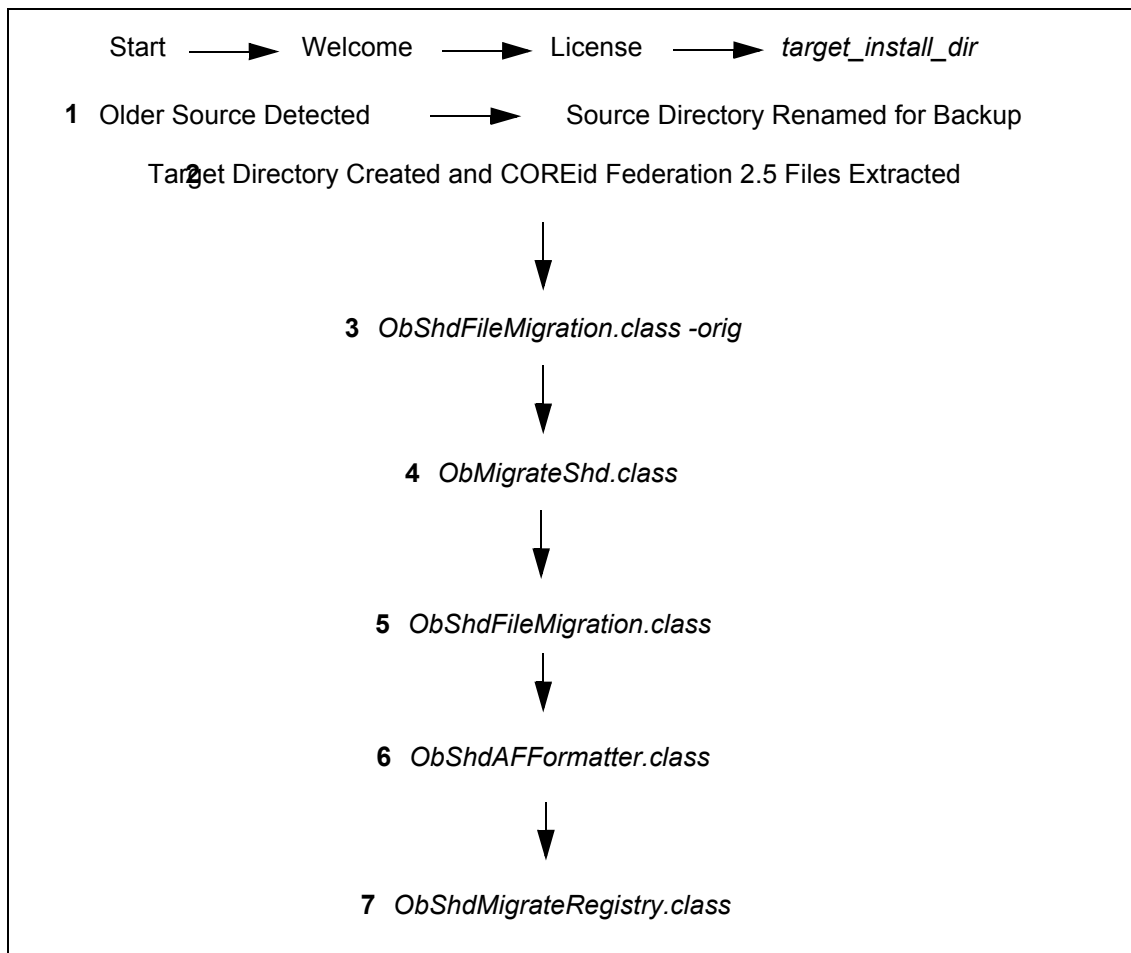
During each phase of the upgrade, a log file is produced by the specific tool used during that sequence to inform you if any problem should arise. You can find the upgrade log files in:

Log File Path—`\SHAREid_install_dir\oblix\tools\migration_tools\shareid\logs\`

Note: Unless indicated, the upgrade steps you perform and processing that occurs are the same for the COREid Federation source domain and destination domain. For COREid Federation Proxy servers, however, once the upgrade process is initiated it is completely automated and requires no intervention from you.

Figure 1 on page 17, and the process overview that follows it, outlines the flow of events that occur when you start a COREid Federation installation using the latest installation packages from Oracle and intend to complete the upgrade of a COREid Federation source domain or destination domain. The upgrade on Proxy servers uses different tools and is not illustrated.

Figure 1 COREid Federation Upgrade Events



Process overview: Upgrading COREid Federation

1. When you start a COREid Federation installation using the latest packages, and specify a target directory that contains an older version of COREid Federation:
 - The earlier version is detected and you are asked if you want to upgrade.
 - When you accept the upgrade, the directory containing the older version is renamed as a backup and files preserved:

For example:

backup_install_dir

2. The target installation directory is created as specified and latest COREid Federation files are stored therein.

For example:

SHAREid_install_dir

The target installation directory contains the latest files. For example, the latest version of COREid Federation obaccess.dll file is stored in the target installation directory (the older version resides in the *backup_install_dir*). Files in the previous release that are no longer needed are present only in the *backup_install_dir*.

3. **ObShdFileMigration.class**—Is called with the -orig parameter to create the orig_files directory in which to store relevant files required for future upgrading: backup_install_dir/orig_files.
4. **ObMigrateShd.class**—Is launched automatically for COREid Federation Server upgrades and drives the rest of the process.

Note: A Proxy upgrade does *not* use ObMigrateShd.class.

When you choose to use GUI mode, ObMigrateShd.class is invoked automatically. When you choose to use Console mode, ObMigrateShd.class is not invoked automatically. For more information, see “GUI vs. Console Mode Upgrades” on page 20.

5. **ObShdFileMigration.class**—Is called without the -orig parameter to copy files from the backup directory to the new directory to preserve the old settings.

Note: A Proxy upgrade uses obmigratefiles.bat for Windows, and obmigratefiles.sh for Unix (*not* ObShdFileMigration.class).

6. **ObShdAFFormatter.class**—Is called to modify and format the contents of files to suit the new version of COREid Federation.

The upgrade process occurs incrementally and files may be compared and/or updated more than once before the process is complete.

7. **ObShdMigrateRegistry.class**—Is called only on Windows systems to remove COREid Federation v2.0 entries from the registry and add COREid Federation v2.5 entries.

Note: With a Proxy upgrade, the Windows Registry upgrade is accomplished by the installer using a bean (*not* ObShdMigrateRegistry.class). The process is automated, even in Console mode.

For additional information on the tools called and log files produced during the upgrade process, see “Introducing COREid Federation Upgrade Utilities” on page 37.

Features Not Supported by the Upgrade

Several features are not supported by the upgrade to COREid Federation 2.5. The information below is organized alphabetically.

Login/Logout Page Customizations—Are not carried forward and must be manually implemented in COREid Federation 2.5.

Parameter and Message Files—Are not upgraded. Any changes you have implemented are not carried forward to the new version and must be manually implemented in COREid Federation 2.5.

Rolling Back to Your Previous Version—There is *no* way to directly rollback to your original version once you have upgraded to COREid Federation 2.5. Even though your original environment is stored in files in the *backup_install_dir* that was created when you accepted the upgrade, a number of changes occur in the *backup_install_dir* that prevent its use:

- The registry keys for the previous (2.0) version are removed
- The uninstall key of the previous (2.0) version is removed, which means that you do not have the option to uninstall the previous version.

For more information, see “About Restoring COREid Federation 2.0” on page 21.

COREid Federation Setup Changes—To use new features in COREid Federation 2.5, you need to setup COREid Federation 2.5 after the upgrade. Changes in COREid Federation 2.5 setup that support the addition and/or configuration of new data and/or a file are not completed during the upgrade process.

For example, suppose that the COREid Federation 2.5 setup process asks for additional information that was not requested during COREid Federation 2.0 setup. In this case, you need to configure the new options manually following setup.

Uninstalling the Upgraded (2.5) Version—Is *not* supported. Do *not* attempt to uninstall the upgraded (COREid Federation 2.5) version. Attempting to uninstall the upgraded version causes the following to occur:

- All required registry keys for the product will be removed.
- The entry of the service in the control panel will be removed, which means that the option for starting and/or stopping the COREid Federation Service from the control panel is removed.

Some libraries may be deleted if you attempt to uninstall COREid Federation 2.5, which may cause the product to function improperly.

Upgrade Options

There are several options you can choose when performing the upgrade:

- “GUI vs. Console Mode Upgrades” on page 20
- “Automatic vs. Confirmed Mode Upgrades” on page 20

GUI vs. Console Mode Upgrades

You may choose to start an installation or upgrade using either GUI mode or Console mode:

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

```
COREid_Federation_2_5_win32
./COREid_Federation_2_5_sparc-s2
```

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.

When you choose GUI mode, the upgrade framework (ObMigrateShd.class) is invoked automatically through the installer. Upon completion of the upgrade process, the installer performs any additional cleanup and exits.

Console Mode—May also be used with either Windows or Unix systems when you use a command window and issue the command using the -console parameter:

```
COREid_Federation_2_5_Win32 -console
./COREid_Federation_2_5_sparc-s2 -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 20.

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:

Performing File Migration

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

Performing File Migration. Do you wish to continue?

Enter choice ('1' - Yes or '2' - No) [1]:

1

Performing FILE MIGRATION

About Restoring COREid Federation 2.0

As discussed in “Features Not Supported by the Upgrade” on page 19:

- There is *no* way to uninstall the upgraded COREid Federation 2.5 version
- There is *no* way to revert the upgraded COREid Federation 2.5 version to your original 2.0 version

However, the following task overview outlines how to ensure that your original COREid Federation 2.0 configuration can be restored.

Task overview: Ensuring your original COREid Federation 2.0 implementation can be restored

1. Before you complete the upgrade, backup your COREid Federation 2.0 registry keys located in:

HKLM\SOFTWARE\Obliv\Obliv NetPoint\2.0\SHAREID

2. Before you complete the upgrade, backup your uninstall registry key for COREid Federation 2.0 located in:

HKLM\SOFTWARE\Microsoft\Windows\CurrentVersion\Uninstall\KEY

where *KEY* is dynamically generated by the installer.

3. Find the relevant key by checking the following in the registry entry:

Install Location

Version Major

Note: In future releases that support schema and/or data migration you also need to backup the directory server settings.

4. If you decide to restore your original configuration after the upgrade, complete the steps below:
 - a) Remove the COREid Federation 2.5 registry key and add the backed up 2.0 registry key.
 - b) Delete the uninstall key of the COREid Federation 2.5 version and restore the COREid Federation 2.0 uninstall key manually.
 - c) Delete the *SHAREid_25_install_dir*, then rename *backup_install_dir*.

2 Upgrading COREid Federation

This chapter explains all you need to know to prepare your environment and complete a successful upgrade to COREid Federation 2.5. Topics include:

- “Preparing for the Upgrade” on page 23
- “Upgrading a COREid Federation Server” on page 27
- “Confirming Your Upgraded Environment” on page 33
- “Upgrading a COREid Federation Proxy Server” on page 34
- “Restoring COREid Federation 2.0” on page 36

Preparing for the Upgrade

Before you start to upgrade COREid Federation to v2.5, you can help assure a successful outcome by completing the following tasks.

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

Task overview: Preparing your environment for an upgrade includes

1. Confirming that your existing COREid Federation installation running properly and meets requirements in the *Oracle COREid Federation 2.0 Guide*:
 - Platform and directory server requirements
 - COREid Federation installation prerequisites and requirements
 - Host clock synchronization
 - POST profile and Artifact profile are setup and working properly
 - COREid Federation installation is working properly
2. “Choosing Administrative Rights” on page 24
3. “Confirming Available Disk Space” on page 25
4. “Confirming the Active Directory DNS Entry” on page 25

5. “Deleting the vpd.properties File” on page 25.
6. “Ensuring COREid Federation 2.0 can be Restored” on page 26.
7. “Preparing Existing COREid Federation Directories and Files” on page 26.
8. “Stopping COREid Federation Services” on page 27.

Choosing Administrative Rights

Only a dedicated user who has installed the previous version of COREid Federation can upgrade the COREid Federation to the latest version. If a user *Admin* performs the upgrade, that user should restore the previous ownership permission following the upgrade.

To choose administrative rights for the upgrade

1. Confirm the user who installed the previous version of COREid Federation.
2. Log in as the user who installed the previous version of COREid Federation.

Comparing Compatibility with Previous Versions

As discussed earlier, to use COREid Federation 2.5 features, you need to upgrade all older instances to COREid Federation 2.5. How you go about this depends on the older version with which you start:

- **COREid Federation 2.0**—Use the information in this guide.
- **COREid Federation 1.0**—*Also known as NetPoint 6.x SAML Services*—Transition NetPoint 6.x SAML Services to COREid Federation 2.0 as described in the *COREid_Federation 1.0 to COREid_Federation 2.0 Guide*, then return to this guide to complete the upgrade.

The platforms and versions in your environment must correspond to those supported by COREid Federation 2.5.

Be aware of the following considerations when upgrading an older version of SHARE to v 2.5:

- The binaries for ASDK are bundled with the COREid Federation installer.
- COREid Federation 2.5 upgrades support only file and registry upgrades.

Confirming Available Disk Space

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

COREid Federation Release	Amount of Disk Space Needed (Approximate)
COREid Federation 2.5	165 MB
COREid Federation 2.0 (will be backed up)	160 MB

Confirming the Active Directory DNS Entry

When you have Active Directory in your installation, the etc/host file must include the DNS entry for the Active Directory server.

To prepare Active Directory

1. Locate the etc/host file.

For example:

Windows—WINNT\system32\drivers\etc

Unix—/etc/hosts

2. Ensure that the Active Directory server entry includes the DNS entry for the Active Directory server.

For example:

192.168.10.111

ob-udgir.intranet.psp1.co.in

Deleting the vpd.properties File

If previous installations 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 on the machine hosting the COREid Federation instance you plan to upgrade.
2. Delete the vpd.properties file.

Ensuring COREid Federation 2.0 can be Restored

As discussed in “About Restoring COREid Federation 2.0” on page 21, it is a good idea to prepare your environment to ensure that you can restore the previous (2.0) version after the upgrade should you choose to do so for any reason.

To ensure your original configuration can be restored

1. Before you start the upgrade, backup your COREid Federation 2.0 registry keys located in:
HKLM\SOFTWARE\Obliv\Obliv NetPoint\2.0\SHAREID
2. Look for source and destination keys.
3. Before you start the upgrade, backup your uninstall registry key for COREid Federation 2.0 located in:
HKLM\SOFTWARE\Microsoft\Windows\CurrentVersion\Uninstall\KEY
where *KEY* is dynamically generated by the installer.
4. Before you start the upgrade, backup your product keys for the source and destination.
5. Find the relevant key by checking the following in the registry entry:
Install Location
Version Major
6. Export the registry file keys:

Note: In future releases that support schema and/or data migration you will also need to backup the directory server settings.

Preparing Existing COREid Federation Directories and Files

During the upgrade, files are copied from the backup directory to the new directory and contents are modified to suit the new version of COREid Federation.

If any directories or files in your existing COREid Federation installation are in use (or open in a text editor), the upgrade process cannot rename the backup directory. For example, if you have an older COREid Federation folder selected or a file open in a text editor, the upgrade process cannot rename the backup directory.

To prepare existing COREid Federation directories and files

1. Ensure that all files in your current COREid Federation installation directory are closed.
2. Close any text editors.

3. Confirm that all folders in the existing COREid Federation installation directory are closed and not in use.

Stopping COREid Federation Services

Before you start to upgrade COREid Federation, you must stop COREid Federation services on the host machine as described in the Oracle *COREid Federation 2.0 Guide*.

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

To stop appropriate services

1. Stop the source COREid Federation service using the Control Panel > Administrative Tools > Services > *Service_Name* > Stop.
2. Stop the destination domain service Control Panel > Administrative Tools > Services > *Service_Name* > Stop.

Prerequisites Checklist

Before you begin upgrading the COREid Federation Server, check the tasks in Table 2 to ensure they have been completed. Failure to complete prerequisites may adversely affect your upgrade.

Table 2 COREid Federation Server Upgrade Prerequisites Checklist

Checklist	COREid Federation Server Installation Prerequisites
	Review information in “About Upgrading COREid Federation” on page 13.
	Complete all activities in “Preparing for the Upgrade” on page 23.
	Complete steps in “Ensuring COREid Federation 2.0 can be Restored” on page 26.

Upgrading a COREid Federation Server

As discussed in “About Upgrading COREid Federation” on page 13, there are three parts to upgrading:

- File transitions

During the upgrade, files are copied from the backup directory to the new directory.

- File modification

After files are copied, they are modified to suit the new version of COREid Federation.

- Windows Registry modification removes entries in registry for v2.0 replacing with v2.5 entries provided by the v2.5 installer

In the example below, steps are based on upgrading a COREid Federation server in a source domain and another in a destination domain. These instances may be on the same machine or on a different machine. The configuration for this example is outlined below:

Source Domain—Configured as follows:

IdMBridge—LDAP directory IdMBridge

Listen Port—30000

Bind DN—cn=Directory Manager

Assertion Profiles for source while interacting with destination

My Domain configuration includes various URLs and details relevant for a source domain

Destination Domain—Configured as follows:

Listen Port—30101

SSL Port—xx113

IdMBridge, COREid IdMBridge

Master Admin name and password

AccessGate and Access Server for COREid Federation=Open connection

My Domain configuration includes details relevant for a destination domain

Your environment *will* vary. Upgrade steps are similar for both source and destination domain upgrades. For more information about the COREid Federation Server, and source and destination domains, see the *COREid Federation 2.5 Guide*.

Note: If your environment includes a COREid Federation Proxy server, see “Upgrading a COREid Federation Proxy Server” on page 34 after upgrading the COREid Federation Server.

In this chapter, the COREid Federation upgrade task has been divided into several functional procedures that you can use as a guide. You must complete all procedures in order for a successful upgrade. All procedures are similar whether you are upgrading a source or destination domain.

Task overview: Upgrading to COREid Federation 2.5 includes

1. Completing all prerequisites in Table 2 on page 27.
2. Starting the upgrade like any COREid Federation 2.5 installation, as described in “Starting the Upgrade Process” on page 29.

3. “Initiating the Upgrade” on page 30
4. “Finishing the Upgrade” on page 32
5. “Confirming Your Upgraded Environment” on page 33

Starting the Upgrade Process

You can start the latest COREid Federation 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 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—COREid_Federation_2_5_win32_Server

Solaris—./COREid_Federation_2_5_sparc-s2_Server

Console Mode

Solaris—./COREid_Federation_2_5_sparc-s2_Server -console

Windows Command Window—

COREid_Federation_2_5_win32_Server -console

The Welcome screen appears.

3. Dismiss the Welcome screen by clicking Next.
You are asked to enter your older license key.

4. Enter your older license key, then continue.

For example:

Please enter the license key: *****

The license agreement appears and you are asked to accept the terms. You cannot continue unless you accept the license agreement terms.

5. Read and *accept* the terms of the license agreement, then click Next to continue.

Next you are informed that you must be running this installation as a user with administrator privileges.

6. Respond to the next question based upon your platform:

- **Windows**—If you are logged in with administrator privileges, 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.”

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

Next you are asked to specify the installation directory for this component.

7. Proceed to “Initiating the Upgrade” on page 30.

Initiating the Upgrade

During this sequence you must specify the *same* target directory for the new COREid Federation Server version as the older source version.

When your target installation directory is the same as the older source directory, you are informed that a version of COREid Federation 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, a backup directory is created to store the older COREid Federation files, a check is made to ensure you have enough disk space, then the target directory is created and COREid Federation 2.5 files are extracted into it. The latest version must be extracted to the original target path.

To specify the target directory and accept the upgrade

1. Choose the directory where you installed the older version, then click Next.

You are asked if you want to accept the upgrade.

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

The next screen tells you that the existing installation has been saved and provides the name of the renamed, timestamped source directory (also known as the *backup_install_dir*). The renamed source directory contains all files from the previous installation for reference.

You are informed about the amount of space needed for the installation.

3. Continue the upgrade by clicking Next.

The orig_files folder is created in the current installation directory and contains files that you might change during COREid Federation configuration. For example, server.xml, hibernate.cfg.xml, users.xml, and the like. These backed up files will be used in the future when you upgrade from COREid Federation 2.5 to the next major version. At that time, files in the orig_ folder will be compared with the files from the install directory to find changes you have made while configuring COREid Federation 2.5. Your customizations can be retained in the next major version.

4. Start v2.5 file extraction into the target directory by clicking Next.

A status bar indicates the progress of the file extraction.

5. 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.
- **Console Mode**—The installation script exits and a transcript appears containing information like that shown in the following steps.

This manual uses Console mode to illustrate the process.

6. **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, and a message is printed to run this file.

7. 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 20.

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

Note: Oracle recommends that you run the upgrade in Automatic mode, which requires no input or intervention from you. Despite this recommendation, the following steps are presented in Confirmed mode to illustrate the process.

8. **Confirmed vs. Automatic 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.

```
-----  
Performing File Migration. Do you wish to continue?  
Enter choice ( '1' - Yes or '2' - No ) [1]:  
-----
```

9. Proceed to “Finishing the Upgrade” on page 32.

Finishing the Upgrade

You finish the upgrade as you do any COREid Federation installation, as indicated below. Automatic mode will complete all tasks and inform you as they are completed. Confirmed mode asks for confirmation before completing a task.

Important: You should accept each choice. All tasks must be completed for a successful upgrade.

To finish the upgrade

1. **File Migration**—In Confirmed mode, accept by typing the number 1.

For example:

```
-----  
Enter choice ( '1' - Yes or '2' - No ) [1]:  
1  
Performing FILE MIGRATION  
  
Performing Ascii File Formatter. Do you wish to continue?  
-----
```

2. **Ascii File Formatter**—In Confirmed mode, accept by typing the number 1.

For example:

```
-----  
Enter choice ( '1' - Yes or '2' - No ) [1]:  
1  
Performing ASCII FILE FORMATTER
```


Performing Registry Migration. Do you wish to continue?

3. **Windows Registry Migration**—In Confirmed mode, accept by typing the number 1.

For example:

Enter choice ('1' - Yes or '2' - No) [1]:

1

Performing Registry Migration

Migration process has completed successfully.

Press the return key to continue...

4. **Finish**—Press the Return key to complete the upgrade.

The upgrade process is complete and the installer performs some cleanup. In Console mode, you see the transcript, cleanup is performed, then the installer exits.

5. Complete the activities in “Confirming Your Upgraded Environment” on page 33, then repeat the upgrade process on your destination domain.

See also “Upgrading a COREid Federation Proxy Server” on page 34.

Confirming Your Upgraded Environment

After finishing the upgrade process, it is a good idea to complete the steps below to confirm that COREid Federation 2.5 is working properly.

For more information, see the *COREid Federation 2.5 Guide*.

To confirm that your COREid Federation 2.5 environment is working

1. Start the COREid Federation services.
2. Log in to COREid Federation, as usual.

3. Verify that your COREid Federation v2.0 configuration was retained by reviewing COREid Federation source configuration pages, as usual.

IdMBridge—LDAP directory IdMBridge

Listen Port—30000

Bind DN—cn=Directory Manager

Assertion Profiles for source while interacting with destination

My Domain configuration URLS and details for the source domain

4. Ensure that the POST profile works properly by logging into the source domain and trying to access a protected resource, as usual.
5. Ensure that your Artifact profile work correctly by trying to access a protected resource, as usual.
6. Complete the activities below, as needed:
 - a) **Destination Domain**—Repeat the upgrade process in on your destination domain.
 - b) **COREid Federation Proxy Server**—See “Upgrading a COREid Federation Proxy Server” on page 34.

Upgrading a COREid Federation Proxy Server

As discussed earlier, the COREid Federation Proxy server upgrade includes file and registry upgrades, but does *not* call the upgrade framework (ObMigrateShd.class) used with COREid Federation Server upgrades. Instead:

- The file upgrade is done when a script (obmigratefiles.bat for Windows, and obmigratefiles.sh for Unix), which is configured by the installer, is invoked by the installer automatically.
- The Registry upgrade for Windows is accomplished by the installer using a bean, not using ObShdMigrateRegistry.class as is the case with a COREid Federation Server upgrade.

For a Proxy server upgrade, the process is automated even in Console mode.

The steps used for restoring an old Proxy server setup are the same as discussed in “Restoring COREid Federation 2.0” on page 36.

You begin a COREid Federation Proxy server upgrade as you do the COREid Federation Server upgrade described in “Upgrading a COREid Federation Server” on page 27.

To upgrade a COREid Federation Proxy server

1. Log in as a user with administrator privileges.
2. On the machine hosting the COREid Federation Proxy server, launch the new installer in either GUI mode or Console mode:

GUI Mode

Windows—COREid_Federation_2_5_win32_Server

Solaris—./COREid_Federation_2_5_sparc-s2_Server

Console Mode

Solaris—./COREid_Federation_2_5_sparc-s2_Server -console

Windows Command Window—

COREid_Federation_2_5_win32_Server -console

The Welcome screen appears.

3. Dismiss the Welcome screen by clicking Next.

You are asked to enter your older license key.

4. Enter your older license key, then continue.

For example:

Please enter the license key: *****

The license agreement appears and you are asked to accept the terms. You cannot continue unless you accept the license agreement terms.

5. Read and *accept* the terms of the license agreement, then click Next to continue.

Next you are informed that you must be running this installation as a user with administrator privileges.

6. Respond to the next question based upon your platform:

- **Windows**—If you are logged in with administrator privileges, 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.”

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

Next you are asked to specify the installation directory for this component.

You must provide the same target installation directory as the directory containing the older COREid Federation Proxy setup. When the existing Proxy installation is detected, you are asked if you want to upgrade. If you choose Yes, the upgrade process is completed without any further questions to or intervention by you.

7. Choose the directory where you installed the older version, then click Next.
You are asked if you want to accept the upgrade.
8. Accept the upgrade by clicking Yes, then click Next.

The next screen tells you that the existing installation has been saved and provides the name of the renamed, timestamped source directory (also known as the *backup_install_dir*). The renamed source directory contains all files from the previous installation for reference.

You are informed about the amount of space needed for the installation.

Note: The Registry upgrade for Windows is accomplished by the installer using a bean, automatically. For a Proxy server upgrade, the process is automated even in Console mode. When the Proxy server upgrade is finished, the status (Success or Failure) is reported and the installer exits.

9. Confirm that the Proxy server upgrade was completed successfully, as described in “Confirming Your Upgraded Environment” on page 33.

Restoring COREid Federation 2.0

After the upgrade, if you decide to restore your original configuration for any reason, you need to complete the procedure below.

Important: For the procedure below to work, you must have completed steps in “Ensuring COREid Federation 2.0 can be Restored” on page 26.

To restore your original (2.0) configuration after the upgrade

1. Remove the COREid Federation 2.5 registry key, then add your previously backed up 2.0 registry key.
2. Delete the COREid Federation 2.5 uninstall key, then restore your previously backed up COREid Federation 2.0 uninstall key manually.
3. Delete the 2.5 *SHAREid_25_install_dir*.
4. Rename the *backup_install_dir* with the timestamp to its original name.

A Introducing COREid Federation 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” on page 37
- “About COREid Federation Upgrade Utilities” on page 39
- “Files Used by the Utilities” on page 39
- “Log Files Produced by the Utilities” on page 40

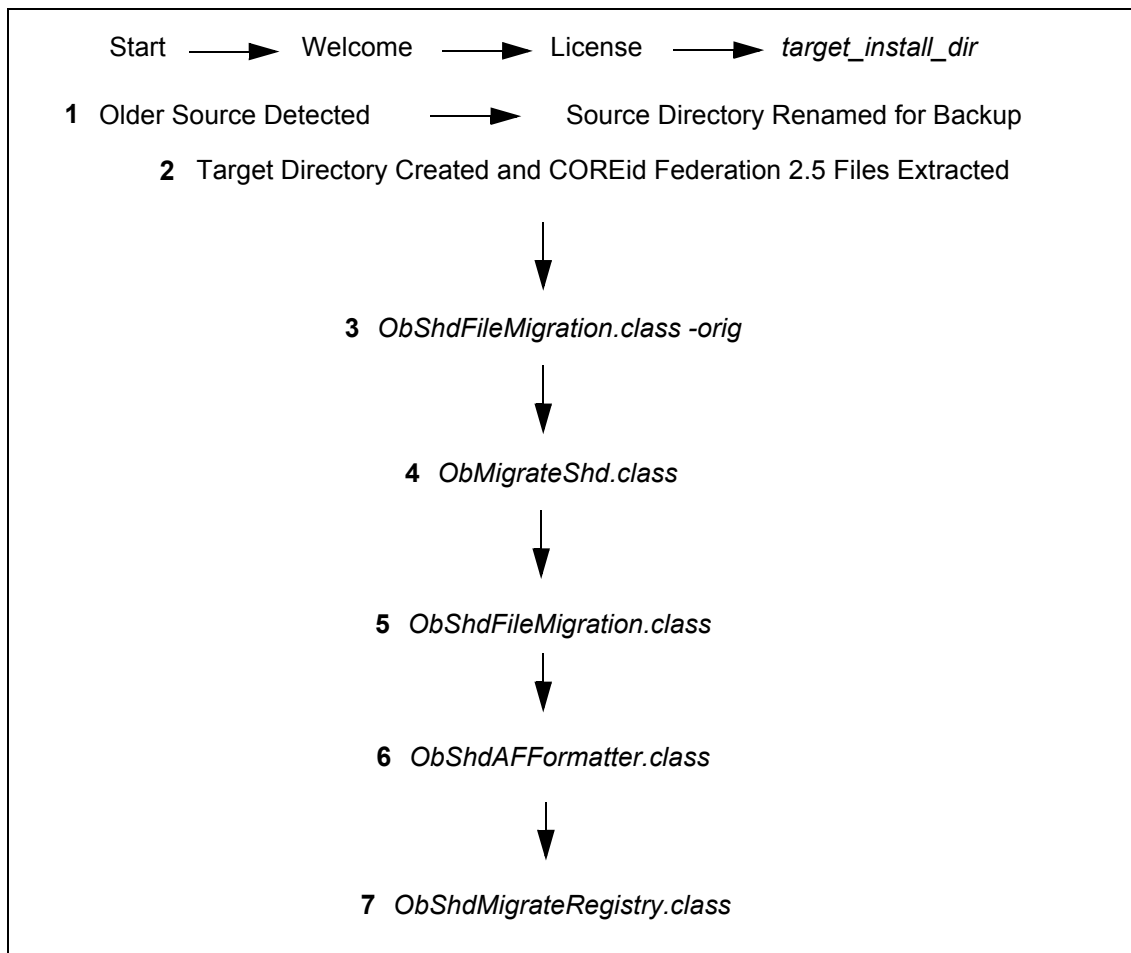
Note: The information here is for information only. Running the tools manually is *not* recommended. Oracle strongly recommends that you complete the upgrade as described in “Upgrading COREid Federation” on page 23.

About Upgrades

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

Figure 2 illustrates the process and highlights utilities used and discussed in this chapter. See also, “About the Upgrade Task and Processing” on page 15.

Figure 2 COREid Federation Upgrade Events



Source—An older version of COREid Federation detected in the target directory. The directory is renamed for use as a backup and all files are preserved *before* the new target directory is created for the latest version of COREid Federation.

Target—The destination you specify for your COREid Federation installation. This directory is created and contains the latest COREid Federation files. You are asked about upgrading when an older version of COREid Federation is detected in the target.

About COREid Federation Upgrade Utilities

Utilities used for the upgrade process are developed in Java and are not executables. These include:

- **ObShdFileMigration.class**—Is called *with* -orig parameter to create the orig_files directory in which to store relevant files required for future upgrading: *backup_install_dir/orig_files*.
- **ObMigrateShd.class**—Drives the process.
- **ObShdFileMigration.class**—Is called *without* the -orig parameter to copy files from the backup directory to the new directory to preserve the old settings.
- **ObShdAFFormatter.class**—Modifies and updates the contents of files to suit the new version of COREid Federation.

Note: The upgrade process occurs incrementally. Utilities may be called more than once and files may be updated more than once before the process is complete.

- **ObShdMigrateRegistry.class—Windows Only**—Removes COREid Federation v2.0 entries from the registry and adds COREid Federation v2.5 entries.

Files Used by the Utilities

The following files are used during the upgrade process:

- **ObShdMigrationConfig.properties**—Used by ObMigrateShd to govern the upgrade flow, including which utility is invoked and when.
- **orig_files.properties**—Used by the file upgrade utility to create the orig_files folder. This file includes items like:

file:conf/server.xml
file:conf/tomcat-users.xml

- **shd_basefile.properties**—Used by the file upgrade utility to migrate files from the backup directory to the *target_install_dir*. For example:

file:conf/keystore
file:conf/LICENSE
file:jdk/jre/lib/security/cacerts

- **shd_aff_oldversion_newversion.properties**: Used by ObShdAFormatter.class to determine the names of files that need to be updated for a particular increment. The entries in this file is of the form:

Name of the file which is to be updated (*X*) = Name of the file (*Y*) that contains the instruction for the update of file *X*.

Log Files Produced by the Utilities

The log files below are produced so you can verify information about the process:

- **ObMigrateShd.log**—The main log file containing details about numerous events during the upgrade.
- **ObShdFileMigration.log**—The log file that contains information about the backup orig folder.
- **ObShdAffMigration.log**—A file formatter log file produced when an intermediate utility is invoked by the file upgrade utility.
- **ObShdRegistryMigration.log**—The registry update log file.

Index

A

- About Restoring COREid Federation 2.0 21
- Accept the upgrade 30
- Active Directory 25
- administrative rights 24
- audience 9
- Automatic Mode 21

C

- Choose administrative rights for the upgrade 24
- conf/keystore 39
- conf/LICENSE 39
- Confirm
 - COREid Federation 2.5 is working 33
- Confirmed Mode 21
- Console Mode 20
- contact information 11
- COREid Federation 1.0 13, 14
- COREid Federation 2.0 13, 14, 15, 21
- COREid Federation 2.5 14
- COREid Federation Setup Changes 19
- COREid Federation1.0 15
- Customizations 19

D

- documentation 10

E

- Ensure v2.0 can be restored 26

F

- Files Used by Utilities 39
- Finish the upgrade 32

G

- GUI Mode 20

J

- jdk/jre/lib/security/cacerts 39

L

- Log file path 16
- Log Files 40
- Login/Logout Page Customizations 19

M

- Maintenance versions 14
- Message and Parameter files 19
- Minor version patches 14

N

- NetPoint SAML Services 13, 14

O

- ObMigrateShd 18
- ObMigrateShd.class 39
- ObMigrateShd.log 40
- ObShdAffMigration.log 40
- ObShdAFFormatter.class 39
- ObShdFileMigration 18
- ObShdFileMigration.class 39
- ObShdFileMigration.log 40
- ObShdMigrateRegistry.class 39
- ObShdMigrationConfig.properties 39
- ObShdRegistryMigration.log 40
- Oracle contact information 11
- orig_files.properties 39

P

- Parameter and Message Files 19
- Prepare
 - existing COREid Federation directories and files 26
- Prepare Active Directory 25
- Procedure
 - To remove the vpd.properties file 25
- Process overview
 - Upgrading COREid Federation 17
- Proxy server 28, 34, 35

R

- Restore your 2.0 implementation after the upgrade 36
- Rolling Back 19

S

- SAML Services 13, 14
- shd_aff_oldversion_newversion.properties 40

- shd_basefile.properties 39
- Source Directory 15, 38
- Specify the target directory 30
- Start the upgrade 29
- Stop COREid Federation services 27

T

- Target Directory 15, 38
- Task overview
 - Ensuring your original COREid Federation 2.0 implementation can be restored 21
 - Preparing your environment for an upgrade 23
 - Upgrading COREid Federation 15
 - Upgrading to COREid Federation 2.5 28
- typographical conventions 11

U

- Uninstalling v2.5 19
- Upgrade Paths 14
- Upgrade utilities
 - ObMigrateShd.class 39
 - ObShdAFFormatter.class 39
 - ObShdMigrateRegistry.class 39
- Upgrading
 - log in as an administrator prior 24
- Upgrarde utilities
 - ObMigrateShd.class 39

V

- vpd.properties file 25