

CA GovernanceMinder

Upgrade Guide

12.6.1



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CA Technologies Product References

- This document references the following CA Technologies products:
- CA GovernanceMinder
- CA IdentityMinder
- CA SiteMinder
- CA User Activity Reporting
- CA SDM
- [assign the value for iamcs in your book]

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Chapter 1: Upgrade Overview

This section contains the following topics:

- [Supported Upgrade Paths](#) (see page 7)
- [Product Components](#) (see page 7)
- [Architecture](#) (see page 8)

Supported Upgrade Paths

The following upgrade path is supported in this release:

- CA GovernanceMinder r12.5 and later SPs on JBoss
- CA GovernanceMinder 12.6 to 12.6.1 on WebSphere

Note: Upgrade from a 32-bit system to a 64-bit system is not possible. To migrate to a 64-bit system, install a new version of the product and migrate your data to the new installation.

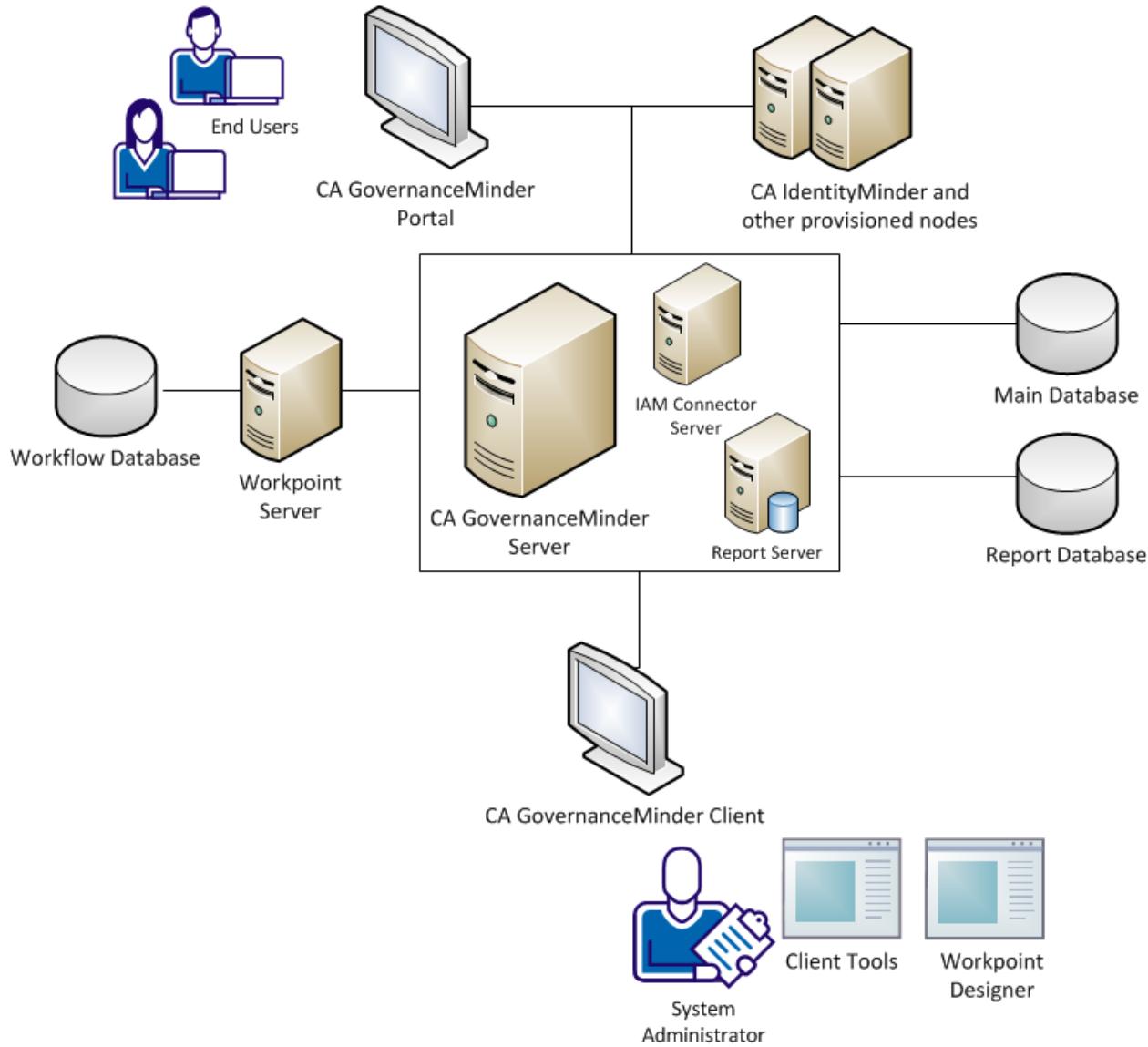
Product Components

Upgrade from a previous version of CA GovernanceMinder involves the following components:

- **CA GovernanceMinder Server**—The CA GovernanceMinder installer automatically updates the server application.
- **CA GovernanceMinder Client Tools**—Uninstall the existing instances of the Client Tools, and reinstall this version.
- **Workpoint Processes**—Business processes are overwritten with updated versions.
- **Certifications (Campaigns) and Business Workflows**—If upgrading from a version prior to SP3, conclude and archive all certifications, self-service requests, and business workflows before you upgrade.

Architecture

The following diagram shows the interaction between these components.



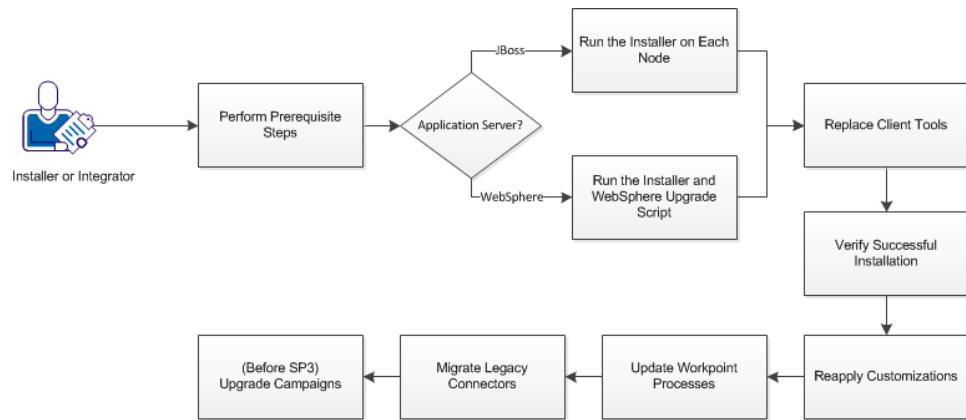
Chapter 2: Upgrade CA GovernanceMinder

This section contains the following topics:

[How to Upgrade CA GovernanceMinder](#) (see page 9)

How to Upgrade CA GovernanceMinder

This section describes prerequisite steps that you must complete when you upgrade CA GovernanceMinder to the current release.



Follow these steps:

1. [Perform all prerequisite steps before the upgrade](#) (see page 10).
2. Upgrade your application server:
 - [JBoss: Run the CA GovernanceMinder installer on each node](#) (see page 11).
 - [WebSphere: Run the installer and the upgrade script.](#) (see page 11)
3. [Replace instances of the client tools](#) (see page 12).
4. [Verify a successful installation](#) (see page 13).
5. Reapply any customizations and reverify installation.
6. [Update Workpoint processes](#) (see page 14).
7. [Migrate legacy connectors](#) (see page 14).
8. (Upgrade from r12.5 SP2 and earlier only) [Upgrade campaigns](#) (see page 15).

CA GovernanceMinder Server Prerequisites

Perform the following steps to prepare your CA GovernanceMinder system for upgrade.

Follow these steps:

1. (Optional) Run an export for any modified master and model configuration.
2. Back up all customizations.
3. Stop and delete all scheduled jobs, as follows:
 - a. Navigate to Administration, Workflows in the Portal.
 - b. Select a workflow and go to the Administration tab.
 - c. Click Stop.
 - d. Navigate to Administration, Job Scheduler.
 - e. Delete all scheduled jobs.
4. Stop the CA GovernanceMinder Server.
5. If you are upgrading from a release prior to r12.5 SP3, do the following:
 - Stop and archive all campaigns, as follows:
 - a. Navigate to Administration, Workflows in the Portal.
 - b. Select a campaign and go to the Administration tab.
 - c. Click Stop.
 - d. Click Archive.
- Note:** After upgrade, you can create a certification based on this archive. You can also export campaign progress to an audit card, and include it in a new certification. For more information, see the *Administration Guide*.

 - Complete all self-service requests.
 - Complete all pending tickets in your Inbox.
6. If you are using a connector to CA IdentityMinder from before CA GovernanceMinder 12.5 SP4, remove it from the system and recreate a connector to CA IdentityMinder using the new connectivity functionality.

Note: For more information about creating a connector to CA IdentityMinder, see the *Integration Guide*.

Run the Installer on Each Node

Run the installer to create a reference installation on a single node.

Note: The installation worksheets list information you provide during installation. Use the worksheets during installation to avoid errors.

Follow these steps:

1. Verify that the designated CA GovernanceMinder database server host is running.

Note: Host the database on a different computer than the cluster nodes.

2. Run one of the following installation programs:

- Windows: InstCARCM.exe
- Linux: InstCARCM.bin

These installation programs are available in the installation package that you downloaded.

The CA GovernanceMinder installer opens.

3. Select the language you want for the Portal, which is a web-based interface for CA GovernanceMinder.

Note: The language you select affects only the Portal interface and not the installation or any other component. This selection does not affect this installation.

4. Complete the installer by providing the necessary information.

5. In the step The Application Server, select JBoss: Install with customized JBoss on this computer.

6. Review your installation choices and click Install.

The installer runs the customized installation package.

7. Click Done to close the installer.

Next, you configure the install Client Tools.

Upgrade the WebSphere Application Server

If you are using WebSphere on Linux, upgrade your WebSphere application server.

Follow these steps:

1. Stop all WebSphere servers in the cluster.

2. Run the CA GovernanceMinder installer on each node in the cluster.

3. On the host node, navigate to the following installation folder:
install_dir/CA/RCM/Server/rcm-websphere/WAS-Scripts/
4. Run the UpgradeGVM.sh script and enter the WebSphere application bin directory as a parameter. For example:
`/opt/IBM/WebSphere/AppServer/bin/`
You have upgraded the WebSphere application server.

Next, you install Client Tools.

Install Client Tools

Use the Client Tools to import and modify data, and analyze, construct, and administer the role hierarchy. Install the Client Tools on a Windows computer that can communicate with the CA GovernanceMinder server and the database server.

Follow these steps:

1. On a Windows computer, run the .msi file you prepared earlier:
 - On a 64-bit computer, run CA-RCM-rel#-Client-Tools-x64.msi
 - On a 32-bit computer, run CA-RCM-rel#-Client-Tools-x86.msiThe Client Tools installation wizard opens.
2. Complete the installer following the wizard prompts.
If you selected to install more components, the installation prompts you for the required files:
 - To install the UUID and IM Connector tools, locate the CA-RCM-rel#-Client-Tools-Open-Source.zip file.
 - To install the Online Help, locate the CA-RCM-rel#-Language-Files.zip file.The installer runs and installs the CA GovernanceMinder client tools on the computer.

3. (64-bit computers only) Run the Microsoft Assembly Registration Utility:
 - a. Open a command line window and navigate to the following folder:
C:\WINDOWS\Microsoft.NET\Framework64\v2.0.50727
 - b. Enter the following commands:
regasm.exe "C:\Program Files\CA\RCM\Client Tools\Software\Microsoft.Web.Services3.dll"
regasm.exe "C:\Program Files\CA\RCM\Client Tools\Software\SageSOAP.dll"

You have installed the Client Tools on a Windows computer that can communicate with the CA GovernanceMinder server and the database server.

Next, you verify a successful installation.

Verify Successful Installation

When you have verified a successful installation, you can access the CA GovernanceMinder Portal.

Follow these steps:

1. Open a Command Prompt window on Node 1, navigate to the JBoss home folder and run the following file:

Windows: eurikify.bat

Linux: eurikify.sh

The CA GovernanceMinder and JBoss servers on Node 1 starts.

2. Review the logs and ensure Node 1 starts with no error messages.

The CA GovernanceMinder cluster node log folder is:

jboss.5.1home\server\all\log

Note: *jboss.5.1home* is the CA GovernanceMinder cluster node home directory.

3. Stop the CA GovernanceMinder and JBoss servers on Node 1.

You have verified the CA GovernanceMinder installation.

Next, you update the Workpoint processes.

Update Workpoint Processes

To enable certifications and other business processes, import predefined workflow definitions into Workpoint.

Follow these steps:

1. Verify that the CA GovernanceMinder databases are running.
2. Log in to the Portal as an administrator.
Your Portal home page appears.
3. Go to Administration, Settings.
4. Click Workpoint DB Administration.
The Workpoint DB Administration screen appears.
5. Under Update Workpoint Processes, verify the CA GovernanceMinder Server Host Name, Port, and HTTPS setting.
Note: In a clustered environment, enter the cluster name instead of the server hostname.
6. Click Update.
The product populates the Workpoint database with Workpoint processes and related data.

Next, you migrate connectors.

Note: Connector migration is only relevant for upgrades from r12.5 SP2 and SP3.

Migrate Connectors

Connector migration is only relevant for upgrades from r12.5 SP2 and SP3.

Consider the following issues when migrating connectors:

- Always migrate an export connector after migrating the import connectors.
- You can migrate one export connector.
- View legacy connector content and configuration details in the Portal, under the Connectivity tab of the Universe before migration.
- Note the following issues for connectors from before r12.5 SP2 (12.5, SP1):
 - They cannot be migrated
 - They can be deleted
 - They appear in the legacy connectors table in the Portal

Follow these steps:

1. Log in to the Portal as an administrator.
2. Go to Administration, Universes.
A list of universes appears.
3. Select the universe where you want to migrate connectors.
4. Select the Connectivity tab.
The Connector screen opens.
5. In the Legacy Connector area, click Migrate Legacy.
The migration process starts and concludes. You have migrated connectors.

Next, you upgrade campaigns.

Note: Upgrade campaigns for versions before 12 SP3.

Upgrade Campaigns

After an upgrade, you can create a certification based on the campaign archives you made prior to the upgrade. You can also use the audit card containing the exported campaign progress and include it in a new certification.

Note: For more information, see the *Administration Guide*.