

Tech-Note

*ORACLE APPLICATION SERVER –
MIGRATING ORACLE INSTANT PORTAL
FROM ORACLE APPLICATION SERVER
STANDARD EDITION ONE (10.1.2.0.1) TO THE
STANDARD AND ENTERPRISE EDITIONS
(10.1.2.0.2)*

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INTRODUCTION

Oracle Instant Portal provides instant out-of-the-box portals for secure publishing and content sharing, ideal for companies and departments that require cost-effective, easy-to-build, easy-to-maintain content portals. Oracle Instant Portal's debut is part of Oracle Application Server 10g Release 2 (10.1.2.0.1) Standard Edition One – a new Oracle Application Server release designed for small to medium businesses or departments. Oracle Instant Portal will also be available in Oracle Application Server 10g Release 2 (10.1.2.0.2) Standard and Enterprise Editions.

This tech note describes how Oracle Application Server 10g Release 2 (10.1.2.0.1) Standard Edition One customers can take advantage of the additional features of Oracle Application Server 10g Release 2 (10.1.2.0.2) Standard and Enterprise Editions by migrating their Oracle Instant Portal page groups from Oracle Application Server 10g Release 2 (10.1.2.0.1) to Oracle Application Server 10g Release 2 (10.1.2.0.2).

SUPPORTED VERSIONS

This tech note applies to migrating Oracle Instant Portal page groups from 10.1.2.0.1 to 10.1.2.0.2.

DOCUMENTATION

The migration is accomplished by exporting and importing the Oracle Instant Portal page groups. Steps for performing exports and imports are fully documented in the *Oracle Application Server Portal 10g Release 2 (10.1.2.0.2) Configuration Guide* chapter titled “Exporting and Importing Content”.

This tech note provides an introduction to the migration process and contains information specific to migrating Oracle Instant Portal. It is intended as a supplement to the *Oracle Application Server Portal 10g Release 2 (10.1.2.0.2) Configuration Guide*; that is, use this tech note in conjunction with the chapter “Exporting and Importing Content”.

SOFTWARE

Oracle Application Server 10g Release 2 (10.1.2.0.2) can be downloaded from the [Oracle Technology Network](#) or ordered on CD using the regular channels.

MIGRATION OVERVIEW

After you install Oracle Application Server 10g Release 2 (10.1.2.0.2) Standard or Enterprise Edition in the configuration required to support your capacity, follow these steps to migrate your Oracle Instant Portal page groups:

1. Migrate users from the 10.1.2.0.2 Oracle Internet Directory to the 10.1.2.0.2 Oracle Internet Directory server.

This step is required if the target portal will not share the same Oracle Internet Directory server. Detailed steps for migrating users in Oracle Internet Directory server are found in the *Oracle Internet Directory Administrator's Guide*.

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2. Check OTN to see if the Oracle Application Server 10.1.2.1.0 patch is available yet. If it is, it is recommended that you apply that patch to both the source and target installations before exporting and importing your Oracle Instant Portal page groups. If the 10.1.2.1.0 patch is not yet available, you may still export from your 10.1.2.0.1 installation and import into your 10.1.2.0.2 installation.
3. Export the Oracle Instant Portal page group from the 10.1.2.0.1 installation (source) and import to the 10.1.2.0.2 installation (target).

Here is a summary of the OracleAS Portal export and import process:

1. Create transport sets and extract the content to transport tables. Transport sets contain the portal objects that you are planning to export to your target portal environment.
2. Prepare to move the transport sets from one system (source) to another (target) by using OracleAS Portal export/import command-line scripts to generate a transport set dump file.
3. Transfer the script and dump file to the target system using FTP or other file transfer utilities.
4. Invoke the command line script to import the dump file to the transport tables on your target system.
5. Import the objects from the transport tables to the target portal repository using the Transport Set Manager portlet.

Although the instructions in the *Oracle Application Server Portal Configuration Guide 10g Release 2 (10.1.2.0.2)* are for migrating content you manually create in portal, the steps are the same for migrating Oracle Instant Portals. Just as in OracleAS Portal, an Oracle Instant Portal's content is contained in a portal page group as a set of pages, templates, navigation pages, styles, item types, items, and portlets.

Understanding the Oracle Instant Portal Application

It is important to note that an Oracle Instant Portal page group is a complete entity. That means that you need to migrate the entire page group and should not try to migrate individual objects within the page group. As you prepare to migrate your Oracle Instant Portal, it is useful to understand the components that make up the Oracle Instant Portal application.

The Oracle Instant Portal application consists of:

- A page group, containing pages, templates, navigation pages, styles, custom item types with associated item type procedures, items, database provider portlets (with default settings and user preferences), and an instance of the portal custom search portlet with customizations.
- Item type procedures as PL/SQL code in the PORTAL schema
- Two UI templates:
 - OIP_HOME_TEMPLATE
 - OIP_LOBS_TEMPLATE
- A database provider in the PORTAL schema
- Mid-tier files: JavaScript library, CSS files, images, etc.

The target Standard or Enterprise Edition portal already contains some aspects of the Oracle Instant Portal application including:

- The item type procedures as PL/SQL code in the PORTAL schema
- The database provider in the PORTAL schema
- The mid-tier files

This means you will migrate the page group and UI templates only. After you explicitly select the Oracle Instant Portal page group for migration, the Export/Import Dependency Manager will identify the UI templates as external objects related to the page group objects being explicitly exported. You will then select the two UI templates for export, along with the page group, by adding the UI templates to the list of transport set objects. Since the UI templates are necessary for the page group, you must always export them along with the page group.

It is not necessary to migrate any other part of the application, such as the database provider and item type procedures in the PORTAL schema, or application files from the mid-tier, which helps simplify the export and import process.

Portlet Customizations

OracleAS Portal export and import automatically migrate portlet customizations for you. Portlet customizations for the home page portlets and the custom search portlet are migrated with the page group, so you will not need to reconfigure these after completing the import. However, all user preferences, such as those established in the Favorite Contents portlet, will be lost. When users log in to the new environment, they will need to re-establish their lists of favorite content.

MIGRATING ORACLE INSTANT PORTAL PAGE GROUPS

Follow these steps to export and import your Oracle Instant Portal page groups.

Migrating Your Users

Migrate your users from your source Oracle Internet Directory to your target Oracle Internet Directory using the instructions in the in the *Oracle Internet Directory Administrator's Guide*.

Exporting Your Oracle Instant Portal

1. Log in to OracleAS Portal as the portal administrator (default user name is PORTAL), and create a transport set for export by selecting the Oracle Instant Portal page group for export. From the Navigator, click **Export** next to your Oracle Instant Portal page group to display the Transport Set Manager.
2. Make the transport set name as descriptive as possible and avoid using any special characters at the start of the name. For example, *Oracle Instant Portal Transport Set 24-MAY-2005*.
 - Select both check boxes under the Transport Set Options:
Export Access Control Lists. Includes access control lists associated with the objects in the transport set.
 - **Validate System Tables**. For container objects such as a page group, system tables are always validated.

Accept the “Replace on Import” default import mode for the page group. Add to transport set the two UI Templates from the External Objects list:
OIP_HOME_TEMPLATE
OIP_LOBS_TEMPLATE

3. Select **Export Now** to finalize your transport set. In the background, the objects marked for export are copied to the transport tables for migration.

If your transport table creation step times out, it may be because your page group has a lot of content, so the browser is timing out before the dependency manager and the pre-check routines complete their calculations. You can use the Oracle Portal Export Assistant to export a large page group. This tool creates the transport set, and promotes all external objects. It then submits the transport set for extraction. This tool does the equivalent to creating transport sets in the user interface and clicking on Export Now. Refer to the Configuration Guide chapter “Exporting and Importing Content” for instructions for using this tool.

4. Check the log in your transport set manager for any errors by clicking the **View Log of Actions** link. Refer to the Configuration Guide chapter for instructions for reading the log file.
5. Choose an appropriate export script based on your operating system, UNIX or Windows NT, and save the script file to your source system. Remember to include the correct file extension, .csh for UNIX or .cmd for NT; for example, MyScript.csh. This script is both your export script and your import script. When running the script, you will indicate the mode as export or import.
6. Run your script to create an export dump file. Be sure to set your Oracle home environment variable (ORACLE_HOME) to your infrastructure Oracle home before running the script.

```
Usage: MyScript.csh <-mode export> <-s portal_schema>
<-p portal_password><-c connect_string> <-d dump_file_name>

-mode is the mode for invoking the command line utility
-s portal_schema is the Oracle Database account for portal
-p portal_password is the Oracle Database password for portal
-c connect_string is the TNS connection information to connect to the
database
-d dump_file is the name of the file to which Oracle export will write
```

For example,

```
MyScript.csh -mode export -s portal -p REUDY6x4 -c asdb -d export.dmp
```

7. Transfer your dump file and export/import script to the computer where your target installation resides.

Importing Your Oracle Instant Portal

You are now working on your target system (10.1.2.0.2).

1. To import your objects, the contents of the transport set dump file must first be imported to the transport set tables on the target system. Run the same script used in the export, but this time, with -mode set to import. Be sure to set your Oracle home to your infrastructure Oracle home before running the script.

```
Usage: MyScript.csh <-mode import> <-s portal_schema>
<-p portal_password> <-pu portal_username> <-pp portal_userpassword>
<-c connect_string> <-d dump_file_name>

-mode is the mode for invoking the command line utility
-s portal_schema is the Oracle Database account for portal
-p portal_password is the Oracle Database password for portal
-pu portal_username is the lightweight user name for logging in to portal
from the browser
-pp portal_userpassword is the lightweight user password for logging in to
portal from the browser
```

-c connect_string is the TNS connection information to connect to the database
-d dump_file is the name of the file from which Oracle import will read

For example,

```
MyScript.csh -mode import -s portal -p REUDY6x4 -pu portal -pp  
welcome1 -c asdb -d export.dmp
```

2. Log in to OracleAS Portal as the portal administrator (default user name is PORTAL), and locate the Export/Import Transport Set portlet, installed by default on the Administer tab of the Builder page. From the *Import a Transport Set* area of the portlet, browse and select the transport set you just imported. You will find it under the same name you gave for the export transport set. Select **Import** to proceed.
3. To view the status of the import of your dump file to the transport set tables, click the Status icon. Refer to the Configuration Guide for a description of each status type, and for instructions to view a detailed log of the import process, including debug messages.
4. In the Explicitly Selected Objects section, you should see your Oracle Instant Portal page group and both UI templates listed as explicitly selected objects. Select **Replace on Import** next to your page group, to replace the page group objects if found in the target portal.
Do *not* select **Replace on Import** next to the UI templates. This allows you to reuse the shared objects UI templates from your target system.
5. On the Main tab, make sure that the Import Access Control Lists option is selected.
6. Select **Import Now** to import the objects from the transport tables.

After selecting your transport set for import, if you find that precheck times out, it may be because your page group has a lot of content, and your browser is timing out before the pre-check routines complete their calculations. You can then run the import script with the automatic merge option. This imports the dump file into the target system and also starts the import.

For example,

```
MyScript.csh -mode import -s portal -p REUDY6x4 -pu portal -pp  
welcome1 -c asdb -d export.dmp -automatic_merge
```

7. Check the log file for errors. Refer to the Configuration Guide for a description of log file messages you may see.
8. Ensure that the page group and UI templates have been imported correctly by navigating to the Oracle Instant Portal page group and viewing the pages. Check that the home page portlets have been imported. Go to the User Management screen, and check that user privileges have been imported correctly.

CONCLUSION

This tech note introduced the components of Oracle Instant Portals, the Oracle export and import process, and the steps to migrate Oracle Instant Portals from 10.1.2.0.1 to 10.1.2.0.2. Please refer to the *Oracle Application Server Portal 10g Release 2 (10.1.2.0.2) Configuration Guide* for a complete set of instructions for Oracle export and import.



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