

Novell Identity Manager Roles Based Provisioning Module

3.6

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USER APPLICATION: MIGRATION
GUIDE



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About This Guide

This guide describes how to migrate from the Identity Manager User Application version 3.5 or 3.5.1 to the Identity Manager Roles Based Provisioning Module version 3.6.

Audience

This guide is intended for administrators who are responsible for installing and maintaining Identity Manager.

Feedback

We want to hear your comments and suggestions about this manual and the other documentation included with this product. Please use the User Comments feature at the bottom of each page of the online documentation, or go to www.novell.com/documentation/feedback.html and enter your comments there.

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For documentation on other Identity Manager features, see the [Identity Manager Documentation Web site](http://www.novell.com/documentation/idm) (<http://www.novell.com/documentation/idm>).

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Migrating from Identity Manager User Application Version 3.5 or 3.5.1 to Version 3.6

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This document describes the process of migrating from Identity Manager User Application version 3.5 or 3.5.1 to the Identity Manager Roles Based Provisioning Module version 3.6. The migration process is performed in a number of tasks, using several installers and utilities. The migration process consists of the following tasks, in the order given. Each of these tasks is described in greater detail in the following sections.

- ♦ [Section 1.1, “Installing Identity Manager,” on page 9](#)
- ♦ [Section 1.2, “Migrating User Application Drivers,” on page 9](#)
- ♦ [Section 1.3, “Installing the User Application,” on page 11](#)

WARNING: Before beginning the migration process, make directory and database backups of your Identity Manager system.

1.1 Installing Identity Manager

The first step of the migration process is to install the Version 3.5.1 of Identity Manager.

1. Make sure your system configuration meets the requirements for Identity Manager 3.5.1. See “System Requirements for Identity Manager” in the [Identity Manager 3.5.1 Installation Guide \(http://www.novell.com/documentation/idm35/index.html\)](http://www.novell.com/documentation/idm35/index.html), and “Upgrading” in the [Identity Manager 3.5.1 Installation Guide \(http://www.novell.com/documentation/idm35/index.html\)](http://www.novell.com/documentation/idm35/index.html).
2. Install the Metadirectory engine.

NOTE: The Metadirectory engine and the Administration server must be installed separately, or the installation hangs. Install the Metadirectory engine first by deselecting *Identity Manager Web Components* and *Utilities* in the components selection panel in the Identity Manager installation program. When the installation is complete, run the installation program again; this time deselect *Novell Identity Manager Metadirectory Server* and select *Identity Manager Web Components* and *Utilities* in the components selection panel.

3. Install the Administration server

1.2 Migrating User Application Drivers

You must migrate the version 3.5 or 3.5.1 User Application drivers that you want to use in Identity Manager 3.6. Migrating a User Application driver updates all directory abstraction layer definitions and provisioning request definitions to use the latest format. Several non-visible runtime configuration objects are also updated and additional properties are added.

The migration of a User Application driver ensures that the driver contains the necessary configuration for new features, while maintaining existing configurations (for example, custom entities and provisioning request definitions).

WARNING: You must use Designer for Identity Manager to migrate User Application drivers. You cannot use iManager.

The migration tool only migrates the User Application configuration of the User Application driver. It does *not* migrate the entire driver. Specifically, it doesn't migrate policies. These are handled by the general Designer and the deploy code. For information about migrating policies, see [Upgrading Identity Manager Policies \(http://www.novell.com/documentation/idm35/index.html?page=/documentation/idm35/policy/data/policyupgradeoverview.html\)](http://www.novell.com/documentation/idm35/index.html?page=/documentation/idm35/policy/data/policyupgradeoverview.html).

NOTE: You can set preferences for migrating User Application drivers (see “[Setting Provisioning View Preferences](#)” in the *Identity Manager User Application: Design Guide*).

- 1** Install Designer for Identity Manager version 2.1.1 with Roles Based Provisioning Tools.
See [Designer: Installation \(http://www.novell.com/documentation/idmrbpm36/index.html\)](http://www.novell.com/documentation/idmrbpm36/index.html).
- 2** (Optional.) Create a new provisioning project to store the local representations of the artifacts that are located on your Metadirectory server. To migrate an existing project, continue with [Step 3](#).
For instructions on creating a provisioning project, see “[Setting Up a Provisioning Project](#)” in the *Identity Manager User Application: Design Guide*.
 - 2a** To populate the new provisioning project, import the driver set that contains the User Application drivers that you want to migrate.
See “[Importing Provisioning Objects](#)” in the *Identity Manager User Application: Design Guide*.
- 3** Make a backup copy of the new or existing provisioning project that contains the User Application driver to migrate.
 - 3a** Right-click the name of the project in Project view, then select *Copy Project*.
 - 3b** In the Copy Project dialog box, type a new *Project Name* (or accept the default name), then click *OK*.
- 4** Use one of the following methods to select the Migrate command for the User Application that you want to migrate.
 - ♦ In the *Provisioning View*, right-click the name of the User Application driver and select *Migrate*.
 - ♦ In the *Modeler* view, right-click the name of the User Application driver and select *Application > Migrate*.
 - ♦ In the *Outline* view, right-click the name of the User Application driver and select *Migrate*.

This step in the process migrates the local definition of the driver found in the Designer workspace. These changes are not made to the Metadirectory server until a later step when you deploy the changes. You must use the Outline view to perform the deployment, and you must deploy the entire driver.
- 5** If the *Close All Editors* dialog box displays, select *Yes*.
This dialog box informs you that migrating the User Application will close all editors.
If you have unsaved work in an open editor, the *Save Resource* dialog box displays.
- 6** If the *Save Resource* dialog box is displayed, select *Yes* to save changes in open editors.

A dialog box warns you that the migration requires changes to the Identity Vault schema. You can choose to continue or cancel the migration.

- 7 Select *Yes* to continue the migration, or select *No* to cancel the migration.
- 8 When the migration is completed, a dialog box displays listing information, warnings, and errors encountered during migration. For example, for all objects added during migration, informational text displays for those objects. You can perform several operations by using this dialog box:
 - ♦ The migration automatically saves a log file describing the content of the dialog box to the `project-name/Provisioning/AppConfig` folder for the associated User Application. The name of the file will be `migrationLogdate.log`.
It is also possible to save the migration log to a file anywhere on disk by clicking the floppy disk icon in the upper right corner of the dialog box.
 - ♦ To revert to the original User Application configuration (for example, if errors occurred during the migration) click the *Undo Migration* button.
You can undo the migration until you click *OK* in the dialog box.
 - ♦ Make sure *Deploy Migrated User Application Configuration* is NOT selected.
- 9 Open the project and run the Project Checker on the migrated objects.
See “*Validating Provisioning Objects*” in the Identity Manager User Application: Design Guide. If validation errors exist for the configuration, you are informed of the errors. These errors must be corrected before you can deploy the driver.
- 10 Navigate to the Outline view, right-click the driver, and select *Deploy*.
After the migration, the project is in a state in which only the *entire* migrated configuration can be deployed. You cannot import any definitions into the migrated configuration. After the entire migration configuration has been deployed, this restriction is lifted, and you can deploy individual objects and import definitions.
- 11 Repeat this process for each User Application driver in the driver set.

NOTE: When you upgrade a driver, ensure that all other drivers in the same driver set are also upgraded to the same version. See [Upgrading Drivers to the New Architecture \(http://www.novell.com/documentation/idm35/index.html?page=/documentation/idm35/policy/data/policyupgradeoverview.html\)](http://www.novell.com/documentation/idm35/index.html?page=/documentation/idm35/policy/data/policyupgradeoverview.html).

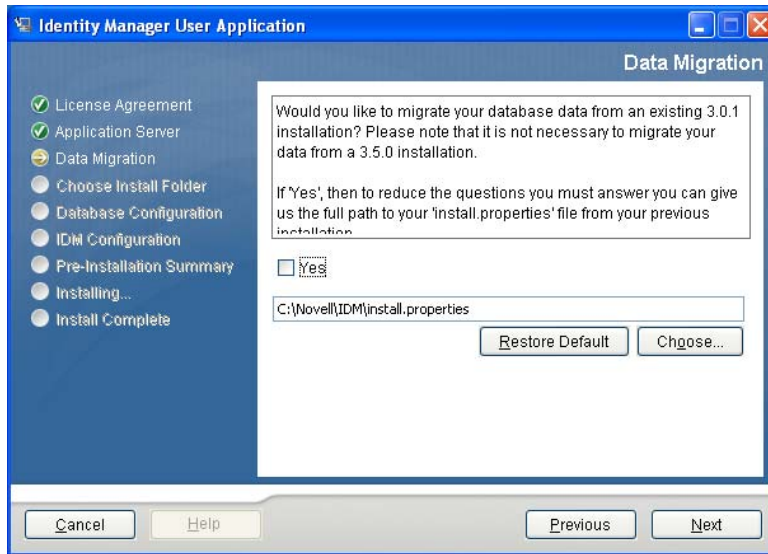
1.3 Installing the User Application

Before you upgrade the User Application, make sure that all prerequisites to installing the Roles Based Provisioning Module version 3.6 have been completed (see “Prerequisites to Installation” in the [Identity Manager Roles Based Provisioning Module 3.6 User Application: Installation Guide \(http://www.novell.com/documentation/idmrpbm36/index.html\)](http://www.novell.com/documentation/idmrpbm36/index.html)).

During installation of the Roles Based Provisioning Module User Application, you must:

- ♦ Use the same User Application database.
 - ♦ Use the same User Application context name.
- 1 Start the Roles Based Provisioning Module User Application installation program.

When the User Application installation program starts, it displays a page that asks you if you want to migrate your database data from a previous installation.



- 2 Make sure that *Yes* is *NOT* selected.
- 3 Click *Next* to proceed with the installation.

The rest of the installation proceeds as described in the [Identity Manager Roles Based Provisioning Module 3.6 Installation Guide](http://www.novell.com/documentation/idmrbpm36/index.html) (<http://www.novell.com/documentation/idmrbpm36/index.html>).