

User Application: Migration Guide

Novell® Identity Manager Roles Based Provisioning Module

3.6.1

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About This Guide

This guide describes how to migrate from the Identity Manager User Application version 3.5.1 or the Identity Manager Roles Based Provisioning Module 3.6 to the Roles Based Provisioning Module 3.6.1.

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.

Additional Documentation

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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When a single pathname can be written with a backslash for some platforms or a forward slash for other platforms, the pathname is presented with a backslash. Users of platforms that require a forward slash, such as Linux* or UNIX*, should use forward slashes as required by your software.

Migrating to the Roles Based Provisioning Module Version 3.6.1

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This section describes how to migrate to the Roles Based Provisioning Module 3.6.1 from:

- ♦ Roles Based Provisioning Module version 3.6.
- ♦ User Application Provisioning Module version 3.5.1.

It includes the following sections:

- ♦ [Section 1.1, “User Application Migration Checklist,” on page 9](#)
- ♦ [Section 1.2, “Migrating User Application Drivers,” on page 10](#)
- ♦ [Section 1.3, “Installing the Roles Based Provisioning Module,” on page 12](#)

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

1.1 User Application Migration Checklist

- ♦ [Section 1.1.1, “Migration Environment Checklist,” on page 9](#)
- ♦ [Section 1.1.2, “User Application Driver Migration Checklist,” on page 9](#)

1.1.1 Migration Environment Checklist

- Before beginning the migration process, make directory and database backups of your Identity Manager system.
- Verify that your Identity Manager configuration meets the system requirements for the Roles Based Provisioning Module version 3.6.1.
See “System Requirements” in the [Roles Based Provisioning Module 3.6.1 Installation Guide \(http://www.novell.com/documentation/idmrpbpm361/index.html\)](http://www.novell.com/documentation/idmrpbpm361/index.html).
- Verify that the prerequisites for the Roles Based Provisioning Module are met.
See “Prerequisites” in the [Roles Based Provisioning Module 3.6.1 Installation Guide \(http://www.novell.com/documentation/idmrpbpm361/index.html\)](http://www.novell.com/documentation/idmrpbpm361/index.html). This is especially important if you are using the 3.5.1 IDM metadirectory because you must perform manual installation of new schema and driver configuration files for the 3.6.1 Roles Based Provisioning Module to work properly.
- Install Designer for Identity Manager 3.0 to migrate the User Application driver.

1.1.2 User Application Driver Migration Checklist

- Before you begin the migration, export your existing 3.5.1 or 3.6 User Application driver and save it.

- ❑ Migrate the User Application driver. See [Section 1.2.2, “Migrating a User Application Driver,” on page 10.](#)
- ❑ Deploy the migrated driver. See [Section 1.2.3, “Deploying the Migrated Driver,” on page 11.](#)
- ❑ (For the Roles Based Provisioning Module) Create a new Role Service driver version 3.6.1.
- ❑ (For the Roles Based Provisioning Module) Deploy the new Role Service driver.

1.2 Migrating User Application Drivers

- ◆ [Section 1.2.1, “About User Application Driver Migration,” on page 10](#)
- ◆ [Section 1.2.2, “Migrating a User Application Driver,” on page 10](#)
- ◆ [Section 1.2.3, “Deploying the Migrated Driver,” on page 11](#)

Role Service drivers are not migrated. If you have an existing Role Service driver for version 3.6, you must create a new one for version 3.6.1.

1.2.1 About User Application Driver Migration

Migrating the User Application driver ensures that the driver contains the necessary configuration for new features, maintains support for existing configurations (for example, custom entities and provisioning request definitions), adds new driver properties, and updates the following:

- ◆ Directory abstraction layer definitions
- ◆ Provisioning request definitions
- ◆ Several non-visible runtime configuration objects

You can set preferences for migrating the User Application driver (see “[Setting Provisioning View Preferences](#)” in the *Identity Manager User Application: Design Guide* (<http://www.novell.com/documentation/idmr bpm361/index.html>)).

The User Application driver migration utility migrates only 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.

1.2.2 Migrating a User Application Driver

- 1** Make a backup copy of the provisioning project that contains the User Application driver to migrate:
 - 1a** Right-click the name of the project in Project view, then select *Copy Project*.
 - 1b** In the Copy Project dialog box, type a new *Project Name* (or accept the default name), then click *OK*.
- 2** Use one of the following methods to run 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 migrates the local definition of the driver found in the Designer workspace. These changes are not made to the Identity Vault until after you deploy the changes.

- 3 If the *Close All Editors* dialog box displays, select *Yes*.
If you have unsaved work in an open editor, the *Save Resource* dialog box displays.
- 4 If the *Save Resource* dialog box is displayed, select *Yes* to save changes in open editors.
- 5 If you are prompted for a driver version to migrate to, select *IDM 3.6.1 (Roles Based Provisioning Module)*, then click *OK*.
- 6 Designer warns you that schema changes are required in the Identity Vault, select *Yes* to continue the migration (if you have already updated the Identity Vault schema in a separate process), or select *No* to cancel the migration (if you have not already updated the Identity Vault schema).

See “Prerequisites” in the [Roles Based Provisioning Module 3.6.1 Installation Guide \(http://www.novell.com/documentation/idmrpbpm361/index.html\)](http://www.novell.com/documentation/idmrpbpm361/index.html) for information about how to make schema changes. This is especially important if you are using the 3.5.1 IDM metadirectory because you must perform manual installation of new schema and driver configuration files for the 3.6.1 Roles Based Provisioning Module to work properly.

When the migration completes, Designer displays a dialog box 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 does not automatically save a log file describing the content of the dialog box to the *project-name/Provisioning/AppConfig* folder for the associated User Application. You can manually save it here. The default name of the file is *migrationLogdate.log*. You can also 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.
- ♦ To deploy the driver, you can select *Deploy migrated User Application*; or, if you want to deploy the driver later after validating the project using the project checker, follow the steps in [Deploying the Migrated Driver](#) to complete the process.

NOTE: When you migrate a driver, ensure that all other drivers in the same driver set are also migrated to the same version.

1.2.3 Deploying the Migrated Driver

The driver migration is not complete until you deploy the entire driver to the Identity Vault.

- 1 Open the project in Designer and run the Project Checker on the migrated objects.

See “*Validating Provisioning Objects*” in the [User Application: Design Guide \(http://www.novell.com/documentation/idmr bpm361/index.html\)](http://www.novell.com/documentation/idmr bpm361/index.html). If validation errors exist for the configuration, you are informed of the errors. These errors must be corrected before you can deploy the driver.

- 2 Navigate to the Outline view, right-click the driver, and select *Deploy*, or in the Modeler view, right-click the driver and choose *Driver > 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.

- 3 Repeat this process for each User Application driver in the driver set.

1.3 Installing the Roles Based Provisioning Module

When you run the Roles Based Provisioning Module installation program, you must use the same User Application database that you used for the previous installation (that is, the installation from which you are migrating). You can use a different User Application context name.

During the Roles Based Provisioning Module installation program, when you are asked if you want to migrate your database data from a previous installation, make sure *Yes* is not selected..

You can continue the rest of the installation as described in the [Identity Manager Roles Based Provisioning Module 3.6.1 Installation Guide \(http://www.novell.com/documentation/idmr bpm361/index.html\)](http://www.novell.com/documentation/idmr bpm361/index.html).