

# Novell Identity Manager

3.5.1

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IDENTITY MANAGER USER  
APPLICATION: MIGRATION GUIDE

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# About This Guide

This guide describes how to migrate from Identity Manager User Application version 3.5 to version 3.5.1.

## Audience

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

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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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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 from Identity Manager User Application Version 3.5 to Version 3.5.1

# 1

This document describes the process of migrating from Identity Manager User Application Version 3.5 to Identity Manager Version User Application 3.5.1. 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 10](#)
- ♦ [Section 1.3, “Installing the User Application,” on page 12](#)
- ♦ [Section 1.4, “Using the Identity Manager 3.5.1 User Application with Version 3.5 Identity Manager,” on page 13](#)

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

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## 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.

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**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.

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3. Install the Administration server
4. Continue with [Section 1.2, “Migrating User Application Drivers,” on page 10.](#)

## 1.2 Migrating User Application Drivers

You must migrate the version 3.5 User Application drivers that you want to use in Identity Manager 3.5.1. 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 in Identity Manager 3.5.1, while maintaining existing configurations (for example, custom entities and provisioning request definitions).

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).

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**NOTE:** You can set preferences for migrating User Application drivers (see “[Setting Provisioning View Preferences](#)” in the *Identity Manager 3.5.1 User Application: Design Guide*).

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- 1 Install Identity Manager Designer version 2.1.

See “[Installing Designer](#)” in the *Novell Designer 2.1 for Identity Manager 3.5.1 Guide (http://www.novell.com/documentation/designer20/index.html?page=/documentation/designer20/admin\_guide/data/front.html)*.

- 2 Create a new provisioning project to store the local representations of the artifacts that are located on your Metadirectory server.

See “[Setting Up a Provisioning Project](#)” in the *Identity Manager 3.5.1 User Application: Design Guide*.

- 3 Import the driver set that contains the User Application drivers that you want to migrate.

See “[Importing Provisioning Objects](#)” in the *Identity Manager 3.5.1 User Application: Design Guide*.

- 4 Make a backup copy of the new provisioning project as follows:

- 4a Right-click the name of the project in Project view, then select *Copy Project*.

- 4b In the Copy Project dialog box, type a new *Project Name* (or accept the default name), then click *OK*.

- 5 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 and select *Migrate*.
- ◆ In the *Modeler* view, right-click the name of the User Application and select *Application > Migrate*.
- ◆ In the *Outline* view, right-click the name of the User Application and select *Migrate*.

This step migrates the local definition of the driver, found in the IDM Designer workspace. These changes are not made to the Metadirectory server until a later step when you deploy the changes.

- 6 Click the *Provisioning View* tab.

- 7** Click the plus (+) sign next to the name of the project to show the list of User Applications in the project.
- 8** Right-click the name of the User Application that you want to migrate and select *Migrate*.  
The *Close All Editors* dialog box is displayed. This dialog box informs you that migrating the User Application will close all editors.
- 9** Select *Yes*.  
If you have unsaved work in an open editor, the *Save Resource* dialog box displays.
- 10** 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.
- 11** Select *Yes* to continue the migration, or select *No* to cancel the migration.
- 12** 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.
  - ◆ To deploy the migrated configuration directly from the *Migration* dialog box, select *Deploy Migrated User Application Configuration*.  
If you select this option, the migrated driver is validated before it is deployed. If you don't select this option, you should run the Project Checker on the migrated driver.  
See “[Validating Provisioning Objects](#)” in the *Identity Manager 3.5.1 User Application: Design Guide*.
- 13** Select the desired options in the *Migration* dialog box, then click *OK*.  
Designer checks to see if the User Application driver exists in the Identity Vault. If it does not (for example, if you imported a project from a file, or imported a driver from a driver configuration file), Designer displays a dialog box that asks you if you want to deploy the entire driver.
- 14** If you want to deploy the entire driver at this time, click *Yes*.
- 15** If you do not deploy directly from the migration dialog box, run the Project Checker on migrated objects.  
See “[Validating Provisioning Objects](#)” in the *Identity Manager 3.5.1 User Application: Design Guide*.  
If validation errors exist for the configuration, you are informed of the errors, which must be corrected before the driver can be deployed.
- 16** If you do not deploy directly from the migration dialog box, deploy the driver by right-clicking the name of the driver and selecting *Deploy*.

After the migration, the project is in a state in which only the entire migrated configuration can be deployed. You also cannot import any definitions into the migrated configuration. After the entire migrated configuration has been deployed, this restriction is lifted and you can deploy individual objects and import definitions.

**17** Repeat Step 5 through Step 15 through for each User Application driver in the driver set.

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**NOTE:** When you upgrade a driver to Identity Manager 3.5.1, ensure that all other drivers in the same driver set are also upgraded to Identity Manager 3.5.1. 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).

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## 1.3 Installing the User Application

Before you upgrade the User Application, make sure that all prerequisites to installing the Identity Manager 3.5.1 User Application have been completed (see “System Requirements for Identity Manager” in the *Identity Manager 3.5.1 Installation Guide* (<http://www.novell.com/documentation/idm35/index.html?page=/documentation/idm35/install/data/front.html>)).

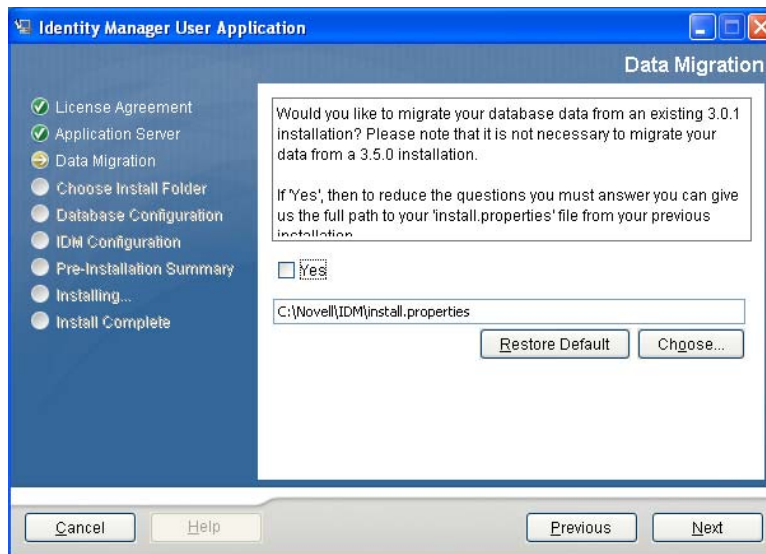
During installation of the 3.5.1 User Application, you must:

- ♦ Use the same User Application database.
- ♦ Use the same User Application context name.

**1** Start the version 3.5.1 User Application installation program.

See “Installing the User Application” in the *Identity Manager 3.5.1 Installation Guide* (<http://www.novell.com/documentation/idm35/index.html?page=/documentation/idm35/install/data/front.html>).

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 3.5 Installation Guide* (<http://www.novell.com/documentation/idm35/index.html?page=/documentation/idm35/install/data/front.html>).

## 1.4 Using the Identity Manager 3.5.1 User Application with Version 3.5 Identity Manager

You can use the Identity Manager 3.5.1 User Application without upgrading your Version 3.5 Identity Manager system. However, you must perform the following steps:

1. Locate the following files on the installation media. They are located in a folder called `\35MetaDirSupport` at the installation media root.
  - ♦ `afadmin.JAR`
  - ♦ `dirxml.lsc`
  - ♦ `srvprv.sch`
  - ♦ `UserApplication_3_5_1.xml`
2. Use iManager to import the new User Application schema, then:
  - a. Log into iManager.
  - b. Select *eDirectory Maintenance > Import Convert Export Wizard*.
  - c. Accept the default, then click *Next*.
  - d. Choose *Schema File* as the *File Type*, then browse to the `srvprv.sch`.
  - e. Click *Next*.
  - f. Enter your eDirectory server name and ports.
  - g. Select *Authenticated login* and enter the Admin username and password.
  - h. Accept the defaults, then click *Finish*.

If you see errors stating that the entry already exists, you can ignore them. However, if you see other errors, use the ICE command to import the schema.

3. Update the User Application driver preconfig file (`UserApplication_3_5_1.xml`) by:
  - a. Copying the new user application preconfig file to your `DirXML.Drivers` directory on your iManager server:

```
\dirxml\rules\DirXML.Drivers
```

The file should display in the list of configurations to choose from when creating a driver from iManager.
  - b. Create a new driver or update an existing driver using the new configuration file.
4. Update the Workflow plug-in JAR by:
  - a. Copying the `afadmin.JAR` to your iManager `WEB-INF/lib` directory, for example:

```
/var/opt/novell/iManager/nps/WEB-INF/lib
```
  - b. Restart the iManager server.
5. Update your Novell Audit server to use the new `dirxml.lsc` file.

See the section on Adding the Identity Manager Application Schema to your Novell Audit Server as a Log Application in the *Identity Manager 3.5.1 User Application: Administration Guide*.