Quick Start Guide for Installing and Upgrading NetIQ Identity Manager 4.9 Standard Edition

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Introduction

This document provides guidelines to install and configure Identity Manager 4.9 Standard Edition, and upgrade to this version.

Overview

Identity Manager 4.9 Standard Edition provides the following features:

- Rule-based automated provisioning
- Password management (Self-Service Password Reset)
- Identity Reporting
- Identity Console
- Content packaging framework
- Single sign-on (One SSO)
- Analyzer
- Designer

For installing, configuring, or upgrading Identity Manager Standard Edition, see the setup guide for your platform:

- *NetIQ Identity Manager Install and Upgrade Guide for Linux*
- *NetIQ Identity Manager Install and Upgrade Guide for Windows*

IMPORTANT: Identity Manager 4.9 Advanced and Standard Editions are available in the same ISO file. The integration modules continue to remain the same for both editions.

For information about new features, enhancements, and features that have changed or are no longer supported in this version, see NetIQ Identity Manager 4.9 Release Notes.

Installing Identity Manager 4.9 Standard Edition on Linux

Download the software from the Software License and Download (https://sld.microfocus.com)portal. The `Identity_Manager_4.9.0_Linux.iso` file contains the DVD image for installing the Identity Manager components on Linux.

The installation script is located in the directory where you have mounted the installation package. For information about the default installation locations, seeNetIQ Identity Manager 4.9 Release Notes.

Table 1 *Checklist for Identity Manager Standard Edition Installation on Linux*

Task	Notes
1. Prerequisites	◆ Review the system requirements for each component to ensure that your computer or virtual images meet the installation prerequisites. For more information, see the System Requirements for Identity Manager 4.9 page. ◆ For information about prerequisites for component-specific installation, see Considerations for Installing Identity Manager Components in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.
2. Plan your installation	See Planning to Install Identity Manager in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.
3. Order of installation and/or configuration	Ensure that you install the components in the following order because the installation programs for some components require information about previously installed components. 1. Sentinel Log Management for Identity Governance and Administration (IGA) 2. Identity Manager Server components 3. Identity Reporting components (also installs single sign-on component) 4. Identity Console 5. Self-Service Password Reset 6. Designer for Identity Manager 7. Analyzer for Identity Manager
4. (Conditional) Install Sentinel Log Management for IGA	If you need audit-based reports, configure the Data Synchronization Policy in the Identity Manager Data Collection Services page to forward events to the reporting database. For installation instructions, see Installing Sentinel Log Management for Identity Governance and Administration in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.

Task	Notes
5. Install Identity Manager Server components Identity Reporting Components, and Password Management Component	From the mount directory of the `.iso` file, run the following command to install Identity Manager server and Identity Reporting components: `./install.sh` For more information on the installation steps, see one of the following resources in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*. ◆ Performing an Interactive Installation ◆ Performing a Silent Installation Identity Manager provides a separate installation program for installing SSPR. For installation instructions, see Installing SSPR or see Performing a Silent Installation of SSPR in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*. **NOTE:** ◆ The Identity Reporting installation process installs the authentication service for reporting. It also deploys the `rptdoc.war` and `dcsdoc.war` that contains the documentation of REST services needed for reporting. These `.war` files are automatically deployed on your application sever when Identity Reporting is installed. ◆ You must import the report definitions into Identity Reporting. To download them, use the Download page within the Reporting application.

Task	Notes
6. Configure the installed components (Identity Manager Server components, Identity Reporting Components, and Password Management Component)	Configure Identity Manager server components and Identity Reporting components by running `configure.sh`, located in the mount directory of the `.iso` file. Before beginning the configuration process for all components, review the configuration options from Understanding the Configuration Parameters in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*. For configuring SSPR, see Configuring SSPR in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*. After you have configured the Identity Reporting component, assign the Report Administrator role to a user that you want to access reporting functionality. For more information, see "Creating and Assigning rptadmin Role to a User" on page 6.
7. Install Designer	From the root directory of the `Identity_Manager_Linux_LDAP_Designer.tar.gz` file, run one of the following commands: ◆ **Console:** `./install` ◆ **GUI:** `./install -i console` Follow the prompts and complete the installation. For more information, see Installing Designer in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.
8. Install Analyzer	From the root directory of the `Identity_Manager_Linux_Analyzer.tar.gz` file, run one of the following commands: ◆ **Console:** `./install` ◆ **GUI:** `./install -i console` Follow the prompts and complete the installation. For more information, see Installing Analyzer in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.
9. Activating Identity Manager	Activate your Identity Manager components. For more information, see Activating Identity Manager in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.

Installing Identity Manager 4.9 Standard Edition on Windows

Download the software from the Software License and Download (https://sld.microfocus.com). The `Identity_Manager_4.9.0_Windows.iso` file contains the DVD image for installing the Identity Manager components.

The installation files are located in the respective directories in the Identity Manager installation package. For information about the default installation locations, see Executables and Default Installation Paths on Windows in the *NetIQ Identity Manager 4.9 Release Notes*.

Table 2 Checklist for Identity Manager Standard Edition Installation on Windows

Task	Notes
1. Prerequisites	Review the system requirements for each component to ensure that your computer or virtual images meet the installation prerequisites. For more information, see System Requirements for Identity Manager 4.9 page.
2. Plan your installation	See Planning to Install Identity Manager in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.
3. Order of installation	Ensure that you install the components in the following order because the installation programs for some components require information about previously installed components. 1. Sentinel Log Management for Identity Governance and Administration (IGA) **NOTE:** This installation is supported only on Linux. For more information, see Installing Sentinel Log Management for Identity Governance and Administration in the NetIQ Identity Manager Install and Upgrade Guide for Linux. 2. Identity Manager Server components 3. Identity Reporting components (also installs single sign-on component) 4. Identity Console 5. Self-Service Password Reset 6. Designer 7. Analyzer
4. Install and configure Identity Manager Server Components	For installation instructions, see Installation Procedures for Identity Manager Server, Identity Applications, and Identity Reporting in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*. For configuration instructions, see the respective Identity Server component-specific configuration procedures in the NetIQ Identity Manager Install and Upgrade Guide for Windows. **NOTE:** You must import the report definitions into Identity Reporting. To download them, use the Download page within the Reporting application.
5. Install and configuring the Password Management Component	For installation instructions, see Installing SSPR in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*. For configuration instructions, see Configuring Self Service Password Reset for Identity Manager in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.
6. Activating Identity Manager	Activate your Identity Manager components. For more information, see Activating Identity Manager in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.

Creating and Assigning rptadmin Role to a User

You create an Organizational Role object in the Identity Vault and then assign this role to a new user or an existing user by using Identity Console.

1 Create an Organizational Role object.

   1a In Identity Console, click **Object Management**.

   1b Click +.

   1c Type the name and context of the object or use the Object Selector to find it, in **Type** select Organizational Role, then click **Next**.

   1d Click **Create**.

   1e When the confirmation message appears, click **OK**.

2 Assign `reportAdmin` role to a user object.

   2a Create an `.ldif` file as per your requirement like the following example:

```
……
dn: cn=custadmin,ou=sa,o=system
changetype: add
sn: custadmin
cn: custadmin
userpassword: ****
objectClass: <object-name given>
objectClass: Person
objectClass: ndsLoginProperties
objectClass: organizationalPerson
objectClass: Top
nspmpasswordpolicydn: cn=Sample Password Policy,cn=Password
Policies,cn=Security
messageServer: cn=rhel83,ou=servers,o=system
uid: custadmin



dn: o=data
changetype: modify
add: ACL
ACL: 2#subtree#cn=custadmin,ou=sa,o=system#[All Attributes Rights]
ACL: 6#entry#cn=custadmin,ou=sa,o=system#loginScript
ACL: 6#entry#cn=custadmin,ou=sa,o=system#printJobConfiguration
……
```

   2b Open the command prompt, Run the following commands via ldapadd:

```
ldapconfig set "Require TLS for Simple Binds with Password=no"

ldapadd -c -x -D "cn=admin,ou=sa,o=system" -w novell -H ldap:// -f
<given.ldif>

ldapconfig set "Require TLS for Simple Binds with Password=yes"
```

Post-Installation Tasks

To modify installation properties after installation, run the configuration update utility depending on your platform.

- **Linux:** Run `configupdate.sh` from `/opt/netiq/idm/apps/configupdate`.
- **Windows:** Run `configupdate.bat` from `C:\netiq\idm\apps\configupdate`.

If you change any setting for Identity Reporting through the configuration update utility, you must restart the Tomcat application server for the changes to take effect. However, you do not need to restart the application server after making changes in the web user interface for Identity Reporting.

Upgrading Identity Manager

NetIQ supports the following upgrade paths for upgrading to Identity Manager 4.9:

- Identity Manager 4.8 Standard Edition to Identity Manager 4.9 Standard Edition.
- Identity Manager 4.8 Standard Edition to Identity Manager 4.9 Advanced Edition.

  You cannot perform a direct upgrade from Identity Manager 4.8 Standard Edition to Identity Manager 4.9 Advanced Edition. However, you can choose one of the following approaches to complete the upgrade:

  - Upgrade Identity Manager 4.8 Standard Edition to Identity Manager 4.9 Standard Edition and then upgrade to Identity Manager 4.9 Advanced Edition.
  - Upgrade Identity Manager 4.8 Standard Edition to Identity Manager 4.8 Advanced Edition and then upgrade to Identity Manager 4.9 Advanced Edition.

Upgrading Identity Manager 4.8 Standard Edition to Identity Manager 4.9 Standard Edition

Before performing an upgrade, NetIQ recommends that you review Upgrading to Standard Edition section in the *NetIQ Identity Manager 4.9 Release Notes* and then complete the following tasks in the same sequence:

NOTE: The same steps apply if you are upgrading from 4.7.5 Standard Edition to 4.9 Standard Edition.

Table 3 *Checklist for Upgrading form Identity Manager 4.8 Standard Edition to Identity Manager 4.9 Standard Edition*

Task	Linux	Windows
1. Review the differences between an upgrade and a migration	See Understanding Upgrade Process in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.	See Understanding Upgrade and Migration in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.
2. Plan your upgrade	You cannot directly upgrade or migrate to the 4.9 version from versions before 4.7.5. For information on the supported upgrade paths, seeUpgrading from Identity Manager 4.7.x Versions in the NetIQ Identity Manager 4.9 Release Notes.	You cannot directly upgrade or migrate to the 4.9 version from versions before 4.7.5. For information on the supported upgrade paths, see Upgrading from Identity Manager 4.7.x Versions in the NetIQ Identity Manager 4.9 Release Notes.

Task	Linux	Windows
3. Get the files needed for upgrade/ migrate	Ensure that you have the latest installation kit to upgrade/migrate Identity Manager to 4.9 Standard Edition.	Ensure that you have the latest installation kit to upgrade/migrate Identity Manager to 4.9 Standard Edition.
4. Interaction among Identity Manager components	See "Considerations for Installing Identity Manager Components " in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.	See "Installation and Configuration Process Overview" in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.
5. System requirements	Ensure that your computers meet the hardware and software prerequisites for a newer version of Identity Manager. For more information, see the Identity Manager System Requirements page.	Ensure that your computers meet the hardware and software prerequisites for a newer version of Identity Manager. For more information, see the Identity Manager System Requirements page.
6. Back up the current project, driver configuration, and databases	See "Backing Up the Current Configuration " in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.	See Backing Up the Current Configuration in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.
7. Upgrade Analyzer	See "Upgrading Analyzer" in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.	See Upgrading Analyzer in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.
8. Upgrade Designer	See "Upgrading Designer" in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.	See Upgrading Designer in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.
9. Upgrade eDirectory	See Upgrading the Identity Vault in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.	See Upgrading the Identity Vault in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.
10. Stop the drivers	See Stopping the Drivers in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.	Stop the drivers that are associated with the server where you installed the Identity Manager engine. For more information, see Stopping and Starting Identity Manager Drivers in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.
11. Upgrade the Identity Manager Server Components	See Upgrading Identity Manager Engine in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.	See Upgrading the Identity Manager Engine Components in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.
12. (Conditional) Upgrade the packages	This is only required if a newer version of a package is available and there is a new functionality included in the policies for a driver that you want to add to your existing driver.	This is only required if a newer version of a package is available and there is a new functionality included in the policies for a driver that you want to add to your existing driver.
13. Apply Identity Manager 4.8 Standard Edition activation key	In Identity Console make sure that you apply the Identity Manager 4.9 Standard Edition activation. If you do not apply the activation, Identity Manager engine and drivers run in the evaluation mode.	In Identity Console, make sure that you apply the Identity Manager 4.9 Standard Edition activation. If you do not apply the activation, Identity Manager engine and drivers run in the evaluation mode.

Task	Linux	Windows
14. Upgrade Identity Reporting	See Upgrading Identity Reporting in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.	See Upgrading Identity Reporting in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.
15. Start the drivers	Start the drivers associated with the Identity Reporting and Identity Manager engine. For more information, see Starting the Drivers in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.	Start the drivers associated with the Identity Reporting and Identity Manager engine. For more information, see Starting the Drivers in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.
16. (Conditional) Restore your custom settings	If you have custom policies and rules, restore your custom settings. For more information, see Restoring Custom Policies and Rules to the Driver in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.	If you have custom policies and rules, restore your custom settings. For more information, see Restoring Custom Policies and Rules to the Driver in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.
17. (Conditional) Upgrade Sentinel	If you are using NetIQ Sentinel, ensure that you are running the latest service pack. For more information about upgrading Sentinel, see the *NetIQ Sentinel Installation and Configuration Guide*.	Sentinel installation is not supported on Windows.

Upgrading Identity Manager 4.8 Standard Edition to Identity Manager 4.9 Advanced Edition

Upgrading Identity Manager 4.8 Standard Edition to Identity Manager 4.9 Advanced Edition involves configuration changes for the Identity Manager components. You do not need to run the Identity Manager installation program to perform this upgrade.

The Identity Manager 4.9 Advanced Edition includes all the features included in the Standard Edition along with additional features such as identity applications. The NetIQ Identity Manager 4.9 Release Notes includes brief details of the new features in Identity Manager 4.9.

To perform the upgrade, NetIQ recommends that you complete the steps in the below checklist in the given order:

NOTE: The same steps apply if you are upgrading from 4.7.5 Standard Edition to 4.9 Advanced Edition.

Table 4 *Checklist for Upgrading form Identity Manager 4.8 Standard Edition to Identity Manager 4.9 Advanced Edition*

Task	Linux	Windows
1. Review the differences between an upgrade and a migration	Review the differences between an upgrade and a migration. For more information, see Understanding Upgrade Process in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.	Review the differences between an upgrade and a migration. For more information, see Understanding Upgrade and Migration in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.

Task	Linux	Windows
2. Plan your upgrade	You cannot directly upgrade or migrate to the 4.9 version from versions before 4.7.5. For information on the supported upgrade paths, see Upgrading from Identity Manager 4.7.x Versions in the NetIQ Identity Manager 4.9 Release Notes.	You cannot directly upgrade or migrate to the 4.9 version from versions before 4.7.5. For information on the supported upgrade paths, see Upgrading from Identity Manager 4.7.x Versions in the NetIQ Identity Manager 4.9 Release Notes.
3. Get the files needed for upgrade/ migrate	Ensure that you have the latest installation kit to upgrade Identity Manager to 4.9 Advanced Edition.	Ensure that you have the latest installation kit to upgrade Identity Manager to 4.9 Advanced Edition.
4. Learn about the interaction among Identity Manager components	For more information, see "Planning Your Installation " in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.	For more information, see "Planning Your Installation " in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.
5. System requirements	Ensure that your computers meet the hardware and software prerequisites for a newer version of Identity Manager. For more information, see the Identity Manager System Requirements page.	Ensure that your computers meet the hardware and software prerequisites for a newer version of Identity Manager. For more information, see the Identity Manager System Requirements page.
6. Stop the application server where Identity Reporting is installed	Stop Tomcat.	Stop Tomcat.
7. Uninstall Identity Reporting	Uninstall the Identity Reporting WAR files from your application server. To do this, follow the instructions in the documentation specific to your application server. For more information, see Uninstalling Identity Reporting in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.	Uninstall the Identity Reporting WAR files from your application server. To do this, follow the instructions in the documentation specific to your application server. For more information, see Uninstalling Identity Reporting in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.
8. Apply the Identity Manager 4.8 Advanced Edition activation key	In Identity Console, ensure that you apply the Identity Manager 4.9 Advanced Edition activation key. Otherwise, Identity Manager engine upgrade does not proceed.	In Identity Console, ensure that you apply the Identity Manager 4.9 Advanced Edition activation key. Otherwise, Identity Manager engine upgrade does not proceed.

Task	Linux	Windows
9. Install and configure the identity applications	For installation instructions, see Performing an Interactive Installation or Performing a Silent Installation in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*. For configuration instructions, see Configuring the Identity Manager Components in the NetIQ Identity Manager Install and Upgrade Guide for Linux.	For installation instructions, see Installation Procedures for Identity Manager Server, Identity Applications, and Identity Reporting in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*. For configuration instructions, see Configuring Identity Applications in the NetIQ Identity Manager Install and Upgrade Guide for Windows.
10. Install and configure Identity Reporting	For installation instructions, see Performing an Interactive Installation or Performing a Silent Installation in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*. For configuration instructions, see Configuring the Identity Manager Components in the NetIQ Identity Manager Install and Upgrade Guide for Linux.	For installation instructions, see Installation Procedures for Identity Manager Server, Identity Applications, and Identity Reporting in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*. For configuration instructions, see Configuring Identity Reporting in the NetIQ Identity Manager Install and Upgrade Guide for Windows.
11. (Conditional) Restore your custom settings	If you have custom policies and rules, restore your custom settings. For more information, see Restoring Custom Policies and Rules to the Driver in the *NetIQ Identity Manager Install and Upgrade Guide for Linux*.	If you have custom policies and rules, restore your custom settings. For more information, see Restoring Custom Policies and Rules to the Driver in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.
12. (Conditional) Upgrade Sentinel	(Conditional) If you are using NetIQ Sentinel, ensure that you are running the latest service pack. For more information about upgrading Sentinel, see the *NetIQ Sentinel Installation and Configuration Guide*.	Sentinel installation is only supported on Linux. (Conditional) If you are using NetIQ Sentinel, ensure that you are running the latest service pack. For more information about upgrading Sentinel, see the *NetIQ Sentinel Installation and Configuration Guide*.

Uninstalling Identity Manager 4.9 Standard Edition

Some components of Identity Manager have prerequisites for uninstallation. Ensure that you review all the information for each component before beginning the uninstallation process. For more information, see Uninstalling Identity Manager Components in the *NetIQ Identity Manager Install and Upgrade Guide for Linux* or Uninstalling Identity Manager Components in the *NetIQ Identity Manager Install and Upgrade Guide for Windows*.

Contacting Micro Focus

For specific product issues, contact Micro Focus Support at https://www.microfocus.com/support-and-services/.

Additional technical information or advice is available from several sources:

- Product documentation, Knowledge Base articles, and videos: https://www.microfocus.com/support-and-services/
- The Micro Focus Community pages: https://www.microfocus.com/communities/

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