



## One Identity Active Roles 7.3

# Configuration Transfer Wizard Administrator Guide

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-  **WARNING:** A WARNING icon indicates a potential for property damage, personal injury, or death.
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# Contents

|   |           |
|---|-----------|
| <b>Configuration Transfer Wizard overview</b> .....                   | <b>4</b>  |
| What's new in version 7.3 .....                                       | 4         |
| <b>Solution components</b> .....                                      | <b>5</b>  |
| Configuration Collection wizard .....                                 | 5         |
| Configuration Deployment wizard .....                                 | 5         |
| ARScnfig command-line tool .....                                      | 5         |
| <b>Installing the solution</b> .....                                  | <b>7</b>  |
| Installation requirements .....                                       | 7         |
| Installation procedure .....  | 8         |
| <b>Using the solution</b> .....                                       | <b>9</b>  |
| General considerations .....  | 9         |
| About dangling links .....  | 10        |
| Using the Collection wizard and Deployment wizard .....               | 11        |
| Using the ARScnfig command-line tool .....                            | 12        |
| Syntax .....  | 12        |
| Parameters .....  | 13        |
| Scenario: Transfer Active Roles configuration .....                   | 15        |
| Step 1: Creating a list of the configuration objects to package ..... | 16        |
| Step 2: Creating configuration data package file .....                | 16        |
| Step 3: Configuring domain mapping .....                              | 16        |
| Step 4: Deploying the configuration data package .....                | 17        |
| Scenario: Rolling back the configuration changes .....                | 17        |
| <b>Known issues</b> .....   | <b>18</b> |
| <b>About us</b> .....   | <b>21</b> |
| Contacting us .....   | 21        |
| Technical support resources .....                                     | 21        |

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# Configuration Transfer Wizard overview

For large enterprises which implement a complex administrative structure using Active Roles, one of the greatest challenges becomes exporting Active Roles configuration from a test environment to a production environment.

With Active Roles Configuration Transfer Wizard, you can export Active Roles configuration objects (such as Access Templates, Managed Units, Policy Objects, Policy Type objects, etc.) to an XML file and then import them from that file to populate another instance of Active Roles. The export and import operations provide a way to move configuration objects from a test environment to a production environment.

This document provides information on how to install and use Configuration Transfer Wizard.

## What's new in version 7.3

Version 7.3 of Configuration Transfer Wizard adds support for the latest Active Roles version, 7.3. Now you can use Configuration Transfer Wizard to move configuration data between Active Roles instances of version 6.7 or later, including version 7.3.

## Solution components

Configuration Transfer Wizard includes the following components, which are installed during the solution setup:

- Configuration Collection wizard
- Configuration Deployment wizard
- ARSconfig command-line tool

### Configuration Collection wizard

Configuration Collection Wizard is intended to collect the Active Roles configuration data in a source environment. During the collection process, the selected Active Roles configuration objects are packed into an XML file referred to as *configuration package*.

### Configuration Deployment wizard

Configuration Deployment Wizard is designed to deploy a configuration package, earlier created with the Configuration Collection Wizard, in a destination Active Roles environment. When deploying the configuration data, the target Active Roles instance is populated with the configuration objects collected from the source Active Roles instance.

### ARSconfig command-line tool

The ARSconfig command-line tool provides a script-based interface that enables automation of Active Roles configuration transfer. By using the command-line script, you can create or deploy an Active Roles configuration data package, or roll back changes made to a target Active Roles configuration during deployment of a configuration package.

For information on how to use the solution components, see [Using the solution](#) later in this document.

## Installing the solution

This section explains how to install Configuration Transfer Wizard.

### Installation requirements

The solution runs on top of Active Roles, and requires the Active Roles Administration Service to be deployed in your Active Directory environment prior to deploying the solution. The following versions of the Active Roles Administration Service are supported:

- 6.7.0
- 6.8.0
- 6.9.0
- 7.0.2
- 7.1
- 7.2
- 7.3

Before you install Configuration Transfer Wizard, ensure that you have any of following software components installed on the computer where you plan to install Configuration Transfer Wizard:

- Active Roles Administration Service
- Active Roles Console (MMC Interface)

Depending on whether you use the solution to collect Active Roles configuration data or to deploy a configuration package, Configuration Transfer Wizard must be installed on a computer from which you can connect to the Active Roles Administration Service in the source or destination environment. If the source and destination environments are physically separated, the solution must be installed in each environment.

# Installation procedure

Assuming default security settings, the Domain Admins rights are sufficient to install the solution.

## ***To install Configuration Transfer Wizard***

1. Start the Installation Wizard by running **ConfigurationTransferWizard.msi** from the Active Roles distribution package.
2. Follow the instructions in the Installation Wizard.



## Using the solution

This section explains how to use Configuration Transfer Wizard.

### General considerations

To use this solution, you must have the necessary security permissions. It is sufficient to be a member of the Active Roles Admin account, in both the source and destination environments. The Active Roles Admin account is specified during installation of the Administration Service and defaults to the Administrators group on the computer running the Administration Service.

- ❗ **IMPORTANT:** Before transferring the Active Roles configuration data, ensure that the Active Directory Organizational Unit (OU) structure in the destination environment is identical to the OU structure in the source environment.

These are the general steps required to transfer Active Roles configuration data by using this solution:

1. **Collect configuration data from a source Active Roles environment** In this step, you select the Active Roles configuration objects you want the configuration package to include, and then create a configuration package XML file. This step is performed in the source environment.
2. **Deploy the collected configuration data to a destination Active Roles environment** In this step, the target Active Roles instance is populated with configuration objects from an earlier created package. This step is performed in the destination environment.

- ❗ **NOTE:** If an object to deploy already exists in the target configuration, then the properties of the object are updated during the deployment process.

To perform these steps, you can use either the Configuration Collection Wizard and Configuration Deployment Wizard, or the ARSconfig command-line tool. Both methods have the same effect and can be used interchangeably, depending on your requirements.

- You can use this solution to transfer Active Roles configuration objects of the following categories:
- Access Templates and containers that hold Access Templates
- Managed Units and containers that hold Managed Units
- Policy Objects and containers that hold Policy Objects
- Scheduled Task objects and containers that hold such objects
- Application objects and containers that hold such objects
- Script Modules and containers that hold Script Modules
- Virtual attributes
- Access Template Links (edsACE object type)
- Policy Object Links (edsPolicyObjectLink object type)
- Mail Configuration objects (edsMailConfiguration object type)
- Workflow definition objects (edsWorkflowDefinition object type)
- Automation Workflow definition objects (edsAutomationWorkflowDefinition object type)
- Policy Type objects (edsPolicyType object type)
- Entitlement Profile Specifier objects and containers (edsOneViewSpecifier or edsOneViewSpecifiersContainer object type) - requires Active Roles 6.7 or later
- Display specifiers and containers that hold display specifiers (displaySpecifier or edsDisplaySpecifierContainer object type)

The solution cannot be used to transfer configuration objects of the following categories:

- Built-in objects (the objects that have "built-in" as part of the name)
- Objects held in the Configuration/Application Configuration/Web Interface container (Web Interface configuration data)

If you need to roll back the changes made to the configuration of the target Active Roles instance, during the package deployment, you can do this by using the command-line tool included with the solution. For step-by-step instructions, see [Scenario: Rolling back the configuration changes](#) later in this document.

## About dangling links

When collecting Access Templates and Policy Objects, the solution analyzes their links and writes the links to the destination package. Every link record includes information about the directory object and, if applicable, the trustee to which the respective Access Template or Policy Object is applied. In the configuration package file, this information normally takes the form of the distinguished name (DN), whereas in the Active Roles environment the links refer to the objects by security identifier (SID) or globally unique identifier (GUID). The solution needs DN rather than SID or GUID to identify an object as in a different environment, the object SID or GUID differs from that in the original

environment. By identifying the link reference objects by DN, the solution enables the delegation and policy settings to be properly transferred from the source environment to the destination environment.

To have the link records identify the link reference objects by DN, the solution has to look up object SID or GUID to object DN. If this process fails for a given link, the link record is created that identifies the link reference object by SID or GUID. Such a record is referred to as *dangling link*.

If any dangling links have been recorded to the destination package, the solution informs of this condition. Deploying a package that contains dangling links may create links in the destination environment that refer to non-existent objects. As a result, some delegation and policy settings configured by deploying the package may not match the settings found in the source environment from which the package was collected.

The ARSconfig tool provides the *danglingLinks* parameter that allows you to specify how you want the deployment process to handle dangling links. For more information, see [Using the ARSconfig command-line tool](#) later in this document.

## Using the Collection wizard and Deployment wizard

To transfer Active Roles configuration, you can collect configuration objects from one Active Roles environment and then deploy them to another environment in the following way:

1. Create a configuration package file with the Configuration Collection Wizard.
2. Deploy the package with the Configuration Deployment Wizard.

### **To create a configuration package with the Configuration Collection wizard**

1. Start the wizard by running the **Configuration Collection Wizard** application from the Start menu or Start page.
2. On the **Collect Active Roles Configuration Data** page, do the following:
  - a. Click **Connect** and using the **Connect to Administration Service** dialog that opens, select the Administration Service to which you want the wizard to connect.
  - b. Under **Select configuration objects to package**, select the objects you want to include in the configuration package, and specify whether you want to collect the child objects of the selected objects.
  - c. When finished, click **Create Package**.
3. On the **Specify a location for the configuration package** page, do the following:
  - a. Click **Browse** to specify a location and name for the configuration package file.
  - b. Under **Package description**, enter the package description (optionally).

- c. To cause the wizard to collect Access Templates associated with selected objects, leave the **Do not collect associated Access Templates** check box cleared. Otherwise, select this check box.
  - d. To cause the wizard to collect Policy Objects associated with selected objects, leave the **Do not collect associated Policy Objects** check box cleared. Otherwise, select this check box.
4. On the **Verify the information you specified** page, click **Start**.

### ***To deploy a configuration package with the Configuration Deployment wizard***

1. Start the wizard by running the **Configuration Deployment Wizard** application from the Start menu or Start page.
2. On the **Deploy Active Roles Configuration Data** page, do the following:
  - a. Click **Browse** to select the configuration package file.
  - b. Optionally, select the **Ignore errors** check box for the wizard to ignore any errors during the configuration deployment.
  - c. Click **Deploy Package**.
3. On the **Connect to Administration Service** page, select the Administration Service to which you want the wizard to connect, and then click **Next**.
4. On the **Add Domain Name Mapping** page, if names of the managed domains differ in the test and production environments, add domain name mapping entries, and then click **Next**.
5. On the **Verify the information you specified** page, click **Start**.

## Using the ARSconfig command-line tool

As an alternative to using the graphical user interface tools, you can use the ARSconfig command-line tool. The ARSconfig tool is the `arsconfig.wsf` Windows Script File (WSF) that defines the command line parameters and the required object references.

Using the ARSconfig tool requires two files to be pre-configured, before running the script. These are a file that lists the configuration objects that the package must include, and, if necessary, a file containing domain mapping entries.

### ***To run the ARSconfig command-line tool***

- From a command prompt, run the `arsconfig.wsf` script, specifying the required type of task and parameters. The script syntax is described in the section that follows.

## Syntax

```
Cscript arsconfig.wsf [/?] /task:<'collect' | 'deploy' | 'rollback'>
[/selection:"<filename.xml>"] [/package:"<filename.xml>"] [/map:"<filename.csv>"]
```

```
[/verbose] [/log:"<filename>"] [/deletelog] [/server:<servername>] [/login:<username>]
[/password:<userpassword>] [/danglingLinks:<'Stop' | 'Skip' | 'Deploy'>]
[/ignoreLinks:<'0' | '1' | '2' | '3'>] [/ignoreErrors] [/upgrade]
```

## Parameters

**Table 1: Parameters**

| Parameter        | Description  |
|------------------|--|
| <i>task</i>      | <p>This is a required parameter which defines the type of task you want to perform by using this script.</p> <p>Specify one of these parameter values:</p> <ul style="list-style-type: none"> <li>'collect' - Collects configuration data from the source Active Roles environment, and creates a configuration package file.</li> <li>'deploy' - Populates the target Active Roles instance with objects from a configuration package created earlier by Configuration Transfer Wizard.</li> <li>'rollback' - Reverts the configuration of the target Active Roles instance to the state it was in before deployment of the configuration package.</li> </ul> |
| <i>selection</i> | <p>The path and name of the XML file containing a list of the source configuration objects to be included in the configuration package.</p> <p>This parameter is required when you use this script to create a configuration package. The XML file you specify in this parameter must be manually created before you run the script.</p>   |
| <i>package</i>   | <p>The full path to the configuration package XML file.</p> <p>Add this parameter if you want to specify a custom name and location for the configuration package file. If you do not specify this parameter, the script assumes that the installation path, and the default package file name are used.</p>   |
| <i>map</i>       | <p>The name of the domain mapping file.</p> <p>Add this parameter if you want the test domain names to be replaced with the production domain names, during configuration package deployment.</p> <p>You can add this parameter only when you use this script to deploy a configuration package. The CSV file you specify in this parameter must be manually created before you run the script.</p>  |
| <i>verbose</i>   | <p>Enables log trace output.</p>   |

| Parameter            | Description   |
|----------------------|---|
|                      | If this parameter is not specified, then no information is displayed in the Command Prompt while the script is running.   |
| <i>log</i>           | Specifies the name of the trace output file. You can also specify a target location for the log file.<br><br>Add this parameter to create a log file with diagnostic information.   |
| <i>deletelog</i>     | Deletes the trace output file upon successful completion.<br><br>Add this parameter if you want the log file deleted if a task was completed with no errors.  |
| <i>server</i>        | The fully qualified domain name of the computer running the Administration Service to connect to.<br><br>If this parameter is not specified, the script attempts a connection to any available Administration Service.  |
| <i>login</i>         | The user logon name of the account with which you want to connect, in the form Domain\UserName, or in the form of a user principal name.  |
| <i>password</i>      | Password for the user logon name you specify in the <i>login</i> parameter.   |
| <i>danglingLinks</i> | This parameter takes effect if the <i>task</i> parameter value is set to 'deploy', and specifies whether to deploy Access Template or Policy Object links, if any found in the package, that refer to objects which may fail to be resolved in the destination environment (dangling links). The acceptable parameter values are: <ul style="list-style-type: none"> <li>'Stop' - The deployment process is not started if any dangling links are detected (default setting)</li> <li>'Skip' - The dangling links are not deployed in the destination environment</li> <li>'Deploy' - Deployment of the dangling links is attempted based on the data found in the package</li> </ul> |
| <i>ignoreLinks</i>   | Specifies whether to collect Access Template links and Policy Object links. This parameter can take any of the following values: <ul style="list-style-type: none"> <li>'0' - Collect all links (default setting).</li> <li>'1' - Do not collect Policy Object links.</li> <li>'2' - Do not collect Access Template links.</li> <li>'3' - Do not collect Policy Object and Access Template</li> </ul>   |

| Parameter           | Description   |
|---------------------|---|
|                     | links.  |
| <i>ignoreErrors</i> | If this parameter is specified, the solution ignores any errors that can be encountered during the configuration deployment.  |
| <i>upgrade</i>      | If supplied together with <code>/task:'deploy'</code> , preserves the existing links, policy parameters and scheduled task parameters. Without this parameter, the deployment of a configuration package replaces the existing links with the links found in the configuration package, and resets the policy and schedule task parameters to the default values. |

## Scenario: Transfer Active Roles configuration

This scenario explains how to use the ARSconfig command-line tool to transfer a set of configuration objects from a test Active Roles instance to a production instance.

Suppose you need to transfer the following configuration objects from a test Active Roles instance to a production Active Roles instance:

- The **Configuration/Access Templates/Common** container, including all child objects stored in this container.
- The **Configuration/Managed Units/Development** container, excluding the child objects stored in this container.
- All child objects stored in the **Script Modules/Corporate Policy/Priority Access** container, but excluding the container itself.

Also, assume that the names of the domains managed by the test (source) Active Roles instance are **test1.company.com** and **test2.company.com**, and the two corresponding domains managed by the production (target) Active Roles instance are **prod1.company.com** and **prod2.company.com**.

To implement this scenario, complete the following steps:

1. Create a list of the configuration objects to collect
2. Create configuration data package
3. Add domain mapping
4. Deploy the configuration data package

## Step 1: Creating a list of the configuration objects to package

In this step, you create a list of the configuration objects that you want to collect into the configuration package, and define how you want to collect their child objects.

To do that, create the **selection.xml** file, and save that file to the solution installation folder: <Active Roles installation folder>\Configuration Transfer Wizard\Scripts.

To clarify the file format, consider the following sample file that illustrates how to collect Access Templates, Managed Units, and Script Modules residing within specified containers:

```
<?xml version="1.0" encoding="utf-8"?>
<Configuration>
<include DN="CN=Common,CN=Access Templates,CN=Configuration" collectSelf="True"
collectChildren="True"/>
<include DN="CN=Development,CN=Managed Units,CN=Configuration" collectSelf="True"
collectChildren="False"/>
<include DN="CN=Priority Access,CN=Corporate Policy,CN=Script
Modules,CN=Configuration" collectSelf="False" collectChildren="True"/>
</Configuration>
```

## Step 2: Creating configuration data package file

In this step, you use the ARSconfig command-line tool to create a configuration data package file using the data from the **selection.xml** file created in Step 1.

### To create the configuration data package file

- At a command prompt, navigate to the Configuration Transfer Wizard installation folder, and enter the following syntax:

```
Cscript.exe arsconfig.wsf /task:collect /selection:selection.xml
```

As the result, the **package.xml** configuration data package file will be created in the following default location: <Active Roles installation folder>\Configuration Transfer Wizard\Scripts.

## Step 3: Configuring domain mapping

If the names of the managed domains are different in the test and production environments, you must add domain mapping that defines the correspondence between the domain names. When the configuration package is deployed in the target environment, the domain names specified as a part of the objects' attributes are replaced with the names of the production domains, according to the name mapping entries.



In this step, you create the CSV domain name mapping file—**mapping.csv**, and then save that file to the solution installation folder: <Active Roles installation folder>\Configuration Transfer Wizard\Scripts. In this scenario, the **mapping.csv** file contains the following lines:

```
"DC=test1,DC=company,DC=com", "DC=prod1,DC=company,DC=com"
```

```
"DC=test2,DC=company,DC=com", "DC=prod2,DC=company,DC=com"
```

## Step 4: Deploying the configuration data package

In this step, you use the ARSconfig command-line tool to deploy the **package.xml** configuration package in the production Active Roles environment. When running the `arsconfig.wsf` script, specify the package file to deploy (**package.xml**), and the domain name mapping file (**mapping.csv**) you have created in Step 3.

### To deploy the package

- At a command prompt, navigate to the Configuration Transfer Wizard installation folder, and enter the following syntax:

```
Cscript.exe arsconfig.wsf /task:deploy /package:package.xml /map:mapping.csv
```

## Scenario: Rolling back the configuration changes

This step may be required if you have encountered any errors when deploying a configuration package in the production environment. By rolling back changes in the target configuration, you bring it to the state it was in before the package was deployed. Use the following instruction to roll back the changes made by the deployment of the **package.xml** file described in the scenario outlined above.

### To roll back configuration changes

- At the command prompt, navigate to the Configuration Transfer Wizard installation folder, and enter the following syntax:

```
Cscript.exe arsconfig.wsf /task:rollback /package:package.xml
```

## Known issues

This section provides a list of the currently known issues that customers may experience with Configuration Transfer Wizard. For each issue, the list includes an ID number, which identifies the issue, a brief description of the problem, and a workaround, if any exists, for the problem.

### TF00004281

In the target Active Roles configuration, the solution cannot restore the `edsvaDebuggingServer` and `edsvaDebuggingServerName` properties of Script Module objects: those attributes are always empty.

#### WORKAROUND

Manually specify those properties with the use of the Active Roles console.

### TF00004581

Configuration Deployment Wizard fails to deploy some of Access Templates. The solution log file contains the error message similar to the following text:

```
"Error [4710]: Administrative Policy returned an error. The object <Object DN> not found."
```

This error occurs if the source configuration contains nested Access Templates.

#### WORKAROUND

On the **Collect Active Roles Configuration Data** page of the wizard, select all the nested Access Templates you want to collect. If you are using ARSconfig, ensure that the selection file includes the nested Access Templates into the configuration export package.

### TF00004585

After transferring a Policy Object that includes the "User Account Relocation Deprovisioning" policy entry, the "Description" and the "Error message returned by this policy" text boxes available on the **User Account Relocation Policy Properties** dialog box contain invalid target domain name.

## **WORKAROUND**

After deploying the target configuration, manually edit those text elements using the Active Roles console.

## **TF00010732**

When collecting Script Modules, Configuration Transfer Wizard may not collect the library Script Modules that are used by the Script Modules being exported. As a result, the deployment of the exported Script Modules may cause an error condition in the destination environment.

## **WORKAROUND**

On the **Collect Active Roles Configuration Data** page of the wizard, select all the library Script Modules that are used by the Script Modules you want to collect. If you are using ARSconfig, ensure that the selection file includes the library Script Modules into the configuration export package.

## **TF00039803**

When collecting Display Specifiers, Configuration Transfer Wizard may not collect the Active Roles virtual attributes for which the Display Specifiers are being exported. As a result, the deployment of the exported Display Specifiers may cause an error condition in the destination environment.

## **WORKAROUND**

On the **Collect Active Roles Configuration Data** page of the wizard, select all the Active Roles virtual attributes for which the Display Specifiers are being exported. If you are using ARSConfig, ensure that the selection file includes the Active Roles virtual attributes into the configuration export package.

## **TF00050511**

In a situation where an object to be exported does not exist in the source environment, Configuration Transfer Wizard stops the export process. As a result, the configuration export package may not include all objects that were selected for export.

## **WORKAROUND**

Ensure that all objects you selected for export exist in the source environment.

## **TF00062463**

Configuration Transfer Wizard does not provide the ability to export links that involve pre-defined or built-in objects, nor does it make possible to export pre-defined or built-in objects. As a result, you do not have the option to transfer, for example, the links of pre-defined Access Templates.

**WORKAROUND**

When transferring a configuration that includes any links of pre-defined or built-in objects, create the required links manually in the destination environment.

**TF00125202**

When using the Configuration Collection Wizard or Configuration Deployment Wizard, you may encounter an error message such as "A generic error occurred in GDI+."

**WORKAROUND**

Disregard the error message. Click **OK** to close the error message box.

**TF00130489**

When using ARSconfig with the 'rollback' task option, you may encounter an error: "This script module is in use, and cannot be deleted." This issue is most likely to occur with a PowerShell based Script Module containing a library script, and is due to the fact that the Script Module remains locked for a certain time period after all the Script Modules that use the library script have been deleted.

**WORKAROUND**

Run ARSconfig with the 'rollback' task option once more, or delete the Script Module manually, with the use of the Active Roles console.

**TF00134074**

With the display DPI setting of 'Large size (120 DPI)' you may encounter some minor visual defects on Configuration Transfer Wizard pages.

**WORKAROUND**

Use the display DPI setting of 'Normal size (96 DPI)'.

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