

Migrating to FlexNet Manager Suite On-Premises

Legal Information

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Migrating to FlexNet Manager Suite 2018 R1 On-Premises



Note: This document does not cover upgrading from FlexNet Manager Suite 2014 (any revision) or 2015 to FlexNet Manager Suite 2018 R1. For that simple process, see *Upgrading FlexNet Manager Suite to 2018 R1 On-Premises*. As well, managed service providers (MSPs) should see the separate documentation for multi-tenant environments.

FlexNet Manager Suite is a powerful and sophisticated tool, which has been extensively rewritten since FlexNet Manager Platform 9.2, with a new user interface and some significant back-end changes. Therefore migration is a significant project. Planning your upgrade is made more challenging because there are many different configurations of the 9.2 product, each of which represents a different starting point to migrate to the 2018 R1 release. This document covers the major starting points, and includes consideration of functionality required going forward.

This document is intended for use by:

- System engineers responsible for implementing and maintaining the system
- Network and security personnel with responsibility for infrastructure that the system relies on
- Flexera consultants implementing your system.

Assumptions: Readers have completed at least the appropriate training course in FlexNet Manager Suite administration, and understand basic product concepts. Readers have a technical background and are experienced with product installations and configuration.

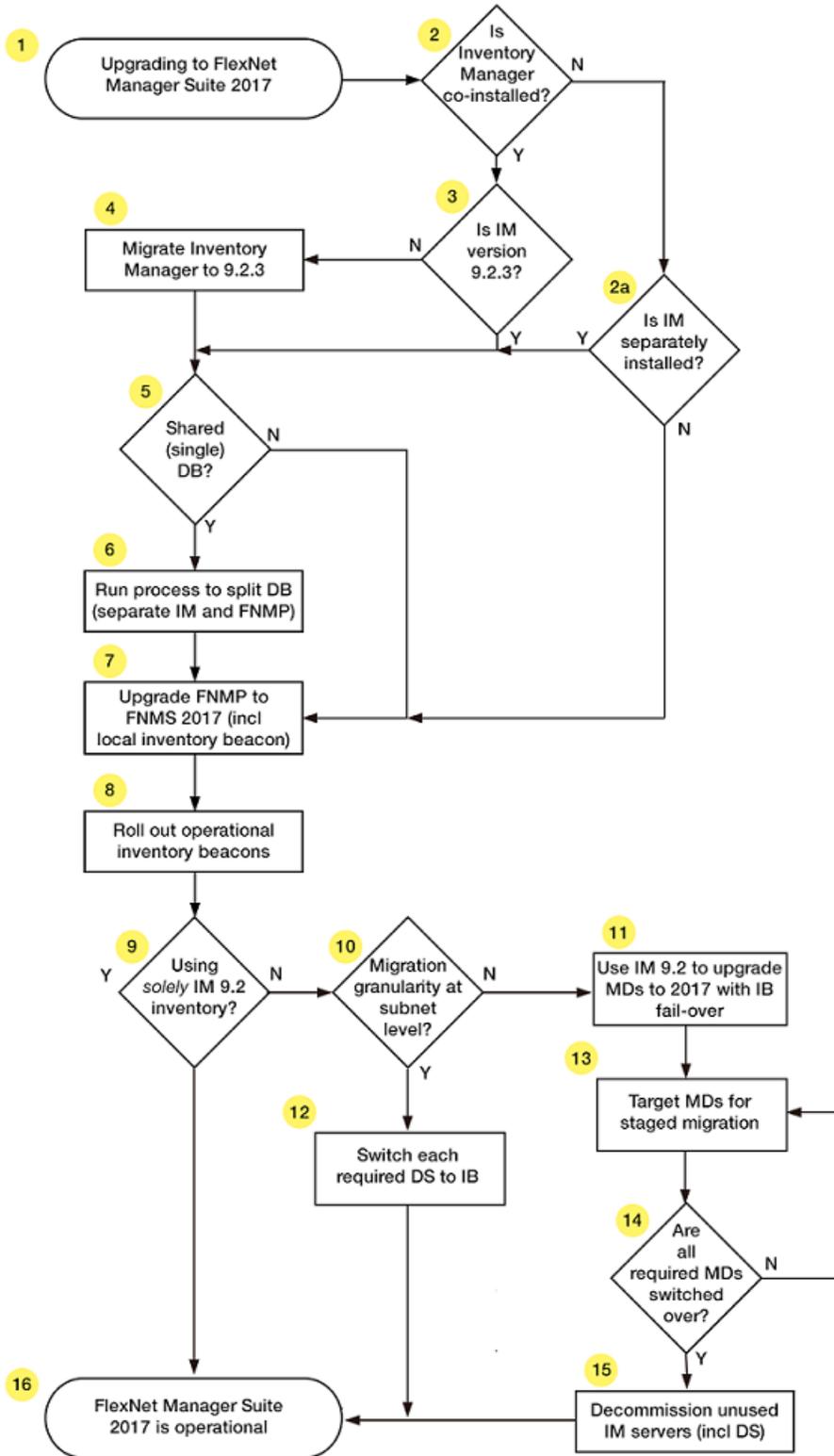
Process Overview

When upgrading to FlexNet Manager Suite 2018 R1, there are several possible starting points, each causing variations in the process. You may also desire a variety of possible outcomes. Having so many choices can make a guide like this seem complicated. The following flowchart and description illustrates your choices. To simplify further, you may wish to highlight the path through the possibilities that applies to your enterprise. The

discussion that follows references each step in the flow chart by the numbers shown. The process outlined here has been proven successful, and you need to follow carefully.



Important: *Not shown in the flowchart is an initial backup of your database(s) and also of your existing server(s), using your normal backup procedures. In the unlikely event that you are dissatisfied with the result of this migration, the only 'roll back' option is to restore these backups.*



1. Upgrading – The starting point

FlexNet Manager Suite 2018 R1 is a single, integrated solution for license optimization. However, you may be coming to this solution from a variety of starting points, such as:

1. FlexNet Manager Suite 2014. This is a simple upgrade path, for which a simplified document is available (see *Upgrading FlexNet Manager Suite 2014 Rx to 2018 R1 On-Premises*).
2. FlexNet Manager Platform 9.2 or earlier; or its fore-runner Compliance Manager across many different releases. Provided that any one of these products is installed *on its own* (specifically, *without* a co-installation of Inventory Manager on the same application server), you may migrate this product directly to FlexNet Manager Suite 2018 R1 using this guide. If you also had a separate installation of Inventory Manager on another server, you may choose to upgrade it as part of this project, or to consider its upgrade separately if you wish, since earlier versions of Inventory Manager can still integrate with FlexNet Manager Suite.
3. Any of FlexNet Manager Platform 9.2 or earlier or Compliance Manager (any version) installed on the same application server as Inventory Manager. This is the most challenging case, as FlexNet Manager Suite now has integrated handling of its own inventory data, and no longer requires the separate Inventory Manager product. However, it is possible that you may prefer to preserve Inventory Manager for some of its more fine-grained targeting capabilities.

The following discussion points clarify the issues and options around case 2 (either no Inventory Manager, or implemented on a separate application server) and case 3 (co-installation on the same application server). (The question of a shared database is treated separately below.)

2. Is Inventory Manager co-installed?

"Co-installed" here means that Inventory Manager and your previous compliance product were installed on the same application server. You can usually tell whether Inventory Manager is installed with your earlier implementation by opening the product in the MMC console. If, along with the **FlexNet Manager Platform** node, you see nodes like **Managed Device Settings**, **Discovery and Adoption**, and **Remote Task Manager** in the console tree on the left, then Inventory Manager is co-installed on the same server. In this case, you will need to commission a new server (or set of servers, virtual or physical) for FlexNet Manager Suite 2018 R1 alone. Your existing combined server rolls forward as your Inventory Manager (only) server, at least for the time being, and we will uninstall your old FlexNet Manager Platform from this server in due course.

The rare exception is that you may have Inventory Manager installed, but on a *separate* server (question 2A). It will have its own MMC interface on that server with the same kind of nodes in the console tree (but not the **FlexNet Manager Platform** node). When Inventory Manager is separately installed like this, you may choose whether to:

- Defer any upgrade of the Inventory Manager product to a separate project that you will tackle later. In this case, go directly to step 5.
- Include the upgrade of Inventory Manager in this same project, as documented here. In this case take steps 3 and 4.

If you do not have *any* implementation of Inventory Manager, your decision tree is simplified, and you race ahead to step 7 (down the **N** exit from step 2a).

Details: [Identify and Update Inventory Manager Server](#).

3 and 4. Ensure that Inventory Manager is up-to-date.

For the upgrade process, the scripts to assist your process with database separation and clean-up are based on the schema at 9.2.3. For that reason alone, you need to have Inventory Manager up-to-date before proceeding.

Also from a business perspective, if you plan to carry forward with Inventory Manager as an inventory source feeding your system (an option we discuss later), you are likely to use release 9.2.3 of Inventory Manager, since it has additional functionality particularly in relation to Oracle inventory gathering. So it will be convenient to complete this upgrade as part of the same project.

For these reasons, there is summary guidance for upgrading Inventory Manager included in this document (see [Identify and Update Inventory Manager Server](#)). If you want further information, use the Upgrade Guide installed with the 9.2 product to guide you.

Once you have done that, you are at the baseline to commence the upgrade to FlexNet Manager Suite 2018 R1.

5. Do both products share a single database?

If, in step 2, you identified that your products were co-installed on the same server, then you do have a shared database as well, so your answer here is **Y**.

If you have separate application servers, you may still have them sharing a common database. You could ask your DBA, or you can check a registry key as described later. Details: [Identify and Update Inventory Manager Server](#).

The upgrade process requires that a shared database is first split into two. One database is preserved for on-going operation of Inventory Manager. The other can be upgraded to FlexNet Manager Suite 2018 R1.



Tip: The minimum supported database release is Microsoft SQL Server 2008. You'll also notice that the new product requires two or three additional databases that were not present in the 9.2 release (typically on the same database server).

If you are sure that your previous implementation already had separate databases (and on a supported version of SQL Server), you can skip forward to step 7.

6. Split the databases

Separating the databases is required for the migration process. As well, since you may want to continue with Inventory Manager functionality for some time, splitting the databases allows for one copy to migrate up to FlexNet Manager Suite 2018 R1 while the other continues for Inventory Manager. You achieve this by:

- Doing a backup of your current joint database
- Doing a restore to make a second copy with a new name
- Running the scripts provided to clean out from each database the content belonging to the 'other' product.

Details: [Splitting a Shared Database](#).

7. Upgrade your compliance product to FlexNet Manager Suite 2018 R1

If your earlier implementation had two separate servers for your compliance product and for Inventory Manager, you can apply the software upgrade to your compliance server directly.

In contrast, if you previously had a single server hosting both compliance and inventory, you now commission a new application server and install FlexNet Manager Suite 2018 R1 as a fresh installation. (Details are provided for

planning your new implementation.) You can also uninstall the old compliance product from the previously combined server, which now becomes your Inventory Manager server.

In both cases, you also install an inventory beacon on your central application server. This 'home base' inventory beacon allows you to continue managing the compliance connections recorded in your database in your previous implementation. (Inventory beacons on separate servers cannot access legacy connections that were migrated from your 9.2 Inventory Manager database into your FlexNet Manager Suite 2018 R1 database. Only the local inventory beacon has database access.)

Full details for this step are included in the chapter [Upgrading FlexNet Manager Suite](#).

8. Roll out your inventory beacon hierarchy

Your old Inventory Manager product possibly used a hierarchy of distribution servers to send out packages and upload inventory collected by inventory agents installed on managed devices. (Around release 9.0, the distribution servers were renamed inventory beacons; but to avoid confusion in this document, we will continue to call them distribution servers.)

Inventory beacons supplied with FlexNet Manager Suite 2018 R1 are completely re-architected, and you should roll out a new hierarchy of 2018 R1 inventory beacons on separate machines (which can be virtual machines if you so choose).



Note: *Inventory beacons for 2018 R1 are not compatible with earlier distribution servers (including those for 9.2 or later that were called inventory beacons), and cannot coexist on the same computer.*

Exactly how you do this depends on your strategy, decided in the following steps. For example, if you want the fastest possible automated switch-over, you simply replace the distribution server software with FlexNet Beacon software, as described in more detail in step 12.

Your alternative strategy involves parallel operation of 9.2 inventory gathering with 2018 R1 inventory beacons. Since these cannot exist simultaneously on the same server, parallel operation requires that you roll out a parallel machine hierarchy.

Keeping both the old distribution server hierarchy and the new inventory beacon hierarchy operational in parallel allows for an orderly transition. Later, if you decide to move away from Inventory Manager, you can decommission and re-purpose the former distribution servers.

Details: [Managing Device Migration by Individual Device](#).

9. Using solely Inventory Manager 9.2 for FlexNet inventory collections?

Broadly, you need to decide what functionality from Inventory Manager you want to preserve, and for how long. FlexNet Manager Suite 2018 R1 deliberately simplifies management of FlexNet inventory agents on target devices. Consider this functionality comparison:

Inventory Manager 9.2	FlexNet Manager Suite 2018 R1
Choose between client-side policy merging and server-side policy merging. (Client-side policy merging was more commonly used for deployment activities. Any managed devices relying on client-side policy merging must continue to be managed under Inventory Manager 9.2.)	Only server-side policy merging is supported (as appropriate for gathering inventory), and is the required setting for all FlexNet inventory agents managed under this system.
Manually configure settings packages for inventory agents.	Settings are determined automatically, based on behavioral rules you create.
Manually deploy settings packages to managed devices.	Inventory agents (on inventoried devices) are updated automatically.
Create multiple schedules for inventory agents and data upload.	All FlexNet inventory agents share a single schedule for local inventory gathering, and there is one schedule for discovery across the network (but there are individual schedules for importing inventory data from each third party system, and for importing each kind of business data like purchases).
Ability to run custom remote execution commands.	Only the specific remote execution tasks required for inventory are available.
Manually identify target computers for adoption as managed devices.	Option to automatically install an inventory agent on any computers that are discovered (and do not already have an agent installed). This rule-based 'adoption' can be targeted to individual machines or to subnets.

By comparing product functionality with your requirements, you need to decide whether to:

- Persist with Inventory Manager 9.2.3, using it as an inventory feed into FlexNet Manager Suite 2018 R1, and not using the FlexNet inventory gathering features in FlexNet Manager Suite 2018 R1 at all. You are preserving Inventory Manager functionality, shown in the left-hand column above, across your *entire* computing estate. This means you are done, and take the **Y** exit from step 9 to leap forward to the finish line at step 16. (Otherwise you take the **N** exit and continue with step 10.)
- Switch entirely to the simplified native inventory gathering incorporated in FlexNet Manager Suite 2018 R1, using the new rule-based approach. You plan to enjoy the simplified management in the right-hand column above. You need to make the choice described for step 10 to work out how you will handle this.
- Combine the systems, using distinct features of each in those parts of your enterprise for which they are best suited. (Technically, this is like the switch-over scenario, except that you make the transition period of indeterminate length.) You might, for example, use Inventory Manager to manage a set of machine-room servers for which you demand individual scheduling and custom configurations of the inventory agent; whereas you might prefer the simplified management of FlexNet Manager Suite 2018 R1 for things like management of desktop and mobile devices. The current migration process makes it practical to isolate parts of your present infrastructure for upgrade, and protect other parts to continue with the old system. Nothing in the process sets a time limit on this kind of parallel operation. Of course, if you plan to extend this parallel operation, you should consider the impact on other corporate processes, such as acquisition of new machines

and how these should be targeted for adoption by one system or the other. In the meantime, if considering parallel operation, you should also continue with both steps 10 and 11 for the appropriate parts of your environment that are to be migrated to 2018 R1.

10. Migration can be controlled at the level of subnets

This choice is about how much individual control you want over the migration of your computing estate (or parts of it, if you are mixing the approaches) from the old system to the new system. The simple path is to have control at the level of each subnet. Particularly if you have first tested the migration in a test environment, migrating a subnet at a time may represent a good balance of control with resourcing and time. If subnet granularity is not sufficient for your needs, you can have control that extends down to the level of each individual device if necessary. The following table clarifies the differences between these two levels of control.

Functionality/tasks	Control migration by subnet	Control migration by device
Server deployment	Deploy an inventory beacon into each subnet as you target that subnet. (Because you process a subnet at a time, a server previously used as a distribution server in the old system can be re-purposed as an inventory beacon in the next subnet. The total number of servers required is the number of subnets + 1.)	Deploy inventory beacons in a parallel hierarchy so that managed devices can operate through the 9.2 distribution server hierarchy today and gradually switch over to the new 2018 R1 inventory beacons as they are updated. In general, this approach requires as many new inventory beacons as you have old deployment servers. (It is not possible to co-install the FlexNet Beacon software on a server running the deployment server code.)

Functionality/tasks	Control migration by subnet	Control migration by device
Migration mode setting	<p>Not required; but may be used as a "starter's gun" to commence migration. Must be clear (not checked) for this migration method to proceed. At any time that migration mode is set, devices connecting to 2018 R1 inventory beacons successfully report inventory results through those inventory beacons into the new FlexNet Manager Suite database; but they do so using their settings current at the moment that migration mode was disabled (in other words, if they switch over while migration mode is disabled, they use settings obtained from the 9.2 system). Only after the migration mode is turned off do they receive an updated policy which aligns them with the settings in the 2018 R1 version of FlexNet Manager Suite (the policy updates generally occur within about 15 minutes of migration mode being turned off).</p>	<p>Must be selected (checked). In migration mode, devices must be:</p> <ul style="list-style-type: none"> • Already upgraded to the 2018 R1 client • Identified in a target used to control migration. <p>Those managed devices that do not meet these requirements receive a 404 "Not found" error when they access a DL on a new inventory beacon, and fail over to an existing distribution server. Once the migration is sufficiently advanced, you may have sufficient confidence to allow "all the rest" to migrate at once. At this point, you may turn off migration mode. When this is off, all devices that access the DL on an inventory beacon receive their new policy and switch over (irrevocably) to the new system.</p>
Updating managed device (agent) version	<p>Choose whether to:</p> <ul style="list-style-type: none"> • Update managed devices before they migrate (permitted, but not required) • Allow the 2018 R1 system to automatically update clients to the level you specify as part of their automated migration. 	<p>You <i>must</i> upgrade all targeted managed devices (using your 9.2 technology) <i>before</i> they can be migrated to the new system. If any of these managed devices previously used client-side policy merging, they must be switched to server-side policy management before the upgrade.</p>

Functionality/tasks	Control migration by subnet	Control migration by device
Preparing the managed devices	No preparation of the 9.2 devices required.	<p>In addition to the update of the agent software on all migrating managed devices, you must decide how these device are encouraged to try getting policy from the DL on an inventory beacon:</p> <ul style="list-style-type: none"> • If you do nothing, the final built-in step in the netselector algorithm (a randomization across the DLs available to this device, for load sharing) causes (on average) an equal share of managed devices to attempt the connection to the DL on the inventory beacon at each policy request. (For example, if you have a distribution server and an inventory beacon accessible in a subnet, on average 50% of devices access each of the two servers at each policy request.) By design, of course, this randomization is not deterministic, and is generally not adequate to ensure that every last device migrates in a reasonable time frame. • Using the 9.2 system before devices switch over, you can deploy a device settings package that adds the <code>MgsInventoryBeaconMatch</code> netselector algorithm to the updated devices. This addition ensures that all devices prioritize the new inventory beacons above all old distribution servers, ensuring that every managed device attempts to connect to the DL on a new inventory beacon. (The response each gets is still determined by the setting of migration mode and the targeting for migration.)

Functionality/tasks	Control migration by subnet	Control migration by device
Preparing the 9.2 distribution system	No preparation of the 9.2 system required.	<p>For each distribution server in your 9.2 hierarchy:</p> <ul style="list-style-type: none"> • Declare an additional download location (DL) in the MMS 9.2 interface. • This new DL must use either the HTTP or HTTPS protocol (other protocols supported by 9.2 cannot be used in this case). • Configure the URL setting for this DL (even though it is being declared on a 9.2 distribution server) so that it points to the download location on the parallel inventory beacon that managed devices are able to access after they migrate. <p>This download location acts as a "double agent" or "mole": it is specified in 9.2 so that the clients reporting to 9.2 may find it; but when contacted for policy updates, it admits only updated and targeted devices to the 2018 R1 system (all others fail over to existing distribution servers). Once provided with a 2018 R1 policy, devices cannot switch back to the 9.2 system.</p>
Trigger migration	<p>Within each subnet, start migration simply by changing the DNS alias that currently points to the local distribution server to point instead to the local inventory beacon. (If you were not previously using a DNS alias to point to the distribution server, create one now. It's best practice.) All managed devices that access the new DL on the inventory beacon are updated with their 2018 R1 policy (subject to migration mode being off, as described above).</p>	<p>When migration mode is on, and managed devices have been updated, declare a target in the web interface for FlexNet Manager Suite 2018 R1 that includes those devices you want to switch over. At the next policy update cycle, targeted devices get their policy update and commence reporting to the new system. You can then repeat the process of declaring a new target for the next set of devices, and waiting for these devices to update their policies.</p>

Functionality/tasks	Control migration by subnet	Control migration by device
Roll back	If roll back is required for any reason in any subnet, simply switch the DNS alias back to the 9.2 distribution server. All devices revert to the old server, and receive a policy 'update' that reverts them to their previous settings.	Not available.

For those areas where you will control migration by subnet, read on in step 12. For areas where you choose to control migration down to the level of individual devices, read on at step 11.

11. Upgrade agents on managed devices to 2018 R1

Use your existing 9.2 Inventory Manager system to upgrade managed devices to the inventory agents supplied with FlexNet Manager Suite 2018 R1. A package is provided to assist with this.

- If you are eventually migrating your entire estate away from Inventory Manager 9.2, you can upgrade managed devices indiscriminately if you wish, since the new inventory agent is backward compatible with the 9.2 Inventory Manager system, and continues to operate through the 9.2 distribution server hierarchy for the time being.
- If you want parts of your estate (perhaps server rooms) to continue indefinitely under your 9.2 infrastructure, methods are provided where you can exclude target machines from this upgrade. For example, you can use an existing security group that identifies these machines (or create a Legacy security group) as an 'exclusion' from the upgrade process.

The upgrade package also updates the managed devices to use the `MgsInventoryBeaconMatch` netselector algorithm to recognize and prioritize the inventory beacon(s) deployed with FlexNet Manager Suite 2018 R1, alongside their existing fail-over list of the old distribution server hierarchy. In migration mode, the inventory beacons do nothing for unknown devices, and so each manage device calls the inventory beacon, gets nothing, and fails over to its preferred 9.2 distribution server and continues normal operation in your existing infrastructure — until notified otherwise!

 **Important:** *Managed devices upgraded to the 2018 R1 inventory agent must first be switched into server-side policy merging.*

Details: see [Prepare Managed Device Self-Upgrade Package](#) and [Distribute Self-Upgrade and Settings Packages](#). Now, for these devices, skip to step 13.

12. Switch each required distribution server to an inventory beacon

Include this step only if, at step 10, you chose to migrate (parts of) your computing estate with control at subnet granularity.

The 'subnet switch-over' approach relies on you exchanging the distribution server within the subnet for an inventory beacon. (If the subnet contains multiple distribution servers, switch all at the same time to prevent managed device toggling back and forth as they randomly access different servers.) The server types must be switched because all your 9.2 managed devices have a local record of the distribution server(s) they can access. If your migration process 'drops' a distribution server instead of replacing it with an inventory beacon, all managed

devices that can access only that distribution server are thereby orphaned. You can only recover those orphans by visiting each one and manually upgrading and redirecting them. You avoid any nasty surprises simply by doing an *in place* switch of each distribution server to an inventory beacon. There are two ways you can achieve this:

- (Strongly recommended.) Use a DNS alias to redirect all requests for the distribution server to the inventory beacon. Inventory and other uploads instantly switch to the new system. Provided that migration mode is off, the next cycle of policy updates see all agents updated with their new policies (including all rules relevant to their assigned subnets and the like). For as long as you maintain the original distribution server in place, you have an easy roll-back option available if required: simply redirect the DNS alias back to the distribution server.
- You can do an in-place replacement of the distribution server software with the FlexNet Beacon software (these two cannot be installed on the same server at the same time). As part of this exchange, you preserve the same IP address and DNS entry. However, this approach does not provide an easy roll-back option (to roll back, you would need to uninstall the new software and re-install the old).

Once the inventory beacon is in place (and migration mode is off), as each managed device calls for its latest policy, it is automatically updated to the latest approved managed device software, and given the policy needed for the new FlexNet Manager Suite 2018 R1 system. After a decent interval to ensure that all managed devices (even the notebooks carried by road warriors) have been updated, you arrive at step 16.

13. Target managed devices for staged migration to the new system

You already have [at least some of] your inventory beacons rolled out, and the [selected] managed devices are ready to connect with those inventory beacons. Now, in your web interface for FlexNet Manager Suite 2018 R1, you create a rule for a small target group of devices to manage through those inventory beacons. This group can be as small as one in the first instance, until you satisfy yourself that everything works as expected. For details about targeting from the Inventory Manager side, see [Targeting the Inventory Agent Upgrades and Migration](#).

Each upgraded managed device, when it next 'phones home', tries to connect to an inventory beacon as top priority. As already noted, in migration mode the inventory beacon rejects any devices that are not specified in its target, and those rejected devices fail over to the existing hierarchy of distribution servers, and continue operations under 9.2 as always. When the pilot device(s) contact the inventory beacon, they are automatically issued a new policy that switches them out of the distribution server hierarchy, and into the inventory beacon hierarchy. From the next scheduled inventory collection, these devices start reporting their inventory directly to FlexNet Manager Suite 2018 R1. For details of targeting from the FlexNet Manager Suite side, see [Create a Roll-out Target](#).

At this early stage, be very detailed in assessing the behavior of the pilot managed device(s). It is still possible to roll back to the 9.2 system, but this becomes more time-consuming as more devices migrate. As a protection against accidental regression, the system does not normally allow a device reporting through FlexNet Manager Suite 2018 R1 to switch back to Inventory Manager, and over-riding these safeguards required direct intervention.

14. Loop until done

You can continue to target pilot devices at any level you choose so that groups of managed devices are switched progressively into the new system. If you were conservative about your rule targeting, you can continue to expand the targeting until it includes all desired managed devices. When you are satisfied with progress, you can switch to operations mode, so that *any* managed device attempting to contact the inventory beacon is now switched over. (Note that the devices in the Legacy security group never come knocking on an inventory beacon,

but continue operating as part of your Inventory Manager infrastructure, unaffected by the changes.) There is a single check box that switches from migration mode into operations mode, which automatically welcomes all remaining visiting devices into management by FlexNet Manager Suite 2018 R1.

15. Decommission or re-purpose redundant Inventory Manager servers

When you are satisfied that all the managed devices previously reporting to a given distribution server have begun reporting into FlexNet Manager Suite 2018 R1, you can decommission that distribution server (by uninstalling the DS software). If desirable, you might re-purpose this server hardware to become your next inventory beacon, rolling it into the migration process back at step 8. Eventually, if you are not preserving any Inventory Manager 9.2 functionality, even your central inventory server may be re-purposed.

16. Done!

Your new FlexNet Manager Suite 2018 R1 system is fully operational, with (optionally) some parallel use of Inventory Manager 9.2.3 for specialized management of inventory agents with specialized schedules or custom configurations. A final topic highlights a few manual clean-up actions (see [Finishing Off](#)).

Design the Final Topography

Whereas in release 9.2 or earlier, Inventory Manager and FlexNet Manager Platform (or earlier compliance product) might be installed on a single server (and so thought of as 'combined'), it is important now that you approach migration thinking of *completely separate products*. In particular, it is vital to mentally separate two ways of handling inventory:

- FlexNet Manager Suite 2018 R1 has its own direct inventory-gathering capacity (and may require a separate "inventory server" to handle this); but as outlined in [Process Overview](#), this is completely independent of the 9.2 Inventory Manager product.
- You may also wish to continue operation of the 9.2 Inventory Manager solution (always referred to as Inventory Manager in this document) as a separate inventory source for import into FlexNet Manager Suite 2018 R1. If you do this, Inventory Manager is "just another inventory source" along with Microsoft SCCM and any other inventory sources you may use.

At this stage of the design, the focus is entirely on the implementation of FlexNet Manager Suite 2018 R1, independent of Inventory Manager. So proceed now to design your FlexNet Manager Suite 2018 R1 implementation.

Determine whether to implement a single server or multi-server solution, based on projected scaling. Please refer to the following diagram, where each blue box represents a potentially separate server, and where all are given the names referenced throughout this document.



Note: Both the inventory server (or in smaller implementations the processing server, or the application server in a single-server implementation) and the inventory beacon(s) are expected to be members of Active Directory domains. (For test environments, consultants may see article 000017145 [How to run FlexNet Manager Suite processing server on a workgroup computer.](#)) If you implement a multi-server solution (separating the web application server, the batch server, or the inventory server), it is strongly recommended that all are members of the same Active Directory domain.

There are six different kinds of server functionality in FlexNet Manager Suite. Your implementation may merge all this functionality onto a few servers; or for very large implementations, you may need six or more separate (virtual or physical) servers. In all cases, it is important to understand the functionality of these separate components that make up a working system:

- At least one inventory beacon, and typically more for a complex infrastructure



Tip: When you are migrating from 9.2 or earlier, it is mandatory to install an inventory beacon on the batch server (defined shortly). This inventory beacon (alone of all beacons) has access to the database, where migrated connections are stored.

- An inventory server, which can also be duplicated across multiple servers if you are gathering FlexNet inventory for many tens of thousands of devices (see below)
- A batch server (also known as a reconciliation server) that imports third-party inventory, integrates FlexNet inventory, incorporates business-related information, and reconciles everything to calculate your license position



Tip: Currently MSMQ limits the hostname of the batch server to 15 characters (excluding the domain qualifier).

- The database server (where the five underlying databases may also be split across separate database servers if required)
- The web application server that handles presentation of the interface
- A server for the business reporting option (powered by Cognos), where applicable.



Tip: If the Cognos content store is installed on an SQL Server installation later than 2012, it should be run in SQL Server 2012 compatibility mode.



Tip: If you previously had separate servers for FlexNet Manager Platform and Inventory Manager, you can start with your FlexNet Manager Platform server and upgrade it to the new system, where it can function as any of the servers described above (or indeed, for the combined servers as described next, if yours is a smaller implementation). Similarly, if you had a separate database server in your previous implementation, that same database server may host the new databases shown in the diagram.

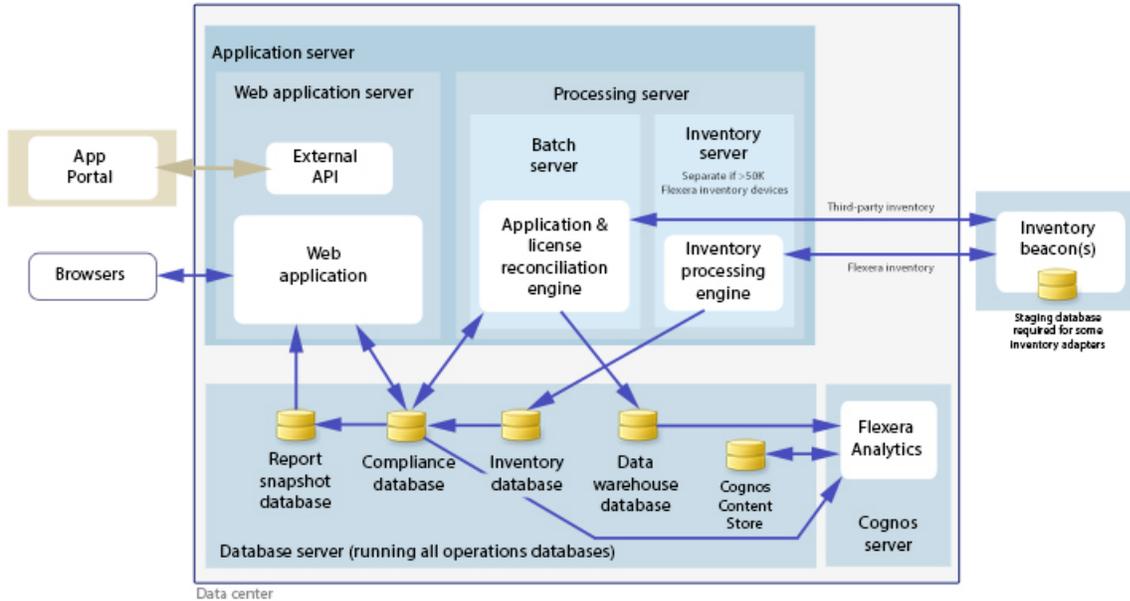
All system servers require a 64-bit operating system. The database server (alone) may have a 32-bit operating system, but a 64-bit operating system is recommended.

In more moderately-sized implementations (the vast majority), a typical implementation might have a separate database server and Cognos server, and combine the remaining three central functions as a single "application server", as shown in the diagram. As scaling dictates, you can combine or separate the web application server, the batch server, and the inventory server in any combination required. The logical separation of presentation from processing need not drive hardware requirements. Scaling considerations may include the following:

- Typically the first candidate for replication is the inventory beacon. This is often driven by network considerations as much as by simple scaling considerations.
- If your system manages more than 50,000 devices reporting FlexNet inventory alone (ignoring for the moment inventory through other third-party tools), the inventory server should be separated onto its own device. You

can expect to duplicate a separate inventory server for (roughly) every 50,000 devices reporting FlexNet inventory.

- If you manage inventory from more than 100,000 devices, the batch server (or reconciliation server) may be separated from the web application server and installed separately.



Tip: When you implement your web application server as a separate server, you must configure one or two network shares that all servers can access to share uploaded data between them. The shared drives are identified during the installation process. For details, see [Configure Network Shares for Multi-Server](#).

The diagram shows that:

- FlexNet inventory (from the FlexNet inventory agent) is uploaded to the inventory database by the inventory server, and then separately imported to the compliance database
- Third-party inventory imported from other tools is loaded by the batch server and stored directly in the compliance database
- Some time-based data is copied to the data warehouse database, and reports may combine trend data from here with current data from the compliance database
- Some data is copied to the snapshot database to improve presentation performance
- The web interface automatically displays a mixture of data from the snapshot database and the compliance database, as appropriate; and data manually input through the web interface is written back to the compliance database
- While Flexera Analytics can be installed on your application server, for performance reasons Flexera Analytics is best installed on a separate server (it has high memory use requirements).



Note: All servers shown inside the data center should be within a single time zone. This is particularly important if you are using Flexera Analytics, since the Flexera Analytics Operational Dashboard combines time-based data from the database server(s) and the Cognos server.

Your previous combined server

If your previous implementation had FlexNet Manager Platform and Inventory Manager co-installed on the same server, you should plan for this server to roll forward as your Inventory Manager 9.2.3 implementation. This path minimizes disruption. Even when you are planning eventually to decommission Inventory Manager and rely entirely on the functionality in FlexNet Manager Suite 2018 R1, plan for this server to continue operations through the transition period.

Choose your web servers per device

Web protocols are used for data transfer within the FlexNet Manager Suite infrastructure. Two alternatives are supported, and can be mixed and matched within the infrastructure of inventory beacons and servers:

- Microsoft IIS. Choose this alternative when any of the following apply:
 - The host server is one of your central application servers (web application server, batch server, or inventory server, or combinations as applicable). No web server is required on a stand-alone database server. When you install the recommended inventory beacon on the same device as the central batch server, that beacon also uses IIS (whereas other free-standing beacons on separate devices still have a choice).
 - When a particular inventory beacon is collecting inventory from (and passing back recommendations to) FlexNet Manager for SAP Applications, that inventory beacon must use IIS.
 - When you require Windows Authentication to allow transfer of data (for example, a parent inventory beacon might typically use Windows Authentication if it receives data from a child in your DMZ outside a firewall).
 - When you require the use of the HTTPS protocol to encrypt data transfers.
- FlexNet self-hosted web server. Choose this alternative when none of the previous cases apply, and:
 - You want simple administration of the web server.
 - You want to minimize the installations on your inventory beacon, so that you do not need to install Microsoft IIS.
 - Anonymous access, and use of the HTTP protocol, are adequate (for example, within your secure LAN).



Note: After installation, more information about these web server options and how to configure them is available in the online help under *Inventory Beacons > Local Web Server Page > Configuring Direct Inventory Gathering*.

Placement of inventory beacons

For more details about placing inventory beacons within your network, see [Considerations for Inventory Beacons](#).

Output

Prepare a block diagram of the actual servers for your implementation. Start with the central collection of servers, depending on the scale of your implementation.

Don't forget the inventory beacons you intend to deploy. You should include an inventory beacon on your batch server (or processing server, or application server, depending on your scaling decisions), as this is a requirement to carry forward management of connection strings that were set up previously on your old Inventory Manager system. Thereafter you may choose to deploy a hierarchy of inventory beacons (perhaps mirroring your hierarchy of distribution servers used in your old system), ensuring that every targeted device will have access (preferably high-speed LAN access) to an inventory beacon. One or more of these inventory beacons may be used for 'bootstrapping' your managed devices that attempt to switch over to the new system.

Label each block in your diagram with:

- The server type, either 'inventory beacon' or as named in the diagram above (for ease of reference in following instructions)
- The actual server name and IP address



Tip: Keep in mind that an underscore character is not valid in a host name referenced by a DNS. If you have a host name that includes an underscore, you may need to set up a DNS alias for the server; or else use its IP address during the installation process.

- Which web server will be installed on each of these hosts
- For inventory beacons, whether they will be used for bootstrapping.



Tip: The DNS name and IP address of the inventory beacons used for bootstrapping must be known in advance of the inventory beacons themselves being deployed in the processes that follow.

Add to this diagram the additional server(s) being rolled forward for Inventory Manager 9.2.3 (either in the transition period, or longer term).

Additional details will be added later.

Considerations for Inventory Beacons

The inventory beacons in your network may be arranged in ways that meet your requirements. For example:

- You may use a flat arrangement where each inventory beacon communicates directly with the central application server
- You may arrange them in a hierarchy, where the top-level inventory beacon(s) communicate with the central application server, and further inventory beacons are arranged as 'children' that communicate with the inventory beacon(s) above them in the hierarchy.

There are no formal limits to the structure of this hierarchy. It may contain as many levels as you require. However, good network design typically means that your hierarchy has two or three (or rarely, four) levels.

The following considerations should assist in your network planning.

Fan-out

These are general guidelines. You should adjust expectations based on experience in your own environment:

- Provide one inventory beacon for every 20,000 (or so) devices with locally-installed FlexNet inventory agent software. Keep in mind that you cannot specify particular allocations of devices to inventory beacons: the FlexNet inventory agent is a state-based tool that manages itself to match its downloaded policy, and as part of its self-management, it chooses which inventory beacon to use for data uploads and policy downloads. The default algorithm looks first for an inventory beacon in the same site as the inventory device, then for the best ping response time, with a randomizing tie-breaker. Therefore this guideline is about the quantitative planning; and you should use other factors to determine the placement of inventory beacons.
- An inventory beacon may also gather inventory from other systems, such as importing inventory gathered by Microsoft SCCM or IBM's ILMT ('third-party inventory'). Since you control the schedule for the collection of third-party inventory, you can stagger the times for different kinds of inventory; and as a result, one inventory beacon can easily handle multiple third-party inventory sources.
- Similar considerations apply to the collection of any business information through an inventory beacon. Arrange the schedules for business importer operations to spread the load on the relevant inventory beacon.
- If you are arranging a hierarchy of inventory beacons in a very large system, you should limit the fan-out from a parent inventory beacon to less than 100 child inventory beacons.

Minimum of one per subnet

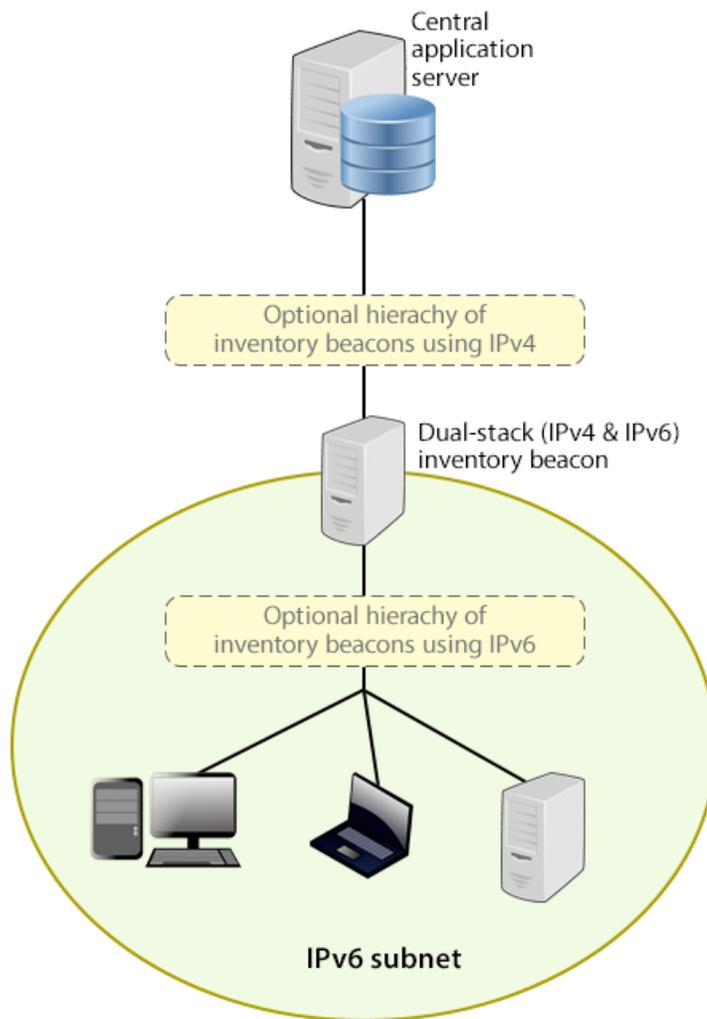
It is best practice to deploy at least one inventory beacon into each separate subnet that contains target devices for which you may want an inventory beacon to execute discovery and inventory gathering. Being within the target subnet allows the inventory beacon to reliably use ARP or `nbtstat` requests to determine the MAC address of a discovered device (reliability of these results is reduced across separate subnets). If you do *not* place an inventory beacon in each subnet:

- It is possible that, across subnet boundaries, only an IP address can be found for a device (that is, the device data is missing both a MAC address and a device name).
- In this case, a central record is created for the discovered device, but because IP addresses may be dynamic (unreliable identifiers), this record is not matched (or merged) with more complete records (those which also contain either or both of the MAC address and a device name).
- As a consequence, on data import you may produce multiple discovered device records with duplicate IP addresses:
 - One record may be complete (for example, automatically created by FlexNet Manager Suite from inventory when it could not find an existing, matchable discovery device record to link to the inventory device record)
 - One or more others may be discovery records that are missing identifying data as discussed.
- Since these complete and incomplete records cannot be merged automatically, you are left with a manual task to clean up the incomplete duplicates.
- What's worse, even after that manual clean-up, if the situation persists and an applicable discovery rule is re-run, the incomplete record is recreated.

You avoid all these risks by simply having a local inventory beacon in the same subnet as target devices. Being in the same target subnet means that the inventory beacon can provide both the IP address and the MAC address, which is sufficient for matching discovered device records. If you must do discovery across subnet boundaries *without* a local inventory beacon, ensure that there are full DNS entries visible to the inventory beacon for all devices you intend to discover. This allows the inventory beacon to report both an IP address and a device name or fully-qualified domain name (FQDN), which combination is again sufficient for record matching.

Bridging to IPv6 subnets

All inventory beacons can operate within subnets configured to use either IPv4 or IPv6 addressing; and FlexNet inventory agent can also handle all data transfers within either environment. However, the link to the central application server must use an IPv4 network protocol. The need to support the IPv4 protocol at the top level of the architecture, and the IPv6 protocol at the low level with the local FlexNet inventory agent, means that at least one inventory beacon must be a dual-stack server that provides the bridge between the two protocols, as shown in the following architectural sketch:



Reading from top to bottom, this sketch shows:

- Your application server (or in larger implementations, multiple servers) continue(s) to support HTTP or HTTPS communications over an IPv4 network layer.
- Within IPv4 zones of your network, you may deploy as many inventory beacons as required, either as a flat layer where each communicates directly with the application server, or in a hierarchy, as dictated by your network requirements. Of course, these inventory beacons provide full functionality, supporting all forms of FlexNet inventory gathering from target inventory devices within the IPv4 network (for simplicity, these devices in the IPv4 zone are not shown in the sketch above).
- At least one inventory beacon must be a dual stack device that supports both IPv4 and IPv6 network layers. It does not matter whether this is achieved using two Network Interface Cards (NICs) or a single configurable NIC. The IPv4 interface links upward to its parent (whether that be to another inventory beacon in the hierarchy or directly to the application server). The IPv6 interface links downward to those of its child devices that are in the IPv6 zone (of course, other devices in the IPv4 network could also communicate through this inventory beacon, given its dual stack architecture). As shown, these IPv6 children may optionally include a further hierarchy of inventory beacons (which child inventory beacons would then be operating entirely within the IPv6 network).
- Eventually, target inventory devices within the IPv6 zone that have locally installed FlexNet inventory agents communicate with at least one inventory beacon in the same zone; or where the lightweight FlexNet Inventory Scanner has been run on a target device, this can also communicate with the inventory beacon.

There are further restrictions and requirements to add to these general sketches:

- All inventory beacons operating within an IPv6 network (whether as single-stack IPv6 devices or dual-stack IPv4 and IPv6 devices) must utilize Microsoft IIS as the web service. The simple alternative self-hosted web server does not support the IPv6 protocol.
- Inside an IPv6 network, an inventory beacon cannot import Active Directory details. However, a dual-stack inventory beacon that can communicate with a domain name server (DNS) over IPv4 can still import Active Directory data. Alternatively, an inventory beacon *co-installed on your central application server* (which by definition must have IPv4 available to it) can still access a DNS on IPv4 and import Active Directory data.
- Inside an IPv6 network, an inventory beacon cannot do any of the following:
 - Import inventory from third-party sources
 - Import business data from other systems (such as your purchasing or HR systems)
 - Communicate with SAP systems in your IPv6 environment
 - Perform any inventory beacon-based discovery or remote inventory collection across the IPv6 subnet, including VMware host scans (such as required for special 30-minute scans for IBM PVU license management)
 - Adopt target inventory devices that can communicate only on an IPv6 subnet (instead, use third-party deployment to install the FlexNet inventory agent on target devices within an IPv6-only subnet).

However, once again, a dual-stack inventory beacon that can communicate with a DNS over IPv4, and contact the various sources also exclusively over IPv4, still supports all the above functionality on the IPv4 side. This is also true of an inventory beacon co-installed on the application server.

Take these factors into account when planning the distribution of your inventory beacons around your network. Details about installing the individual inventory beacon are available in [Configure Beacon Connections](#).

Prerequisites and Preparations

Please ensure that you have worked through every one of the following topics.

Locate License Details

A license file for your existing product(s) was sent to you with your original order confirmation. (While you are under a maintenance agreement, this same license entitles you to this system upgrade.) You will require your license file when you start from a single server combining Inventory Manager with FlexNet Manager Platform (or its predecessor Compliance Manager), and migrating to a multi-server implementation.

 **Important:** *If you are updating from Inventory Manager 9.0 or earlier to Inventory Manager 9.2.3 as part of this overall upgrade process, you must obtain a new license file, as the format of the licence file changed between these releases. You will also require a new license file if you are purchasing additional options, such as FlexNet Manager for VMware.*

In all other cases, locate your license file(s), originally despatched with your order confirmation.

If you cannot locate the license file, please contact the Flexera order processing team, and ask for a new copy of your license file.

Enable MTS and MSMQ

Microsoft Task Scheduler (MTS) must be enabled on your central application server. If you have a multi-server implementation, Microsoft Task Scheduler must be enabled on at least the batch server and the inventory server. If Microsoft Task Scheduler is disabled, the PowerShell configuration script fails when attempting to create a scheduled task folder, and of course the scheduled task required for server operation are not created. To correct this, enable Microsoft Task Scheduler, and re-run the `Config.ps1` configuration script.

Microsoft Message Queuing (MSMQ) is a messaging service widely available as a component of various Microsoft operating systems. It allows applications running in separate processes, even on separate servers, to enjoy failsafe communications. MSMQ is used as foundational infrastructure for the batch scheduler and batch processor on the central application server (or, in larger systems, the batch server) of FlexNet Manager Suite. Its operation is mandatory on all central servers (whether a single server, or scaled up to separate web application server, batch server, and inventory server) to allow the interactions necessary for batch processing tasks. Where the database server is separate, it is not required on the database server.

FlexNet Manager Suite makes use of the standard facilities of MSMQ, with no customization required. For example, MSMQ may make use of the following ports in operation:

- TCP: 1801, and 389 for version 3.0 and later
- RPC: 135, 2101*, 2103*, 2105* (Port 135 is queried to check availability of the remaining ports. The port numbers marked * may be incremented by 11 if the initial choices are not available when MSMQ initializes.)

- UDP: 3527, 1801.

FlexNet Manager Suite makes no special demands on, nor adjustments to, the use of ports for MSMQ, and uses whatever ports are operational. Please check Microsoft documentation for more information about when various ports are required (for example, <https://support.microsoft.com/en-us/kb/178517>).

The system requirements for integration with MSMQ are:

- In a multi-server implementation, each server must know the URL of all others (or, on a single-server implementation, localhost may be used). This is normally configured by the PowerShell configuration script, described later.
- MSMQ imposes a 15-character limit on the batch server hostname (as noted in the section on design, and elsewhere).
- A single service account should be used in common across all central servers to facilitate the operations of MSMQ. This is also noted in the following section on accounts.

Where MSMQ is already operational on your central servers, no customization is required. Where MSMQ has been disabled or removed:

- When the feature is not installed or is not enabled, the PowerShell configuration script (described later) will attempt to install (if necessary) and enable the Windows feature. This requires that the installing user (see section on accounts, below) has sufficient permissions to allow these actions if required. It also requires that the Windows CAB files are still available to the server.



Tip: After installing MSMQ, the PowerShell configuration script attempts to create the message queue. If the installation process requires a reboot, this attempt fails, and the script reports *Message Queueing has not been installed on this computer*. If you see this message, reboot the server and re-run the same PowerShell configuration script.

- Alternatively, if the CAB files are still in place, an administrator can manually enable the Windows feature before running (or re-running) the PowerShell configuration script.
- Where CAB files have been removed as part of server hardening for security, MSMQ must be installed following the instructions from Microsoft available through MSDN. The PowerShell scripts can be run (or re-run) thereafter.

FlexNet Manager Suite has been tested with multiple versions of MSMQ, up to and including version 6.3, which is part of Windows Server 2012 R2.

Identify (or Set Up) Accounts

You may have accounts correctly configured from your previous implementation. If you need to adjust, here are the details.

For installation and operation, FlexNet Manager Suite requires several different sets of account privileges. While it is possible to load a single account with all these privileges, this is typically unacceptable in secure environments, which require a separation of concerns between interactive login accounts for installation and maintenance, and operational service accounts (usually with long-term and closely-guarded credentials).

The following tables list the various privilege levels, their purpose within FlexNet Manager Suite, and a suggested set of Active Directory accounts allowing for that separation of concerns. The three account types described are:

- A database administrator (typically this is an existing database administrator within your enterprise)
- An installing system administrator (account details must be made available to db-admin)
- A service account for normal operations (account details must be made available to db-admin).



Tip: Where privileges are controlled by Active Directory Group Policy Objects (GPOs), ensure that the accounts and group(s) are added to the appropriate GPO settings prior to attempting installation. A suggested practice when creating the databases is to assign the installing administrator account (*fnms-admin*) and the service account (*svc-flexnet*) to an Active Directory group (suggested: *FNMS Administrators*) in order to grant them appropriate privileges; so you may choose to manage other rights through that group. Also note that these accounts and their privileges must remain active for the lifetime of the FlexNet Manager Suite environment.

Table 1: Database administration privileges — suggested AD account: db-admin

Privileges	Required on	Purpose
Database administrator, with db_owner rights on all operations databases related to FlexNet Manager Suite (compliance data, warehouse data, snapshot data, and inventory data).	Database servers	Provides the following accounts with database access rights as described.
Member of the public database role in the model database on the database server.	Database servers	Required so that the account can run scripts that check the database compatibility level.
SELECT rights to the following tables in the msdb database: <ul style="list-style-type: none"> • dbo.sysjobs • dbo.sysjobsteps • sysjobs_view. EXECUTE rights to the stored procedures from the msdb database used in the database scripts, including: <ul style="list-style-type: none"> • sp_add_job • sp_add_jobserver • sp_add_jobstep • sp_add_jobschedule • sp_delete_job. 	Database servers	Only required if an existing installation of FlexNet Manager Suite 2015 or earlier is being migrated to a later release.



Tip: If you are installing Flexera Analytics (powered by Cognos) as part of your implementation, you also need a SQL Server account with read/write access to the Content Store database required by Cognos. The Flexera Analytics installer asks for the login name and password for this account (for details, including character set restrictions, see [Install Flexera Analytics](#)).

Table 2: Installing administrator privileges — suggested AD account: fnms-admin

Privileges	Required on	Purpose
Membership in the db_owner role on all operations databases (compliance data, warehouse data, snapshot data, and inventory data).	Database server.	Post-installation, for continuing administration, this account can be reduced to the same privileges as for the service account (described below). However, the standard installation scripts set some database properties (ARITHABORT, QUOTED_IDENTIFIER) that can only be configured by an account with db_owner privileges. Therefore the installing account needs membership in the db_owner role at least temporarily during installation.
Local administrator	<ul style="list-style-type: none"> Central application server(s) (including, where separated, web application server, batch server, and inventory server); All inventory beacons. 	Installs and configures software on all servers. On inventory beacons, interactive login to the inventory beacon interface also requires local administrator privileges (that is, on inventory beacons this is an operational account as well as being required for setup).
Set the execution policy for, and execute, PowerShell scripts	Central application server(s) (including, where separated, web application server, batch server, and inventory server).	PowerShell scripts are used to complete the configuration of central servers during implementation. Includes an attempt to enable Microsoft Message Queuing, where this is not already enabled.
Create tasks in Windows Task Scheduler	<ul style="list-style-type: none"> Central application server(s) (including, where separated, web application server, batch server, and inventory server); All inventory beacons. 	Runs PowerShell scripts during installation that create scheduled tasks.

Privileges	Required on	Purpose
Internet connection to https://flexerasoftware.flexnetoperations.com	A central server (with network access to all other central application servers in a multi-server implementation).	Retrieve product downloads and licenses for implementation.
Internet connection to http://www.managesoft.com (Typically granted through membership in the FNMS Administrators security group in Active Directory.)	The batch server (or, in smaller implementations, the processing server or application server).	Maintenance or unscheduled collection of the Application Recognition Library, the SKU libraries, and the Product Use Right Libraries.

Table 3: Service account privileges — suggested AD account: svc-flexnet

Privileges	Required on	Purpose
<p>Membership in the following fixed database roles:</p> <ul style="list-style-type: none"> • db_ddladmin • db_datawriter • db_datareader. <p>In addition, the account requires you to GRANT EXECUTE permissions on all operations databases (compliance data, warehouse data, snapshot data, and inventory data).</p>	Database server	Normal operation (which includes execution of SQL stored procedures).



Tip: *In less stringent environments, it may be convenient to give this account membership in the db_owner role for the operations databases, which supersedes all of the above.*

Privileges	Required on	Purpose
<p>Logon as a Service, and run all FlexNet services</p> <hr/> <p> Tip: Admin access for this account is convenient, and typically granted through membership in the FNMS Administrators security group in Active Directory; otherwise read, write, and execute permissions are required on all folders containing FlexNet installations, FlexNet data, and FlexNet log files.</p>	<ul style="list-style-type: none"> • Central application server(s) (including, where separated, web application server, batch server, and inventory server); • All inventory beacons. 	<p>Runs all system operations, including batch services and web services.</p> <hr/> <p> Important: In a multi-server implementation, the same service account must be used on all central servers, and it must be a Windows domain account. This is required for proper functioning of Microsoft Message Queueing between the servers. (A distinct service account may be used for inventory beacons.)</p>
<p>Logon as a Batch Job</p>	<ul style="list-style-type: none"> • Central application server(s) (including, where separated, web application server, batch server, and inventory server); • All inventory beacons. 	<p>When the service account runs a batch job, this setting means the login is not an interactive user.</p> <hr/> <p> Tip: This is particularly important on the batch server (for authorization details, see Authorize the Service Account).</p>
<p>Run scheduled tasks as a service account.</p>	<ul style="list-style-type: none"> • Central application server(s) (including, where separated, web application server, batch server, and inventory server); • All inventory beacons. 	<p>Runs scheduled tasks within normal operations.</p>
<p>Run IIS application pools as a service account</p>	<ul style="list-style-type: none"> • Central application server(s) (including, where separated, web application server, batch server, and inventory server); • Those inventory beacons that are running IIS 	<p>Normal operations</p>

Privileges	Required on	Purpose
Internet connection to http://www.managesoft.com (Typically granted through membership in the FNMS Administrators security group in Active Directory.)	The batch server (or, in smaller implementations, the processing server or application server).	Scheduled collection of the Application Recognition Library, the SKU libraries, and the Product Use Right Libraries.

 **Tip:** While the table above lists a single service account `svc-flexnet` on your application server(s) and inventory beacons, this may be adequate only in environments where security is not a significant concern. For greater security, consider a separate service account for each inventory beacon that has the permissions listed above on the inventory beacon, but no permissions on your central application server(s).

 **Note:** At implementation time, all services are configured with the correct password using the PowerShell scripts provided. If at any time the password on the service account is forced to change, the services will cease to operate. To ensure service continuity, you may either (a) allow the service account password to never expire (as normal for Windows service accounts), where permitted by your corporate policies; or (b) review the accounts listed in [Password Maintenance](#).

In addition to the three core accounts described in the table, your implementation may require additional accounts for special circumstances.

For example, if you are using adapters to connect to other systems and import data, you need appropriate accounts. For details, see documentation for the adapters you need, such as the *FlexNet Manager Suite Adapters Reference*, available through the title page of the online help after installation.

 **Tip:** There may be several accounts needing to log in directly to the application server for tasks related to FlexNet Manager Suite, such as manipulating log files, scheduling tasks, and the like (this excludes access through the web interface, which is not relevant to this discussion.) It is often convenient for these accounts to have the same database permissions as the services account on all components of the operations databases: compliance data, warehouse data, snapshot data, and inventory data. A suggested method is to create either a local or Active Directory security group (such as FNMS Administrators) and add all such accounts to this group. Then you can, for example, set these permissions by opening each database in Microsoft SQL Server Management Studio, and granting the appropriate privileges to the security group. The procedures are detailed in the topics covering database creation. Accounts to list in the security group minimally include:

- The operational service account (suggested: `svc-flexnet`)
- The installing administrator account (suggested: `fnms-admin`) for post-installation on-going administration (remembering that `db_owner` membership is required temporarily during installation, as described in [Identify \(or Set Up\) Accounts](#))
- Any operational account needing to log in to a central inventory beacon installed on your batch server (remember that, since the inventory beacon requires administrator privileges to run, this account is both a local administrator on the batch server and a `db_owner`)
- Any future back-up administrator accounts needed for the application server.

Isolate the System

You need to protect your data from operational changes during the upgrade.

Since your previous implementation receives inputs from operators and through scheduled tasks, all these should be blocked before you migrate.



To isolate the system:

1. Send out the notification (such as email), as required by your corporate processes, to alert operators that the system is going down for maintenance.
2. Log in to the server as a system administrator.
3. Shut down Microsoft IIS as the most efficient way to prevent any operator from logging in, or any files from being uploaded. Use your preferred method. For example, using the user interface on Windows Server 2008:

- a. Click Start, right-click on **Computer**, and select **Manage** from the context menu.

The **Server Manager** dialog opens.

- b. In the left-hand navigation bar, expand **Roles > Web Servers (IIS)**, and select **Internet Information Services**.

The IIS page is displayed.

- c. In the **Actions** panel on the right, select **Stop**.

A message like *Attempting to stop...* appears. Note that it can take some time before the service is stopped.

4. Shut down all related Windows Scheduled Tasks. For example:

- a. Ensure that your **Server Manager** dialog is still open.

- b. In the left-hand navigation bar, expand **Configuration > Task Scheduler > Task Manager Platform**, and select the **ManageSoft** folder.

- c. Select all of the relevant tasks in the list (click the first, shift+click the last), and in the **Actions** pane, in the **Select Item** section, click **Disable** (or right-click the selection, and click **Disable**).

- d. Close the dialog.

Check Database Collation Sequence

All databases for this system require the correct collation sequence, both case insensitive and accent sensitive.

This is easiest if they are installed on one or more database instances that have this as the default collation sequence. If you are carrying forward the database instance that previously supported your 9.2 implementation, this already complies with the appropriate collations sequence. For any new DB instance, use this process to check the collation sequence.

**To validate the server's default database collation sequence:**

1. In SQL Server Management Studio, locate the SQL Server instance in the **Object Explorer** pane.
2. Right-click the server, and select **Properties** from the context menu.
3. On the server **Properties** dialog, select the **General** tab, and check the current collation sequence.

If the collation sequence includes the codes `_CI_AS` (for example, `SQL_Latin1_General_CP1_CI_AS`), you may proceed with the installation.



Tip: Other suffixes like `_KS` or `_WS` are optional.

If the server's default collation does not include `_CI_AS`, you can set the collation sequence for each database, as you create it, by right-clicking the new database, selecting **Properties** from the context menu, and choosing the collation on the **Options** tab. Remember that the collation sequence must be *identical* for:

- The compliance database (suggested name: FNMSCompliance)
- The reporting snapshot database (suggested: FNMSSnapshot)
- The data warehouse database (suggested: FNMSDataWarehouse).

For example, if the first of these has the collation sequence called `SQL_Latin1_General_CP1_CI_AS`, then all of them must have the exact same collation sequence. In contrast, the inventory database, when separate (suggested: FNMSInventory), and the Cognos content store may have different collation sequences, provided that these also include the same `_CI_AS` codes. The `tempdb` database (alone) may have any collation sequence, since FlexNet Manager Suite creates the required tables here with the appropriate collation sequence.



Important: If you have not already backed up your database, do so now.

Enable SQL Server CLR

FlexNet Manager Suite requires Microsoft's SQL Server Common Language Runtime (CLR) Integration to be enabled prior to upgrading for increased performance.

**To enable SQL Server CLR:**

1. In SQL Server Management Studio, locate the SQL Server instance to be used by FlexNet Manager Suite.
2. Enable Microsoft SQL Server Common Language Runtime (CLR) Integration by executing the following stored procedure:

```
sp_configure 'show advanced options', 1;
GO
RECONFIGURE;
GO
sp_configure 'clr enabled', 1;
```

```
GO
RECONFIGURE;
GO
```



Note: By default the CLR integration feature is disabled and must be enabled by the DB system administrator before database creation and installation.

Configure .NET and IIS

ASP.NET needs patching, and IIS configuration must be modified for ASP.NET. As well, you must prevent WebDAV from blocking functionality.

Detailed steps depend on the operating system and installed software. You must repeat this process in turn on each of:

- web application server
- batch server
- inventory server
- each free-standing inventory beacon (the inventory beacon installed on your central batch server is covered by the configuration of the batch server).



Note: Inventory beacons have an additional requirement, that PowerShell is at least at version 3.0. Should you wish to upgrade PowerShell to release 4.0, Microsoft also requires Microsoft .NET Framework 4.5 on the same server. Take both these matters into account at the same time (see [Upgrade PowerShell on Inventory Beacons](#) for more details).

(If your implementation combines multiple servers into a processing server, or into an application server, then complete the task once per server.)



Tip: Mark off each server on your block diagram as this process is completed for that device.



To configure .NET and IIS on a server:

1. If the server is running Microsoft Windows Server 2012:
 - a. Open Windows Programs and Features.
 - b. Search the list of applications for Microsoft .NET Framework 4.5 (or later). If it is present, skip to step 4 below.
 - c. Because Microsoft .NET Framework 4.5 (or later) is not present, follow steps under "To install IIS and ASP.NET modules on Windows Server 2012 using the UI" in <http://technet.microsoft.com/en-us/library/hh831475.aspx#InstallIIS>. Thereafter, continue with step 4 below.
2. If your server is running Microsoft Windows Server 2008, the original installation was Microsoft .NET Framework 4, but it may have been upgraded already to 4.5. To check:
 - a. Open Windows Programs and Features.

- d. Click **Next** (or select **Server Selection**), and select the server you are currently configuring.
- e. Click **Next** (or select **Server Roles**), and in the **Roles** panel, expand **Web Server (IIS) > Web Server > Common HTTP Featured (Installed)**.
- f. Observe whether the check box for **WebDAV Publishing (Installed)** is selected.

If this check box is clear, WebDAV is not installed, and you may click **Cancel**, then close all relevant dialogs. If this is not the last server on your list, loop back and restart this process on the next server. However, if the check box is selected, WebDAV is installed and *must* be disabled, as described in the following steps.

9. Open the IIS settings page. For example:
 - On Windows Server 2016, open Server Manager (**Start > Administrative Tools > Server Manager**). On the Server Manager dashboard, click **IIS** to reveal the server name in the right-hand pane. Right-click the server name, and select **Internet Information Services (IIS) Manager**.
 - On Windows 7, navigate to **Control Panel > System and Security > Administrative Tools**, and double-click **Internet Information Services (IIS) Manager**.
10. In the work pane that opens, expand the server name node (if required), expand **Sites**, and select **Default Web Site**.
11. In the **Home** pane for this site, in the **IIS** group, locate **WebDAV Authoring Rules**.



Tip: If it is not present, it is likely that WebDAV is not installed on this server, and your mission is complete.

12. Right-click the icon, and select **Open Feature**. A pane opens for **WebDAV Authoring Rules**.
13. On the right, in the **Actions** group, there is an option to enable or disable WebDAV.
 - If the link currently says **Enable WebDAV**, do nothing, because your mission is complete.
 - If the link current says **Disable WebDAV**, click the link.
14. Click **OK** to close all applicable dialogs.

If this is not the last server on your list, loop back and restart this process on the next server.
15. Flexera Analytics requires installation of **URL Rewrite**.
 - a. Open a web browser and open <https://www.iis.net/downloads/microsoft/url-rewrite>
 - b. Select the **Install this extension** box, which will download the urlrewrite2.exe file. A selection of alternate language installers are also available on this page.
 - c. Run the file which will execute the installation of this extension.
 - d. Exit the installer.
16. Flexera Analytics also requires the installation of **Application Request Routing**.
 - a. Open a web browser and open <https://www.iis.net/downloads/microsoft/application-request-routing>
 - b. Select the **Install this extension** box, which will download the ARRv3_0.exe file.

- c. Run the downloaded file which will execute the installation of this extension.
- d. Exit the installer.



Tip: There is additional configuration of IIS handled by PowerShell configuration scripts described later.

Upgrade PowerShell on Inventory Beacons

PowerShell is used both as part of the installation, and for operation of inventory beacons after installation.

The minimum requirement on inventory beacons is PowerShell 3.0.

You may choose to upgrade PowerShell to version 4.0, but be aware that this release has a prerequisite of .NET Framework 4.5.



To check and optionally upgrade PowerShell on a candidate server:

1. Within Windows PowerShell, run `$PSVersionTable.PSVersion`.

This produces output similar to the following:

Major	Minor	Build	Revision
-----	-----	-----	-----
3	0	-1	-1

2. If the Major value is less than 3, download your chosen version and install it.

For example:

- For PowerShell 3.0, see <http://www.microsoft.com/en-us/download/details.aspx?id=34595>.
- For PowerShell 4.0, see <https://www.microsoft.com/en-us/download/details.aspx?id=40855>.

Configure Network Shares for Multi-Server

If you have not already done so, use Windows Explorer to configure the network share drives used by your central servers.

There are two such shares required when you install the web application server on a separate server:

- The data import directory used for handing off any content imported through the web interface of FlexNet Manager Suite (such as one-off inventory spreadsheets) to the batch server for processing (default value: `%ProgramData%\Flexera Software\FlexNet Manager Platform\DataImport\`). It may be on any of your central servers, as convenient in your implementation; and it may be on any drive and any file path. You must configure the share manually in Microsoft Windows.
- The parallel data export folder used to stage data for integration with other systems like FlexNet Manager for Engineering Applications. This is typically located as a peer of the above (default value: `%ProgramData%\Flexera Software\FlexNet Manager Platform\DataExport\`).

You may implement these shares as you see fit.

For added security, you may set up these shares so that they are available to the minimum number of accounts (rather than open to all). From the process of setting up accounts, you are already acquainted with the Active Directory security group `FNMS Administrators`, which minimally contains the operational service account (suggested: `svc-flexnet`), the installing administrator account (suggested: `fnms-admin`), and any accounts with interactive logins to any of your central servers. If you wish, you can restrict these network shares so that they are open only to members of `FNMS Administrators`, with the group providing full control for both daily operations and any required maintenance/troubleshooting.

Configure Internet Explorer

Microsoft Internet Explorer needs configuration.

Compatibility mode must be turned off for FlexNet Manager Suite. In addition, when Internet Explorer is used on a server-based operating system to access FlexNet Manager Suite after setup is complete (for example, if you are testing from your central application server, or an inventory beacon has a server operating system), its enhanced security provisions must be turned off on that server, as follows. (Alternatively, use a different browser.)



Tip: Check release notes for supported versions. For example, Microsoft Internet Explorer releases up to and including release 9 are deprecated for FlexNet Manager Suite from 2016 R1.



To configure Microsoft Internet Explorer:

1. Open Internet Explorer, and navigate to:

```
res://iesetup.dll/IESecHelp.htm#overview
```

2. Follow the instructions displayed there for disabling Enhanced Security Configuration.
3. FlexNet Manager Suite attempts to advise Internet Explorer that the website should not be run in compatibility mode. You need follow these steps only if you receive an alert asking you to turn off compatibility mode:
 - a. In Internet Explorer, press the Alt key to display the Menu bar.
 - b. Click **Tools**, then **Compatibility View Settings**.
 - c. Make sure **Display all websites in Compatibility View** and **Display intranet sites in Compatibility View** are both clear.
 - d. Add websites that do require compatibility mode to the list of **Websites you've added to Compatibility View**.

There are a number of other configuration requirements for whichever web browser you choose to use:

- URLs to add to your trusted locations
- Recognition of your central server as an Intranet site, and allowing automatic logon
- Javascript must be enabled
- Cookies must be enabled

- Windows authentication must be enabled
- Font download should be enabled for optimum usability of the site
- Any company proxy servers must allow browsers to access to the web application server.

Details for each of these are included in the first topic in the online help, *Configuring Your Web Browser*, available after the product is upgraded.

Drivers for Spreadsheet Imports

It is quite likely that at some stage you will need to import data from spreadsheets or CSV files. For example, you may have purchase records in spreadsheets, or inventory exported from a hard-to-reach system, or you may have a record of entitlements from a reseller in a spreadsheet format. Documentation is available for these different uses, including the chapter *Importing Inventory Spreadsheets and CSV files* in the *FlexNet Manager Suite System Reference* PDF file, available through the title page of online help after installation.

You need a driver update if all of the following conditions apply to your future use of FlexNet Manager Suite:

- You will *import* data from spreadsheets (the export of data to spreadsheets is not relevant, and the import of data from CSV [comma-separated values] file is also not relevant)
- The spreadsheets will be Excel spreadsheets in .xlsx format (the earlier .xls format does not require the driver update; but be aware that this older format limits each spreadsheet to about 65,000 records/rows)
- The .xlsx files will be imported to the batch server (or processing server, or application server in a single server implementation); or they will be imported to an inventory beacon — obviously, drivers are needed only on servers (whether a central server or inventory beacon servers) where such imports actually occur, so that this prerequisite applies only to those relevant server(s).

In these conditions, you must install a 32-bit version of Microsoft Access Database Engine on the relevant server. The particular release is not important: for example, Microsoft Access Database Engine 2010-32 is adequate. Drivers are supplied within the Microsoft Access Database Engine.



Important: *Only the 32-bit version is supported by the Business Importer mechanism, and this version is incompatible with the 64-bit version of Microsoft Office products installed on the same machine. This means that, when you need imports in .xlsx format, 64-bit Office cannot be installed on the central batch server (or application server), or on applicable inventory beacons. Naturally, Office documents including spreadsheets prepared on other machines running 64-bit Office can successfully be imported. The limitation is only on co-installation on the same computers.*

Download the Materials

Position yourself on a computer that is accessible from all the central servers you will implement, and preferably at least some of your inventory beacons.



To download installation and upgrade software:

1. Use your browser to access the Flexera Customer Community.

- a. On <https://flexeracommunity.force.com/customer/CCLanding>, use the account details emailed to you with your order confirmation from Flexera to log in (using the **Login** link in the top right).



Tip: Access requires your Customer Community user name and password. If you do not have one, use the Request Community Access link on the login page to request one. Your credentials are configured for access to content you have licensed.

- b. Select the **Downloads** tab from the row across the top of the page.

A routing page appears to let you Access Product and License Center, displaying lists of products from Flexera.

- c. In the lists of products, identify FlexNet Manager Platform, and click the **Access Above Products** button that is *below* that product name.

The Product and License Center site is displayed.

- d. In the Your Downloads section of the Home page, click the link for [FlexNet Manager Platform](#).

- e. In the Download Packages page, click the link for [FlexNet Manager Platform 2018 R1](#) to access the downloads. (You may need to repeat this action on a second page to access the downloadable files.)

2. Depending on your login account, a click-through license may appear. If so, review the terms, and click **I Agree**.
3. Download the release notes, and review the requirements for the Windows Server computer(s) on which you will install FlexNet Manager Suite 2018 R1.



Tip: Use your block diagram of the servers to note requirements, and check these off when you validate that the machines are adequately provisioned. Resolve any issues with server provisioning before proceeding with the implementation.

4. Download the following archives and save to a convenient (network-accessible) location on this computer (such as C:\temp\FNMSUpgrade\). You may unzip all these archives here.
 - FlexNet Manager Suite 2018 R1 Installer.zip
 - Database Migration to FNMS 2018 R1.zip
 - Inventory Agent 92 Upgrades to 2018 R1.zip
5. If you are collecting inventory from Citrix XenApp, also download:
 - Adapter Tools.zip.
6. If your implementation design includes Flexera Analytics (powered by Cognos), also download:
 - Report Designer for FlexNet Manager Suite.zip (this contains the default report structures within FlexNetManagerPlatformReportsAndDashboard.zip)



Tip: There are additional downloads required if you are also upgrading your Inventory Manager installation. These are covered in [Identify and Update Inventory Manager Server](#).

2

Preparing Inventory Manager

If you do not have any installation of Inventory Manager as part of your current implementation (see the first topic following for ways of checking), you may skip ahead to the following chapter, [Upgrading FlexNet Manager Suite](#).

Otherwise, your Inventory Manager system (including the inventory agents installed on managed devices throughout your enterprise) can be prepared for the migration even before FlexNet Manager Suite 2018 R1 is installed. Work through the following topics.

Identify and Update Inventory Manager Server

This process corresponds to steps 2 through 5 in the overall flowchart in [Process Overview](#). Complete all the following on the central server(s) of your current implementation.



To identify and update your Inventory Manager server:

1. If you have not already done so, back up your server(s) now.
2. If you have been using Flexera Analytics (powered by Cognos) and intend to continue using it with FlexNet Manager Suite 2018 R1:
 - a. On your application server (where Inventory Manager runs), open `regedit`.
 - b. Navigate to `HKLM\SOFTWARE\ManageSoft Corp\Compliance\CurrentVersion\BIDispatchUrl`.
 - c. Take a note of the URL recorded there. You will use it when importing the updated reports package.
 - d. Close `regedit`.
3. Open your existing compliance product in the MMC console.
4. Look for the following nodes in the left-hand console tree:
 - **Managed Device Settings**
 - **Discovery and Adoption**

- **Remote Task Manager.**

If any of these nodes is present, Inventory Manager is co-installed on the same server as your compliance product. This server will roll forward as your Inventory Manager (only) server, at least for the time being. Check that your server plan includes a new server (or set of servers) for FlexNet Manager Suite 2018 R1. Also make a note that you must clean your previous compliance product off this server, as described in the process below. This co-location also means that your two products were using a shared database. Make a note that you need the process for splitting this database, described in [Splitting a Shared Database](#). For now, skip to step 6.

5. If you have been managing inventory from computers collected through FlexNet inventory agents, there is an installation of Inventory Manager on another server. Identify that server (if need be, asking operators how they have been accessing the inventory). To determine whether your two separately-installed products were accessing a shared database:

- a. Start the registry browser on each of these two servers (compliance and inventory).
- b. Browse to the following registry keys:
 - For 64-bit operating systems: HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\ManageSoft Corp\ManageSoft\Reporter\CurrentVersion\DatabaseConnectionString
 - For 32-bit operating systems: HKEY_LOCAL_MACHINE\SOFTWARE\ManageSoft Corp\ManageSoft\Reporter\CurrentVersion\DatabaseConnectionString
- c. Compare the values of the Database and Server settings.

If these two values each match across both servers, your two products were using a shared database. Make a note that you need the process for splitting this database, described in [Splitting a Shared Database](#).

6. On the server with Inventory Manager installed, in the MMC interface for the product (or combined products), open the **Help** menu, and select **Help about Inventory Manager**.

If the release shown is 9.2.3, you are done with this procedure. Skip forward to [Prepare Managed Device Self-Upgrade Package](#).

If the release is shown as 9.2, Flexera recommends that you upgrade to release 9.2.3. This upgrade delivers enhancements consistent with the FlexNet Manager Suite 2018 R1 upgrade, which will be helpful while these products co-exist (full details are available in the release notes for 9.2.3). Should you choose to do without those enhancements, technically the 9.2 release is sufficient to move forward with the upgrade of FlexNet Manager Suite.

If the release is prior to (less than) 9.2, you should upgrade the Inventory Manager 9.2.3 as the foundation for moving forward with the joint systems.

7. Using your login credentials for Flexera Product and License Center, navigate to the product download page for FlexNet Manager Platform 9.2.3: <https://flexerasoftware.flexnetoperations.com/control/inst/download?element=5631471>.
 - a. Log in to <https://flexerasoftware.flexnetoperations.com>.
 - b. Click FlexNet Manager Platform.
 - c. Click FlexNet Manager Platform again on the next page.

- d. In the 9.2.3 row, click FlexNet Manager Platform again.
- 8. Download at least the following:
 - Release notes (FlexNet Manager Platform Release Notes.pdf)
 - For database migration: Database Migration Scripts 9.2.3 (Database Migration.zip)
 - For updates to the Inventory Manager software: Flexera Inventory Manager 9.2.3 Installer (im923.exe)
- 9. If you have not already done so, login to the Inventory Manager server with a privileged account that:
 - Is a member of the domain where Inventory Manager and your database server are installed
 - Has Administrator privileges on your Inventory Manager server
 - Has Database Owner privileges.
- 10. Ensure that there is sufficient disk space on your database server to accommodate a complete copy of your existing database.



Important: This is the space required for the database upgrade process. If you plan to use the same database server for two products rolling forward, be aware that, in addition to separating the Inventory Manager and FlexNet Manager Suite databases, the latter product also requires two or three additional databases:

- Its own inventory database, suggested name FNMSInventory
 - FNMSSnapshot, used for performance improvement particularly relating to reports
 - FNMSDataWarehouse (this may have been present in the 9.2 implementation, where it was an option; but in 2018 R1 it is a requirement).
- 11. If you have not already done so, back up your database (see your SQL Server documentation for procedures).
 - 12. Ensure that all operators are logged out of Inventory Manager and your compliance product (such as FlexNet Manager Platform).
 - 13. Unzip the Database Migration.zip archive to a convenient working location on the Inventory Manager server (such as C:\temp\IMUpdate).
 - 14. Open a Command Prompt window, and navigate to your working copy of the migration folder (such as C:\Temp\IMUpdate\Database Migration\Inventory Manager).
 - 15. Run the mgsDatabaseUpdate.exe program, using the following syntax:

```
mgsDatabaseUpdate.exe -i InventoryManagerMigration.xml -nsu -l <LogFile> [-s <serverName>[\<instanceName>]] [-d <databaseName>] [-u <userName>] [-p <password>]
```

where:

-d <databaseName> The name of the database to connect to. If -d is not specified, ManageSoft is used.

-i InventoryManagerMigration.xml	This is the configuration file describing the migration tasks, and is of course mandatory.
-l <logfile>	Identifies the path and name of the file to receive a log of the migration tasks that occurred. If this option is not specified, a log file called InventoryManager.log is created in the same folder where the executable is running.
-nsu	Run the database update without putting the database into single user mode. (The steps to perform migration require that multiple connections are made.)
-p <password>	The password for the username specified with -u. This is only required if the database server is configured to use SQL Server authentication.
-s <serverName> or -s <serverName>\<instanceName>	The name of the database server to connect to. If -s is not specified, the value at HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\ManageSoft Corp\ManageSoft \Reporter\CurrentVersion\DatabaseConnectionString is used. The registry key is present on the compliance and inventory servers. (If you have chosen to run this script on the database server itself, the registry entry is not available, and you must therefore specify the server name, or use the dot notation [.] to refer to the current server.) If the database is in a named instance (and not in the default database on the server), the instance name must be specified as well.
-u <userName>	The username with which to connect to the database. This is only required if the database server is configured to use SQL Server authentication. If not specified, Windows Integrated Authentication is used to connect to the database server using the current user's credentials.

The following command performs the migration using the standard configuration file. Instead of recording the log in the default log file, it will be written to the mig.Log file specified in the command. Because the upgrade is running from the inventory server, the database server name (and, if required, instance name) is retrieved from the registry, and Windows Authentication is used to log in as the account name running the executable.

```
mgsDatabaseUpdate.exe -i InventoryManagerMigration.xml -nsu -l mig.Log
```

Check messages on the command line to confirm that the database migration was successful. If any error messages occur, check the log file to troubleshoot the problem. Do not proceed to the next step until the database migration is successful.

16. Optionally, re-index the inventory database.

For details, see [Re-Indexing a Database](#).

17. Still logged in on the inventory server, ensure that:

- All processes have completed—open the Windows Task Manager to check. If `ndrp1ag.exe` is still processing tasks, allow it to finish.
- The system is in a stable state (one that will not be modified by processing imports or the like).
- The administration console (MMC interface) is closed.

18. If this is a co-located installation of Inventory Manager and your compliance product on the same server, keep the former, and remove the latter as follows:



Tip: *It is a requirement that you remove the co-located compliance product before updating Inventory Manager.*

- a. On the application server, open **Program and Features (Control Panel > Uninstall a Program)**.
- b. Uninstall FlexNet Manager Platform (or your earlier compliance product, such as Compliance Manager), and then close **Program and Features**.
- c. Use Windows Task Scheduler to remove the scheduled task called `Execute business importer connections`.

19. Navigate to where you downloaded the Flexera Inventory Manager 9.2.3 Installer (`im923.exe`), and double-click the executable.

A setup page for Flexera Inventory Manager appears.

20. In the menu bar, click **Install**.

The **Install** menu is displayed.

21. Under the **Inventory Server** heading, select **Install**.

The installation wizard is invoked, and checks your system for prerequisites, as well as for content that must *not* be present. Depending on the results of these tests, you may be asked to perform various functions before you can progress with the installation. When the checks are satisfactorily completed, the wizard displays its welcome page.

22. Step through the installation wizard.



Tip: *If you prefer step-by-step guidance through the wizard, open `UpgradeGuide.pdf` from the documentation folder of your existing Inventory Manager installation, and in chapter 3, `Upgrading administration servers`, find the process `To upgrade an administration server`. Detailed documentation of the wizard starts from step 4 of this process.*

23. When installation wizard is complete, enable the following scheduled tasks (steps described below):

- Generate ManageSoft system status information
- Generate ManageSoft Wake on LAN jobs
- Import ManageSoft application usage logs
- Import ManageSoft discovery information

- Import ManageSoft distribution logs
- Import ManageSoft installation logs
- Import ManageSoft inventories
- Import ManageSoft remote task status information
- Import ManageSoft system status information
- Merge ManageSoft policies
- Process ManageSoft remote execution actions.

Three other Inventory Manager schedules are created:

- Process ManageSoft distribution jobs —This task is always 'Running' and does not need to be enabled.
- Reconcile ManageSoft directory tables with AD —This task is disabled by default. If you do want to enable this task, ensure that its timing will not clash with the Merge ManageSoft policies task as it also performs reconciliation.
- Service the ManageSoft database —This task is disabled by default, but can be manually enabled or run if and as appropriate for your environment.

To enable the scheduled tasks in the list above:

- Navigate to **Scheduled Tasks** (for example, **Start > Settings > Control Panel**).
- For each of the scheduled tasks listed above, right-click the task and select **Properties**.
- Select the **Enabled (scheduled task runs at specified time)** check box.
- Click **OK**, and repeat for the remaining scheduled tasks in the list.

24. Decide when to upgrade some of your distribution servers, and which ones to target for removal:

- There is no urgency: the upgraded central Inventory Manager server is backward-compatible with earlier distribution servers.
- Some of your distribution servers may shortly face decommissioning, or re-purposing as inventory beacons. There is no value in upgrading these.
- For the time being, use the distribution server hierarchy recorded in Inventory Manager to identify all distribution servers and their specific purposes (such as "desktop inventory", "machine room inventory", "Oracle introspection", and the like). From the list, identify the ones that can be targeted for removal as their managed devices are switched over to FlexNet Manager Suite 2018 R1.
- When you decide to migrate any distribution servers, use the previous *UpgradeGuide.pdf*, chapter 4, *Upgrading distribution servers*, to guide you.

Prepare Managed Device Self-Upgrade Package

You have identified the managed devices in your estate that are to migrate to exclusive management using FlexNet Manager Suite 2018 R1.

 **Important:** *Managed devices migrating to 2018 R1 must be covered by server-side policy merging. Any managed devices for which client-side policy merging remains important must not be migrated, and must continue under Inventory Manager 9.2. The switch to server-side policy merging is incorporated in the self-upgrade package provided.*

You have further identified how to target these devices, whether by operating system, security group, or other techniques. You also have ready your block diagram of all servers, including inventory beacons and which of these will be used for bootstrapping managed devices into the new system (see [Design the Final Topography](#)). And you have completed the upgrade of your central Inventory Manager Server to 9.2 SP3 (or thereabouts).

 **Warning:** *You must NOT upgrade the managed devices until after your central server has been upgraded.*

Now prepare the self-upgrade package for the target managed devices.

 **Tip:** *This procedure covers Windows-based managed devices. For non-Windows managed devices, see your previous [UpgradeGuide.pdf](#) from the documentation folder of your existing Inventory Manager installation, and refer to chapter 5.*

This procedure corresponds to step 11 in the flow-chart in [Process Overview](#).

 **To prepare a self-upgrade package:**

1. In your 9.2 implementation of Inventory Manager:
 - a. Expand **Managed Device Settings**, and choose a managed device configuration.

You may have only the **Managed Device Default Configuration**, in which case open that. But if you have another settings package that you normally issue as standard to the majority of your managed devices, open that settings package instead.
 - b. In the groups list, scroll down to (and select) the NetSelector Agent.
 - c. In the **Settings in package** list, record the current value of the Selector algorithm.

You will use the values as input to your new system, later in the process.
2. Copy Inventory Agent 92 Upgrades to 2018 R1.zip to this server, and unzip to a convenient location (such as C:\Temp).

You downloaded this archive in the process under [Download the Materials](#).
3. If your migration of Inventory Manager has not taken you all the way to 9.2 SP3, locate the files linuxdpkg and linuxrpm from the unzipped archive, and copy them to `warehouse-folder\Repository\Environments` (the default value for `warehouse-folder` is C:\ManageSoft).

4. Open a Command Prompt and navigate to `install-dir\Common`.

Replace `install-dir` with the installation directory for Inventory Manager 9.2 SP3.

5. Execute the following command:

```
mgsreceive.exe -N extracted-archive-folder\Flexera -d Flexera -o pack=FALSE
```

where `extracted-archive-folder` is the folder (such as `C:\Temp`) where you unzipped the upgrade packages. This loads the upgrade and settings packages into your 9.2 software library, visible in the MMC.

6. Open your upgraded Inventory Manager.

We must customize the settings package before distribution and targeting.

7. Under the **Flexera Software** node, expand the **Software Library** node, and continue expanding it (**Flexera > FNMS 2018 R1 Migration Settings > 1.0.0 > Rev 1.0**) until the **FNMS 2018 R1 Migration Settings** project is visible. Right-click the package and select **Edit...**
8. In the navigation bar, expand **Registry Entries > All Registry Entries > HKEY_LOCAL_MACHINE > SOFTWARE > ManageSoft Corp > ManageSoft > Common > DownloadSettings > InventoryBeacon** node.
9. In the right-hand pane, double-click the **Host** entry.

The **Host Properties** dialog appears.

10. In the **Value** field, enter the fully qualified domain name of an inventory beacon in your FlexNet Manager Suite 2018 R1 system that will be used for bootstrapping managed devices across to the new system.

You identified the inventory beacon(s) for bootstrapping as part of your design work in [Design the Final Topography](#).



Note: If you are not using HTTP protocol on the standard port 80, you may also modify the following settings in your package:

Location	Notes
Port	The default value for HTTP protocol is 80, and the default for HTTPS protocol is 443. If necessary, edit the port value to match the configuration of this inventory beacon.
Protocol	Either accept the default value of http, or you may edit it if you are using the HTTPS protocol on this inventory beacon. (The value is case insensitive.)

If you wish, you may also identify multiple inventory beacons for bootstrapping managed devices into the upgraded system by defining additional `DownloadSettings`. For example, if your NetSelector algorithms include `MgsSubnetMatch`, you may wish to include an inventory beacon in each of your subnets for maximum network efficiency in inventory uploads from the managed devices. You can identify all such inventory beacons here: each managed device will choose the one within its own subnet (or the one that gets top priority according to your selected algorithms).

11. In the navigation bar, expand **Registry Entries > All Registry Entries > HKEY_LOCAL_MACHINE > SOFTWARE > ManageSoft Corp > ManageSoft > NetSelector > CurrentVersion** node.

12. In the right-hand pane, double-click the **SelectorAlgorithm** entry.

The **Selector Algorithm Properties** dialog appears.

13. In the **Value** field, replace `$(ExistingSelectorAlgorithm);MgsInventoryBeaconMatch` with your current choices of net selector algorithms, with the new `MgsInventoryBeaconMatch` value appended on the end.

Use the list of algorithms you noted down at the start of this process. On targeted managed devices, the settings package also modifies the `PolicySource` registry value to the value `Server`. Only server-side policy management is supported in 2018 R1.

14. Click **OK** on the properties dialog, and click **Save** on the project.

15. Optionally, customize `setup.ini`.

Use this file to add transforms to the installation of the managed device, suppress installation of the application usage agent, or prevent users cancelling the upgrade process on their computer (managed device). For details, see [Configure setup.ini](#).

Your self-upgrade package and settings package are now ready to distribute to your distribution servers. Even though FlexNet Manager Suite 2018 R1 is not yet in place, you may distribute the packages now, as we have a separate step to apply these packages; and even thereafter, the managed devices will update, and fail over to their current fail-over locations until they are targeted by an inventory beacon in the new system. Distributing (and optionally applying) the packages *now* gives time for the upgrade and settings to percolate through your managed devices while you are completing the next stages of the central upgrade. Or, if you prefer, distribute the packages later, if that better suits your processes. Whenever you are ready, you'll find details in [Distribute Self-Upgrade and Settings Packages](#).

Configure setup.ini

This file modifies the installation of the managed device.

Use this optional procedure if you wish to:

- Control the level of end-user feedback and control for the managed device upgrade
- Add a transform to the MSI package
- Switch off the installation of the application usage agent.

Each of these options is independent.



Tip: Be aware that there are two `.ini` files available. This is the one for the MSI, and is called just `setup.ini` (not `mgssetup.ini`).



To configure `setup.ini` (optional):

- 1.** On your 9.2 Inventory Manager application server, in the flat text editor of your choice, open `C:\ManageSoft\Repository\Packages\Flexera\Upgrade for managed devices\10.2.0\Rev 1.0\Upgrade for managed devices\setup.ini`.

2. Within the `setup.ini` file, locate the section `[Startup]`.
3. To prevent users from manually cancelling the managed device upgrade, under that heading enter

```
UserInteractionLevel=/q
```

This quiet-mode setting suppressed the default user interface (which includes a **Cancel** button) during the upgrade.

4. To prevent installation of the application usage agent, in the same section of the file, locate `CmdLine` and append:

```
REMOVE=aua
```

5. To attach your transform files to the MSI, to the same `CmdLine`, append a list of your transform files, separating multiples with semi-colons(;), as in the following example:

```
Transforms=custom1.mst;custom2.mst
```

6. Save and close the file.

Your modified `setup.ini` is automatically included in the upgrade package to be distributed shortly.

Distribute Self-Upgrade and Settings Packages

You have prepared, validated and (preferably) tested your self-update and settings packages for managed devices that are to migrate out of Inventory Manager control and into management through FlexNet Manager Suite 2018 R1. You now wish to distribute these packages to distribution servers accessible to those selected devices. In fact, the first level of targeting that may be applicable in your enterprise is to restrict the packages to certain distribution servers. For example, suppose that one distribution server exclusively manages inventory from a machine room, and you wish to preserve this machine room under Inventory Manager control. You should exclude that distribution server from the list that receive the upgrade package.



Tip: *The upgrade package causes managed devices to self-update to 2018 R1 inventory clients. These clients are compatible with both the 2018 R1 system and the previous 9.2 Inventory Manager system. You may like to send this package to all your managed devices to get the latest client functionality. The switch from 9.2 to 2018 R1 is controlled exclusively by the settings package. Therefore, when targeting managed devices to migrate, include the settings package; and when deciding on managed devices that should remain in the 9.2 system, exclude the settings package from these devices.*

This procedure is part of step 11 in the flow-chart in [Process Overview](#).

You can distribute the packages from the **Software Library** node of Inventory Manager. This will distribute the packages for all managed device platforms:



To distribute self-upgrade and settings packages:

1. Right-click the **Software Library** node and select **Distribute...**
The **Package Distribution Wizard** page is displayed.
2. Click **Next**.
The **Assign Packages** page is displayed.
3. Select (by checking the boxes) **Flexera\FNMS 2018 R1 Migration Settings** and **Flexera\Upgrade for managed device\1.0.0**, and click **Next**.
The **Select Distribution Locations** page is displayed.
4. Select each of the servers to which you will distribute, and click **Add**.
5. If required, select the **Force distribution** option.
It is not compulsory to force distribution. This is used to overwrite packages on distribution locations, even if they are not listed as needing the update. Use this option if you are not certain that your distribution database is an accurate reflection of the state of your distribution servers.
6. Click **Next**.
The **Distribution Priority** page is displayed.
7. Select a priority for the package.
Normal is the default setting).
8. Click **Next**.
The **Selection Summary** window is displayed.
9. Click **Next**.
The **Completing the Package Distribution Wizard** page is displayed.
10. Click **Finish**.
The package(s) is/are now sent to the selected distribution servers.
11. After allowing adequate time for the distribution and reporting traffic, verify delivery by clicking on **Reports > Distribution > Packages > All**.

Targeting the Inventory Agent Upgrades and Migration

The update and settings packages are distributed. Now determine which devices should act on which of these packages.

This procedure corresponds with step 13 in [Process Overview](#).

You are already familiar with targeting upgrades in your previous implementation, and with the options for policy-level filtering or package-level filtering available in Inventory Manager 9.2. If your goal is that selected

managed devices will migrate to FlexNet Manager Suite 2018 R1, and that another group of managed devices do not migrate but continue (at least for the time being) under Inventory Manager 9.2, it is mandatory that you target the settings package only to those devices that should migrate. (The inventory agent upgrade package is compatible with either system for both client-side policy merging and server-side policy merging, and may be sent to all inventory clients if you so wish.)

This targeting in Inventory Manager creates a pool of managed devices primed for migration (because they are both upgraded, *and* received the settings package). Later, on the FlexNet Manager Suite side, you can at first apply additional targeting to this group to allow only a test device, or a pilot group of devices, from the pool to migrate. But in due course, as you move out of the testing phase, that filtering is removed, and then every device in the migration pool will automatically switch over to FlexNet Manager Suite 2018 R1 and its hierarchy of inventory beacons. At that time, it is critical that the managed devices intended to continue under Inventory Manager 9.2 have *not* received the settings package, or they will be 'lost' by switching over to the new system.

You may have already applied a first line of control by excluding certain distribution servers from even hosting the settings package (see [Distribute Self-Upgrade and Settings Packages](#)).

Whether or not that is the case, you now need to exert further control, for which your options include policy-level filtering and package-level filtering. Your enterprise has most likely fixed on one or other of these approaches to use. Both are applied through the **Add to Policy** wizard in Inventory Manager. Below is a summary of the process, and more detail is available in your 9.2 documentation (including the `SoftwareDeploymentGuide.pdf` chapter 3, *Best practice* for a discussion of options, and chapter 5, *Deployment policies* for details of the wizard).



Tip: *If none of your existing Active Directory security groups allow for the appropriate targeting of this upgrade, consider creating purpose-specific security groups before starting this wizard. Two sample groups are discussed in the procedure below: read ahead for details.*



Note: *If you are not using Active Directory and instead use ManageSoft policy, adapt the principles below for your corporate practices. For example, you can first assign the upgrade package to your pilot policy, and after verification, assign the same package to your production policy. Then, if you have some managed devices that you want to switch to the new system, target those devices for the client settings package. Remember that only those devices that are both upgraded to the 2018 R1 inventory client and have the updated client settings package can switch to the new system.*

You may choose to do package targeting now, or later. If you do it now, the updated managed devices check for an inventory beacon, and for as long as they do not succeed, fail over to their existing hierarchy of distribution servers. If you do it later, you introduce a further delay while you wait for the update package and settings package to be applied. Doing it now allows plenty of time for the managed devices to self-update and collect the new settings package while you work on other things. The device upgrade package and the settings package must be targeted separately.



To target inventory devices for upgrade:

1. In Inventory Manager 9.2.x, navigate through the Software Library to select the upgrade package you have prepared and distributed.
2. Either right-click the package in the console tree and select **Add to Policy**, or in the right-hand page click the **Add this package to policy** action button.

The **Add to Policy Wizard** is displayed.

3. Click **Next**.

For the path described here, the **Select Deployment Policy** page is displayed. By choosing the appropriate policy, you are using policy-level filtering. You need to be aware of where in the Active Directory hierarchy this policy is attached, as it will be applied to all managed devices in this group and all its descendants. At this stage, keep in mind that the inventory agent upgrade is applicable to all managed devices, if you so choose.

4. Expand the relevant domain and browse to the policy to which you want to assign your upgrade package. With the policy selected, click **Next**.

The **Create or Choose Group** page is displayed.

5. Select one of the following radio buttons:

- **Create a new, empty filter group**

Accept the default name proposed, or type a unique name that better reflects the group's purpose (such as ManagedDeviceUpgrade). This is often a good option for providing highly customized targeting for your upgrade package.



Note: After completing this wizard, you must add members to this new security group, either in the Group Policy Object Editor, or using the Package Allocation wizard. Save effort at this stage by including in this security group only those devices that you wish to upgrade to the latest inventory client, but to continue under management with Inventory Manager 9.2. (We use a different security group for devices that are migrating to the new system, next time through the wizard, as noted below.)

- **Select an existing filter group, applying the package to all group members**

Use the **Browse for Filter Group** page to select the relevant container or security group, and select its check box before clicking **OK**. Keep in mind that this adds your upgrade package to whatever other packages and policy the members of this group receive.

- **Apply this package without filtering to all members of the selected policy**

This allows pure policy-level filtering (by your choice of policy in the previous page), with no package-level filtering applied.

6. Click **Next**.

The **Package Applicability** page is displayed.

7. Ensure that the default **All users on targeted computers (computer policy)** is selected, and click **Next**.



Note: Only computer policy is supported going forward. If you need any user policies, these policies and their users and machines must be preserved for operation in Inventory Manager 9.2.

The **Deployment Conditions** page is displayed.

8. Accept the default (**This application must be installed. (Mandatory)**) and leave both **Removal** options unchecked. Click **Next**.

The **Postponement Options** page is displayed.

9. Set the options to suit your corporate practices for allowing users to delay the update package, and click **Next**.

Since this update package only changes the behavior of the inventory agent and does not involve rebooting the device, it may be quite acceptable to leave all options deselected so that the end-user may not delay your migration process.

The **Package Lifetime Options** page is displayed.

10. Accept the default **As soon as policy becomes effective**, and click **Next**.

The **Summary** page is displayed.

11. Review the details, and if everything is as intended, click **Next**.

The wizard creates a policy and (if required) security group as specified. This may take a few moments. Then the **Completing the Add to Policy Wizard** page appears.



Tip: If you created a new security group, there is a check box **Begin allocating this software package to end-users or computers** displayed on the page. Leave this checked to start the **Package Allocation wizard** and target the individual machines you want in the group. (For details about the **Package Allocation wizard**, see the section *To allocation a package to users or computers* in chapter 5, *Deployment policies*, of the *SoftwareDeploymentGuide.pdf*.)

12. Click **Finish** to complete this wizard.
13. Repeat from step 1 for the settings package, being careful to target this package exclusively to those managed devices which you intend to migrate to the new system. Use a separate security group as noted here:



Note: The second time through the wizard, create a second security group such as *MigrateTo2014R3*.

- Later, in group policy, insert as members of this group all the managed devices that you want to migrate to the new system. This means that they receive the settings package.
- Also in group policy, make the group *MigrateTo2014R3* also a member of the earlier group *ManagedDeviceUpgrade*. This means that the migrate targets also receive the device upgrade package.

14. To monitor progress on self-updating of the managed devices:

- a. Select the **Reporting** node.
- b. In the right-hand details panel, locate the **Package Installation** table.
- c. Locate the **Managed Devices** group, and select the link for **All**.

All information on distributed packages is displayed.

- d. Locate the required package in the list, and click the graph icon to its left. Use the dynamically-updated graph to track the distribution and installation of the self-update package.

Once the next policy merge is run, the updated policy is applied to the target groups. Managed devices in those groups will self-update, and wait for an inventory beacon to be available to them.

Splitting a Shared Database

The migration process requires separate databases because of schema incompatibility from Inventory Manager to FlexNet Manager Suite 2018 R1.

In [Identify and Update Inventory Manager Server](#), you clarified whether your previous implementations of Inventory Manager and your compliance product shared a common database. If that was NOT the case, so that they already had separate databases, skip this topic.

The previous, shared database will roll forward as your Inventory Manager database (at least for the time being). In this process you will split off a copy to convert into the FlexNet Manager Suite 2018 R1 database, and clean up both databases following the separation.

As already noted, your new database can share the same server, subject to software version and adequate disk space (and remembering the additional databases required for the new release). In [Design the Final Topography](#), you identified (and recorded) your database server for FlexNet Manager Suite 2018 R1.

This procedure corresponds to step 5 in [Process Overview](#).



To split a shared database:

1. Backup the existing shared database (its default name was ManageSoft).

For details about backing up, see [http://msdn.microsoft.com/en-us/library/ms187510\(v=sql.100\).aspx](http://msdn.microsoft.com/en-us/library/ms187510(v=sql.100).aspx). (This is in addition to the protective backup at the start of the entire process. This time you are backing up the updated database.)

2. Did your previous implementation include the data warehouse database (then used for reports prepared in Flexera Analytics)? If so:

- a. Also back up this database (its default name was FNMPDataWarehouse).
- b. Copy this database to the SQL Server database identified for the data warehouse database in your server plan.

Upgrade of this relocated database follows in [Upgrade/Create Databases](#).

3. Use the previously-shared (ManageSoft) backup file you just created, and restore it on the SQL Server database identified for FlexNet Manager Suite 2018 R1 in your server plan. The default database name (used in this document) is FNMSCompliance.

For details about restoring, see [http://msdn.microsoft.com/en-us/library/ms177429\(v=sql.100\).aspx](http://msdn.microsoft.com/en-us/library/ms177429(v=sql.100).aspx). You will resume working on this database in [Upgrade/Create Databases](#).

4. Using SQL Management Studio:

- a. Connect to the SQL database server where your current Inventory Manager database is located (the default name was ManageSoft), and select that database.
- b. Choose **File > Open**, navigate in the database migration folder in your downloaded archive (such as C:\Temp\FNMSUpdate\Database Migration\FlexNet Manager Platform\Normal), and open IM92SchemaCleanup.sql.
- c. Execute this SQL script on the ManageSoft database (or equivalent if you renamed this).

This script removes tables, views, and functions that are related only to FlexNet Manager Suite, and not needed for the continued operation of Inventory Manager.

You have now separated your previously combined databases, such that the previous one (default name ManageSoft) carries forward for Inventory Manager data only, and the new copy (default name FNMSCompliance) is used for FlexNet Manager Suite 2018 R1.

If, as well as the shared database, your previous implementation also had your compliance product (Compliance Manager or FlexNet Manager Platform) and Inventory Manager installed on the same server, you also need to remove the compliance product from this server, allowing it to roll forward as your Inventory Manager server.

3

Upgrading FlexNet Manager Suite

You have completed all the prerequisites in [Prerequisites and Preparations](#) (and its subsections). Depending on your starting conditions, you have also separated any previously combined databases and cleaned up any co-installation of FlexNet Manager Platform (or Compliance Manager) from what is now your Inventory Manager server. Only when all these tasks are complete should you move forward to the upgrade of FlexNet Manager Suite to 2018 R1.

Upgrade/Create Databases

Any existing compliance databases must be upgraded, and 2018 R1 uses additional mandatory databases.



Tip: Previously you have been working on Inventory Manager preparations. Now clear your mind of anything to do with Inventory Manager. Keep in mind that FlexNet Manager Suite 2018 R1 also separately manages its own inventory information in its own inventory database. In this procedure, we are concerned solely with the databases for FlexNet Manager Suite 2018 R1, including its own inventory database. (Later, we will configure Inventory Manager to be a data source feeding into the FlexNet Manager Suite inventory database.) For the moment, then, nothing to do with Inventory Manager.



Important: If you are using Microsoft SQL Server 2016, ensure that at least SP1 has been installed. This update addresses a defect in SQL Server that triggers a fatal error, as documented in <https://support.microsoft.com/en-au/help/3173976/fix-fatal-error-when-you-run-a-query-against-the-sys-sysindexes-view-in-sql-server-2016>.



Important: All database scripts use Unicode character sets to allow for necessary localization. This means that:

- Any FTP transfer of these files must be in binary mode (not ASCII mode)
- The files must be edited only in editors that support Unicode character sets.

Failure to observe these precautions may result in failures in script operations.

Take note of all the database names you create with the `-d` parameter in the following steps. You need the names later (if database setup is done by a separate DBA, the database names must be handed off to the installing administrator). While it is possible to create your own database names, using the default names makes it easier to follow the rest of the documented processes.



Tip: There may be several accounts needing to log in directly to the application server for tasks related to FlexNet Manager Suite, such as manipulating log files, scheduling tasks, and the like (this excludes access through the web interface, which is not relevant to this discussion.) It is often convenient for these accounts to have the same database permissions as the services account on all components of the operations databases: compliance data, warehouse data, snapshot data, and inventory data. A suggested method is to create either a local or Active Directory security group (such as *FNMS Administrators*) and add all such accounts to this group. Then you can, for example, set these permissions by opening each database in Microsoft SQL Server Management Studio, and granting the appropriate privileges to the security group. The procedures are detailed in the topics covering database creation. Accounts to list in the security group minimally include:

- The operational service account (suggested: *svc-flexnet*)
- The installing administrator account (suggested: *fnms-admin*) for post-installation on-going administration (remembering that *db_owner* membership is required temporarily during installation, as described in [Identify \(or Set Up\) Accounts](#))
- Any operational account needing to log in to a central inventory beacon installed on your batch server (remember that, since the inventory beacon requires administrator privileges to run, this account is both a local administrator on the batch server and a *db_owner*)
- Any future back-up administrator accounts needed for the application server.



Tip: Because you are migrating content from a previous 9.2 implementation (or earlier), it is mandatory that you install an inventory beacon on the batch server component of your FlexNet Manager Suite central servers. As mentioned above, the account that will access that central batch server also needs to be included in this security group. For more about inventory beacons, see [Deploy Inventory Beacons](#).



Note: If your databases are to run on Microsoft SQL Server 2016 SP1 or later, set the database compatibility to a lower level for each database. If upgrading from an earlier version of a database, preserve its compatibility level (100 or later, such as 110 for SQL Server 2012). For new database installations, set the compatibility level for each database to SQL Server 2014 (120).



Important: If you have been using Flexera Analytics (powered by Cognos), be aware that Cognos may acquire schema locks on objects within the operations databases of FlexNet Manager Suite. For this reason it is important to stop the Cognos server before updating databases, and to restart it afterwards.

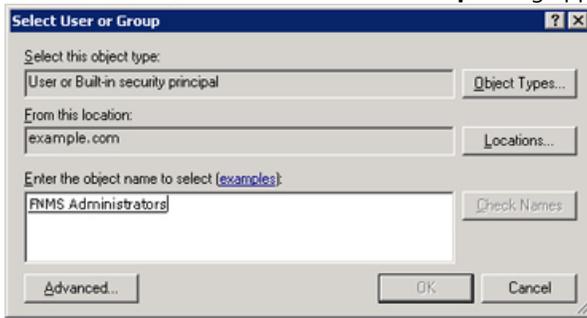
This procedure assumes that you are updating a previous database from 9.2. This may either be one that was always separate, or one that you split in the procedure [Splitting a Shared Database](#).



To upgrade (or create) databases as appropriate:

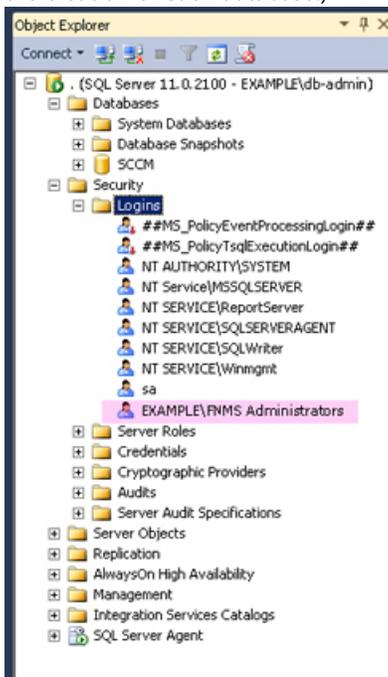
1. If your previous implementation included Flexera Analytics (powered by Cognos), stop the Cognos server.
2. Create a security group (suggested: *FNMS Administrators*), and (optionally) add to it all accounts directly logging into the central application server (or you can add accounts later).
3. In SQL Server Management Studio, ensure that the AD security group (suggested: *FNMS Administrators*) has a secure login:
 - a. Under **Security > Logins**, Create a new login.

The **Select User, Service Account or Group** dialog appears.



- b. Use the **Object Types...** button to ensure that User, Group, or Built-in security principal is selected as the object type.
- c. Use the **Locations...** button to select your Active Directory domain.
- d. As the object name, enter the name of your security group (suggested: FNMS Administrators), and use **Check Names** to validate that the group name is found.
- e. Click **OK**.

The newly added group is visible under the Security > Logins node. (You will use this group after the creation of each database.)



- 4. Back up any customized files to a temporary location, (for example, C: \temp).

Customized files may include compliance importer procedures (XML files located by default in *installation_dir*\Compliance\ImportProcedures from 8.0 onwards, or for earlier releases, check in sourceprocedures.xml).

- 5. Ensure that the target database instance is set for case-insensitive and accent-sensitive collations (as required by all databases in this system). To check the collation settings at the server level:

- a. In SQL Server Management Studio, locate the SQL Server instance in the **Object Explorer** pane.
- b. Right-click the server, and select **Properties** from the context menu.
- c. On the server **Properties** dialog, select the **General** tab, and check the current collation sequence.

If the collation sequence includes the codes `_CI_AS` (for example, `SQL_Latin1_General_CP1_CI_AS`), you may proceed with the installation.



Tip: Other suffixes like `_KS` or `_WS` are optional.

If the server's default collation does not include `_CI_AS`, you can set the collation sequence for each database, as you create it, by right-clicking the new database, selecting **Properties** from the context menu, and choosing the collation on the **Options** tab. Remember that the collation sequence must be *identical* for:

- The compliance database (suggested name: FNMSCompliance)
- The reporting snapshot database (suggested: FNMSSnapshot)
- The data warehouse database (suggested: FNMSDataWarehouse).

For example, if the first of these has the collation sequence called `SQL_Latin1_General_CP1_CI_AS`, then all of them must have the exact same collation sequence. In contrast, the inventory database, when separate (suggested: FNMSInventory), and the Cognos content store may have different collation sequences, provided that these also include the same `_CI_AS` codes. The `tempdb` database (alone) may have any collation sequence, since FlexNet Manager Suite creates the required tables here with the appropriate collation sequence.

6. Use SQL Server Management Studio to ensure that the database **Recovery model** is set to `Simple` (first recording its current value before changing it if necessary).
 - a. In SQL Server Management Studio, right-click the database, and select **Properties** from the context menu.
 - b. Select the **Options** tab.
 - c. Check that **Recovery model** is set to `Simple` (or note its current value, change it to `Simple`, and click **OK**).

Especially for large databases, this prevents the transaction log from growing to excessive proportions. Because of this growth, for databases of all sizes, the migration process will truncate the transaction log at the end of the process, and this truncation relies on the simple **Recovery model**. If the model is not currently `Simple`, note the existing value — there is a reminder below to restore this value after a successful database migration.

7. Ensure that you have sufficient disk space on the database server for a complete second copy of your database during migration.



Tip: When considering disk space, keep in mind that FlexNet Manager Suite 2018 R1 requires the following mandatory databases, at least two of which are new since your 9.2 implementation:

- Its own inventory database, suggested name `FNMSInventory`
- `FNMSSnapshot`, used for performance improvement particularly relating to reports

- *FNMSDataWarehouse* (this may have been present in the 9.2 implementation, where it was an option; but in 2018 R1 it is a requirement).

If space seems tight, before starting migration you can use Microsoft SQL Server Management Studio to allow for additional data files on a different drive (for details, see <https://msdn.microsoft.com/en-us/library/ms189253.aspx>). If this is done and the primary drive runs out of space during the upgrade, Microsoft SQL Server automatically uses space on the second drive to complete the process.

8. If you have not already done so, login to the central application server with a privileged account (suggestion: db-admin) that has the privileges described in [Identify \(or Set Up\) Accounts](#).
9. If you cannot access your downloaded and unzipped archives from your current login on this application server, copy Database Migration to FNMS 2018 R1.zip to this server and unzip it to a convenient location, such as C:\temp\FNMSUpgrade.
10. Create the database for FlexNet native inventory collection.

 **Remember:** If you plan to collect both inventory data and compliance data in a single database, use the same `-d FNMSCompliance` name parameter for this and the compliance databases; or for a separate inventory database (recommended), use a different name as shown below.

 **Tip:** To avoid typos, you may want to copy all five of the following command lines into your ASCII text editor, globally search for and replace the placeholders `DBserver-name\instance name` with the name of your SQL Server and your database instance (where that is not the default instance), and then copy/paste each modified command line when required.

 **Important:** Be very careful with copy and paste. Some tools "helpfully" convert a pasted minus (dash, or hyphen) character to something else, perhaps from an extended character set. Such substitutions will cause the command line to fail.

- a. On the database server (or the application server for a single-server implementation), open a command prompt.

 **Tip:** If your console window is in **QuickEdit** mode (visible in the **Properties** for the window), simply clicking in the window when it already has focus puts it into Mark or Select mode. In such a mode, a process that is writing to the window is paused, awaiting your input. Beware of unintentionally pausing database migration by extra clicking in this command prompt. A process that has been paused in this way is resumed when the window already has focus and you press any key.

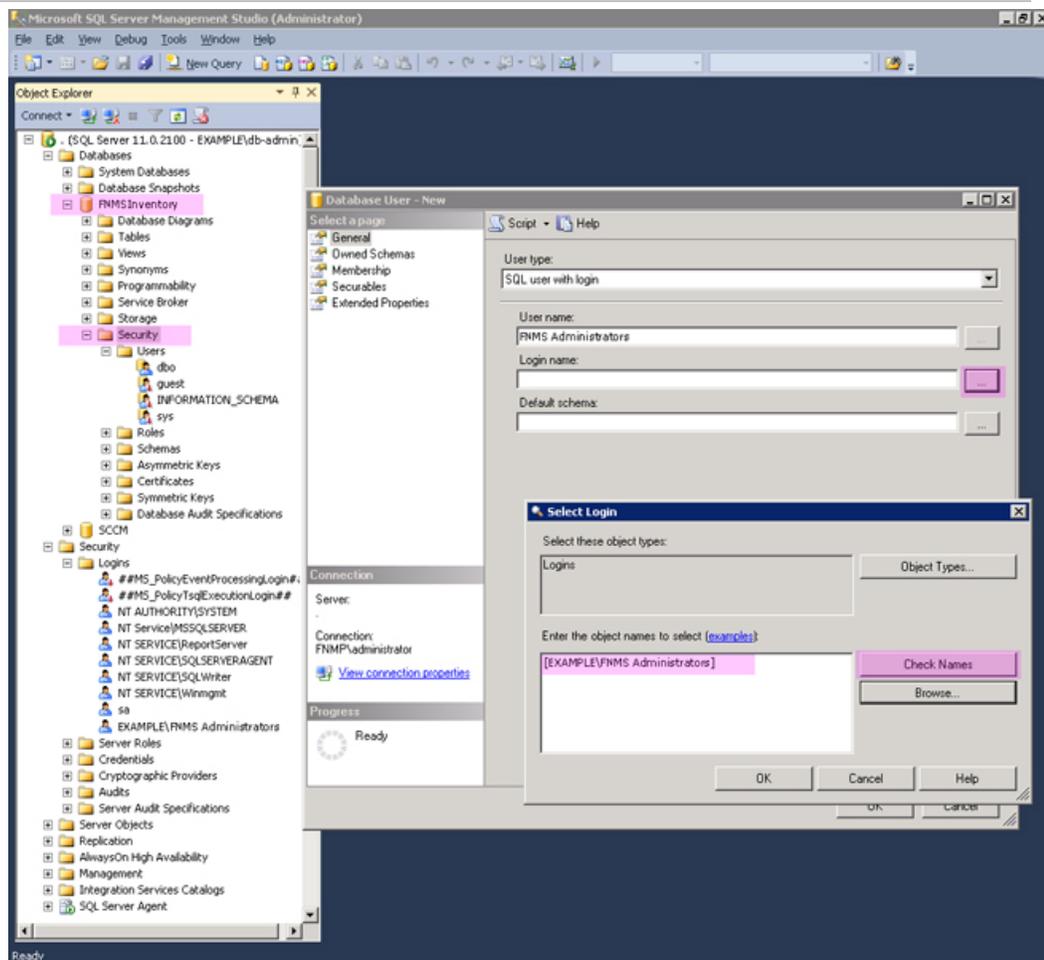
- b. Navigate in the unzipped archive to the FlexNet Manager Suite\Database\Normal\FlexNet Manager Platform folder. (The database creation scripts can be run from a mapped network drive.)
- c. Execute the following (replacing the placeholders `DBserver-name\instance name` with the name of your SQL Server and your database instance):

 **Note:** The command-line switches (as usual), and the `WindowsNT` argument, are case sensitive.

```
mgsDatabaseCreate -a WindowsNT -s DBserver-name\instance name -d
FNMSInventory -i InventoryManagerDatabaseCreation.xml
```

Wait for completion before proceeding.

- d. Open this database in Microsoft SQL Server Management Studio, expose the Security > Users node, right-click and choose to create a new user.
- e. In the **Database User - New** dialog, set the **User type** to SQL user with login, and enter a **User name** (for example, call it FNMS Administrators as well).
- f. Next to the **Login name** field, click the ellipsis (...) button, and use the **Select Login** dialog to select your Active Directory security group (suggested: FNMS Administrators). Click **OK** to close both dialogs.



- g. For your newly-added user, right-click and select the properties, and select the Membership page. Check the db_owner role, and click **OK**.
- h. Strongly recommended for SQL Server 2016 SP1 or later: Set the compatibility level on this database to SQL Server 2012 (110) or SQL Server 2014 (120).

11. In the Command Prompt window, navigate to your working copy of the migration folder (such as C:\Temp\FNMSUpdate\Database Migration\FlexNet Manager Platform\Normal).

This folder contains the `mgsDatabaseUpdate.exe` program that you now use to create your new compliance database (suggested name: FNMSCompliance) by migrating from the old database.

12. Run the `mgsDatabaseUpdate.exe` program, using the following syntax:

```
mgsDatabaseUpdate.exe -i ComplianceMigration.xml -nsu -l <LogFile>
[-s <serverName>[\<instanceName>]] [-d <databaseName>] [-u <userName>] [-p
<password>]
```

where:

`-d <databaseName>` The name of the database to connect to. A suggested name is FNMSCompliance.



Note: If you are currently operating from a new application server that has not previously connected to the database server, this parameter is mandatory. If you are upgrading an existing application server that has separately run your compliance product (not in co-location with Inventory Manager), the registry entry listed below for the `-s` option is normally set. In this case, if you omit the `-d` option, the database name is taken from the registry key.

<code>-i ComplianceMigration.xml</code>	This is the configuration file describing the migration tasks, and is of course mandatory.
<code>-l <LogFile></code>	Identifies the path and name of the file to receive a log of the migration tasks that occurred. If this option is not specified, a log file called <code>ComplianceMigration.log</code> is created in the same folder where the executable is running.
<code>-nsu</code>	Run the database update without putting the database into single user mode. (The steps to perform migration require that multiple connections are made.)
<code>-p <password></code>	The password for the username specified with <code>-u</code> . This is only required if the database server is configured to use SQL Server authentication.

<p>-s <serverName> or -s <serverName>\<instanceName></p>	<p>The name of the database server to connect to. If -s is not specified, the value at HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\ManageSoft Corp\ManageSoft \Reporter\CurrentVersion\DatabaseConnectionString is used. The registry key is present on the compliance and inventory servers. (If you have chosen to run this script on the database server itself, the registry entry is not available, and you must therefore specify the server name, or use the dot notation [.] to refer to the current server.)</p> <p>If the database is in a named instance (and not in the default database on the server), the instance name must be specified as well.</p>
<p>-u <userName></p>	<p>The username with which to connect to the database. This is only required if the database server is configured to use SQL Server authentication. If not specified, Windows Integrated Authentication is used to connect to the database server using the current user's credentials.</p>



Tip: It is normal for the migration to appear to "pause" at about the 80% mark. At this point the database is busy restructuring for local evidence for applications, and it requires time.

Example: The following command performs the migration using the standard configuration file. Instead of recording the log in the default log file, it will be written to the mig.log file specified in the command. Because the upgrade is running on a new server, the database server name (and, if required, instance name) and database name must be specified, and Windows Authentication is used to log in as the account name running the executable.

```
mgsDatabaseUpdate.exe -i ComplianceMigration.xml -nsu -l mig.log -s MyDBServer\  
thisInstance -d FNMSCompliance
```

Check messages on the command line to confirm that the database migration was successful. If any error messages occur, check the log file to troubleshoot the problem. Do not proceed to the next step until the database migration is successful. For more information about database validation and remedies, see [Database Validation](#).



Tip: If, after migration is complete, the database size still seems much larger than before, ask your database administrator to check whether there is a significant amount of unused space in the database files (using Microsoft SQL Server Management Studio). If so, a database shrink operation can reclaim this unused space.

- If you are processing a copy of a previously-shared database that you split, open your newly-migrated compliance database in Microsoft SQL Server Management Studio, and complete the following steps.



Warning: Do NOT start this until *after* you have completed the database migration described in the previous step. If you run this prematurely, your migration will fail (because expected database elements are missing after these clean-up steps). Migrate first (step 12), and only *after* that, clean up the result.

- Grant db_owner privileges to the security group (suggested: FNMS Administrators).

b. Choose **File > Open**, navigate in the database migration folder in your downloaded archive (such as C:\Temp\FNMSUpdate\Database Migration\FlexNet Manager Platform\Normal), and open FNMP92SchemaCleanup.sql.

c. Execute this SQL script on the FNMSCompliance database.

This script removes tables, views, and functions that are related only to Inventory Manager, and not needed for the upgrade of this database to FlexNet Manager Suite 2018 R1.

d. If you previously changed the setting for the database **Recovery model**, restore the original value now.

14. Strongly recommended for SQL Server 2016 SP1 or later: Set the compatibility level on this database to SQL Server 2012 (110) or SQL Server 2014 (120).

15. Optionally, re-index the compliance database.

For details, see [Re-Indexing a Database](#).



Note: Up until (and including) release 9.2 of FlexNet Manager Platform, it was an option to have the data warehouse database for trend-based reporting (reports built in Flexera Analytics, powered by Cognos). While Cognos remains optional, the data warehouse database is now mandatory, and is used by new reporting functionality within FlexNet Manager Suite 2018 R1.

16. Do one of the following:

- If your prior implementation included the data warehouse database (you copied it to the planned SQL Server in [Splitting a Shared Database](#)), migrate it now on its new SQL Server instance (running the mgsDatabaseUpdate.exe program again with different parameters):

```
mgsDatabaseUpdate.exe -i DataWarehouseMigration.xml -nsu -d FNMSDataWarehouse
                        [-l logFile]
                        [-s serverName\instanceName]
                        [-u userName]
                        [-p password]
```



Important: In this instance, the database name (-d parameter) is mandatory. (The suggested value is shown, which you should customize if your database name is different.)

Check messages on the command line to confirm that the warehouse migration was successful. If any error messages occur, check the log file to troubleshoot the problem. Do not proceed to the next step until the migration is successful. For more information about database validation and remedies, see [Database Validation](#).

- If your prior implementation did *not* include the data warehouse database, it is now mandatory, whether or not you are using Cognos at this time. In the same archive folder, execute:

```
mgsDatabaseCreate -a WindowsNT -s DBserver-name\instanceName -d
FNMSDataWarehouse -i DataWarehouseCreation.xml
```

17. Open the data warehouse database in Microsoft SQL Server Management Studio, and grant db_owner privileges to the security group (suggested: FNMS Administrators).
18. Strongly recommended for SQL Server 2016 SP1 or later: Set the compatibility level on this database to SQL Server 2012 (110) or SQL Server 2014 (120).
19. Create a snapshot database (used for performance optimization):
 - a. In the same archive folder, execute:


```
mgsDatabaseCreate -a WindowsNT -s DBserver-name\instance name -d
FNMSSnapshot -i SnapshotDatabaseCreation.xml
```
 - b. Open this database in Microsoft SQL Server Management Studio, and grant db_owner privileges to the security group (suggested: FNMS Administrators).
 - c. Strongly recommended for SQL Server 2016 SP1 or later: Set the compatibility level on this database to SQL Server 2012 (110) or SQL Server 2014 (120).
20. If you began this process by stopping your Cognos server, you may restart it now.

For more information about database validation and remedies, see [Database Validation](#).

Re-Indexing a Database

When updating the databases used by FlexNet Manager Suite, consider whether this is also the time to re-index the databases. Take into account the following factors:

- Re-indexing increases data access speed and recovers wasted disk space.



Tip: *It is a good idea to re-index your database at least once a year. In SQL Server, tables that do not have clustered indexes do not automatically reclaim space from deleted records. Re-indexing will reclaim this space.*

- Re-indexing is especially important if you have a lot of records in history tables. For example, in the inventory database, check the Installation and InstallationHistory tables.
- Re-indexing is very demanding for SQL Server. You should only ever attempt a re-indexing of one database at a time. It is also good practice to schedule this out of production times, such as overnight or on a weekend.
- On large databases, **this process can take more than 24 hours.**

There is no requirement that you *must* re-index at this time: you may prefer to complete the current processes and schedule re-indexing at appropriate times soon. However, your current process is an excellent trigger for planning a regular schedule for re-indexing, say one or twice a year.

FlexNet Manager Suite provides a re-indexing script that can be applied to the following databases:

- The compliance database (suggested name: FNMSCompliance)
- The inventory database (suggested name: FNMSInventory)

- The data warehouse database (suggested name: FNMSDataWarehouse).

(There is little benefit in re-indexing the snapshot database (suggested name: FNMSSnapshot), as this is effectively cleaned up each time a snapshot is saved.)



Important: Do **not** apply the script to the Report Writer Content Store. This is a database designed by Cognos and not aligned with the reindexing script from Flexera.



To re-index one of the FlexNet Manager Suite operations databases (optional):

1. Start SQL Server Management Studio.
2. Open the appropriate copy of ReIndexAll.sql (**File > Open...** and browse to the appropriate file listed below).
 - For the inventory database, look in Database Migration\Inventory Manager
 - For the compliance database, look in C:\temp\FNMSUpate\Database Migration\FlexNet Manager Platform\Normal.
3. Click the **Execute Query** tool, or press F5 to run the script.

Keep in mind that the re-indexing may take a considerable time, depending on the size of your database.

Database Validation

Database migration includes a number of checks on the quality of the resulting database.

The first of these is a check of database constraints that may have been either enabled or disabled without data checks. If constraint errors are detected, the migration process corrects them. Where a constraint is enabled, the process also attempts to ensure that the data it covers is appropriate for the constraint. Generally, this succeeds without issue, and the change is simply noted in the migration log. However, if it fails, the migration process also fails with an error similar to:

```
ERROR: One or more constraints cannot be enabled (step number 99).
```

If this occurs, the names of the constraints that cannot be enabled are listed in the migration log. Restarting the migration at this time does not help this issue, and the database is unusable for production work. First, a database administrator or a Flexera support engineer must manually correct the issue with the underlying data. Once the data has been corrected, the migration process will be able to be restarted safely.

At the end of the migration process, there is a final schema check of the upgraded database to ensure that the upgrade has been successful. Messages from this database check may appear in your console towards the end of the process, after the migration itself is completed.

This check is included for the three main system databases: the compliance database, the inventory database, and the data warehouse database.

When these checks are run, the upgrade has already been completed without errors, and the database is likely to be usable. These are additional checks to look for irregularities in the database that may cause future operational problems. These kinds of irregularities may occur because:

- The earlier database had previously been changed (either by database administrators or by a Flexera consultant) in ways that are not supported by the product
- A previous migration updated the database in ways that were not entirely correct, but not previously detected
- Something has occurred in the present migration that did not raise an error in the migration, but leaves the database in a less than perfect condition.

Such causes can produce a range of possible issues, including:

- Missing tables, indexes, columns, or foreign keys
- Extra indexes, columns or foreign keys
- Incorrectly configured columns (the size differs, or their nullability)
- An index configured in unexpected ways, either in its uniqueness, its clustering status, or in the columns it covers.

For the above cases, assistance from a database administrator or Flexera support engineer is also required to correct the schema. In many cases, the issues described in the log can be remedied in place, without requiring that the database migration process is restarted.

Authorize the Service Account

The account used to run processing services requires permission to run as a service. Prior to installing anything, perform this process on:

- Your batch server/reconciliation server (in a large-scale implementation with three servers)
- Your processing server (in a two server application implementation)
- Your application server (in a single server implementation).



To authorize the service account:

1. On the appropriate server, log in as an administrator (suggested: fnms-admin).
2. Go to:
 - On Windows Server 2012, **Start > Administrative Tools > Local Security Policy**
 - On earlier releases of Windows Server, **Start > All Programs > Administrative Tools > Local Security Policy**.
3. Select the **Local Policies** node, and choose **User Rights Assignment**.
4. Open the policy Log on as a service, and add the service account (example: svc-flexnet).
5. Open the policy Log on as a batch job, and add the service account (example: svc-flexnet).
6. Click **OK**.



Tip: A Microsoft error dialog *Security Templates - An extended error has occurred. Failed to save Local Policy Database.* may appear. This error is described at <http://support.microsoft.com/kb/2411938>, and may safely be ignored.

Install the Web Interface

The web interface provides the user interface to manage your inventory and license position. Continue this process as administrator (fnms-admin) on either your

- application server (for a single server installation) or
- web application server (in a multi-server installation).



Note: Are you installing on the same server that was previously a separate administration server for FlexNet Manager Platform 9.2 (or an earlier compliance product), where Inventory Manager was not co-located on the same server? If so, you should now uninstall the previous version of the product so that you remove the MMC interface, deprecated from version 2014 R2. To do so:

1. On the application server, open **Program and Features (Control Panel > Uninstall a Program)**.
2. Uninstall FlexNet Manager Platform (or your earlier compliance product, such as Compliance Manager), and then close **Program and Features**.
3. Open Windows Task Scheduler and delete the scheduled task called *Execute business importer connections*.



Tip: The web interface transfers high volumes of HTML data, which may have noticeable performance impacts for operators with slow links (such as across a WAN) between their web browsers and the web application server. To maximize performance, the `web.config` file installed on this web application server turns on both static and dynamic content compression, with a setting of this form:

```
<urlCompression doStaticCompression="true" doDynamicCompression="true" />
```

These settings turn on compression settings for IIS, where these are available on the web application server:

- Static compression is installed by default for IIS.
- Dynamic compression requires a standard Microsoft installation to enable it. (Without this setup, the dynamic compression setting in the `web.config` file remains latent, having no possible effect.)

If you have operators on slow (WAN) links, check whether dynamic compression is already available on your web application server by examining the **Server Manager**, using the **Add Roles and Features** wizard. If it is not yet configured, see <https://docs.microsoft.com/en-us/iis/configuration/system.webServer/urlCompression#setup> for installation details.



To install the web interface for FlexNet Manager Suite:

1. On the (web) application server, open Windows Explorer.
2. Copy the downloaded archive `FlexNet Manager Suite 2018 R1 Installer.zip` from your staging location to a convenient location on this server (such as `C:\temp`), and unzip it.

 **Tip:** Unzipping the archive locally on each of your servers simplifies running the configuration scripts later in the process. After running the installers, PowerShell scripts need to be Run as Administrator. Notice that the entire archive must be present, as scripts reference other elements from the archive.

3. Navigate in the unzipped archive to the FlexNet Manager Suite\Installers\FlexNet Manager Suite folder.
4. Start (double-click) setup.exe.

 **Tip:** You must start the installation by running setup.exe, rather than running the MSI by any other means. The setup file also installs Visual C++ 2010 Redistributable (if it is not already present), which is a prerequisite for integration with FlexNet Manager for SAP Applications.

5. Step through the installer until asked for the **Setup Type**, and do one of the following:
 - For a small, single server installation combining the web application, the inventory collection, and the batch processing functionality in one server, select the **Complete** option, and follow the instructions in the installation wizard to complete the standard installation.

 **Tip:** In the page where you are asked for the batch process credentials, for **Server type**, choose either **Production** for your main server installation, or **Failover** if this is a stand-by or testing server. On your **Production** server, the batch scheduler and batch processor are automatically started as part of the installation process, while on a **Failover** server, both are disabled by default. If you need to switch between your production and stand-by servers, you must manually:

- Disable the batch scheduler and processor on the product batch server
- Enable the batch scheduler and processor on the standby batch server.

These adjustments are made in the **Microsoft Services** control panel.

- For a multi-server installation, select the **Custom** installation path, and select the **Web application server** for this installation. (If this is the *only* functionality on this server, also ensure that **Inventory server**, **Batch scheduling server**, and **Batch server** are all deselected; but in fact you can combine most servers in the way that best suits your enterprise, so make the selection that matches your server plan.)

Take note of the installation location for future reference.

6. If this is a separate installation of the web application server in a multi-server implementation, ensure that from this server you can access the network shares that you configured in [Configure Network Shares for Multi-Server](#).
7. If this server includes the batch server functionality, you are prompted for the credentials used for batch processes. Be sure that the account you enter already has Logon as a service permission (see [Authorize the Service Account](#)).
8. When successful, close the installation wizard.

Install the Inventory Server

The inventory server processes all inventory collected (or augmented) by the FlexNet inventory agent.

In a single server implementation, this step is already completed and you should skip ahead to [Configure the System](#).

For a multi-server implementation, continue this process as administrator (fnms-admin) on either your

- processing server (in a two server application installation)
- inventory server (in a three or more server application installation).



To install the inventory server software:

1. On the inventory (or processing) server, open Windows Explorer.
2. Copy the downloaded archive FlexNet Manager Suite 2018 R1 Installer.zip from your staging location to a convenient location on this server (such as C:\temp), and unzip it.
3. Navigate in the unzipped archive to the FlexNet Manager Suite\Installers\FlexNet Manager Suite folder.
4. Start (double-click) setup.exe.



Tip: You must start the installation by running setup.exe, rather than running the MSI by any other means. The setup file also installs Visual C++ 2010 Redistributable (if it is not already present), which is a prerequisite for integration with FlexNet Manager for SAP Applications.

5. Select the **Custom** installation path, and do one of the following:
 - For a two server installation, now installing your processing server, select all of the **Inventory server** and the **Batch scheduling server** for this installation, and ensure that the **Web application server** is deselected (displaying a cross).
 - For an installation using three or more servers, now separately installing your inventory server, select only the **Inventory server** for this installation, ensuring that the other options are deselected.

Take note of the installation location for future reference.

6. If this server includes the batch server functionality, you are prompted for the credentials used for batch processes. Be sure that the account you enter already has Logon as a service permission (see [Authorize the Service Account](#)).
7. When successful, close the installation wizard.

Install the Batch Server

The batch server is the integration point that correlates all your entitlement records and your consumption revealed in inventory to work out your reconciled license position.

You do *not* need this process if you have either of:

- A single-server implementation combining the web application server, the batch server, and the inventory server in one; or

- A two-server application implementation where you have combined the batch server and inventory server functionality on one computer and kept the web application server as a second server.

In these two cases, this step is already completed and you should skip ahead to [Installing a Free-Standing Studio](#).

For a three server implementation, continue this process as administrator (fnms-admin) on your batch server.



Tip: Currently MSMQ limits the hostname of the batch server to 15 characters (excluding the domain qualifier).



To install the batch server:

1. On the batch server, open Windows Explorer.
2. Copy the downloaded archive FlexNet Manager Suite 2018 R1 Installer.zip from your staging location to a convenient location on this server (such as C:\temp), and unzip it.
3. Navigate in the unzipped archive to the FlexNet Manager Suite\Installers\FlexNet Manager Suite folder.
4. Start (double-click) setup.exe.



Tip: You must start the installation by running setup.exe, rather than running the MSI by any other means. The setup file also installs Visual C++ 2010 Redistributable (if it is not already present), which is a prerequisite for integration with FlexNet Manager for SAP Applications.

5. Select the **Custom** installation path, and select only the **Batch scheduling server** for this installation (ensuring that the other options are deselected).

Take note of the installation location for future reference.

6. When asked to enter the credentials to be used for running batch processes, be sure that the account you enter already has Logon as a service permission (see [Authorize the Service Account](#)).
7. On the same page of the wizard, for **Server type**, choose either **Production** for your main server installation, or **Failover** if this is a stand-by or testing server.



Tip: On your **Production** server, the batch scheduler and batch processor are automatically started as part of the installation process, while on a **Failover** server, both are disabled by default. If you need to switch between your production and stand-by servers, you must manually:

- Disable the batch scheduler and processor on the product batch server
- Enable the batch scheduler and processor on the standby batch server.

These adjustments are made in the **Microsoft Services** control panel.

8. For the batch processor, you are asked to identify the folder where intermediate packages (uploaded from inventory beacons) are saved prior to processing. The default location is %ProgramData%\Flexera Software\Beacon\IntermediateData. This default is formed by appending IntermediateData to the value of the base directory saved in HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\ManageSoft Corp\ManageSoft\Beacon\CurrentVersion\BaseDirectory. This base location is also used by other processes, and should be changed only with care.



Tip: A second folder, a network share, is used for handing off files uploaded through the web interface (such as inventory spreadsheet imports) for processing by the batch server. For this share, the default path is %ProgramData%\FlexNet Manager Platform\DataImport, and the path is saved in the registry at HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\ManageSoft Corp\ManageSoft\Compliance\CurrentVersion\DataImportDirectory. There is also a parallel folder for data export. For implementations that separate the web application server from the batch server, these shares must also be configured and accessible from both servers. For more information, see [Configure Network Shares for Multi-Server](#).

9. When successful, close the installation wizard.

Installing a Free-Standing Studio

You can install additional copies of the Business Adapter Studio.

There are two kinds of Studio. Adapters can be created or modified using either the Inventory Adapter Studio or Business Adapter Studio (each for its appropriate type of adapter). Each time that you install an inventory beacon, copies of each of the Business Adapter Studio and the Inventory Adapter Studio are installed ready for use on the inventory beacon. These versions are configured exclusively for disconnected mode, where they cannot directly access your central database.

However, sometimes you want to work in connected mode, with direct access to your central database (for example, to write data into staging tables and manipulate it). For these cases:

- The Inventory Adapter Studio is also available on the web application server (or, in smaller implementations, the server providing that function). This works in connected mode.
- You can co-install an inventory beacon on your web application server. As always, this also installs the Business Adapter Studio, giving it (and adapters built there) additional privileges to access your central database in connected mode.

In addition, it is also possible to install a free-standing copy of the Business Adapter Studio (only) on your central application server. (If you have scaled up to several central servers, such as installation can be on whichever server suits you. The default location is indicated below.) Business adapters installed directly on your central server(s) operate in connected mode, with full access to your central database. Obviously, attempt this only if you are very confident and well informed about details of the database schema.



Tip: It is not possible to install additional free-standing copies of the Inventory Adapter Studio.

Start this procedure using a web browser on the server where you will install the Business Adapter Studio, or a computer that provides easy and fast network access from your central server.



To download and install an additional instance of the Business Adapter Studio:

1. Use your browser to access the Flexera Customer Community.
 - a. On <https://flexeracommunity.force.com/customer/CCLanding>, use the account details emailed to you with your order confirmation from Flexera to log in (using the **Login** link in the top right).



Tip: Access requires your Customer Community user name and password. If you do not have one, use the Request Community Access link on the login page to request one. Your credentials are configured for access to content you have licensed.

- b.** Select the **Downloads** tab from the row across the top of the page.

A routing page appears to let you Access Product and License Center, displaying lists of products from Flexera.

- c.** In the lists of products, identify FlexNet Manager Platform, and click the **Access Above Products** button that is *below* that product name.

The Product and License Center site is displayed.

- d.** In the Your Downloads section of the Home page, click the link for [FlexNet Manager Platform](#).

- e.** In the Download Packages page, click the link for [FlexNet Manager Platform 2018 R1](#) to access the downloads. (You may need to repeat this action on a second page to access the downloadable files.)

- 2.** In the list of components to download, select Business Adapter Studio *releaseNumber.zip*, and download and save it to a convenient location (such as C:\Temp).

- 3.** In Windows Explorer, navigate to the downloaded archive, right-click, and choose **Extract All**.

- 4.** Navigate into the unzipped archive, and double-click *setup.exe*, following the instructions in the installation wizard.

The Business Adapter Studio may be installed on any of your central servers (in a multi-server implementation). The installer assesses the installation paths, and installs itself in the installation folder of FlexNet Manager Suite. The defaults are as follows:

- The Business Adapter Studio executable: *BusinessImporterUI.exe*
- Default installation path (in connected mode on central server): *C:\Program Files (x86)\Flexera Software\FNMP Business Adapter Studio*
- No template file storage is required for the Business Adapter Studio in connected mode, as it validates the database schema directly. Your custom business adapters may be saved in the folder(s) of your choice.

When you have completed the remainder of your product installation, the Business Adapter Studio can be run from the Windows start menu on this server; and the Business Importer, which is also installed automatically with the Business Adapter Studio, is also available for execution on the command line. For details about the Business Adapter Studio, see online help or the *FlexNet Manager Suite System Reference* PDF file; and for details about the Business Importer, see the *Using the FlexNet Business Importer* PDF file. Both PDF files are available through the title page of the online help.

Install Flexera Analytics

Flexera Analytics provides interactive reporting for software and hardware asset management.



Important: FlexNet Manager Suite 2018 R1 requires installation of Flexera Analytics, for which the underlying version of IBM Cognos is 11.0.6. Earlier releases of Cognos are not compatible. Depending on the version of

FlexNet Manager Suite you are upgrading from, you may require an updated license for FlexNet Manager Suite that includes new terms for Flexera Analytics (for license installation, see [Product Activation](#)).

See the *FlexNet Manager Suite 2018 R1 Release Notes* for supported platforms and database versions.

Flexera Analytics has the following components:

- **Analytics** — Flexera Analytics is an interactive means for you to explore and create customized reports and dashboards and easily share with anyone in your organization.
- **Content Store Database** — The Content Store is a relational database used by the Flexera Analytics to store information about reporting models, folders, reports, and saved results. You should have already completed setting up this database (see [Create Databases](#)).

The Flexera Analytics installer installs Flexera Analytics to the designated host as a service. Therefore, the account used to install this component must have administrator permissions.

Make sure of the following points:

- The installing account must have administrative privileges on the Cognos server (the server hosting Flexera Analytics).
- The Cognos server must be accessible by its host name, rather than just its IP address. Do not use IP addresses anywhere in the Flexera Analytics settings.
- For performance reasons Flexera Analytics is best installed on a separate server (it has high memory use requirements). (Refer back to [Prerequisites and Preparations](#) for server design details.) When Flexera Analytics is installed on a server other than the database server running the content store database, Microsoft SQL Server Native Client must be installed on the server hosting Flexera Analytics. To download and install the Microsoft SQL Server Native Client installer (subject to changes in the Microsoft website):
 1. In your web browser, navigate to <https://www.microsoft.com/en-us/download/details.aspx?id=29065>.
 2. Expand **Install Instructions** to display the available components of the Microsoft SQL Server® 2012 Feature Pack.
 3. Scroll a long way down the page to the heading **Microsoft® SQL Server® 2012 Native Client** and install the relevant package found there.
- The Cognos server must be in the same time zone as your database server(s).
- When you install Flexera Analytics, the required usernames and passwords can be encrypted, using a credential store. Refer to [Prepare Encrypted Credentials](#) for further information. Alternatively you may choose to use clear text usernames and passwords in the answer file.
- The password for the SQL Server login account used by Flexera Analytics must not contain any of the greater-than, less-than, or ampersand characters (< > &).
- Do not attempt to use Flexera Analytics (nor any related reports saved in FlexNet Manager Suite) before importing the correct license file from Flexera (see [Product Activation](#)).



Important: Do not allow consultants to use their 'normal' login when they develop reports on your behalf. A common user account should not be switched from one Cognos tenant to another. Otherwise, any reports saved under **My Folders** for that account are automatically removed by Cognos as the user account switches between

tenants (or customers). For details, see . For safety, ensure that each consultant uses a login that is unique to your company (such as *johnEnterprise*); or as a workaround, save their developed reports under **Public Folder**.

Before you start, decide whether you want the benefit of content compression for your Cognos server. By default, the `web.config` file installed on this web application server turns on both static and dynamic content compression, with a setting of this form:

```
<urlCompression doStaticCompression="true" doDynamicCompression="true" />
```

Static compression is installed by default for IIS, but dynamic compression requires a standard Microsoft installation to enable it. (Without this setup, the dynamic compression setting in the `web.config` file remains latent.) You can check whether dynamic compression is available in the **Server Manager**, using the **Add Roles and Features** wizard. If it is not yet configured, see for installation details.

To install Flexera Analytics:

1. Install, configure, and test a supported web server.
 - Refer to the *FlexNet Manager Suite 2018 R1 Release Notes* for a list of supported web servers. Refer to the installation, configuration, and testing documentation provided by the web-server vendor.
 - If you choose to use Microsoft IIS as your web server, the installer for Flexera Analytics includes a PowerShell script to apply appropriate configuration. (You need access to the downloaded unzipped archive of the FlexNet Manager Suite installer to access this PowerShell script.)
2. If you are installing FlexNet Manager Suite and Flexera Analytics on separate servers, first copy the `<FNMS Media>\FlexNet Manager Suite\Support` directory from the **application server** to `C:\FNMSCognosAnalytics` on the Flexera Analytics server. If you are performing a single server installation, then the Support folder should already be located on the **application server**.
3. From the support folder, copy the file `ca_srv_win64_11.0.6.17031315.exe` to your Flexera Analytics server.
4. Double-click on this executable file to launch it, and work through the installation wizard panels as described in the following table.



Tip: The executable automatically installs 32-bit software on 32-bit systems, and 64-bit software on 64-bit operating systems.

Panel	Details
Splash screen	Select Installation language , then click Next
Product Install	Select the IBM Cognos Analytics radio button option, then click Next .
License Agreement	<ul style="list-style-type: none"> • If you agree to be bound by its terms, select the I accept the terms of the license agreement check box. • If you do not accept the terms of the license, you must stop the installation process. Do not proceed further in this case.

Panel	Details
Location	<p>Specify the installation folder for the Flexera Analytics. You can enter a path manually in the Installation Folder field, or browse for a location using the Choose... button. If you make a mistake and wish to return the initial folder suggested by the installer, click the Restore Default Folder button.</p> <p>Once an installation folder has been specified, click Next. If the folder does not exist a popup dialog will appear asking if you want to create it during the installation.</p> <p>Click Yes to process or No to specify a different installation location.</p> <hr/> <p> Note: Spaces in the installation path are acceptable in the command line; but if you are scripting the installation, be sure to enclose the entire path-with-spaces in double quotation marks.</p>
Install type	<p>Select the Custom radio button, and click Next.</p> <hr/> <p> Note: The Custom option is required so that the Gateway component is installed.</p>
Custom install	<p>Select First install, and the click Next.</p>
Choose components	<p>Select the Application services and Optional gateway options.</p>
Credentials	<p>Create a Cognos administrator account, and keep a record of the user ID and password that you create.</p> <hr/> <p> Note: The password must contain a minimum of 1 uppercase character, 1 lowercase character, 1 digit, 1 special character among !@#\$ and the length is between 8 and 20 characters.</p>
Pre-installation summary	<p>Review the choices you made, and click Previous to move back through the wizard and make any amendments. Once all seems correct, click Install to begin the installation process.</p> <p>A progress bar illustrates the status of the installation. Once the installation is complete, click Done to close the wizard.</p>

- Using Notepad (or an equivalent text editor), open the file C:\FNMS2017R3CognosAnalytics\Support\CognosConfigProperties.xml and fill out the values for the parameters listed in the following table, using the guidance from the description and examples provided.

Property/Example	Description
<p>CredentialStoreLocation C:\user\customstore.xml</p>	<p>A custom credential store location.</p> <p>If this parameter is omitted, the value defaults to fnms.password.store.xml under the logged in user profile directory.</p>
<p>FNMSBatchServerLocation http://BatchServer1.company.com</p>	<p>The URL of the FlexNet Manager Suite batch server.</p>
<p>ContentStoreDatabaseLocation DBServer1\Instance1</p>	<p>When using TCP, the format for this value is hostname:port. Alternatively, the hostname\instancename format (without a port) can be used. Cognos does not allow the instance name to be Default or MSSQLServer. The SQL Server Browser service needs to be started if using the instance name format.</p>
<p>ContentStoreDatabaseName ContentStore</p>	
<p>ContentStoreDatabaseUsername Typically empty</p>	<p>Optional setting when providing credentials for SQL Server authentication. Leave this value blank to use Windows Authentication.</p> <p> Note: If you have restored a backup of your existing content store to use with a new version of Flexera Analytics, ensure that this user has the following permissions on the database:</p> <ul style="list-style-type: none"> • Create and Drop table privileges. • Member of the db_ddladmin, db_datareader, and db_datawriter roles. • Must be the owner of the default schema on this database. <p> Tip: This schema usually is named FlexNetReportDesignerSchema.</p>
<p>ContentStoreDatabasePassword Typically empty</p>	<p>Optional setting when providing credentials for SQL Server authentication. Leave this value blank to use Windows Authentication.</p>

Property/Example	Description
<p>ContentStoreDatabaseStoreReference flexera://storeUser</p>	<p>The credential store reference for ContentStore database user identity.</p> <p>If the ContentStoreDatabaseStoreReference property is specified then the ContentStoreUserName and ContentStorePassword properties are not required in the answer file, any value provided for these fields is overridden.</p>
<p>CognosInstallationPath C:\Program Files\ibm\cognos\analytics</p>	<p>Cognos installation directory. Update this path to change the default installation path.</p>
<p>CognosServerURI http://\$(ServerName):80</p>	<p> Note: The \$(ServerName) text should not be altered. It will be translated to the host name by the installation code.</p>
<p>CognosServerDispatcherURI http://\$(ServerName):9300</p>	<p> Note: The \$(ServerName) text should not be altered. It will be translated to the host name by the installation code.</p>
<p>AppPoolUserName Company\svc-fnms</p>	<p>The service user, used by IIS.</p>
<p>AppPoolPassword (clear text)</p>	<p>A clear text password.</p>
<p>AppPoolStoreReference flexera://serviceUser</p>	<p>The credential store reference for App Pool user identity.</p> <p>If AppPoolStoreReference property is specified then the AppPoolUserName and AppPoolPassword properties are not required in the answer file. Any value provided for these fields is overridden.</p>
<p>CognosServiceUserName Company\svc-fnms</p>	<p>The service user for the IBM Cognos service. This must have read access to the FNMPDatawarehouse database, as well as being a member of the local Administrators group. Ensure that the account you enter already has Logon as a service permission (see Authorize the Service Account).</p>

Property/Example	Description
CognosServicePassword (clear text)	A clear text password.
CognosServiceStoreReference flexera://serviceUser	The credential store reference for Cognos service user identity. If CognosServiceStoreReference property is specified then the CognosServiceUserName and CognosServicePassword properties are not required in the answer file. Any value provided for these fields is overridden.
CognosServiceMaxMemory 4096	IBM recommends a minimum of 4GB (4096MB) for Cognos Analytics. This number is a starting point and should be adjusted upwards based on the memory usage of your system.  Note: This value determines the amount of memory used by the Java Virtual Machine and depends on how much memory is available. If this value is too high, the process will fail to start and no log information will be generated.
MachineKeyValidationKey ABCDEFGHIJKLMNOPQRSTUVWXYZ0123456789	This is taken from the web.config file on the FlexNet Manager Suite presentation server . For example: C:\Program Files (x86)\Flexera Software\FlexNet Manager Platform\WebUI\web.config. The required value is present in the <machineKey> element.
MachineKeyDecryptionKey 0123456789ABCDEFGHIJKLMNOPQRSTUVWXYZ	This is taken from the web.config file on the FlexNet Manager Suite presentation server . For example: C:\Program Files (x86)\Flexera Software\FlexNet Manager Platform\WebUI\web.config. The required value is present in the <machineKey> element.
SmtpStoreReference flexera:\\smtp	The credential store reference for SMTP user identity. If SmtpStoreReference property is specified then the SmtpUserName and SmtpPassword properties are not required in the answer file. Any value provided for these fields is overridden.

Property/Example	Description
FNMSConfiguration op	This value defines the FlexNet Manager Suite environment configuration. This value is pre-populated based on the installation media and does not require the user to change it. Modifying this value will cause the Cognos installation to fail.

 **Note:** If the *CognosConfigProperties.xml* file contains passwords in clear text, after installation this file should be cleared of passwords; or kept in a file path that is only accessible to Administrators and copied to a secure location off the host server. The file should be preserved for use in future upgrades.

6. Open a PowerShell command-line window with Administrator privileges.

a. Navigate to the directory where you copied the support directory. For example
C:\FNMS2017R3CognosAnalytics\Support

b. If you have not done so already, set the PowerShell permissions with the following command:

```
set-ExecutionPolicy AllSigned -Force
```

Respond to the warning text with the default Y.

c. Run the following command:

```
.\InstallCognos.ps1
```

 **Tip:** This may take some time to complete.

7. Once Flexera Analytics has been successfully installed and configured there are several steps required to be completed on the web application server to finalize the integration of Flexera Analytics with Flexera Analytics. The externally visible URL of the Flexera Analytics server needs to be set on the web application server so that FlexNet Manager Suite knows where to go when a user navigates to Flexera Analytics from **Reports** mode.

a. Log into your web application server.

b. Open a PowerShell command-line window with Administrator privileges.

c. Navigate to the <FNMS Media>\FlexNet Manager Suite\Support directory.

d. Execute the commands

```
Set-ExecutionPolicy AllSigned -Force
```

and

```
.\Config.ps1 ".\Config\FNMS Cognos Config.xml" updateConfig
```

You will now be asked to enter the externally visible URL of the Flexera Analytics server, in the format `http://{servername}`. Then press **Ok**.

8. Before any operator can access any part of Flexera Analytics, you must do each of the following (but these are only possible after you have imported the correct license file from Flexera):
 - a. Create a role to which you have assigned the Analytics User privilege, and a second role that has the Analytics Administrator privilege (in the web interface for FlexNet Manager Suite, navigate to the system menu (⚙️ ▼ in the top right corner), select **Accounts**, select the **Roles** tab, use the **Business reporting portal** section, and click the help button for further details).
 - b. Assign the appropriate operator(s) to these roles.

If you do not complete this step before accessing Flexera Analytics, you may experience an error after you sign in.



Important: By default, no more than 60 operators may be linked to the role that grants the Analytics User privilege (or to all roles that grant this privilege). If you assign more than 60 operators to these roles, all operators are locked out until you reduce the count of operators to the licensed limit. If you need more than 60 operators with this privilege, contact your Flexera Consultant with your request to increase the licensed count.

9. For security reasons, a browser will not provide a user's credentials to the Flexera Analytics server unless the site (or subdomain) is on a list of trusted websites. Extra steps are required to enable silent Windows authentication.
 - **Internet Explorer** or **Chrome** on Windows
 - a. The Flexera Analytics server must be added under Local Intranet Zone in **Internet Options**. If not, the credentials will not be passed to the site and the user will be prompted to enter their credentials every-time they navigate to Flexera Analytics from within FlexNet Manager Suite. You can either add the Flexera Analytics URL to trusted websites locally on the workstation or through your corporate group policy.
 - **Firefox** on Windows
 - a. Launch FireFox
 - b. In the address bar type `about:config` and press **Enter**.
 - c. If prompted with the security warning choose "**I'll be careful, I promise**".
 - d. After the configuration page loads, in the filter box, type: `network.automatic`
 - e. Modify `network.automatic-ntlm-auth.trusted-uris` by double-clicking the row and enter the fully qualified URL of the Cognos server. For example `http://cognos11.domain`.
10. If you wish to configure Security Assertion Markup Language (SAML) authentication for Flexera Analytics, please refer to the *Authentication* chapter in the *FlexNet Manager Suite Systems Reference* guide.

Optional for reinstallation

If you are ever reinstalling Flexera Analytics, you can use one of the following switches to skip specific segments of the installation process, but these cannot be used during a new installation.

Parameter	Description	Syntax
SkipApplyFiles	Skips the extraction of the authenticator, OAuth module, logging configuration and web content, as well as copying of some configuration files.	<code>.\InstallCognos.ps1 -SkipApplyFiles</code>
SkipConfigureIIS	Skips the IIS settings configuration segment of the script.	<code>.\InstallCognos.ps1 -SkipConfigureIIS</code>
SkipConfigureService	Skips the Cognos service configuration segment of the script.	<code>.\InstallCognos.ps1 -SkipConfigureService</code>

Configure the System

PowerShell scripts are provided to complete configuration of the central application server(s), including the connections to the databases, and then store appropriate values in the database.



Important: For a single server implementation, run the PowerShell scripts on the application server (if you have a separate database server, you do not run the PowerShell scripts on that.) If the logical application server has been separated into multiple servers, the PowerShell scripts must be run on each of these servers, and must be run in the following order:

1. Your web application server
2. Your batch server (or processing server, for a two-server application implementation)
3. Your inventory server(s).

On each applicable server in turn, as administrator (fnms-admin), complete all the following steps (noticing that on different servers, different dialogs may be presented). Before executing the PowerShell scripts, you should first ensure that:

- Your administrator account is a member of the db_owner fixed database role (at least temporarily, as described in [Identify \(or Set Up\) Accounts](#))
- The scripts themselves have sufficient authorization to execute, as described in the following process.

Also notice that, to complete this configuration process, you restore IIS, the scheduled tasks, and the batch processing service to prepare your system for operations.



To configure the system using supplied PowerShell scripts:

1. On your web application server, batch server, or inventory server, ensure that Microsoft IIS is running again:
 - a. Ensure that your **Server Manager** dialog is still open.
 - b. In the left-hand navigation bar, expand **Roles > Web Servers (IIS)**, and select **Internet Information Services**.

The IIS page is displayed.

- c. In the **Actions** panel on the right, select **Start**.

A message like `Attempting to start...` appears. Note that it can take some time before the service is started. When the service is running, the PowerShell scripts can update the IIS configuration as required.

2. If you require that the URLs for your central server(s) use the HTTPS protocol, confirm that site bindings have been configured to allow this:

- a. Open IIS Manager.
- b. In the **Connections** pane, expand the **Sites** node in the tree, and then click to select the site for which you want to add a binding.
- c. In the **Actions** pane, click **Bindings**.
- d. In the **Site Bindings** dialog box, click **Add**.
- e. In the **Add Site Binding** dialog box, add the binding information and then click **OK**.

For more information (including the set up of the required certificate), see <http://www.iis.net/learn/manage/configuring-security/how-to-set-up-ssl-on-iis>.

3. Run PowerShell as administrator (use the 64-bit version where available):

- a. Locate PowerShell. For example:
 - On Windows Server 2012, **Start > Windows PowerShell**
 - On earlier releases, in the Windows Start menu, find **All Programs > Accessories > Windows PowerShell > Windows PowerShell** (this is the 64-bit version; the 32-bit version is `Windows PowerShell (x86)`).
- b. Right-click, and choose **Run as Administrator**.



Important: *It is critical that you run the PowerShell scripts with administrator privileges. Otherwise, scripts will fail.*

4. If you have not already done so, in the PowerShell command window, execute:

```
set-executionpolicy AllSigned
```

Respond to the warning text with the default Y.

5. In the PowerShell command window, navigate through the unzipped downloaded archive to the **Support** folder.

6. On each server, execute:

```
.\Config.ps1 "Config\FNMS Windows Authentication Config.xml" updateconfig
```

(This script determines the type of server installation, and applies appropriate configuration. See also server-specific comments below.)



Tip: *If your PowerShell window is in its default **QuickEdit** mode (visible in the **Properties** for the window), simply clicking in the window when it already has focus puts it into **Mark** or **Select** mode. In*

such a mode, a process that is writing to the window is paused, awaiting your input. Beware of unintentionally pausing the configuration scripts by extra clicking in this PowerShell window. A process that has been paused in this way is resumed when the window already has focus and you press any key.

On each server, on first run PowerShell asks whether to trust the publisher of this script. You may allow **Run always** for a certificate signed by Flexera LLC.

7. In each case, allow the script to run once, completing the requested details.



Tip: Helpful notes:

- Use the service account details you created earlier (example: `svc-flexnet`).
- Separately on each dialog, the check box **Use the same credentials for all identities** copies the account details from the upper section to the lower section of the dialog.
- For externally visible URLs, you can specify either HTTP or HTTPS protocol, and either the flat server name or the fully qualified domain name is supported. Any port number is optional. Remember that site bindings may be required if you are using the HTTPS protocol (see above). Valid examples:

```
http://servername
https://www.servername.mydomain:8080
```

- If you have a single-server implementation, when asked for the hostname of the different server functionality, use `localhost`.
- Remember that in a multi-server implementation, MSMQ limits the hostname of the batch server to 14 characters. Of course, this limit applies to the hostname itself, and not to the fully-qualified domain name of the host. (If your batch server is already implemented with a longer hostname, consider using a DNS alias that satisfies this limitation.)



Important: Remember to use the fully-qualified domain name (in the style of `serverName.example.com`) when identifying servers in a multi-server implementation. Do not use a URL.

- The PowerShell script asks for appropriate database connection details, depending on the configuration of the current server (for example, if the current server includes inventory server functionality, the script asks for the Inventory Management database). In each case, supply the host server name (and, if the database instance is not the default instance, the instance name, separated by a backslash character); and the database name for each kind of database. In a small-to-medium implementation, all the operations databases may be on the same host and instance combination; but in larger implementations may be separated onto distinct servers. In either case, each database has a distinct database name, for which the suggested values are:
 - The main compliance database: `FNMSCompliance`
 - The database for inventory collected by the FlexNet inventory agent: `FNMSInventory`
 - The data warehouse for trend reporting: `FNMSDataWarehouse`
 - The snapshot database for performance improvement: `FNMSSnapshot`.

8. Close the PowerShell command window.

9. If this is your batch server (or the server hosting that functionality), ensure that the services for FlexNet Manager Suite Batch Process Scheduler are running:

a. Navigate to Start > **Control Panel** > **Administrative Tools** > **View local services**.

The **Services** dialog opens.

b. In the list of services, ensure that both FlexNet Manager Suite Batch Process Scheduler and FlexNet Manager Suite Batch Processor are both running. If not, right-click each stopped service in turn, and from the context menu, select **Start**.



Note: These services are critical to the operation of FlexNet Manager Suite. It is best practice to set up your service monitoring to alert you any time either of these services is stopped.

10. On your batch server or inventory server, enable all Windows scheduled tasks related to FlexNet Manager Suite.

The scheduled tasks are different on the two different types of servers. On your batch server (also known as reconciliation server), change all tasks in the FlexNet Manager Platform folder:

- Data warehouse export
- Export to ServiceNow
- FlexNet inventory data maintenance
- Import SAP inventories
- Import SAP package license
- Inventory import and license reconcile
- Recognition data import
- Regenerate Business Import config
- Send contract notifications.

On your inventory server, change all tasks in the FlexNet Manager Platform folder:

- Import Active Directory
- Import application usage logs
- Import discovery information
- Import installation logs
- Import inventories
- Import Inventory Beacon activity status
- Import Inventory Beacon status
- Import remote task status information
- Import security event information

- Import system status information
- Import VDI access data.

An example process to change these tasks on Windows Server 2008:

- Open your **Computer Management** dialog (for example, click Start, right-click on **Computer**, and select **Manage** from the context menu).
- In the left-hand navigation bar, expand **Configuration > Task Scheduler > Task Manager Platform**, and select the FlexNet Manager Platform folder.
- Select all of the relevant tasks in the list (click the first, shift+click the last), and in the **Actions** pane, in the **Select Item** section, click **Enable** (or right-click the selection, and click **Enable**).
- Close the dialog.

Configuration by the PowerShell scripts is now complete. Although not needed now, at other times it is possible to re-run the PowerShell scripts with the following flags for the use cases shown. You do not need to re-run the scripts unless, at some later stage, one of these use cases applies to you:

- Use without a flag to add a configuration file to a new installation; or on an existing implementation, to remove all customizations and replace the %ProgramFiles(x86)%\Flexera Software\FlexNet Manager Platform\WebUI\web.config file with the default version:

```
.\Config.ps1 "Config\FNMS Windows Authentication Config.xml"
```

- Add the updateConfig flag to insert any new parameters added by Flexera, leaving all settings (including customizations) unchanged for existing parameters:

```
.\Config.ps1 "Config\FNMS Window Authentication Config.xml" updateConfig
```

- Add the forceUpdateConfig flag to insert any new parameters added by Flexera, and restore the default values for all factory-supplied settings, but leaving any custom parameters unchanged:

```
.\Config.ps1 "Config\FNMS Windows Authentication Config.xml" forceUpdateConfig
```

- Add the removeConfig flag to remove the %ProgramFiles(x86)%\Flexera Software\FlexNet Manager Platform\WebUI\web.config file before using Windows Programs and Features to uninstall FlexNet Manager Suite:

```
.\Config.ps1 "Config\FNMS Windows Authentication Config.xml" removeConfig
```

(Re-)Activate the Product

You need to reimport your license for FlexNet Manager Suite.

The migration process requires that the license is reimported on the batch server, or, in smaller implementations, the server hosting that functionality:

- The application server (in a single server implementation)
- The processing server (in a two server application implementation).



Tip: FlexNet Manager Suite 2018 R1 (and onwards) requires an entirely new license. If you have not already received this license from Flexera, contact the Orders Support team (o-support@flexerasoftware.com) to request the new license file, which will be emailed to you.



To activate FlexNet Manager Suite:

1. On the appropriate server, save a copy of your license in a convenient folder (such as your installation folder), where it is accessible for this activation process.
2. In Windows Explorer, navigate to the `Installation-Dir\DotNet\bin` folder.

Replace `Installation-Dir` with your installation folder. The default location is `C:\Program Files (x86)\Flexera Software\FlexNet Manager Platform\DotNet\bin`.

3. Execute (double-click) `ManageSoft.Activation.Wizard.exe`.
4. Import your license to use FlexNet Manager Suite.

Populate the Downloadable Libraries

FlexNet Manager Suite comes with an Application Recognition Library, a SKU (stock keeping unit) Library. You may also have AppAtlas Service Life product and several Product Use Rights Libraries (depending on which products you have purchased for the suite). These are updated regularly by Flexera and normally downloaded automatically.



Note: The automated updates, and the following process, both assume that your server has access to the Internet. Alternatively, if your server has Internet access controlled through a proxy server, the following URLs must be accessible:

- For the ARL: <https://www.managesoft.com/support/Compliance/RecognitionAfter82.cab>
- For the EOSL: <https://www.managesoft.com/support/Compliance/EOSL.cab>
- For the SKU library: <https://www.managesoft.com/support/Compliance/PURL.cab>
- For the PURLs: <https://update.managesoft.com:443/ProductUseRights>, including access to any sub-directories of this that may be returned to your server in response to its initial request.

If neither direct access nor access through a proxy server can be provided, you can use an alternative process to managed library updates manually (see the following topic).

At installation time, you need to trigger download of the libraries to create a baseline ready for product use.



Tip: New functionality in the 2015 release, including the recognition of some Microsoft Server applications, relies on the latest updates of the downloadable libraries.

Complete this procedure as administrator (`fnms-admin`), having database rights as described in earlier sections.

**To download the current libraries:**

1. On the batch server (or application server for a single-server implementation), open the Microsoft Task Scheduler.



Tip: Library downloads check the terms of your Flexera license. That is why this task cannot be attempted before [Product Activation](#), and must occur on the same server where your license was imported to activate the product.

2. Manually run the **Recognition data import** scheduled task.

By default this task is run at 1am daily. The task places a request for download in the queue of the internal batch scheduler. Given that no other processes are running at this stage of your implementation, it executes almost immediately. A utility downloads all libraries according to the terms of your license, and imports them into FlexNet Manager Suite. Typically for a first download, this may take in the order of a half an hour.

3. Thereafter, in the web interface for FlexNet Manager Suite, navigate to the system menu (⚙️ ▼ in the top right corner), select **System Health > System Health Dashboard**, and check the cards for:

- **ARL**
- **SKU Library**
- **PURL**



Tip: The cards do not refresh automatically. Use F5 to refresh the display from time to time.

Each card shows the currently installed version of the relevant library, and the date of the last successful download and import of these libraries. Errors display an additional alert icon with some explanatory text. In case of errors, check the following log files, located in %APPDATA%\Local\Temp for the service account running the batch processor (suggested: svc-flexnet):

- ImportPURL-*.log
- PURL-*-log.txt
- Recognition*.log (for the Application Recognition Library).

Manual Updates of Library Data

The downloadable Application Recognition Library, Product Use Rights Library, and SKU Library are intended for automated updates delivered directly to your application server (or, in a multi-server implementation, the server hosting the batch server functionality). This automated process naturally relies on the server having direct Internet access.

However, in some secure environments, the applicable server may not be permitted to have Internet access. For such environments, the process of updating these critical libraries must be maintained manually. The manual process is outlined below; but first there are the following preparations.

- Subscribe to the Content Library Updates email list through the webpage <http://learn.flexerasoftware.com/SLO-FMS-Software-Content-Library-Updates>. List members receive email notifications when updates to library data are published.
- On your applicable server, navigate to the Microsoft Task scheduler and disable the **Recognition data import** task (in the **FlexNet Manager Platform** group).
This prevents the server from attempting to connect to the Internet to start downloads.
- Ensure that you have a User Name and Password for the Flexera Customer Community. If you do not yet have these credentials, you can apply as noted in the process below. (There is a delay for account validation.)

When these preparations are completed, you can use the following process to manually update each of the downloadable libraries as new editions are released.



To manually update downloadable libraries:

1. Navigate to the libraries download page in the Flexera Customer Community website:
 - a. On <https://flexeracommunity.force.com/customer/CCLanding>, use the account details emailed to you with your order confirmation from Flexera to log in (using the **Login** link in the top right).



Tip: Access requires your Customer Community user name and password. If you do not have one, use the *Request Community Access* link on the login page to request one. Your credentials are configured for access to content you have licensed.

- b. Select the **Downloads** tab from the row across the top of the page.
A routing page appears to let you Access Product and License Center, displaying lists of products from Flexera.
- c. In the lists of products, identify FlexNet Manager Platform, and click the **Access Above Products** button that is *below* that product name.
The Product and License Center site is displayed.
- d. In the Your Downloads section of the Home page, click the link for [FlexNet Manager Platform](#).
- e. In the **FlexNet Manager Platform** page, in the **New Versions** tab, click **FlexNet Manager Platform Content Libraries**.
- f. If this is your first time accessing the libraries this way, accept the End-User License Agreement by clicking **I agree**.

A **Download List** for the content libraries is displayed.

2. When the Application Recognition Library content is updated:
 - a. On a computer with Internet access, download the file `RecognitionAfter82.cab` (click its name in the **Download List**).
 - b. Log in to your application server (or the server hosting the batch server functionality) as a user in the FNMS Administrators security group.

This is the security group recommended during installation. A suggested account to use is fnms-admin.

- c. Copy the downloaded cab file to a convenient directory (for example, C:\Temp) on this server.
- d. Install the Application Recognition Library content using this command:

```
InstalLDir\DotNet\bin\MgsImportRecognition.exe -ia C:\Temp\
RecognitionAfter82.cab
```

(replacing *InstalLDir* with the installation folder for FlexNet Manager Suite on this server, which by default is C:\Program Files (x86)\Flexera Software\FlexNet Manager Platform.)



Important: The update to the Application Recognition Library places locks on various database tables, and other transactions that are queued may time out. You should therefore execute this command only in off-peak times.

- 3. When the Service Life Data Pack content is updated:



Note: When the Service Life Data Pack content is updated: The matching Application Recognition Library content must be imported prior to the Service Life Data Pack library. Please follow the process mentioned above, and import the Application Recognition Library content first.

On a computer with Internet access, download the file EOSL.cab (click its name in the **Download List**).

- b. Log in to your application server (or the server hosting the batch server functionality) as a user in the FNMS Administrators security group
- c. Copy the downloaded cab file to a convenient directory (for example, C:\Temp) on this server.
- d. Install the Service Life Data Pack content using this command

```
InstalLDir\DotNet\bin\MgsImportRecognition.exe -ie c:\Temp\EOSL.cab
```

(replacing *InstalLDir* with the installation folder for FlexNet Manager Suite on this server, which by default is C:\Program Files (x86)\Flexera Software\FlexNet Manager Platform.)



Important: The update to the Service Life Data Pack content places locks on various database tables, and other transactions that are queued may time out. You should therefore execute this command only in off-peak times.

- 4. When SKU Library content is updated:

- a. On a computer with Internet access, download the file PURL.cab from the **Download List**.
- b. Log in to your application server (or the server hosting the batch server functionality) as a user in the FNMS Administrators security group, such as fnms-admin.
- c. Copy the downloaded cab file to a convenient directory (for example, C:\Temp) on this server.
- d. Install the SKU Library content using this command:

```
InstalLDir\DotNet\bin\MgsImportRecognition.exe -is C:\Temp\PURL.cab
```

(replacing *InstalLDir* with the installation folder for FlexNet Manager Suite on this server, which by default is C:\Program Files (x86)\Flexera Software\Flexera Manager Platform.)

 **Important:** The update to the SKU Library places locks on some database tables, and other transactions that are queued may time out. Although this has less impact than updates to the Application Recognition Library, best practice is to execute this command only in off-peak times.

5. When Product Use Rights Library content is updated, multiple files may be added to the **Download List**. These include PURL.cab (for basic functionality), PURL-Desktop.cab, and others with the naming convention PURL-*vendor*.cab for different vendor options you may have purchased. Process these one at a time:
 - a. On a computer with Internet access, download the files available to you.
 - b. Log in to your application server (or the server hosting the batch server functionality) as a user in the FNMS Administrators security group, such as fnms-admin.
 - c. Copy the downloaded cab files to a convenient directory (for example, C:\Temp) on this server.
 - d. Install each Product Use Rights Library in turn using commands like the following:

```
InstalLDir\DotNet\bin\MgsImportRecognition.exe -is C:\Temp\PURL.cab
InstalLDir\DotNet\bin\MgsImportRecognition.exe -is C:\Temp\PURL-vendor.cab
...
```

(replacing *vendor* with the appropriate name(s), and replacing *InstalLDir* with the installation folder for FlexNet Manager Suite on this server, which by default is C:\Program Files (x86)\Flexera Software\Flexera Manager Platform.)

 **Tip:** You must install PURL.cab as the first PURL library installation, before any vendor-related PURLs. If the SKU library has been released simultaneously, you should have already imported PURL.cab in the previous step (it completes the SKU library import as well); and if this is the case, you do not need to repeat it now.

 **Important:** The update to the Product Use Rights Library places brief locks on some database tables, and other transactions that are queued may time out. Although this has less impact than updates to the Application Recognition Library, best practice is to execute this command only in off-peak times.

Import the Sample Reporting Package

This section is only for those using Flexera Analytics (powered by Cognos).

First, be aware that much of what used to be published in the Report Designer environment in the 9.2 product is now moved into the web interface for FlexNet Manager Suite itself. Compare the functionality of the two releases:

Release 9.2	Release 2018 R1
A product dashboard was available within the Reports Designer.	The product dashboard is now one of the main management tools in the web interface.
A number of business reports were available in Report Designer.	Business reports are now centered in the reports area of the web interface (switch to reporting mode using the large button in the header bar).
Trend analysis reporting was provided only through Report Designer.	Trend analysis reporting is available directly through the web interface.
Reports provided through Report Designer were available through a web portal, providing click-through access.	There is no longer any direct link from the web interface of FlexNet Manager Suite to reports prepared in Report Designer. Users must be given a direct link to those reports, external to the product.
	 Tip: Custom reports in Report Designer can still retrieve data from the FlexNet Manager Suite database.
Reports in Report Designer were central to the operation of the system.	Many reports are still provided in Report Designer, but these are intended as examples to help you build your own reports.

If you wish to continue with custom reporting through Flexera Analytics, use the following process to update your reports package for the new release. In overview, you need to:

- Position the sample reports package ready for import
- Authorize the service account to complete the import
- Perform the import itself
- Restore normal operational permissions to appropriate accounts.



To import the sample reports package:

1. Log in to your Flexera Analytics (Cognos) server, and navigate to the following folder:

```
C:\Program Files\ibm\cognos\analytics\deployment
```

The folder should contain two zip files named Flexera Analytics.zip and FlexNet Manager Platform Data Warehouse Reports and Dashboard.zip. These zip files should have been placed in this directory as part of the Cognos Analytics installation and configuration process. If they are not there, you can copy them from your web application server from the installation media located in the directory <FNMS Media>\FlexNet Manager Suite\Support\Media

2. You may log out of the Flexera Analytics (Cognos) server now.

Shortly you will log into your batch server, but first there are permissions required to authorize the installation process.

3. In the web interface for FlexNet Manager Suite 2018 R1, add your service account (suggested: svc-flexnet) as an Analytics Administrator for the business reporting portal as follows:



Tip: You need to have administrator privileges within FlexNet Manager Suite to make these changes.

- a. Navigate through the system menu (⚙️ ▼ in the top right corner) > **Accounts**.
The **Accounts** page opens.
- b. Select the **Roles** tab, and check for the existence of the Business Reporting Portal Admin role.
If the role does not already exist, you can create it.
- c. Click the edit (pencil) icon at the right-hand end of the card for this role.
The properties page for this role appears.
- d. Expand the **Business reporting portal** tab of the accordion, and from the **Privileges** drop-down list, ensure the **Analytics Administrator** feature has **Allow** permissions.
- e. Switch to the **All Accounts** tab, locate your service account (suggested: svc-flexnet) in the list, and click the account name hyperlink.
The page switches to show **Account Properties** for your account.
- f. Under the **Permissions** section, check whether your Business Reporting Portal Admin role is already listed against the service account. If so, you are set for upload permissions, and should continue with the next step.
- g. Click the + button to the right of the current **Role** to add this account to another role.
A duplicate line appears with another drop-down list of all the roles defines so far.



Tip: Each enterprise is licensed for only a single operator in the Analytics Administrator role. If one has already been assigned this privilege, you need to move that account out before you can add the service account.

- h. From the duplicate drop-down list, select your Business Reporting Portal Admin role.
The **Business reporting portal** tab of your resulting list of privileges is updated. If you expand this tab of the accordion, you see that **Analytics Administrator** now displays Allowed access.
- i. Scroll to the bottom of this page, and click **Save**.
Your services account is now the (only) **Analytics Administrator** for use of the Flexera Analytics.



Tip: Flexera Analytics also requires that this account is valid in Active Directory.

This privilege level allows the account to complete the import of the sample reports package. Keep this web page available for further use shortly.

4. Using the service account (suggested: svc-flexnet), log into your batch server directly.

Refer to your block diagram of servers to identify this machine. If you have combined servers, this may be your processing server, or your application server.



Note: The following 6 steps can be completed using a package import utility as described here, or using a command-line interface (for which see the note at the end of the process).

5. Navigate in Windows Explorer to `installation-folder\Cognos\BusinessReportingAuthenticationService\bin`.

Example:

```
C:\Program Files (x86)\Flexera Software\FlexNet Manager Platform\Cognos\BusinessReportingAuthenticationService\bin
```

6. Right-click `CognosPackageImport.exe` and click **Run as Administrator**.

A window appears for the **Flexera Report Designer Package Import Utility**.

7. Click **Update....**

An **Update Value** dialog appears.

8. In the **Value** field, enter the value for your Cognos Analytics' Dispatch URL.

In a typical installation, this has the following form:

```
http://RD-Server:9300/p2pd/servlet/dispatch
```

where you change the placeholder `RD-Server` to the name of your server hosting Cognos Analytics.

9. Click **Update**.

The value entered is written into the registry on this server, and the additional dialog disappears.



Tip: If you run this import utility on the same machine in future, it displays the value stored in the registry in its read-only **Dispatch URL** field.

10. Click **Install Reports Package**.

Progress is logged in the text window of this dialog as the package is imported into the Cognos database. When successfully completed, the last line displays `Finished publishing the Report Designer package`.



Important: Do not close the utility until it has finished the import! This process may take several minutes.

11. Restore the Analytics Administrator privilege to an appropriate interactive operator account.
 - a. Back in the web interface for FlexNet Manager Suite 2018 R1 (in the **Accounts** tab of the same page), remove your service account (suggested: `svc-flexnet`) from the `Business Reporting Portal Admin` role that includes the sole Analytics Administrator privilege (do this in the account properties, by deleting the appropriate line in the **Roles** group). Save the account properties that you have changed.
 - b. Switch to the appropriate administrator account (suggestion: `fnms-admin`), and for this account add the `Business Reporting Portal Admin` role. Save the changed account properties.

Flexera Analytics dashboards and reports are now available as baselines for your own customization and extension as required. The dashboards and reports can be accessed in a web browser through the web interface for FlexNet Manager Suite: select **Reports** in the modal bar at the very top, then select **Analytics** in the menu bar. Selecting **Analytics** will provide you with three options:

- ◦ **Software Asset Management** — This dashboard, provided by Flexera, displays information about applications, installations, and licenses
- **Hardware Asset Management** — This dashboard, provided by Flexera, displays information about assets, discovered devices, and inventory
- **My Analytics home** — This is a personal dashboard enabling the creation of a customized dashboard, populated using a variety of supplied widgets, for each operator's specific needs.

As well, the appropriate administrator's account is configured to manage Cognos rights for other users.

Remember that Flexera Analytics requires that you allow pop-ups, and that the URL for your reports (where this is separate from the URL for your web interface) must be a trusted site for your web browser. See step 9 in [Install Flexera Analytics](#) for more details.



Note: Rather than using the **Flexera Report Designer Package Import Utility** as described above, you can use the following command-line interface:

1. Open a command line as Administrator.
2. Navigate to `installation-folder\Cognos\BusinessReportingAuthenticationService\bin`.
3. Run the following commands, replacing the `RD-Server` placeholder with the name of your server hosting Cognos Analytics:

```
CognosPackageImportConsole.exe set -d "http://RD-Server:9300/p2pd/servlet/dispatch"
CognosPackageImportConsole.exe import
```



Note: If you are using single sign-on using either a SAML-compliant identity provider or Google OAuth, change the second command by adding the `--saml` (or `-s`) switch:

```
CognosPackageImportConsole.exe import -s
```



Important: If you choose to use the command-line interface, please be advised that the following options are not supported for an on-premises installation, and will not work if they are specified as part of the install:

- `add` - Add system administrator login
- `remove` - Remove system administrator login
- `sync` - Synchronize tenants.

Configure Web Browsers

Efficient use of FlexNet Manager Suite may require adjusting your web browser settings (especially for Microsoft Internet Explorer).

Assumption: Microsoft IIS is running on your central web application server.



To locate instructions for configuring various web browsers:

1. In your preferred web browser, navigate to the URL `server-name-or-IP-address/Suite/Help/webhelp/index.html`.
2. Expand the table of contents on the left by clicking the book icon to the left of the title.
3. Click **Configuring Your Web Browser**, and follow the guidelines in the column for your preferred web browser.

Link to Flexera Service Gateway

Flexera Service Gateway allows interaction between separate products from Flexera.

The ability to link FlexNet Manager Suite to the Flexera Service Gateway is subject to a separate license option. If you have licensed this option (you can check using the process below), you need to configure the connection as part of your configuration process.

To complete this process, you must know credentials that can log into your Flexera Service Gateway server with administrator privileges.



To link to Flexera Service Gateway:

1. Log into the web interface for FlexNet Manager Suite.



Tip: Either log in from a computer other than your web application server; or if running on that server, ensure that you access the full server name (and not `localhost`) in the URL. The URL in your web browser is taken into account in preparing the integration file, and should not include `localhost` if you want to integrate with other products from Flexera.

2. Optionally, check that you have licensed the option to link to Flexera Service Gateway:
 - a. Navigate to the system menu (⚙️ ▼ in the top right corner) > **FlexNet Manager Suite License**.

The **Your FlexNet Manager Suite License** page appears.

- b. Check the **License details** section.

If you have licensed this option, `FNMP API integration enabled: Yes` appears in the list. If it is not visible, you cannot continue with this procedure.

3. Navigate to the system menu ⚙️ ▼ > **System Settings**, and select the **Web API** tab.



Note: This tab is available only if your enterprise has licensed the FNMP API integration option.

4. Click each of the links in turn to download the two files, and save them to a convenient location (such as C:\temp).

There must be network access to your Gateway server from the location where you save the files.

5. Either, in your web browser's list of recent downloads, click the registration tool to open it; or
 - a. Open a Command Window, and navigate to the location where you downloaded the files.
 - b. Run `RegisterFlexeraServiceGateway.exe`.

The **Flexera Service Gateway Registration** dialog appears.

6. Identify the **Flexera Service Gateway host**, the server in your enterprise where the Gateway is installed, and the **Port** number.

You may use an IP address, a fully qualified domain name, or (if your DNS is correctly configured and accessible) the server's host name. The default port number is 9443.

7. Provide the credentials for administrator access to the Gateway account.

In the absence of any better information, try the account `admin` with the password `password`.

8. Use the **Import** button to browse to the other downloaded file, `webapi.config`, and import it into the registration tool.
9. Click **OK**.

Registration is complete. (You do not need to repeat this registration on others of your central servers.)

Update Access Rights

Through your processes of database migration, all the access rights that applied in your earlier compliance product are carried forward into FlexNet Manager Suite 2018 R1.

In addition, if you created a new account for installation (suggested: `fnms-admin`), this account defaults to having administrator privileges in your new implementation, in addition to the migrated access rights. This account has adequate rights to modify access rights for other operators.



To modify access rights:

1. Log in to the web interface to FlexNet Manager Suite 2018 R1.
2. Navigate to the system menu (☰ in the top right corner), choose **Accounts**, and select the **Roles** tab.
3. For each *unique* set of access rights that you need to assign to operators, ensure that there is (or create) a distinct role, and set its rights by expanding the various headings in the accordion and using the controls inside. (For advanced combinations, start by selecting **Custom** from the drop-down list in each section.) Remember to scroll down and click **Save** (or **Create**) when you make any changes.

For more information, click the help button at the top left.

4. When appropriate roles are defined, switch to the **All Accounts** tab.
5. Find each account in the list in turn, and click the hyperlinked account name to open its properties.
6. Change the roles assigned, or add additional roles, to each account as required.

The net effect of all roles on permissions for this account is displayed in read-only mode in the accordion below as you make changes. (Remember that a 'deny' in one role over-rides an 'allow' in another role when the same account is assigned to both roles.)

7. Remember to **Save** each changed account.

Managing Device Migration by Subnet

Controlling migration at the level of subnets makes for a greatly simplified process.

Use this process if, in the [Process Overview](#), you chose the simpler path of controlling migration at subnet granularity. (If, instead, you chose to control migration down to the level of individual computers, instead see the process in [Managing Device Migration by Individual Device](#)).

This process has the smallest overheads beyond the deployment, installation, and configuration of the inventory beacon for each subnet (these latter three being the tasks that are common to all approaches). The only additional step is switching over the DNS alias that is referenced by managed devices as the download location to use within this subnet.



To migrate managed devices by subnet:

1. If you choose to update your managed devices while they are still within the 9.2 infrastructure, start with that process.

However, there is no *requirement* to do any device updates or other preparations within the 9.2 system. Updates of the managed devices to a distinct version can be specified for FlexNet Manager Suite 2018 R1. This controls the upgrade immediately after each managed device switches over to the new system. For full details, see [Configure Updates to Inventory Agents](#). You may complete this configuration before migrating over your first subnet; or you may change the authorized version at a convenient future time.

2. In the first (or next) subnet that you wish to migrate, install the server that is to act as the inventory beacon for this subnet.
3. While logged in with administrator privileges to this future inventory beacon server, install FlexNet Beacon:
 - a. Start a web browser, and access the URL `server-name-or-IP-address/Suite/` (replacing the placeholder with the URL to access your central application server).
 - b. In the **Discovery & Inventory** menu, under the **Network** group, select **Beacons**.
 - c. Click **Deploy a beacon**.

The **Deploy a Beacon** page appears. Ensure that the default **Download a beacon** section of the page is open.
 - d. Click **Download a beacon**.
 - e. Use the web browser dialog to save the installer to a convenient directory (such as C : \ temp).

- f. In Windows Explorer, navigate to the saved file on your inventory beacon, and double-click it to run the installer.
- g. Step through the installation wizard, using the summaries in the accordion section **Beacon setup** or the more detailed online help available through the web interface to assist as necessary.



Important: *If this inventory beacon will import inventory collected by ILMT, or collect data from Oracle servers, follow the links provided in the wizard to ensure that the appropriate drivers are installed on the inventory beacon. In addition, if this inventory beacon is to collect inventory from an Office 365 connection, the following prerequisites must be satisfied (and noting that the order of installation of prerequisite software may be significant):*

- *You have licensed the FlexNet Manager for Microsoft product.*
- *The inventory beacon that will collect inventory for Office 365 in the cloud is a 64-bit machine (prerequisite software is not available for 32-bit architectures)*
- *Microsoft .NET framework version 4.7 or later is running on the inventory beacon.*
- *PowerShell 5.1 or later is running on Windows Server 2008 R2 SP1 or later, or Windows 7 SP1 or later; with the PowerShell execution policy set to RemoteSigned.*



Tip: *The PowerShell execution policy can be correctly set with the following command:*

```
Set-ExecutionPolicy RemoteSigned
```

- *Microsoft Visual C++ 2017 Redistributable is installed on the inventory beacon*
 - *Microsoft Online Services Sign-in Assistant for IT Professionals RTW is installed (instructions <https://technet.microsoft.com/library/dn975125.aspx>, direct link to the MSI <https://www.microsoft.com/en-us/download/details.aspx?id=41950>).*
 - *Microsoft Azure Active Directory Module for Windows PowerShell is installed:*
 - a. *Install the 64-bit version of the Microsoft Online Services Sign-in Assistant (available from <https://go.microsoft.com/fwlink/p/?LinkId=286152>).*
 - b. *Install the Microsoft Azure Active Directory Module for Windows PowerShell with these steps:*
 - a. *Open an administrator-level PowerShell command prompt.*
 - b. *Run the `Install-Module MSOnline` command.*
 - c. *If prompted to install the NuGet provider, type Y and press ENTER.*
 - d. *If prompted to install the module from PSGallery, type Y and press ENTER.*
 - e. *After installation, close the PowerShell command window.*
 - *Skype for Business Online, Windows PowerShell Module (<https://www.microsoft.com/en-us/download/details.aspx?id=39366>) is installed on the inventory beacon.*
4. Ensure that this subnet is recorded within FlexNet Manager Suite. You may:

- Import the sites and subnets (visible to this inventory beacon) from Active Directory (for details, open the online help in the web interface and navigate to **FlexNet Manager Suite Help > What Is an Inventory Beacon? > Importing from Active Directory**)
- Manually edit the list of sites and subnets available in the web interface for FlexNet Manager Suite 2018 R1 at **Discovery & Inventory > Subnets** (in the **Network** group).

Subnets must be recorded, and assigned to inventory beacons, before inventory beacons can target any devices for migration.

5. Ensure that the subnet is assigned to your newly-installed inventory beacon:

- a. In FlexNet Manager Suite, navigate to **Discovery & Inventory > Unassigned Subnets**.
- b. From the list, select the subnet you are migrating now.

(You can also select multiple subnets, if you are migrating several at once.)

- c. Click **Assign to a beacon**.

A new list opens above that button, showing available inventory beacons for your selection. To help with logical groupings of subnets, each inventory beacon also displays subnets already assigned to it. The status of each inventory beacon is also displayed on the right of the list, so that you do not accidentally assign any subnets to a disabled inventory beacon.

- d. Select one inventory beacon from the list, and click **Save**.

The list of inventory beacons closes, and the assigned subnet is removed from the list of unassigned subnets.

The inventory beacon is now prepared to respond to all managed devices within its subnet that ask it for a policy.

6. Identify the 9.2 distribution server that has been managing devices in this subnet, and identify the alias by which that distribution server is identified in the relevant domain name server (DNS).
7. At the DNS, redirect the alias to point instead to the newly-established inventory beacon.

On their regular schedule, all managed devices request a policy update from the same download location URL that they have always used. As this URL has now been redirected to the new inventory beacon, FlexNet Beacon (subject to migration mode being off) supplies each managed device with a revised policy that switches it over to operate with FlexNet Manager Suite 2018 R1. If the current version of the FlexNet inventory agent on each managed device is not as authorized (see [Configure Updates to Inventory Agents](#)), the inventory beacon also supplies the appropriate upgrade (or downgrade) package, and the FlexNet inventory agent self-updates to match requirements.

8. You may decommission the previous distribution server, and optionally repurpose it as an inventory beacon in another subnet.

Because this method redirects the established URL to the new inventory beacon, it doesn't matter whether managed devices have updated their policies before or after you remove the old distribution server.

Repeat this process for each subnet in turn, until all subnets (with their managed devices) have been migrated. Thereafter, skip forward to [Migrating Citrix Inventory Collection](#) (if you have been using the relevant adapter), or to [Finishing Off](#).

Configure Updates to Inventory Agents

Adjust the database settings that control automatic updates of deployed FlexNet inventory agents.



Note: Advanced inventory functionality often requires you to authorize the latest versions of FlexNet inventory agent. For example:

- Collecting access evidence for calculating consumption of CALs requires the use of FlexNet inventory agent for 2016 R1 (12.0.0) or later
- Improved application recognition for Tivoli Storage Manager™ version 7.x and IBM Spectrum Protect™ version 8.x and later require the use of FlexNet inventory agent for 2018 R1 (12.4.2) or later.

By default, an upgrade to your central application server(s) and inventory beacon(s) does not trigger any automatic updates to the FlexNet inventory agents that you have deployed on target machines for local inventory collection. In fact, the upgrade mechanism for FlexNet inventory agent is turned off after an upgrade to the central application servers. This gives you freedom to manage the upgrade of deployed FlexNet inventory agents independently of the upgrade to the central application server.



Tip: This procedure applies only to FlexNet inventory agents installed locally on inventory targets (either through 'adoption' or third-party deployment) and collecting policy from an inventory beacon. Other scenarios are handled differently:

- Copies of the FlexNet inventory core components installed on inventory beacons and used for zero-touch inventory collection are updated as part of the FlexNet Beacon self-update.
- If you are using copies of the lightweight FlexNet Inventory Scanner, you need to update those copies using the same techniques by which you deployed it in the first place.
- If you have used other techniques to deploy the FlexNet inventory core components to file shares or other locations of your choosing (where they are not automatically collecting policy), you need to use your preferred technique for deploying updated components.

The upgrade of deployed FlexNet inventory agents is controlled by settings stored in the central operations databases. For that reason, this procedure takes place on your batch server/reconciliation server (or whichever server includes that functionality, such as your processing server, or application server in smaller implementations).



Tip: The database setting grants permission (through policy) to the FlexNet inventory agents to perform self-upgrades (or even downgrades) to the specified version. The setting, therefore, can only be put into effect on those platforms where the FlexNet inventory agent includes self-update functionality, and where new versions of the FlexNet inventory agent are included in the operations databases after the upgrade. Currently, FlexNet inventory agents on Debian or Ubuntu Linux do not include self-update functionality. On these platforms, you can do any of:

- Deploy new versions of FlexNet inventory agent manually
- Use your preferred third-party deployment tool to publish updates to FlexNet inventory agents
- Uninstall the old version(s) of FlexNet inventory agent, and once again target the devices for adoption through FlexNet Manager Suite.

**To authorize self-update of FlexNet inventory agent through policy:**

1. Log in to your batch server using the installing user account (suggestion: fnms-admin).

Depending on the actions you want to take, the account requires either read or write access to the database.

2. In a command window, navigate to *installation-folder*\DotNet\bin.
3. To review a list of the FlexNet inventory agent versions to which you may upgrade:

```
.\ConfigureSystem.exe list-agent-versions
```



Note: Managed Service Providers (MSPs) covering multiple tenants must use:

```
.\ConfigureSystem.exe list-agent-versions --tenantuid tenantIdentifier
```

This lists all versions of the FlexNet inventory agent that are stored in your database and available for use as upgrades to your currently deployed agents. The list is typically updated at each release of FlexNet Manager Suite. Versions are shown by their internal major-minor-update numbering (such as 12.0.0).

4. To identify which version of the FlexNet inventory agent you have currently authorized as the target version for all upgrades:

```
.\ConfigureSystem.exe current-agent-upgrade
```



Note: Managed Service Providers (MSPs) covering multiple tenants must use:

```
.\ConfigureSystem.exe current-agent-upgrade --tenantuid tenantIdentifier
```

5. To authorize a new version of the FlexNet inventory agent as the target version for all upgrades:

```
.\ConfigureSystem.exe select-agent-upgrade --version versionString
```



Note: Managed Service Providers (MSPs) covering multiple tenants must use (all on one line):

```
.\ConfigureSystem.exe select-agent-upgrade --version versionString
--tenantuid tenantIdentifier
```

Replace *versionString* with the same major-minor-update numbering as is displayed by the `list-agent-versions` action. This value must be an exact match for one of the available versions listed by `list-agent-versions`. If not, no action is taken. (Notice that there is no requirement for the new version to be greater than versions previously installed: you can specify an earlier version from the available list, which causes any later FlexNet inventory agents to downgrade to the specified earlier version.)



Tip: The same version (number) of the FlexNet inventory agent is normally installed across all platforms.

6. To halt all upgrades and downgrades of the FlexNet inventory agents currently deployed in your enterprise:

```
.\ConfigureSystem.exe clear-agent-upgrades
```



Note: Managed Service Providers (MSPs) covering multiple tenants must use:

```
.\ConfigureSystem.exe clear-agent-upgrades --tenantid tenantIdentifier
```



Tip: The result is the default state after the FlexNet Manager Suite application server(s) have been upgraded.

When your new settings are saved to the central database, they are distributed to your inventory beacons at the next update, along with the installer for the currently authorized target version of the FlexNet inventory agent for each platform. The individual FlexNet inventory agents receive the setting and (if necessary) the installer when they next check in (by default, once a day), and subsequently they self-update to the specified version.

For more information about the actions available with this utility, use either of these commands:

```
.\ConfigureSystem.exe help
.\ConfigureSystem.exe help action-name
```

Managing Device Migration by Individual Device

Before deploying inventory beacons, choose whether to use additional targeting of inventory devices as part of your migration strategy.

In the [Process Overview](#), you examined whether to control [parts of] your migration at the granularity of a subnet, or at finer levels with control potentially extending down to an individual device.

By far the simpler process is to control migration for each subnet, so that the complete set of managed devices within an individual subnet switch over together to the new system. As you validate that all is well in this subnet, you can move on to the next subnet. For more information about this approach, see [Managing Device Migration by Subnet](#).

The remainder of this topic introduces concepts important to exerting control down to the level of individual devices.

Production mode accepts all who ask

When FlexNet Manager Suite 2018 R1 is *in production* (that is, when migration mode is turned off), any inventory agent (installed on a device) that contacts an inventory beacon receives a response:

- If the device fits within any target specified in the web interface on the application server, it receives the options defined for that target group (specifically, whether devices within the target group should be 'adopted' by having an inventory agent installed, and whether application usage should be tracked on devices in the group).
- If the device is not covered by any target, it receives (in production mode) default options (those options are not to install the agent, and not to track application usage). However, in receiving these default options, the

device also is notified of all known inventory beacons, and the common schedule for any future actions that may be applied to it in future. From that time on, the inventory agent on these devices reports through the inventory beacons to FlexNet Manager Suite 2018 R1, and has been migrated.

This last fact is critical for migration. Your existing estate includes many inventory agents that you have updated and are now looking for a response from an inventory beacon (and, until they receive one, failing over to the old hierarchy of distribution servers). In production mode, every one of those managed devices would switch over to the inventory beacon hierarchy in 2018 R1 as soon as it contacted its first inventory beacon. This may be the desired behavior at the *end* of a migration process, when you want to sweep up the last few remaining devices; but early in the process, you may wish to target a pilot group, which requires that we prevent the sociable behavior of giving every managed device the default response.

Migration mode rejects outsiders

To allow for controlled migration of inventory agents, there is a control in the beacon settings page of the web interface that switches FlexNet Manager Suite from production mode to *migration mode*. In migration mode, devices already identified in target groups within FlexNet Manager Suite still receive their options as always; but the difference is that those devices *not* included in any target group receive a "not found" 404 response to their request, and therefore fail over to their old hierarchy of distribution servers, staying within the 9.2 system.

Choose your timing

Therefore, your timing decision about switching over your managed devices is this:

- Since you have opted for a staged migration using test machines and pilot groups, exercising control through different sized targets (if required, down to individual machines), ensure that the **Migration mode: Restrict inventory settings to targeted devices** check box (**Discovery & Inventory > Settings**, in the **Beacon settings** group) remains set when you commence your migration.
- At what point are you satisfied that the process is reliable, so that you are happy for all remaining updated devices to switch to the new system? When that time comes, clear the **Migration mode: Restrict inventory settings to targeted devices** check box.

Accepting the default option (for migration mode) gives you another safety net of staging or targeting your switch over of managed devices from 9.2 to FlexNet Manager Suite 2018 R1:

1. You may, in Inventory Manager 9.2, have used selection of your old distribution servers to control which managed devices received the update package that allowed migration (see [Distribute Self-Upgrade and Settings Packages](#)).
2. Still in Inventory Manager, you may have used security policy targeting of the managed devices that were to receive the same update package.
3. Now, even though large numbers of your managed devices stand ready to make the switch, only those you specifically target in FlexNet Manager Suite 2018 R1 can do so.

Once you get past the pilot stage and are confident that migrated managed devices are functioning well in the new system, you simply clear the **Migration mode: Restrict inventory settings to targeted devices** check box. This switches your entire system (and all its inventory beacons) into production mode. At that point, any managed devices that were prepared with the upgrade package but have not yet been targeted can freely and automatically switch over to the new system.

More about targets

Notice that simply defining targets in FlexNet Manager Suite is the enabling step for the switch-over. If an upgraded managed device is identified in a target, it can switch. It does not require a specific rule (actions plus targets plus schedule) to be defined.

The definitions of targets are cumulative: that is, a device identified in *any* target group is able to make the switch. For this reason, these upgrade notes suggest starting with a single target in the new system so that it is simple to maintain control.

The use of targets is also independent of the roll-out of inventory beacons. That is, if you have no targets to begin with, you may roll out as many inventory beacons as you like, and they will continue to reject managed devices as long as the **Migration mode: Restrict inventory settings to targeted devices** check box remains set.

Set Defaults and Migration Mode

Prepare your inventory settings for deployment of inventory beacons.

These settings are applied to all FlexNet inventory agents reporting to FlexNet Manager Suite through the hierarchy of inventory beacons. You can fine tune your settings at any time; but right now, you can configure some settings useful for your migration process.



To set default behavior and migration mode:

1. On a convenient computer, start a web browser and access the URL *server-name-or-IP-address/Suite/*.



Tip: Consider doing this from your central batch server, and once you have completed these settings, you can continue there to install the local inventory beacon on the same server.

2. Navigate to **Discovery & Inventory > Settings**.

The **Inventory Settings** page is displayed.

3. In the **File inventory** section, select **Do not collect file inventory**.

During migration, you do not want your inventory agents undertaking time-consuming work before reporting to their new inventory beacons. You may change this setting later for operational purposes as required.

4. In the **Agent inventory schedule** section, use the controls available to set the schedule for all installed inventory agents to collect inventory from their managed devices.

You can mimic the same schedule that applied to the majority of your devices under the 9.2 system. Remember that this same schedule applies to all inventory agents reporting to FlexNet Manager Suite through inventory beacons.

5. In the **Beacon settings** group, keep the default values for **Interval for beacon updates** and **Beacon version approved for use**. These control the self-updating behavior of the inventory beacons (not the inventory agents that report to them), and you can adjust these later as required.

6. Still in the **Beacon settings** group, do one of the following based on your strategy for migrating managed devices:

- (Recommended) To require specific targeting of managed devices within FlexNet Manager Suite 2018 R1 before those devices can automatically migrate, ensure that the **Migration mode: Restrict inventory settings to targeted devices** check box remains set (checked, or ticked).
- To allow any managed device that contacts an inventory beacon to immediately switch over to FlexNet Manager Suite 2018 R1, clear the **Migration mode: Restrict inventory settings to targeted devices** check box.

7. In the bottom right of the page, click **Save**.

Your inventory settings are ready for delivery to any managed device that is accepted by an inventory beacon.

Deploy Inventory Beacons

Inventory beacons are the data-gathering arms of your compliance system.

Ensure that you have reviewed your policy for migrating inventory agents before deploying any inventory beacons (see [Managing Device Migration by Individual Device](#)), and set migration mode accordingly (see [Set Defaults and Migration Mode](#)).

The process for installing and configuring inventory beacons starts from the web UI for FlexNet Manager Suite.



Note: Any computer on which you will install an inventory beacon must have at least version 3.0 of PowerShell installed. For more information, see [Upgrade PowerShell on Inventory Beacons](#).



Important: When you are migrating from 9.2 or earlier, it is mandatory to install an inventory beacon on your central batch server (or, for combined servers in smaller implementations, your processing server, or your application server). This inventory beacon allows you control of content migrated forward from 9.2, whereas inventory beacons installed on separate servers cannot have similar privileges. This inventory beacon must be a top-level beacon reporting directly to the neighboring inventory server, and optionally it may also be the root of your inventory beacon hierarchy (or you may have many peer top-level beacons). Notice further that the user account that will access this inventory beacon, because it is directly accessing the batch server that had the central beacon installed, must be a member of the security group (suggested as FNMS Administrators) that has database owner privileges (see [Upgrade/Create Databases](#)). Finally, notice that its default settings, requiring Basic Authentication for devices to access it, mean that it cannot be used for bootstrapping new FlexNet inventory agents on managed devices to the 2018 R1 system (because until they receive their first policy, newly installed FlexNet inventory agents do not know any passwords for Windows authentication on any inventory beacons that require it). You may either:

- Switch this inventory beacon on the batch server to accept anonymous authentication
- Use other inventory beacons for bootstrapping new managed devices.



Tip: After installation and configuration, the FlexNet Beacon Engine operates as a long-running service to gather and upload data. During installation, this service is automatically configured to run under the local SYSTEM account (the default and recommended configuration). If you have reason to manually configure different credentials (perhaps to manage access through a proxy server), be aware that these manually-configured credentials for running the service are reset to SYSTEM at each automatic update to an inventory

beacon. (This happens because these manually-configured credentials are unknown to any other elements in your FlexNet Manager Suite infrastructure.) To manage this, you may take one of the following paths:

- Disable automatic upgrades of all inventory beacons (navigate to **Discovery & Inventory > Settings > Beacon settings**, and for **Beacon version approved for use**, choose a fixed version number). This locks all inventory beacons at that version, with no (further) automatic upgrades permitted.
- Allow most inventory beacons to automatically upgrade (at the same location, choose **Always use the latest version**), but individually manage particular inventory beacons (navigate to **Discovery & Inventory > Beacons** [in the **Network** group], click the edit icon for the target inventory beacon, and in the **General** tab of its properties, choose *Choose a specific version* from the **Upgrade mode** drop-down list. This individual setting overrides the setting made for all other inventory beacons.)
- Allow all inventory beacons to automatically upgrade, but manage a manual task after each upgrade to restore any special accounts that you previously manually configured.



To install the FlexNet Beacon software on an inventory beacon:

1. Log in on the computer where the FlexNet Beacon is to be installed, and start a web browser there to access the URL *server-name-or-IP-address/Suite/*.
2. In the **Discovery & Inventory** menu, under the **Network** group, select **Beacons**.
3. Click **Deploy a beacon**.

The **Deploy a Beacon** page appears. Ensure that the default **Download a beacon** section of the page is open.

4. Click **Download a beacon**.



Tip: This button is displayed only to members of the Administrator role.

5. Use the web browser dialog to save the installer to a convenient directory (such as C:\temp).



Tip: If you have not downloaded directly to your intended inventory beacon, you should now move the downloaded installer to that intended device.

6. In Windows Explorer, navigate to the saved file on your inventory beacon, and double-click it to run the installer.
7. Step through the installation wizard, using the summaries in the accordion section **Beacon setup** or the more detailed online help available through the web interface to assist as necessary.
8. When the configuration of this inventory beacon is complete, log in to the next server where you would like to install the FlexNet Beacon software, and repeat this process for each beacon.
9. If your sites and subnets are not already recorded in your database, you should either import them from Active Directory, or enter them manually.

Subnets are visible in the web interface for FlexNet Manager Suite 2018 R1 at **Discovery & Inventory > Subnets** (in the **Network** group). Subnets must be recorded, and assigned to inventory beacons, before inventory beacons can target any devices for migration. For guidance about importing or entering sites

and subnets, open the online help in the web interface and navigate to **FlexNet Manager Suite Help > What Is an Inventory Beacon? > Importing from Active Directory**.

10. In FlexNet Manager Suite, navigate to **Discovery & Inventory > Unassigned Subnets**.

11. Select one or more of the subnets in the list.

You may select subnets for either of two reasons:

- To disable them so that no managed devices in those subnets can be targeted. To do this, click **Ignore**, and they disappear from the list. (Find them again later in the **All Sites** list.)
- To assign them to inventory beacons so that managed devices in those subnets can be targeted for switching to the new system, and they can collect inventory directly into FlexNet Manager Suite. In this case, continue.

12. Click **Assign to a beacon**.

A new list opens above that button, showing available inventory beacons for your selection. To help with logical groupings of subnets, each inventory beacon also displays subnets already assigned to it. The status of each inventory beacon is also displayed on the right of the list, so that you do not accidentally assign any subnets to a disabled inventory beacon.

13. Select one inventory beacon from the list, and click **Save**.

The list of inventory beacons closes, and the assigned subnet is removed from the list of unassigned subnets.

You are now ready to target managed devices to switch over to the new system.

Create a Roll-out Target

Create a target group for piloting the switch-over of managed devices to the new system.

Refer back to your switch-over timing decision (see [Managing Device Migration by Individual Device and Set Defaults and Migration Mode](#)):

- If you are currently targeting a pilot roll-out group, so that the **Migration mode: Restrict inventory settings to targeted devices** check box is set (checked, ticked), continue from step 1 of this procedure to identify the target machines to switch to the new system.
- If you are ready to sweep up remaining managed devices without further targeting, you can clear the **Migration mode: Restrict inventory settings to targeted devices** check box, and skip down to step 8. Your managed devices start switching over automatically shortly after that check box is cleared, and you can start reviewing results as they obtain their updated policy.



Tip: For targeted switch-overs, remember that only targets (not complete rules) need to be defined in FlexNet Manager Suite at this time, and that any device identified in any target that contacts an inventory beacon will immediately switch to operations in the new 2018 R1 system. For a staged roll-out, then, it is convenient to define only one target at first, so that you can assess the results before approving a wider group.

**To create a roll-out target:**

1. In the web interface, navigate to **Discovery & Inventory > Discovery and Inventory Rules**.
2. On the left, select the **Targets** tab.
3. On the right-hand side, click **Create a target**.

The page is replaced by the **Create an Inventory Target** page.

4. Give this target group a helpful **Name** (suggestion: Device Migration) and in the **Description** field, record any notes helpful to other operators, or to yourself after the purpose of this group is forgotten over time.
5. In **Define machines to target**, leave the first choice as Include, and from the Select target... drop-down list, choose a targeting method.

Additional controls appear allowing you to provide details appropriate to your chosen method. For example, the first time you might choose All machines with a name like... and then identify the machine name of your first test computer. Later, when the initial test is successful, you can change this target to define a whole subnet.



Tip: Using the + control at the end of your first definition, you can add additional lines to your definition of this target. For example, you might have your first line target a subnet, and subsequent lines Exclude specific servers by name within that subnet.

The other options on this page are not relevant to the purpose of switching over managed devices that are already deployed (in this case, through Inventory Manager 9.2).

6. Click **Create** (in the bottom right of the page).

Your new target is updated to your inventory beacons (by default, every 15 minutes or so).

7. If you have not already targeted your update packages to managed devices through Inventory Manager 9.2 (see [Targeting the Inventory Agent Upgrades and Migration](#)), do so now!

Three factors are now aligned:

- Inventory beacons are in place
- Targets in FlexNet Manager Suite identify your pilot machines for switching to the new system
- Existing managed devices (from 9.2) are upgraded with instructions to look for inventory beacons.

Now, the upgraded managed devices attempt to connect to an inventory beacon. Until the inventory beacon is ready, they receive a 404 not found error, and revert to using the 9.2 hierarchy of distribution servers (operating as normal in the old system). When the inventory beacon is ready but the individual managed device is not listed in any target, that managed device also receives a 404 error and fails over. Only managed devices matching the filters you established for this target group, contacting any inventory beacon, collect your inventory settings (see [Set Defaults and Migration Mode](#)) and switch permanently to reporting through inventory beacons to FlexNet Manager Suite 2018 R1.

8. To prevent inventory imported through FlexNet Manager Suite 2018 R1 being hidden by old inventory still being imported from Inventory Manager 9.2, ensure that Inventory Manager is not the primary inventory source:

- a. In the System menu (gear-wheel icon in the top right corner), choose **Data Inputs**.
- b. Select the **Inventory Data** tab.

The list of inventory connections is displayed. Most of these are imported from your previous 9.2 implementation. Only one of them is **Primary**, with all the others showing a **Make primary** button.

- c. If the connection to Inventory Manager 9.2 (default name: ManageSoft – Flexera) is currently the primary connection, click the **Make primary** button for the **FlexNet Manager Suite – Flexera** connection.

New inventory imported through the inventory beacons into 2018 R1 will now be displayed in inventory results.

9. Wait.

Time passes while

- The inventory beacons collect your changed target specification
- Managed devices try to access the inventory beacons, and the pilot group members are now accepted, receiving their new inventory settings
- On the schedule you configured, inventory agents collect inventory from their local machines, and upload the results to an inventory beacon
- The inventory beacon, within ten minutes, uploads the results to a web handler on your inventory server, which stores the results into the inventory database
- The inventory import and reconciliation that happens by default at 2am daily collects from the inventory database and imports into the compliance database as required for license calculations.

Some of these processes can be manually triggered; otherwise come back tomorrow, or worst case the next day.

10. In the web interface, review the inventory results collected from your test device(s) (for example, **Discovery & Inventory > All Inventory** [in the **Inventory** group]).

When satisfied, repeat this process to redefine the target group to include a new or wider range of devices, and continue until satisfied that everything is working as expected. As machines successfully switch over to the new system, you may also choose to move them out of the **Device Migration** target and into a production target.



Tip: Moving devices is preferable to simply removing them from a target, since removal means that when the managed device next accesses the inventory beacon to check its settings, it receives a 404 not found response (it continues to report its inventory on the previously received settings). Once a successful device is moved to a production target, you are 'finished' with the device, no longer needing to remember to come back and tidy up later.



Note: If you are not satisfied with your test cases, you may revert these devices to use the old system. In Inventory Manager 9.2, use remote execution on those devices to do a policy 'update' back to your last applicable policy for 9.2. You do not need to roll back the FlexNet inventory agent as well, as the 2018 R1 FlexNet inventory agent is backward compatible with your 9.2 system. Switching between the old and new systems is controlled by the policy applied to the managed device.

11. When you are satisfied with test results and no longer need fine-grained control, navigate to **Discovery & Inventory > Settings** page, and clear the **Migration mode: Restrict inventory settings to targeted devices** check box.

Restricted targeting of managed devices in FlexNet Manager Suite is now turned off. All managed devices that received the upgrade package quickly switch over to the new inventory beacon hierarchy, and receive at least a default policy. You may remove the migration target from your list of targets. It is best practice to ensure that all devices are covered by production target groups, so that you can control the settings they receive.



Tip: FlexNet Manager Suite 2018 R1 records a list of inventory connections under the system menu (⚙️ in the top right corner of the web interface), **Data Inputs**, on the **Inventory Data** tab. If you inspect this now, you see the inventory connection to your old Inventory Manager in the list. You cannot modify the connection details within the web interface. In the new system, connection details must be edited on the responsible inventory beacon (shown in brackets on the list). In the case of the 9.2 Inventory Manager connection, the responsible beacon is the one installed on your central batch server.

12. Return to Inventory Manager 9.2, and monitor the declining traffic as managed devices switch over to the new system. When you think a distribution server might be finished with (because all its managed devices have switched over), visit the distribution server and disable uploads. Then in Inventory Manager, monitor the **Distribution Status** (click the **All** link), and the count of **Logs** (and **Delayed Logs**) should remain at zero. If not, it means that managed devices are still uploading content to this distribution server — you can inspect the log on the distribution server to identify the managed device that has not switched over (validate against your plan whether this managed device is intended to migrate or to stay with Inventory Manager 9.2). Once the count of logs stabilizes at 0, you can decommission the distribution server, potentially re-purposing the machine as an inventory beacon somewhere in your new system.

Migrating Citrix Inventory Collection

If your previous implementation collected inventory from XenApp or XenDesktop, it's likely that rework is required.

If your previous 9.2 implementation was collecting inventory from Citrix XenApp and XenDesktop, the inventory rules are not carried forward in your new FlexNet Manager Suite 2018 R1 implementation. Citrix has largely reimplemented these products from version 7, and your new implementation supports version 7.5 (along with versions 6.0 and 6.5). To extend this support, a redesign of the adapters to import XenApp and XenDesktop inventory has been necessary.

If you are preserving Inventory Manager 9.2 as an inventory source, any existing inventory import from XenApp or XenDesktop to that system continues to operate. If you wish, you can use your adapter connecting with Inventory Manager to import the results of those inventory collections to FlexNet Manager Suite 2018 R1.

However, if you wish to import inventory directly from XenApp or XenDesktop to FlexNet Manager Suite, please follow the appropriate procedures from the following two sections:

- [Update the XenApp Adapter](#)
- [Update the XenDesktop Adapter](#).

Update the XenApp Adapter

The updated XenApp adapter requires updates to the XenApp server agent, the staging database, and the method of collecting Active Directory data.



To update the XenApp server agent:

1. Check the inventory beacon update is complete (see [Update, and Deploy Additional Inventory Beacons](#) and sub-sections).
2. Be sure that you have completed an import from Active Directory from all relevant domains.

For set-up details refer to *FlexNet Manager Suite Help > Inventory Beacons > Active Directory Page*.

3. If you did not already update your staging database for this adapter in your central database server (as described in [Upgrade/Create Databases](#)):
 - a. Locate your downloaded archive `Adapter Tools.zip` (perhaps in `C:\temp\FNMSUpgrade\`), and in your unzipped archive, navigate into the `\Citrix XenApp Server Agent` subdirectory.
 - b. Further navigate into the appropriate sub-folder for your version of XenApp:
 - XenAppAgent6
 - XenAppAgent65
 - XenAppAgent75
 - XenAppAgent76
 - XenAppAgent78
 - XenAppAgent79
 - XenAppAgent711
 - XenAppAgent712.
 - c. From your chosen folder, collect a copy of the database creation/update script `SetupXenAppAgentStagingDatabase.sql`.
 - d. Drop this SQL script on the database server hosting your staging database, and execute it in SQL Server Administration Studio against your chosen database instance.



Tip: *If you have more than one of these staging databases, repeat this process until they are all updated.*

4. Ensure that the appropriate inventory beacon(s) has/have a connection configured for the staging database(s), and that the connection is scheduled for regular operation.

For details, check the *Create Connections for Data Upload* section of the *XenApp Server Adapter* chapter in `FNMSAdaptersReferencePDF.pdf`, available through the title page of online help.

5. On each of your XenApp controlling servers where FNMPXenAppAgent.exe is installed, replace the executable with the correct version from the unzipped archive.

For details, check the *Installing the XenApp Server Agent* section in the above-mentioned chapter.

6. As required, create or update a scheduled task to execute the upgraded XenApp server agent.

See the adjacent topic *Create a Scheduled Task* in the same chapter.



Tip: Pay particular attention to the schedule for the agent, and the schedule of the inventory beacon import from the staging table. These two activities must not overlap.

The XenApp adapter is now ready for operation. On schedule, the agent populates the staging database; on the later schedule, the staged data is collected by the inventory beacon and uploaded to the central server; finally, when the next inventory import and compliance calculation is run, the XenApp applications and the users who can access them are available, at least as installer evidence and file evidence, within FlexNet Manager Suite. You may additionally need to link the evidence to applications, and to ensure these applications are licensed. For more information, see the other online help topics under *FlexNet Manager Suite Help > Adapters Supplied by Default > XenApp Server Adapter*.

Update the XenDesktop Adapter

The best practice configuration for the XenDesktop adapter is to allow direct network access from the appropriate inventory beacon to the XenDesktop broker. (Where this is not permitted, you can copy the appropriate PowerShell script to the XenDesktop broker, execute it locally, and copy the generated .vdi and .ndi files to the Incoming folder on the relevant inventory beacon.)

As this adapter relies on PowerShell scripts run from the inventory beacon and executing on the XenDesktop broker, both these servers must allow at least RemoteSigned execution policy for PowerShell, as described below.

If you are upgrading from an earlier version of the XenDesktop adapter, notice that you *must* run the Active Directory import separately, and prior to exercising the adapter, as listed below. Failure to do this risks the removal of previously-gathered inventory of VDI access to applications.



To update the XenDesktop adapter:

1. Check the inventory beacon update is complete (see [Update, and Deploy Additional Inventory Beacons](#) and sub-sections).
2. Be sure that you have completed an import from Active Directory from all relevant domains.

For set-up details refer to *FlexNet Manager Suite Help > Inventory Beacons > Active Directory Page*.

3. On each of the inventory beacon and the XenDesktop broker, check the execution policy for PowerShell scripts:
 - a. On each machine in turn, open a PowerShell window.
 - b. At the prompt, enter Get-ExecutionPolicy.

Usable settings include RemoteSigned, AllSigned, or Unrestricted (although the latter is not recommended).

- c. If the current policy setting is Restricted, run the following command to set it to RemoteSigned:

```
Set-ExecutionPolicy RemoteSigned
```

4. Create (or update) discovery and inventory gathering rules to target your XenDesktop brokers:
 - a. In the web interface for FlexNet Manager Suite, navigate to **Discovery & Inventory > Discovery** group > **Discovery and Inventory Rules**.
 - b. Select the **Targets** tab, click **Create a target**, and complete the details to target your XenDesktop broker(s). Click **Save** to add your new target to the list of available targets. (If necessary, repeat to create multiple targets.)
 - c. Select the **Actions** tab, click **Create an action**, and give your new action a useful name and description.
 - d. Expand the **XenDesktop environments** heading in the accordion list, and select both **Discover XenDesktop environments** and **Also gather XenDesktop environment inventory**. Then click **Create** to record your new action.
 - e. Select the **Rules** tab, click **Create a rule**, and in the rule builder that appears, click the View Actions... hyperlink.
 - f. For the rule you just created, click **Add to rule builder**, and in the rule builder, click the View Targets... hyperlink.
 - g. For the target(s) you defined, click **Add to rule builder**, and in the rule builder, click **Schedule**.
 - h. Complete the scheduling details, and click **Save as**.
 - i. Give your rule a meaningful name, and click **Save**.

 **Tip:** After a little time (say, 30 minutes) to allow for the relevant inventory beacon to be collected by its updated rules, you can inspect the rule on the applicable inventory beacon, in its **Rules** page. (If it hasn't updated yet, click **Update now**.)

5. After the XenDesktop adapter runs (according to the schedule you just created), and after the subsequent inventory import and compliance calculation, you can inspect the inventory from your XenDesktop broker:
 - a. In the web interface for FlexNet Manager Suite, navigate to **Discovery & Inventory > Discovery** group > **All Discovered Devices**.
 - b. Locate your XenDesktop broker in the list of devices.

 **Tip:** Adding the **VDI broker** column from the column chooser, and then filtering on Yes, may help you locate this server.

- c. Click the device's name to open its properties, select the **Status** tab, and expand the **XenDesktop environment inventory** section of the accordion.

This is also the location where any PowerShell script errors from the inventory beacon are reported. Should you need additional troubleshooting:

- Inspect the log file on the inventory beacon for errors relating to XenDesktop discovery. This file is located at %PROGRAMDATA%\Flexera Software\Compliance\Logging\BeaconEngine.
- Should you need to prepare a trace file to submit to Flexera Support, turn on the Scheduling/RemoteExecution tracing options by editing this file on your inventory beacon:
`InstallationDirectory\Flexera Software\Inventory Beacon\etdp.trace`

6. As required, you may need to link the file evidence imported from XenDesktop to application records, and ensure that those application records are linked to license records. Wherever possible, link the license records to purchase records to identify the number of your license entitlements.

Once all the links are in place, the next compliance calculation reflects your compliance position for applications accessible through XenDesktop.

Critical: Perform a Full Import

Naturally, there are many changes to FlexNet Manager Suite since the 9.2 release. Unless you take the precautionary step described here, some of these changes can produce potential problems in the handling of inventory records, especially in environments where you gather inventory through multiple tools (for example, through the FlexNet inventory agent and Microsoft SCCM, or any other combination of inventory tools).

When you have completed the migration, you should ensure that your first inventory import and compliance calculation includes a *full* inventory import, at least for the FlexNet inventory source, rather than the default differential inventory import. Of course, the full import means that the first compliance calculation after your migration takes longer than usual, but the investment is well worthwhile.



Tip: *If you are using FlexNet Manager Suite as a replacement for ILMT in calculating subcapacity consumption for IBM PVU licenses, this first full import and license reconciliation is also critical for creating the baseline data and 'seeding' the automated processes that maintain special targets for the appropriate inventory rules. For more details, see the chapter Sub-Capacity Licensing with IBM PVU in the FlexNet Manager Suite 2018 R1 System Reference PDF file, available through the title page of online help.*

Take careful note of the following:

- The full import is triggered from your batch server (or, in smaller implementations, the server hosting that functionality).
- You must be logged in as a user with administrator privileges on that server.
- The following command must be entered at the Windows Command Prompt (and specifically, this is *not* for use within a PowerShell window).
- Identify the connection name used for your 9.2.3 Inventory Manager database (either the one that was always separate, or the one that you split off in [Upgrade/Create Databases](#)). The default connection name is FlexNet Manager Suite, and the **Source Type** is ManageSoft.

- Take careful note of the format of the command line shown below. The three dashes and the *tripled* double-quotation marks are not typographical errors, and are required. However, the command line has been broken over multiple lines for publication, and you should enter it all on one line.
- When all conditions are met, use the following command line (all on one line), replacing the placeholder *connectionName* with the name you gave the connection to your FlexNet inventory database:

```
BatchProcessTaskConsole.exe  
  run InventoryImportReaders ---f  
  -it Readers  
  -s ""connectionName""
```

Depending on the size of your inventory database, this import may take some time. In this process, the data from the 9.2.3 inventory is cleaned and updated, so that subsequent merging of records from multiple inventory sources can function correctly.

Enhancement for Purchase Records

Enhanced functionality in the **Unprocessed Purchases** page (if you are upgrading from a release prior to 2016 R1) may require that you re-process some purchase records. The process is described below. These prior notes provide background understanding of causes and impacts.

The enhancement is:

- In prior releases, a purchase (of an appropriate type) appeared in this **Unprocessed Purchases** listing only when it was not *linked* to a license. The test did not take any account of *quantities* that were linked from the purchase to one or more licenses — as long as there was at least one link between the purchase record and a license, the purchase was counted as 'processed'.
- From release 2016 R1, FlexNet Manager Suite better supports splitting purchases of relevant types (including maintenance) across multiple licenses. As part of this improved functionality, it now examines each purchase to compare the quantity purchased with the quantity assigned to one or more licenses. Any time that the quantity assigned is less than the quantity purchased, the purchase is included in the **Unprocessed Purchases** listing. This allows you to use this listing as a work center for purchase processing, especially when you are splitting purchases across multiple licenses. The purchase is automatically removed from the listing as you assign the last of its purchased quantity to a license.

Depending on your previous work practices, this enhancement may cause some purchases previously processed to reappear in the **Unprocessed Purchases** listing after upgrade. This is more likely to occur for purchases of type Software Maintenance, and will occur if your previous practice has been to manually set the purchase quantity for a maintenance purchase to zero as you linked it to a license.*

In those cases where you had manually set the assignment from a maintenance purchase to a license to zero, there is an ongoing mismatch between the quantity purchased and the quantity assigned to the relevant license(s). After your upgrade, this mismatch correctly causes the purchase to appear in the enhanced **Unprocessed Purchases** listing. (The same is true of any other cases of historical purchases where, for any reason, the purchased quantity does not match the total assignments to licenses.) Since every purchase record is checked for this listing (no matter how old), you may rely on it catching all historical cases where the mismatch between purchased quantity and assigned quantity exists.

**To identify and reprocess purchases if required:**

1. In the web interface for FlexNet Manager Suite, navigate to **Procurement > Purchases > Unprocessed Purchases**.

The listing includes all historical purchases for which there is an **Available quantity** (which is the difference between the purchased quantity and the total assigned to all linked licenses).

2. Select one or more rows from the listing.
3. Click **Recalculate**.

After a moment, unprocessed purchases may show updated values for **Recommended licenses**. In the cases described above, the recommendation is most often to link (once again) to the same license(s) you had previously linked to each purchase. Review all recommendations.

4. Select only those purchases with recommendations that you find acceptable, and click **Accept**.



Tip: The **Accept** button is enabled only when you select purchases with recommended licenses. You cannot include any rows where the **Recommended licenses** column displays *No recommendation calculated*,

FlexNet Manager Suite creates the appropriate links to the recommended licenses (including correcting the link types of those purchases that had been incorrectly linked before, so that their maintenance had been wrongly counted towards entitlements).

5. If there are remaining historical purchases that still require processing, select one at a time and click **Process**.

A blue wizard area appears above the listing to assist with your processing choices. For details, click the online help button in the top right of the **Unprocessed Purchases** page.

6. Repeat as required until all the historical purchase records have been reprocessed.

The necessary reprocessing is completed, and entitlement counts and maintenance coverage correctly reflect your input data.



Tip: For *Software Maintenance* purchases, be sure to record the effective date and the expiry date on each maintenance purchase. This allows the system to automatically calculate coverage, alert you to forthcoming renewals, and so on.

* One reason you may have used this approach is because of an early defect, since repaired, that incorrectly counted maintenance purchases toward license entitlements. This error only occurred when:

- The purchase was *manually* linked to the license (it did not occur when purchase automation was used)
- The link was manually made from the *purchase* properties (it did not occur when the link was made from the license end of the relationship).

(Historical purchase records affected by the old defect are visible in the **Purchases** tab of the license properties, where you can examine the **Purchase type** and **License entitlements** columns. Any linked purchase of type *Software maintenance* should have no value shown for **License entitlements**. Cases where you had adjusted the assigned quantity manually are detected and repaired as described here; and any cases where you did not

notice this old error are now likely to be flagged in license listings with an alert that there is a mismatch between the software entitlements and the maintenance coverage.)

Updating the ADDM Adapter

The ADDM adapter now offers increased support for BMC Atrium Discovery and Dependency Mapping. Additional features introduced with ADDM release 11 require that, if you have previously been using this adapter, you need to update the staging database used for data import.



Note: If you are continuing to use ADDM release 10 or earlier, you do not need to update the staging database schema, and may skip this process. However, if you do apply this update to the staging database schema and continue to use ADDM release 10 or earlier, be sure to also use the latest version of the `FmpADDMStage.exe` executable from the same `Adapter Tools for FlexNet Manager Suite 2018 R1.zip` archive. This executable transfers to ADDM data (for any ADDM version) to the staging database, and is schema-aware for the upgraded staging database.

The update is a straight-forward task, once you have the latest copy of the appropriate script.



To update the ADDM adapter:

1. Download the `Adapter Tools for FlexNet Manager Suite 2018 R1.zip` archive from the Flexera Customer Community knowledge base:
 - a. Access https://flexeracommunity.force.com/customer/articles/en_US/INFO/Adapter-Tools-for-FlexNet-Manager-Suite.
 **Tip:** Access requires your Customer Community user name and password. If you do not have one, use the link on the login page to request one.
 - b. Click the link `Adapter Tools for FlexNet Manager Suite`.

A new browser tab may appear temporarily, and the download of `Adapter Tools for FlexNet Manager Suite 2018 R1.zip` commences.
 - c. In your browser dialog, choose to save the file, and if the browser allows it, direct the saved file to a convenient working location (such as `C:\Temp` on a central, accessible server).

If your browser saves the file to a default location (such as your `Downloads` folder), move or copy it to the appropriate working location when the download is finished.
2. Right-click the downloaded zip archive, and choose **Extract All...**
3. Navigate through the unzipped archive to `Adapter Tools for FlexNet Manager Suite 2018 R1.zip > BMC Atrium Discovery and Dependency Mapping Tools > SQL`.
4. If necessary, copy the script `ADDM_staging.sql` from the `SQL\` folder of your unzipped adapter archive to a temporary folder on your staging server.
5. Open a command prompt on the staging server.

6. In the command prompt window, execute the following command, as amended:

```
sqlcmd -S ServerName\InstanceName -i TemporaryPath\ADDM_staging.sql
```

where:

- The database ADDM_Staging is created with all necessary tables, indices, and so on.
- *ServerName* is the name of the database server hosting the staging database, or its IP address, or “. ” (dot) if you are running the staging script on the same server as the database instance
- *InstanceName* is the name of the instance to use for the database staging tables (this parameter may be omitted if the instance is the default instance)
- *TemporaryPath* is the location where you saved the SQL procedure.

Example:

```
sqlcmd -S 192.100.0.20\Development -i C:\temp\ADDM_staging.sql
```

The schema of your staging database is updated. For more information about the latest ADDM adapter, see the relevant chapter in the *FlexNet Manager Suite Adapters Reference*, available through the title page of online help.

Finishing Off

Congratulations! (And there may be a few bits of housekeeping.)

You have achieved a lot.

- You separated previously co-located installations of two products, and split a shared database.
- You upgraded your Inventory Manager implementation to 9.2.3 so that it can continue operations.
- You separated your existing managed devices into two groups:
 - One group to continue on under Inventory Manager, because they needed customized settings or schedules for their installed inventory agents
 - A second group to migrate to management by FlexNet Manager Suite 2018 R1.
- You implemented FlexNet Manager Suite 2018 R1 in such a way that:
 - All intended managed devices automatically switched over to the new system, and are immediately reporting their inventory directly to the new inventory database within FlexNet Manager Suite
 - Your continuing implementation of Inventory Manager 9.2 is already set up as an inventory feed into the new system, in the same way that Microsoft SCCM or IBM's ILMT or other inventory tools can feed your compliance calculations.
- Reports have been optimized in the new system, and you may find some in new locations. As well, the system no longer uses Microsoft Reporting Services for factory-supplied reports, so that some of those reports are no longer available. If you have custom reports you developed in Reporting Services, you may need to redirect those to link to your new compliance (or if combined, operations) database.

If your plan is to continue parallel operations of FlexNet Manager Suite with Inventory Manager continuing as a data source, your work is complete.

If (on the other hand) you wish to migrate all operations Inventory Manager 9.2 across to FlexNet Manager Suite, some tasks remain to be completed manually, including these:

- Scheduled tasks you had established for Inventory Manager are not migrated into FlexNet Manager Suite 2018 R1. In the new system, you establish rules that combine actions, targets, and schedules. Navigate through **Discovery & Inventory > Discovery and Inventory Rules**, and click **Create a rule**.
- Of the many specialized remote execution tasks available in Inventory Manager 9.2, only three have equivalent rules available in FlexNet Manager Suite 2018 R1 (and there is other rule-based functionality not present in Inventory Manager). If you wish to transfer these three remote execution tasks from Inventory Manager to FlexNet Manager Suite, you must manually set up the appropriate rules (on the same **Discovery and Inventory Rules** page mentioned above) to suit your preferred use of these remote execution tasks:
 - Generate Inventory
 - Generate VMWare Infrastructure Inventory
 - Generate Oracle Database Inventory.
- If you have a regular process of network discovery to ensure that any new devices are automatically brought under management, and you want this to transfer to FlexNet Manager Suite, you need to set up matching discovery rules (once again, on the same **Discovery and Inventory Rules** page).
- When you are no longer using Inventory Manager as a data source for FlexNet Manager Suite, you can remove the connection. Do this (only) on the inventory beacon that is installed on the batch server (or server hosting that functionality), opening the **Inventory systems** page and deleting the connection, by default called ManageSoft. Be sure to do this **ONLY** when Inventory Manager is no longer required, and every inventory target has transferred and is actively managed through FlexNet Manager Suite. This is because removing this connection will also remove from the database any inventory records still coming exclusively from that source.

In addition to things that require manual effort, there are some other apparent 'gaps' that you may wonder about, but which are as expected, and do not require manual effort:

- Historical raw Computer Inventories belong in Inventory Manager and are not transferred to the new system. As managed devices switch over to 2018 R1, the **Discovery & Inventory > All Inventory** list (under the **Inventory** group) is now populated from their current inventory reports, as expected.
- Discovered Devices (the list of devices found by Inventory Manager in previous discovery tasks) are all migrated into FlexNet Manager Suite 2018 R1, with the exception of the following (these are consistent with the normal behavior of 2018 R1):
 - Virtual machines identified in ESX host inventory but which have not yet reported their own hardware and software inventory
 - Computers with a blank name
 - Computers with a domain name that is blank, or equal to MANAGESOFT or WORKGROUP
 - Computers that have a MAC address that is not unique across your computing estate

- Remote devices, mobile devices or VDI templates (these are placeholders created for attaching inventory detected as use of virtualized applications and virtual desktops)
- Computers awaiting inventory (that is, records added as assets but not linked to an inventory record).

Your implementation of FlexNet Manager Suite 2018 R1 is now production ready.

4

Notes on Issues

This chapter includes a few brief guidelines for dealing with common issues. If you discover additional issues not described here, please contact Flexera Support for assistance.

For help on problems uploading inventory data, access the online help through the web interface for FlexNet Manager Suite, and navigate to **FlexNet Manager Suite Help > Inventory Beacons > Inventory Beacon Reference > Troubleshooting: Inventory Not Uploading**.

Password Maintenance

When a password on the service account expires, services cease to operate. At password refresh time, ensure that the password is updated for all of the following.



Note: For accuracy, the changes are listed for distinct servers. In smaller implementations:

- *If you have only a web application server and a processing server, then combine the lists for the batch server and inventory server for use on your processing server.*
- *In a single server implementation, combine all three lists on your application server.*

The configuration scripts used during product installation cannot be re-run simply to update passwords. The following passwords must all be maintained manually.

On the web application server

- The identity configured on the following IIS application pools:
 - **FlexNet Manager Platform**
 - **ManageSoftWebServiceAppPool**
 - **SAP Optimization**
 - **SAPServiceAppPool**

On the batch server

- The identity configured on the IIS application pool: **Flexera Beacon**
- In Services:
 - **FlexNet Manager Suite Batch Process Scheduler**
 - **FlexNet Manager Suite Batch Processor**
- In the **FlexNet Manager Platform** folder for Microsoft Scheduled Tasks:
 - Data warehouse export
 - Export to ServiceNow
 - FlexNet inventory data maintenance
 - FNMP database support task
 - Import Active Directory
 - Import application usage logs
 - Import discovery information
 - Import installation logs
 - Import inventories
 - Import Inventory Beacon activity status
 - Import Inventory Beacon status
 - Import remote task status information
 - Import security event information
 - Import SAP inventories
 - Import SAP package license
 - Import SAP user and activity information
 - Import system status information
 - Import VDI access data
 - Inventory import and license reconcile
 - Recognition data import
 - Regenerate Business Import config
 - Send contract notifications.

On the inventory server

- The identity configured on the following IIS application pools:

- **Flexera Importers**
- **Flexera Package Repository**
- In the **FlexNet Manager Platform** folder for Microsoft Scheduled Tasks:
 - Import Active Directory
 - Import application usage logs
 - Import discovery information
 - Import installation logs
 - Import inventories
 - Import Inventory Beacon activity status
 - Import Inventory Beacon status
 - Import remote task status information
 - Import security event information
 - Import system status information
 - Import VDI access data.

On the Cognos server

The password on the IBM Cognos service also needs to be maintained.

On the inventory beacon

By default, the FlexNet Beacon Engine service and scheduled tasks run as the local SYSTEM account. If these defaults have been modified:

- The following service in the **Services (local)** folder of Component Services (this may have been modified to run as a service account with administrator privileges):
 - FlexNet Beacon Engine.



Note: *The following services are also present, but must be running as the local SYSTEM account:*

- *Flexera Inventory Manager installation agent*
- *Flexera Inventory Manager managed device vversionNumber*
- *Flexera Inventory Manager security service.*
- In the **FlexNet Inventory Beacon** folder for Microsoft Scheduled Tasks (by default, these tasks run as the local SYSTEM account, but you may have modified the installation to run these as a named user account in order to manage proxy access):
 - Upload Flexera logs and inventories
 - Upload third party inventory data

Identifying IIS Application Pool Credential Issues

A password change on (any of the) application server(s) may require an update of the IIS configuration.

Background

During installation of an on-premises implementation, PowerShell scripts run on the application server (or, in a multi-server implementation, on each of the component servers in turn) ask you to provide credentials for the application pools used within IIS for FlexNet Manager Suite. The scripts save these as part of the IIS configuration.



Note: If, as recommended, you have used a service account (suggested: `svc-flexnet`) for this purpose, it is very unusual to require a password change for such an account. If you used a normal user account, you require this additional maintenance each time that the password on that account is changed.

If, at any time after installation, the password for this user account is updated, the IIS configuration is now out of date, and IIS will refuse to run the application pools for FlexNet Manager Suite.



Tip: In this case, as well as IIS configuration, you may also need to update passwords on scheduled tasks and on services. For a complete list, see [Password Maintenance](#).

Diagnosis

First symptom: The web interface for FlexNet Manager Suite will not load, producing the following error:

```
HTTP Error 503 - Service unavailable
```

Investigation: If you examine the Microsoft IIS application pools, you will find that the application pool for FlexNet Manager Platform is disabled after any attempt to run the web interface. An examination of the IIS log file shows entries like the following:

```
server-name 5057 Warning Microsoft-Windows-WAS System date time
Application pool FlexNet Manager Platform has been disabled. Windows Process Activation
Service (WAS) did not create a worker process to serve the application pool because the
application pool identity is invalid.
```

```
server-name 5059 Error Microsoft-Windows-WAS System date time
Application pool FlexNet Manager Platform has been disabled. Windows Process Activation
Service (WAS) encountered a failure when it started a worker process to serve the
application pool.
```

```
server-name 5021 Warning Microsoft-Windows-WAS System date time
The identity of application pool FlexNet Manager Platform is invalid. The user name or
password that is specified for the identity may be incorrect, or the user may not have
batch logon rights. If the identity is not corrected, the application pool will be
disabled when the application pool receives its first request. If batch logon rights
are causing the problem, the identity in the IIS configuration store must be changed
```

after rights have been granted before Windows Process Activation Service (WAS) can retry the logon. If the identity remains invalid after the first request for the application pool is processed, the application pool will be disabled. The data field contains the error number.

Repair

Update the credentials for the applications pool on each of your application servers, using the process in [Update Credentials in IIS Application Pools](#).

Update Credentials in IIS Application Pools

To update the password for the FlexNet Manager Suite application pools within Microsoft IIS, complete the following process on each of your servers in turn:



Tip: Servers are here named in a series from most specific (in large scale implementations) to most general (for small scale implementations). Use the first-listed server type that applies to you. For example, if the list item says 'on the inventory server/processing server/application server', and you have a separate inventory server, make the change there. If you do not have a separate inventory server, but you have scaled to a separate processing server (that combines your inventory server and your batch server), make the change on your processing server. For a single-server implementation, you make this change on your application server.



To update credentials in IIS Application Pools:

1. Open IIS Manager (**Start > Administrative Tools > Internet Information Service (IIS) Manager**).
2. In the navigation area on the left, expand the **SERVER-NAME (account-name)** node, and select **Application Pools**.

Any application pool accessed since the user account password was changed displays a status of Stopped. On each server type, the relevant application pools are:

- **Flexera Beacon** on the batch server/processing server/application server
- **Flexera Importers** on the inventory server/processing server/application server
- **Flexera Package Repository** on the inventory server/processing server/application server
- **FlexNet Manager Platform** on the web application server/application server
- **ManageSoftWebServiceAppPool** on the web application server/application server
- **SAP Optimization** on the web application server/application server
- **SAPServiceAppPool** on the web application server/application server.

3. Select the appropriate application pool, and in the **Actions** list on the right, click **Advanced Settings**.

The **Advanced Settings** dialog appears.

4. In the **Process Model** section, select **Identity**, and click the ellipsis button next to the account name.

5. Next to **Custom Account**, click **Set**.

The **Set Credentials** dialog appears.

6. Enter the full **User name** for the account and enter the updated password in the two required fields.
7. Click **OK** to close all the open dialogs and save the new settings.
8. With the appropriate application pool still selected, in the **Actions** list on the right, click **Start**.

IIS Roles/Services

Below are the Microsoft Internet Information Services (IIS) roles and services utilized by FlexNet Manager Suite. In the event of misbehavior, it is often helpful to validate that all of the following are enabled on all your central servers (depending on the scale of your implementation, the ones that you have implemented from the application server, the web application server, the processing server, the batch server, and the inventory server). The process for checking whether the services are enabled is summarized below the list.

- Web Server > Application Development > .NET Extensibility
- Web Server > Application Development > ASP.NET
- Web Server > Application Development > CGI
- Web Server > Application Development > ISAPI Extensions
- Web Server > Application Development > ISAPI Filters
- Web Server > Common HTTP Features > Default Document
- Web Server > Common HTTP Features > Directory Browsing
- Web Server > Common HTTP Features > HTTP Errors
- Web Server > Common HTTP Features > HTTP Redirection
- Web Server > Common HTTP Features > Static Content
- Web Server > Health and Diagnostics > HTTP Logging
- Web Server > Performance > Dynamic Content Compression
- Web Server > Performance > Static Content Compression
- Web Server > Security > Basic Authentication
- Web Server > Security > Request Filtering
- Web Server > Security > Windows Authentication



To check available services in the Windows Server operating system:

1. Starting from the Windows start menu, navigate to **Control Panel > Administrative Tools > Server Manager**.

2. In the navigation bar on the left, under the **Server Manager** node, select the **Roles** node.
3. Locate the **Web Server (IIS)** section, and within that, identify the **Role Services** section.

This section lists the status for each service. All of those in the list above should be both installed and enabled on all your central servers.