

NetIQ Universal Policy Administrator: QuickStart Service

Quickly gain a return on your software investment with the NetIQ UPA QuickStart Service.

Overview

NetIQ Universal Policy Administrator (UPA) by OpenText helps you control all of your policies from a single console using a modern, cloud-based solution. Most organizations have multiple platforms in their ecosystem. Whether you are using Windows, Linux, Mac, or Non-Domain Joined Windows devices, you can pull all of the policies into the NetIQ UPA system and place them under centralized policy management. The various policy mechanisms are translated into a simplified policy language, which can then be applied to the endpoints in the multiple silos and platforms. In fact, these resources can live anywhere—on premises, in any cloud, and even in a container.

With NetIQ Universal Policy Administrator, you can:

- Update all policies in one place, providing a single pane of glass to all device platforms.
- Track policy changes by user and date, making compliance audits a breeze.
- Identify policy conflicts and non-adherent administrator changes, before the changes are deployed.
- Enable experts to manage their specific applications and technology through policy, without handing them the keys to the entire kingdom.

The QuickStart Service accelerates the implementation and adoption, providing a rapid return on your UPA investment. With your assistance, the OpenText Professional Services team gathers initial requirements for the target platforms, policies, and delegation model; defines a design; walks through the product configuration for a number of use

cases for your existing tool; and enables your administrators with the requisite knowledge to continue with enterprise-wide configuration, operation, and maintenance of the NetIQ Universal Policy Administrator (UPA) tool and integrated systems across your on-premises, cloud, and hybrid environments.

Service Implementation

An OpenText Professional Services specialist configures the NetIQ Universal Policy Administrator in an environment of your choice (i.e., Development, User Acceptance, or Production). The engagement is delivered in four phases: 1) Project Planning and Solution Requirements Definition, 2) Gateway and Endpoint Device Implementation, 3) Administrator Knowledge Transfer and Enablement, and 4) Next Steps Collaboration and Recommendations Session.

Week 1: Requirements Definition, Planning, and Design

The engagement starts with gathering requirements, planning, and design. These activities are estimated to require 2–3 dedicated days and include the following:

- Active Directory environments
- OU structure requirements
- Delegation model
- Policy requirements (up to 5)
- Reporting and SIEM integration
- Server specifications, ports, and protocol requirements

Using these requirements, you and the OpenText Specialist determine the integration methods, establish a security model, and provide an initial Design document as a

roadmap for implementation. This design will be presented to your stakeholders for general acceptance to move into implementation.

NOTE: Should complex design requirements be identified determined or extend the design phase, OpenText will advise you of any changes in scope or effort prior to moving into implementation, for mutual acceptance.

Weeks 1 and 2: Gateway and Endpoint Device Implementation

During the QuickStart Service implementation activity, you and the by OpenText Specialist will perform the following activities within weeks 1 and 2 of the engagement:

- Install and configure the NetIQ UPA gateway software, including:
 - One (1) UPA On-Premises Gateway
 - One (1) UPA Cloud Gateway (if deemed required)
- Import each managed Active Directory domain as defined in the initial Design document.
- Install up to five (5) agents per each LINUX or Mac platform designated as “in scope” within the initial Design document.
- Install up to five (5) agents for non-domain joined Windows endpoints.
- Configure up to five (5) Active views for delegated policy administration.
- Configure up to five (5) basic policies as defined in the initial Design document.
- Back up the Git repository.
- Configure audit integration (syslog forwarding) with your existing SIEM.

- Review UPA out-of-the-box reports.
- Provide side-by-side knowledge transfer during these activities.

It is recommended that you make a recording of the above activities and working sessions for reference during the knowledge transfer and enablement activities, and for future internal operational support.

The OpenText specialist will update the initial Design document to reflect any changes agreed on during implementation.

Week 3: Administrator Knowledge Transfer and Enablement

After the implementation, you will continue working with policies (import/export, versioning, rollback, and approval); adding users, groups, and notifications; deploying agents and configurations; working with UPA reports; auditing NetIQ UPA; and testing to become comfortable with typical tasks and the UPA Solution as a whole. The OpenText specialist will review your work and will provide: additional knowledge transfer, critiques regarding practical and best practices, and recommendations for refinement.

This cycle will typically fall into half-day sessions, where the OpenText specialist reviews your previous day's work while you are executing the next tasks in the morning. In the afternoon, you and the OpenText specialist will meet to discuss their findings, answer your questions, and provide additional clarifications as knowledge transfer. Again, it is recommended that these mutual sessions be recorded for future reference. It will be your responsibility to update the Design (as a "living document") with activities completed during this cycle or capturing it with other internal tools.

In parallel with the implementation and the knowledge transfer cycle, the OpenText specialist will compile global recommendations for optimizing the solution within your

environment for review during the Next Steps Collaboration and Recommendations Session.

Week 4: Administrator Knowledge Transfer and Enablement

During the final half day of the engagement, the OpenText specialist will provide and present their global recommendations for technical design, process optimization, and next steps. You and the OpenText specialist will collaborate to plan follow-up activities for topics such as:

- GPO integration
- Additional policies
- Additional training requirements
- Cleanup and/or rename tasks
- Additional platforms to support

Service Eligibility

Any new NetIQ Universal Policy Administrator by OpenText customer qualifies for the QuickStart Service. To qualify, you must:

- Confirm your purchase of the NetIQ UPA license and availability on the OpenText customer care portal.
- Validate that all intended policies and device platforms are, indeed, supported by the current version of NetIQ UPA.
- Purchase four (4) remote Professional Services weekly service SKUs (PS-AA996).

Any existing NetIQ Group Policy Administrator customer intending to migrate to NetIQ Universal Policy Administrator qualifies for the QuickStart Service upon meeting the above qualifications and acknowledging the following caveat: the scope of the engagement is limited to the activities listed herein. Therefore, full migration of your existing NetIQ GPA configuration might not be possible without an extended design discussion and additional services.

Service Limitations

The service does not include the following activities:

- Providing custom integrations or configurations.
- Conducting performance testing.
- Deployment or configuration beyond out-of-the-box functionality within your selected single environment. Traditional Development, User Acceptance, and Production Environment Deployments are considered out-of-scope.
- Advanced design or architecture requirements, such as distributed server or high availability.
- Remediation of findings or implementation of any actions recommended by the OpenText specialist.
- Providing services not clearly specified in this document or beyond the product's license limitations.

Customer Responsibility

Your involvement is pivotal to the successful implementation and adoption of the NetIQ UPA solution. OpenText Professional Services will need your help defining and refining the requirements during the configuration.

You will need to:

- Contact your OpenText Client Principal within 90 days of the purchase date to schedule delivery.
- Confirm the purchase and access to license keys (via OpenText customer care portal) prior to start.
- Confirm that you have provisioned and configured the On-premises Gateway Server and ensure that it is communicating (including firewall configurations between your data center and the necessary cloud components intended for integration), per the specifications provided by OpenText prior to engagement start.
- Provide an Azure Resource Group for installation of the NetIQ UPA Cloud Gateway and SQL Database on Azure for the Cloud Gateway.

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- Ensure the availability of your security expert to generate SSL certificates required for the NetIQ UPA Cloud Gateway and make appropriate DNS changes or entries to ensure proper resolution in the selected deployment environment.
- Identify and test (in advance) the endpoint devices of each platform.
- Attend all design, configuration, and knowledge transfer sessions.
- Identify and commit required resources for the duration of the engagement prior to start.
- Assign a staff member to grant all approvals; provide information; attend all design, configuration, and knowledge transfer sessions; and assist with the delivery.
- Facilitate timely resolution of identified risks, dependencies, and issues as they arise.
- Provide remote access to your network and services, including a VPN token and client software, server names and IP addresses, and administrative user names and passwords.
- Take responsibility for documentation that you might need internally, including but not limited to end-user documentation.

OpenText Professional Services will observe your work, security, and safety policies to determine if they are consistent with OpenText business practices. Please record your policies in writing and provide them in advance.

Duration

OpenText Professional Services delivers the service as a single, continuous event that will not exceed three (3) calendar weeks.

If your environment requires multiple phases over an extended period, you can request (in addition to this service) a specialized statement of work that works for your team.

The Professional Services Difference

OpenText Professional Services delivers unmatched capabilities through a comprehensive set of consulting services. These services help drive innovation through streamlined and efficient solution delivery. We provide:

- Proven software-solution implementation expertise.
- More than 20 years of experience helping large, complex, global organizations realize value from their OpenText software investments.
- Rich intellectual property and unparalleled reach into product engineering.
- A technology-agnostic implementation approach based upon industry standards.
- Education and Support services to ensure successful adoption.