

Q&A Session for Ask Support: Remedy 9 Upgrade Live Q&A

Date: Wednesday, May 24, 2017

Presentation References

AMIGO Program

<https://communities.bmc.com/docs/DOC-28417>

Deployment Portal: Planning an Upgrade

<https://docs.bmc.com/docs/display/public/brid91/Planning+an+upgrade>

Remedy 9.x Upgrade Enablement

<https://communities.bmc.com/docs/DOC-44719>

Upgrading Atrium Core – What you should know to prevent upgrade failures

[Knowledge Article 000097520](#)

Recommended Hotfixes

<ftp://ftp.bmc.com/pub/ARRecommendedFixes/>

Webinar Q&A

Q: Is there a possibility to install a clean 9.x environment and import Customizations and Data from a 8.1 system afterwards? What is the best way to achieve this?

A: Yes, Customers can either upgrade existing env to preserve transactional data or setup Fresh OOB 9.x env and migrate, overlays, foundation and config data and go live with new version if they don't want to preserve transactional data. If customer want to migrate both foundation/config and transactional data and go live with Fresh 9.1, yes, they can use this approach but they need to be technically strong and understand the upgrade process internals. We will publish a white paper on this with various scenarios by end of next month.

Q: Currently on ARS 7.5/ITSM 7.6 and want to upgrade to 9.1. We have 2 options available Upgrade or Fresh implementation. Is there a recommendation between the two options?

A: Choosing option between upgrade vs Fresh implementation is based on your decision of keeping Transactional data or not. As you are coming from overlay unaware env, you need to upgrade to 8.1 and follow overlay conversion and all other tasks then upgrade to 9.x. If you want to preserve Transactional data then you need to upgrade otherwise Fresh install and migrate foundation/config data.

Upgrade from ARS 7.5/ITSM 7.6 to 9.1 should be done in two step process, upgrade to 7604 SP5, Create overlays, then upgrade to 9.1

Fresh install and migrate data from old env : setup 9.1 env, migrate foundation/config data. Migrating transactional data is little challenging as you need to define the mappings and changes to DDM XML files

Q: Details on setting up upgrade servers using staged vs accelerated (database-only) approach?

A: This is documented here:

<https://docs.bmc.com/docs/display/public/brid91/Setting+up+systems+for+a+staged+upgrade>. There are 2 options for setting up the staged server; we have removed the "accelerated" option and replaced it with the second option of simply installing the original ARServer version only. And then proceeding with the upgrade.

Q: Want to upgrade from Remedy 8.1 to 9.1 with SQLServer 2016 and Windows 2016 R2, but 8.1 was released prior to the Release of Microsoft 2016 products. Is this supported?

A: BMC policy on "XYZ or higher" is with an assumption of maintaining previous compatibility, but has not explicitly been tested. It also is not recommended to perform OS, DB, and Remedy upgrade at the same time.

Q: In the past upgrade failed on case insensitive setup. Do upgrades 9.1 to SP02 or SP03 support Oracle 12c setup case insensitive (all indexes are converted to functional indexes)?

A: The install will now succeed but it will not convert regular indexes to Linguistic. This still has to be done manually.

Q: In a single AR System Server environment how does one ensure that escalations will not start up after upgrading from 7.6.04 to 9.1.02?

A: There are several steps to ensure that escalations are disabled once the upgrade is complete. If the server is configured as a member of a server group then first remove it from the group, set the escalation ranking to blank and select the Disable Escalations option.

Q: Never have done an upgrade, but have detailed documentation of all customizations done. How can I approximate how much time it will take to reconcile these customizations? Trying to get an idea of total upgrade time.

A: The time needed to reconcile customizations will vary depending on their scale, complexity and relevance when taking into account functional changes in the new versions of the applications. The best way to estimate the required time is to test the upgrade and reconcile a representative group of customizations to get an idea of how long each will take and scale from there.

Q: We are upgrading from 7.6.04 to 9.1 this year. Can we continue to use our Remedy User fat client? We have CTI integrations with ININ/I3 that will not work as web based calls.

A: Yes, the User Tool client will continue to work with 9.1 servers in the same way that it did with earlier versions. Although the client has been deprecated there have not been any changes which will prevent it from working or reduce its functionality. You may use the fat client for accessing simple forms such as server information page, user form etc.

Q: Saw webinar advertised for ITSM 9.1 Service Pack 3 and Smart IT 1.6, when will they be available?

A: The products will be available June 2017.

Q: Are SR migrating possible and simple from version 7.6.04 to version 9 or is it necessary to perform some manual treatment?

A: If you are upgrading the environment all SRDs would be upgraded. For Advanced Interface Forms (AIFs) there are differences between these versions that require update to your custom forms. This process is documented in the SRM documentation. You can migrate from 7604 to 9.x but you need to understand the behind the scene logic to fix some issues or open each SRD and navigate through wizard, save and publish. BMC Best practice is to migrate SRDs from same version.

Q: Question about the new hierarchical group security in v9.1x. We currently have multiple companies defined for our different business units, ex Corporate, Research, IT etc. All of these companies are in same physical company though and should be able to submit/view change records. What is best way to facilitate this with V9.1? It seems that following the initial install support groups are set to have the parent company as parent group but that isolates each company's data. How can we easily have a top level group that is above all of the other companies?

A: You can create a "Super Company", give everyone access to it and then the "Super Company" a parent group of your other companies as needed.

Q: we are planning an upgrade from ITSM 8.1 to ITSM 9.1 and want to break the upgrade into small tasks, based on compat info:

1. Upgrade midtier to 9.x
 2. Migrate from atriumSSO to RSSO 9
 3. Upgrade (ARS, ITSM, and reconcile customizations)
- A quick first attempt with MT and RSSO showed some problems with Atrium CMDB

A: Java and Tomcat versions should be reviewed, as long as updated versions are used on both components it should be fine. Agents should change, Midtier authenticator should change it is possible that the AR configuration changes minimally if the Identity provided didn't change only the connector. Recommend opening a support case to review this situation.

Q: Smart IT: Is it possible to use end user filter by default?

A: You can set any filter, even those created by a user, to be the default filter for that user. It is controlled by each user... they can set their default filter. Also, they can create their own filters.

Q: Smart IT: Can the REQ number be part of the filters and columns displayed?

A: if you are viewing Incidents and what to see the Request ID that might have caused that Incident to be created we do have a column for Request ID... click on the three dots on the right and add it to the view.

Q: Smart IT: When shall we be able to search by product and operation cat?

A: For Assets, we can search by Product Cat. We don't have Product Cat/Op Cat as a search option for Incidents on the Ticket Console. Parent ID field: can it be used for WorkOrders to display the REQ number (currently looks to work only for tasks).

Q: AR System 9.1.01 to 9.1.02 (latest service pack). Information about doing this type of upgrade.

A: Upgrading a Service Pack is a standard process. You would choose an upgrade path and perform the upgrade. The AR Server can be done as part of a ZDT (Zero Downtime Upgrade). For more information review the documentation - <https://docs.bmc.com/docs/display/public/brid91/Upgrading>

Q: Biggest difference between 9.1 and 8.1 upgrade?

A: 8.1 had many improvements to upgrading in comparison to earlier versions. With 9.1 there have been additional improvements: Configuration Checker run as part of the installer to identify problems prior to upgrading, installation times have been improved in comparison to earlier versions, and there have been many application performance improvements and automated upgrade tasks. Full Text Search (FTS) has been improved in 9.1 as well.

Q: Have 8.1 with 3 servers in a server group, and 2 load balanced midtier, with ASSO. As we are planning to upgrade to 9.1 should we do a staged upgrade?

A: If you can accept downtime, then In Place would be ok, but if they cannot accept much downtime a staged server upgrade would be the better option. Detailed information is available in the documentation - <https://docs.bmc.com/docs/display/public/brid91/Upgrading> and sample upgrade plans are available via the AMIGO collateral in KA#11571 - https://communities.bmc.com/external-link.jspa?url=https%3A%2F%2Fbmc.com%2Fcommunities.force.com%2Fcasemgmt%2Fsc_KnowledgeArticle%3Fsfidcid%3DkA11400000d51RCAQ%26type%3DProductDescription

Q: Currently on AR System 8.1 Sybase and want to migrate to AR System 9.1 SQLServer or Oracle DB (decision pending) on different hardware. Do we load AR System 9.1 on the new hardware, then migrate to the new database? or Load AR System 8.1 on the new hardware, then migrate to the new database, and then upgrade to 9.1.

A: Although there are 3rd party database tools that exist to migrate data from one database type to another they may not convert/represent the data properly. Better to install 9.1 clean on your new hardware and new database, then use tools such as Migrator, DDM, etc. to migrate the data. Also depends on amount of data, you can choose DDM tool or you can use 3rd party DB migrations to migrate data and then you need to run all MSM:Migration tasks related to 9.1 and POST DDM scripts. You need to export overlays and import on 9.1 and use 3-way recon to reconcile overlays. You can build SLAs using SLM Console. You need to build FTS. We will publish a white paper with detailed steps by end of June 2017. If you are targeting your upgrade and need immediate help, Please submit support ticket for additional help on this.

Q: AMIGO Program has useful information. We are a partner and want to get KA's that can be reviewed to help prepare for upgrades.

A: The AMIGO Program KA#11571 has links, sample test & upgrade plans, and other documentation resources. These can be found in the KA and are pdfs attached to the KA you can download. https://communities.bmc.com/external-link.jspa?url=https%3A%2F%2Fbmc.com%2Fcasemgmt%2Fsc_KnowledgeArticle%3Fsfid%3DkA11400000d5IRCAQ%26type%3DProductDescription

Q: Doing a staged server installation after restoring the database does anything else beyond AR need to be installed?

A: No, only "current" production AR System server needs to be installed prior to performing the 9.1 upgrade.

Q: Different database architecture migration - Sybase to SQLServer, are there suggested tools?

A: No suggestion, but Engineering team helped one of the customer where they used DB Best tool to migrate 4TB data from DB2 database to SQL Server. It truncates the tables in the destination and migrate data. No specific recommendation, but your choice on the tool you use. Also, Alderstone is a 3rd party service that does database level migration.

Q: Currently at Version 8.1.02 with MyIT and SmartIT, what is the impact upgrading to 9.1 on MyIT and/or SmartIT?

A: After upgrading or applying a ITSM patch you need to re-apply the User Experience patch again. This will take care of the integrations between AR and MyIT/Smart IT.

Q: To upgrade from 8.1 to 9.x it should be across the board - midtier, arserver, etc. or is it okay to upgrade just the midtier initially?

A: If you are not using CMDB, then you can upgrade midtier so it is on a different version from the AR Server.

Q: Two separate 8.1.02 Environment (one for IT Users and another business users) and would like to understand the multitenancy feature in terms of upgrading.

A: As they are separate environments they cannot be upgraded and combined into one environment. As there maybe ID conflicts of record data. The multi-tenancy feature is an application feature similar to previous versions. It does not allow support of duplicate forms (e.g. user forms, incident, etc.). That isn't the way the feature works.

Q: Migrating ITSM 7.6.04 to ITSM 9.1 new hardware environment. The customizations are done via overlays. Is it supported to migrate 7.6.04 overlays to 9.1 using migrator?

A: There is a major architectural changes with reference to AST forms hence exporting overlays from 7604 and importing on 9.1 will be a challenging task. In the Normal upgrade, installer scripts delete or modify the fields on the form to match target version of forms. If your 7604 overlay points to the field that doesn't exist in 9.1 then overlay may not be imported. You need to spend lot of time in troubleshooting. You can setup 7604 OOB env , import overlays from your prod, upgrade to 9.1, convert overlays to Granular overlays, do 3-way recon and then export these overlays and import on new 9.1 env. Adjusting customizations when upgrading - <https://docs.bmc.com/docs/display/public/brid91/Adjusting+customizations+when+upgrading>

Q: See a lot of entries in ft_pending for over a year that were not processed.

A: Review, many of entries maybe pointing to incorrect servers based on configuration changes you made. So, these can safely be removed.

Q: AR System database backup from source system, it was recommended to stop all services first. Is that still a requirement?

A: There is a concern when taking a backup of a "running" database is in regards to transactional consistency. When doing this for upgrade, it is recommended to ensure all services are stopped to ensure the "state" of the database. This also depends on the type of database you are using SQL Server, Oracle, etc. In Oracle, it will backup tables in alphabetic order Bx table, Hx table, Tx table, etc. if data was added each of the tables for each form would have different record count. This would cause a problem when performing DDM to move the new/changed data. For SQLServer have not observed a problem.

Q: Is there somebody we can contact if we have further questions after the webinar?

A: You can open a support case based on the product component (Server, midtier, apps, etc.) and they can help.

Q: In our 8.1 Atrium, we never performed phase 3 of the installer.....how does that impact moving to 9.1?

A: ITSM installer will give you error message if Phase 3 is not completed in prior upgrade.

Here are manual steps to complete phase 3 / Attribute deletion:

1. Run ITSM_DeleteAttributes.drm using cmdbdriver executable

Eg: One can launch ITSM installer and cmdbdriver will be present in TEMP\Utilities or in \rik path

- Open command prompt and set required SYSTEM variable like LD_LIB path to TEMP\Utilities

- ./cmdbdriver -s ar_server -u AR_USER -p "password" -t 0 -x

//bmc/BMCRemedyITSMsuite/Workflow/phase3/applications/raf/workflow/en/ITSM_DeleteAttributes.drm

```
<Path to CMDB Driver>\cmdbdriver.exe -s <Server Name> -u <User Name> -p <Password> -t <TCD PORT> -x
```

```
"C:\Program Files\BMC
```

```
Software\BMCRemedyITSMsuite\Workflow\phase3\applications\raf\workflow\en\ITSM_DeleteAttributes.drm"
```

```
export LD_LIBRARY_PATH=$LD_LIBRARY_PATH:/arsys/ARSystem/bin
```

2. Update SHARE:App properties to 3-Complete for RAF.

3. Delete objects from itsm_phase3_post_bulkobject_deletion. This xml can be found in raf\workflow\en path.

Q: What is the default number of escalation pools in 9.x and does the out of the box escalation take A:

A: Some of the applications now include escalations set to run on additional pools but the server defaults to only one. The thread count for escalations will need to be increased to take advantage of the pool configuration changes.

Q: Upgrading from 8.1 with no SP. What sort of impact to Web Service Integrations should we expect? And to other types of integrations? Are there types of integrations that you would expect to have issues and likely to have to be rebuilt?

A: If your question specific to AtriumWS? the answer is no. AtriumWS is the same as before. However, we have REST API functional for ARS and the CMDB

Q: Regarding the BMC encryption, is there an issue with upgrading to 9.x when it is enabled?

A: Is this the built-in or Performance/Premium encryption? In the case of the former it should be transparent. The latter may need to be disabled during the upgrade but we will confirm this in the final version of these questions.

Q: We have other systems, like monitoring and others, that create incidents in remedy and we return information, so bi-directional. Would you expect those types of web service integrations to have any issues? We also have some AI Jobs too?

A: Once the webservices are configured they function well and transfer data without major issues. There has been major changes on Webservices integrations, I would recommend not only considering upgrading to 9.x but to install the latest SP and patch available at the time.

Q: Does this approach work with Remedy 7.1 which is a lot older.

A: The docs contain a section on upgrading from earlier versions

<https://docs.bmc.com/docs/display/public/brid91/Planning+an+upgrade> 000097520 - Upgrading AtriumCore from 7.5 to 8.1 and 9.0 - What you should know to prevent upgrade failures. You can also check KA#11571 the AMIGO Program and open a case to discuss alternatives to upgrading, such as setting up a new 9.1 environment.

https://communities.bmc.com/external-link.jspa?url=https%3A%2F%2Fbmc.com%2Fcasemgmt%2Fsc_KnowledgeArticle%3Fsfid%3DkA11400000d5IRCAQ%26type%3DProductDescription

Q: could you post that KB number to fix the install issue of 8.x installer against MS SQL 2016 / MS win 2016 to the chat?

A: It's in the Communities at the moment - <https://communities.bmc.com/message/699898> - it will be added to the Knowledge Base soon

Q: We have AR 8.1 and all customized applications. If we upgrade to AR 9.1, do you see any impact to our customized application? Is there any built in functionality available in AR 8.1 but not available in AR 9.1?

A: No features have been removed but new ones have been added and there have been some changes to functionality – e.g. web services support for SOAP 1.1 - that should be tested to ensure they work as expected. Please see the documentation for details - <https://docs.bmc.com/docs/display/public/itsm91/Version+9.1.00+enhancements>

Q: Within the new R9 Smart IT we miss the possibility to search by product and operational catalogue. Is this possible?

A: There is current no pre-defined filter for product or operational categorization. That's something we are considering to add as part of the product roadmap. Today you can add those fields as columns in the console, and you could sort by these columns. There's ideas in the BMC Community for this enhancement. Feel free to vote on the idea to make sure that it reflects the demand in the customer base.

Q: Is it a good practice to import the 7.6 Custom workflows after upgrade on a 9.1 Workflows And also is it possible to compare Custom Workflows in 3 Way Recond ?

A: If the custom workflow has been created as overlays they will be preserved during the upgrade and you will reconcile them after the upgrade. There is no separate step to import them. If you are exporting manually from 7604 and importing on 9.1 might overwrite base objects with older version and you would see functional issues.

Q: We use Interactive Intelligence (I3) for our CIC solution. Our Tech Support Engineers do "cherry picking" from the queue. So, that is custom and different than most companies.

A: Suggest you open an AMIGO case to get some additional help as it a complex case. I would consider the Oracle upgrade as a separate step and consider adding the Redhat system as a new member of a server group on the current version. Then upgrade

Q: We changed some native BMC objects (Active Links, Filters, etc) in Best Practice Mode (we created Overlays). When we upgrade our environment (7.6.04 to 9.x), will we be able to identify these custom native objects during the upgrade phases?

A: Yes, the overlays will be preserved and you can identify them as part of the reconciliation process <https://docs.bmc.com/docs/display/public/brid91/Reconciling+workflow+objects>

Q: what was the KB article for AMIGO links and attachments? I think KB11711 was mentioned, but can't find it

A: Article 000011571 https://communities.bmc.com/external-link.jspa?url=https%3A%2F%2Fbmcsites.force.com%2Fcasemgmt%2Fsc_KnowledgeArticle%3Fsfid%3DkA11400000d51RCAQ%26type%3DProductDescription

Q: What about the REQ number related to INCs, WOs,... can it be configured to display it as a column?

A: You can show service requests as records in the Ticket Console, but for a backend record (incident, workorder, change) you cannot show the REQ ID as a column in the console. We currently only show parent request ID for tasks as column in the console. Overall, we are looking to expand both the filter and the column configuration options in the Smart IT console to give our customers more flexibility.

Q: Is there some native functionality in Remedy 9 that allows the user to respond to a satisfaction survey or approve a change request through a button directly from the email?

A: Email based approval for change request: yes, this is an OOB feature. This was added in v8.1 and is still available in Remedy v9. And yes, we have options to send our surveys to users, after the completion of a service request. You can configure survey questions, and the answers of the user are recorded and can be reported on. Note that with our latest MyIT / Digital Workplace version, we also introduce a simple satisfaction survey - allowing user just to click on some smiley faces to select, how satisfied they were with the completion of the request. For change approval, I should also point out that you can do this now on a mobile device via MyIT / Digital Workplace or via Smart IT.

Q: Today we have 8.1 and use SAP Crystal Enterprise for reporting. Does this change with 9.1?

A: No, the functionality remains the same. While this continue to work for backwards compatibility, we highly recommend that you use Smart Reporting, once you have migrated to 9.1. This provides a highly modern, very easy-to-use web reporting capability. And as long as you use Smart Reporting to report on ITSM data in Remedy, you don't need a separate license for it. The Remedy ITSM user licenses entitle to access Smart Reporting in that use case.

Q: In SAP Crystal enterprise there is Universe type functionality to make more relational connections to Remedy. Has BMC worked with this universe connection and SAP previously? I could not find any data points about how to use it with Remedy.

A: If you can access/report against the universe using the AR ODBC driver within Crystal Report Designer, Remedy should be able to run this as well. There has not been any concerted effort toward this type of integration.

Q: In version 9.x, is it possible for an SR from SRM to directly open a Release or Problem record? Or only the records available today in version 7.6.04 (INC, WO, CRQ)?

A: Not OOTB. But SRM had always provided an option to build your own AOT that do custom activity, and as far as I know, you could use it to create e.g. a problem record. Per ITIL best practice Release or Problem requests are not originated by end user.

Q: Again, upgrading from 8.1 no SP and upgrading to 9.1 latest SP, are there any modifications to the CMDB? Class modifications? Or any fields being moved from CMDB to Asset Management again?

A: I think you're referring to the Phase 3 that changed most of AM namespace attributes to AST:Attributes. No, there is no additional changes like that. We have added some new attributes to CMDB in 9.1 and have flattened (denormalized) the Common Data Model

Q: I see. No we cannot use the AR ODBC driver with Crystal Enterprise. The new SAP Business Objects Business Intelligence tool connects via a MS SQL Server OLE DB ODBC connection.

A: That would not be supported. Remedy only supports integration to Crystal using the AR ODBC driver

Q: we are in upgrade process from 7.6 to 9.1 (ARS and CMDB only) not ITSM. There are many class created under CMDB and so huge data called Golden Data sets. What will be best approach to keep the same instance id while migration. Is it possible?

A: During upgrade your data will not be modified, Installer will auto populate data to newly added columns. So instance ids will not be changed during upgrade.

Q: We are upgrading from 6.3 version to 9x. Need to understand if user views need to be recreated or the old views will create any inconsistency ?

A: The recommended approach is to upgrade to 8.1 first, converting your customizations to overlays, and upgrade to 9.1 from there

Q: Where can I find the system architecture diagram of remedy 9.1 which has all of the layers, and how they are connected? Has this been change significantly from v7.1?

A: we don't have any data model diagram

Q: It was recommended not to run an upgraded midtier on 9 without upgrading AR Server. What was the impact of running an environment like this?

A: Consider that the recommendation to upgrade midtier and AR server is linked to the use of CMDB. If you are not using CMDB you can upgrade midtier or AR server independently in a supported way.

Q: Can you give some info on SSO?

A: Start here: <https://docs.bmc.com/docs/display/rso91/Home>

Q: Do we need a dedicated server for both (MyIT and Smart IT) applications?

A: Yes the recommendation is to have a dedicated server for MyIT/SmartIT than your ITSM Server to get performance benefit

Q: Has there ever been a data dictionary available under confidentiality to Customers in order to build Adhoc type reports?

A: In Remedy v9, when you go to Smart Reporting, you see a more consumption-/reporting-friendly data model. We make use of the association concept in Remedy 9. So, building ad-hoc reports is very easy in Remedy v9.
