



World Wide Remedy Users Group

WWRUG10 - Sharing Tools, Technology and Training.



October 18 - 22, 2010 :: Hard Rock Hotel & Casino, Las Vegas, Nevada



Software Tool House Inc

Live ITSM Migration using Meta-Update®

Ben Chernys

Outline

2

- ITSM Migrations: Difficult; No Tools
- How Meta-Update® Handles Migrations
- Meta-Update® Benefits
- Sample Migration (Background, Live Demo)
- A look at Meta-Update® Scripting
- More Information

Objectives/Results

3

- Objectives
 - Learn what's involved in an ITSM 6 to 7 data migration
 - Learn how Meta-Update® facilitates all requirements for a successful data migration
- Results
 - A live ITSM 6 to 7 migration will be demonstrated
- Skills developed
 - An introduction to Meta-Update® scripting

ITSM Data Challenges

4

□ The ITSM 7 Suite contains:

- **1,800** **Forms**
- **25,000** **Active Links**
- **8,000** **Filters**

- **500** **Join Forms**

Data is represented by a complex web of differently related records and tables.

Reference fields and tables are completely undocumented.

ITSM Data Challenges

5

□ The ITSM 7.6 Suite contains:

- **2700** **Forms** **1,800**
- **36,000** **Active Links** **25,000**
- **18,000** **Filters** **8,000**
- **800** **Join Forms** **500**

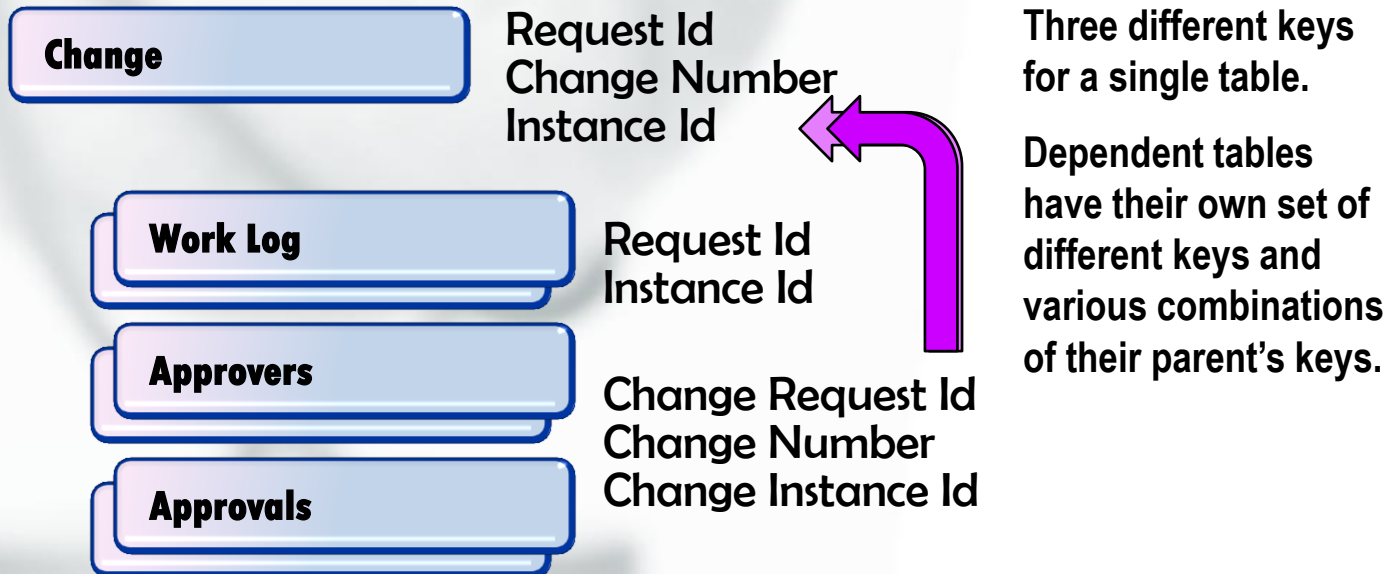
Data is represented by a complex web of differently related records and tables.

Reference fields and tables are completely undocumented.

ARS Data Challenges

6

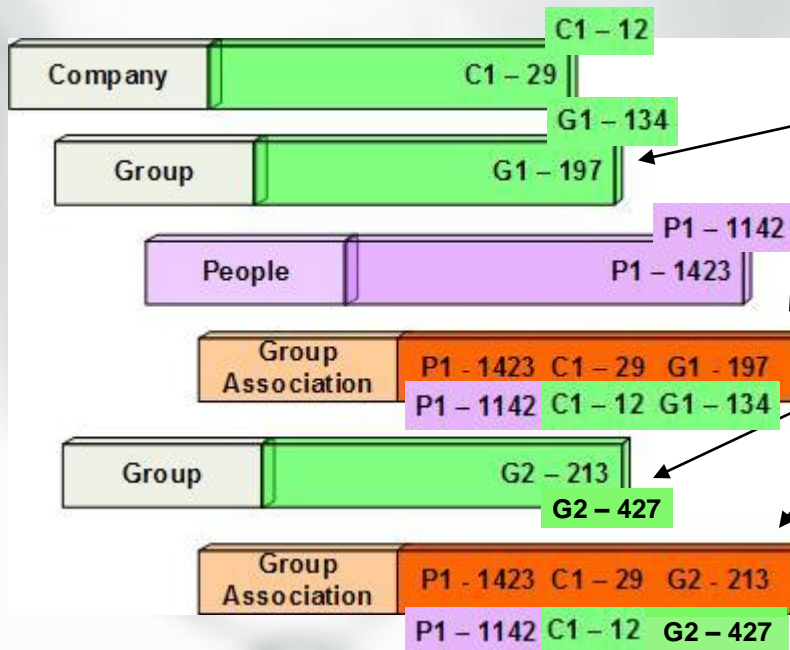
- All ARS Applications represent “Requests” by trees of data records.
- Records in different forms are connected by referencing data in those records.



ITSM Data Challenges

7

□ Support Staff Example



A symbolic name must be looked up and the new ID reference assigned.

ITSM Data Challenges

8

Migrating data across environments

- Once Foundation Data changes are developed and tested there is no sure way to extract these changes and merge them **correctly** on a different server.

Migrating data across ITSM releases

- ITSM release changes are significant undertakings. The conventional advise is to **not** migrate data because of the difficulty in automating data cleansing and migration into mismatching schemas and field sets.

Automating Imports, Customer On-boarding

- Can be a complex, time consuming, expensive ARS or ITSM development task using staging forms and merge workflow.

Challenges in Migrating to ITSM 7

9

Data cleansing

- ITSM data is validated. Addresses and model names for example, need to be looked up against other defining tables. There is no tool that allows you to automate validation and transformation rules.

Dissimilar Data Schema

- Completely different and more complex table structure in ITSM 7. Diary fields need be converted to records. Attachments must be moved. Completely different Company, Person, Support, Groups, Rights, in short, Foundation Data structures.

Following chains of related records

- A primary cause of difficulties with any extract, import, report, validation - *any data operation*, on a complex tree of data.

Ways of Automating Migrations

10

ARS Import Export

Manual exports to CSVs, Excel to change values, manual imports.

Automated with staging forms and import workflow: a time-consuming, expensive Workflow Project.

Template-based Products

Must use supplied templates.

Can't use your own or handle different sources. Manual validation and firing.

Automated with staging forms and import workflow.

Panacea Migrator DSO AIE

Automated with complex Merge workflow.

May require changes to application.

Workflow Project can approach API costs.

API Perl Java c

Sure way to automate.

Expensive and slow to develop.

Usually needs outside, non-Remedy staff.

SQL

Dangerous to the integrity of the ARS system data.

Expensive and slow to develop.

Usually needs outside, non-Remedy staff.

Meta-Update Migration Automating

11

Scripting Tool

Meta-Update reads a simple ASCII script file, and performs your functions through the API. Replete with look-ups, value transforms, file facilities, messaging and error handling.

No Server Changes No Workflow

No server changes at all.
No staging forms and complex Merge workflow.
No changes to OOTB applications.

No API Needed

No API programmers.
No time-consuming, expensive, frustrating development projects.
Your ARS staff easily implement any automation.

Any Sources

Handle CSVs of any type – even with line feeds.
Handle your own developed templates.
Apply automatic value transforms.
Use CSVs as Look Ups.

Efforts Costs Time

ROI is typically its first use.
Reduce efforts and time to delivery by an order of magnitude.

Comparison of Automation Costs

12

➤ ITSM 6 to ITSM 7 Migration

Based on estimates for an unrealized migration, a real migration implemented with Meta-Update, and an inadequate partial migration implemented with ARS facilities.

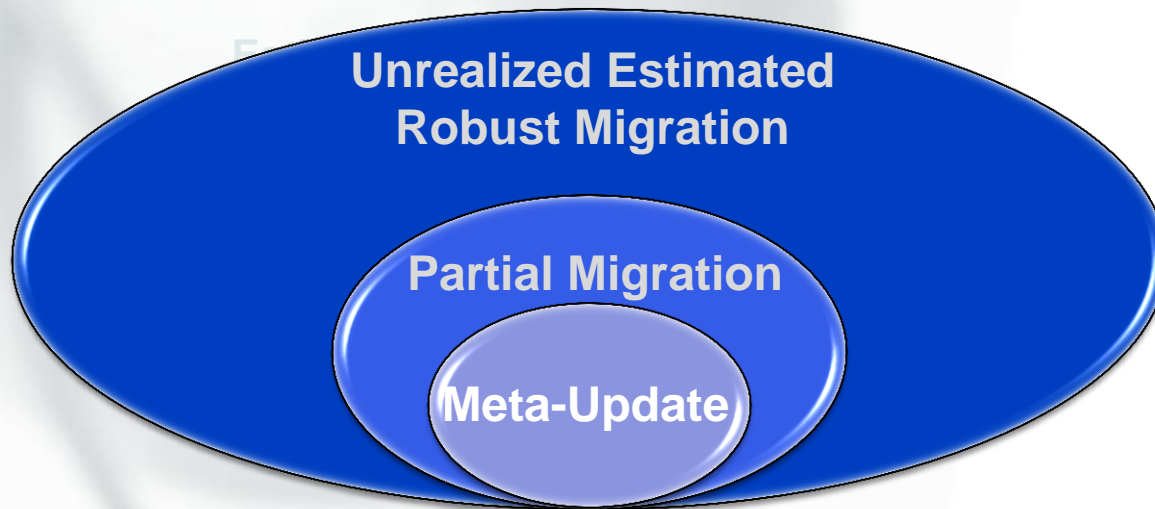
Note that conversion of Diary entries into Work Logs is not possible without Meta-Update or the ARS API.

	Partial Migration	Estimated Migration	Meta-Update
Months	7	24	3

Comparison of Automation Costs

13

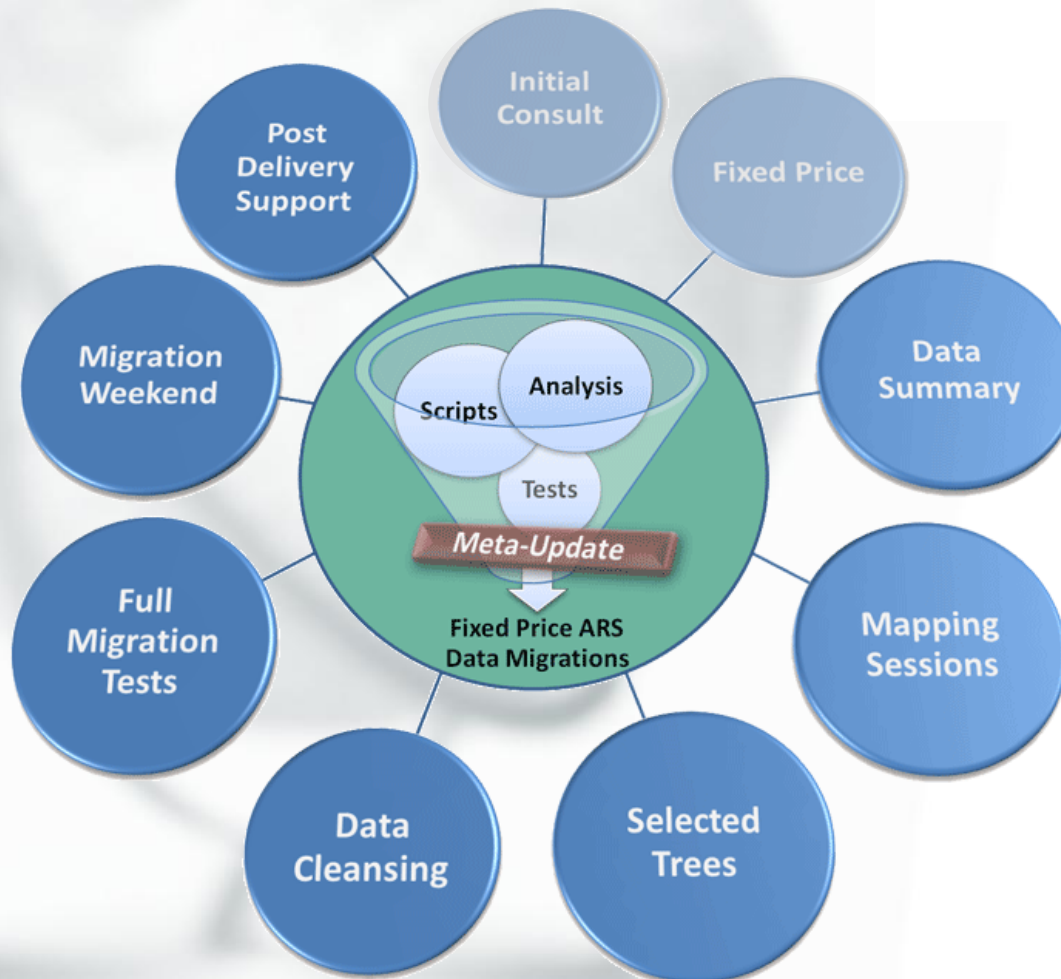
➤ ITSM 6 to ITSM 7 Migration



People	Months
3	24
1	7
1	3

Migration Milestones

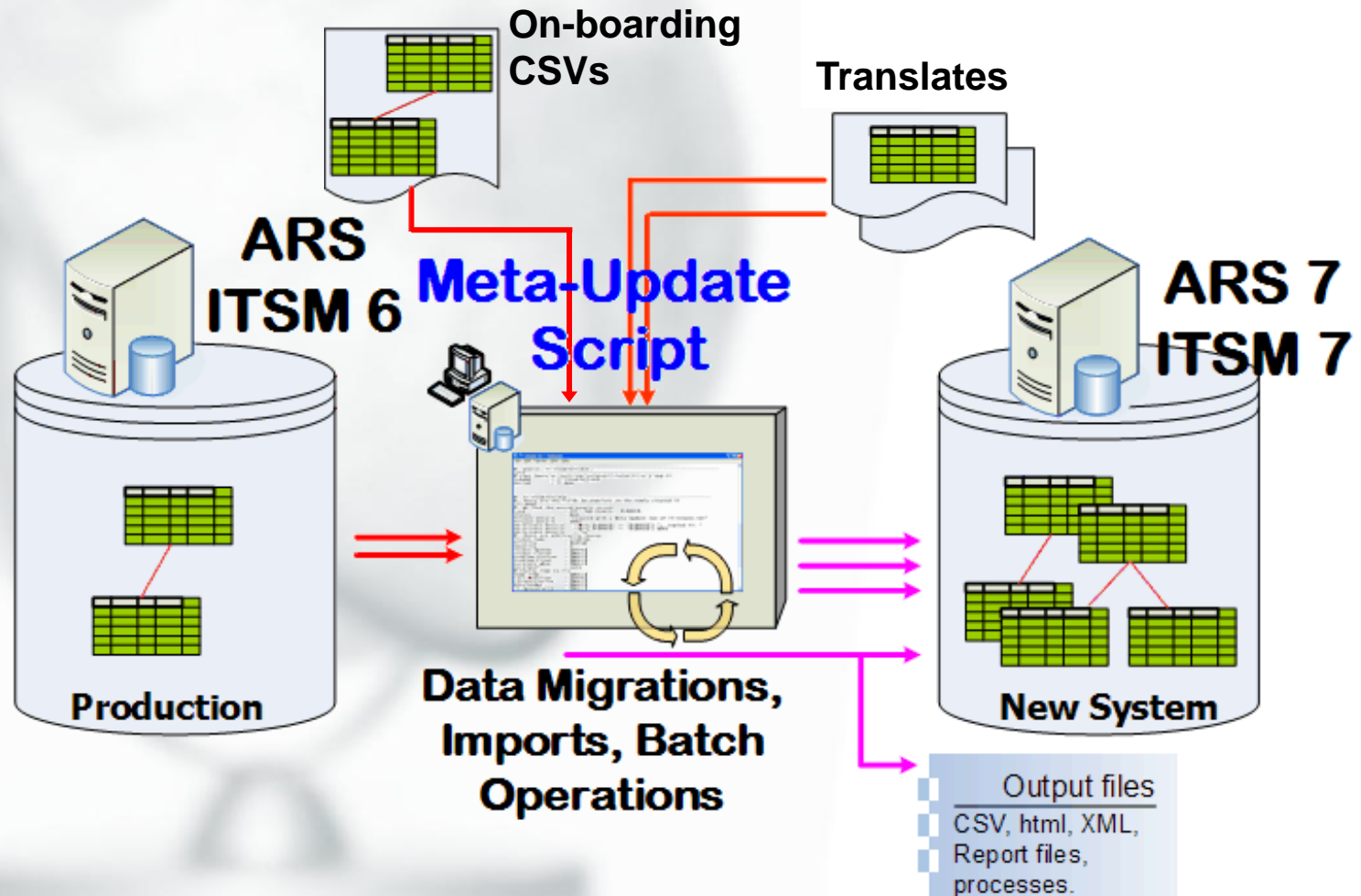
14



14

Demo of a ITSM 6 to 7.6 Migration

15



15

Demo: ITSM 6 to 7.6 Migration

16

- We'll now move to the Demo part of the presentation
- We'll start by showing you a running ITSM 6 server and a partially migrated 7.6.03 ITSM Suite
- We'll run the Help Desk to Incident script in debug mode with an editor open to walk through a bit of it
- We'll let it run to completion and examine the results with the User tool

ITSM 6: HD Case 8

17

Help Desk Case (Modify)

Help Desk Cases - Matching

Case ID+	Priority*	Status*	Category*	Type*	Item*	Summary*
HD00000000000008	Low	Closed	Facilities	Ergonomics	Assessment	I need an er...
HD00000000000009	Medium	Closed	IT Services	Account Administration	IP Assignment Or Change	Need an IP...
HD00000000000010	High	Closed	Networking	Access to Files/Drives	Permissions	Error when c...
HD00000000000013	Low	Closed	Software	Other	Report Writer	Error using r...
HD00000000000015	Medium	Closed	Networking	Access to Files/Drives	Configuration	Cannot map...
HD00000000000016	Low	Closed	Facilities	Furniture/Accessories	Chair	need quest...

Remedy Remedy IT Service Management for the Enterprise

Help Desk Case

Summary* I need an ergonomic assessment. **Case Type*** Incident

Description* I am having back pain and ... **Case ID+** HD00000000000008 **Status*** Closed

Category* Facilities **Group+** Facilities **Pending** Pending

Type* Ergonomics **Individual+** Felix Fac **Closure Code** Automatically Closed

Item* Assessment **Request Impact** Low **Escalated?** No **Priority*** Low

Auto-ReAssign

Requester Information | Activity | Duplicates | Solutions | Tasks | SLAs | Related Items | Problem Management | Attachments

Case Log

Work Log

[Audit Trail](#)

Time Spent Resolving Case

Estimated Total Time

Start Time

Time Spent (min)

Total Time Spent (min)

Time Information

Assigned

Resolved

Arrival Time

Create Date

Other Activities

Request Reassignment

Incident Reason Code

Save | Print Case | Reports | Bulletin Board | Reminders | Create Problem | Close [Help](#)

ITSM 6: HD 8: Requester Profile

18

The screenshot displays the Remedy IT Service Management interface. At the top, a 'Help Desk Cases - Matching' table lists several cases. Below this, a 'Person Information (sth-m3)' window is open, showing details for a user named Erica Engineer.

Case ID+	Priority*	Status*	Category*	Type*	Item*	Summary*
HD00000000000008	Low	Closed	Facilities	Ergonomics	Assessment	I need an ergonom...
HD00000000000009	Medium	Closed	IT Services	Account Administration	IP Assignment Or Change	Need an IP
HD00000000000010	High	Closed	Networking	Access to Files/Drives	Permissions	Error when c
HD00000000000013	Low	Closed	Software	Other	Report Writer	Error using r
HD00000000000015	Medium	Low				
HD00000000000016	Low					

Person Information (sth-m3)

Remedy IT Service Management for the Enterprise

Person Information

Login* Erica Engineer **Last Name*** Engineer **Support Staff?*** No
ID 2022 **First Name** Erica **Type*** Internal
Status* Active **Full Name*** Erica Engineer **VIP** No
Training **Manager?** No

Notification Method* Email **Region** USA **Office** 11-A
Email Address erica **Site** 25 Bay St, Mountain Vie **Manager's Name+**
Phone Number 222-2221 **Department** Engineering **Web Page**
Fax Number 222-2220

Requester Information Activity D...
Login*+ Erica Engineer
Name*+ Erica Engineer
VIP No
Phone

Requester's Cases

Case ID+	Summary	Status
HD0000000	DLL error	Assigned
HD0000000	Need file re	Assigned
HD0000000	Printer is n	Work In P

View Refresh Save Close Help

Save Print Case Reports Bulletin Board Reminders Create Problem Close Help

18

ITSM 6: Attachments Needed

19

Help Desk Case (Modify)

Help Desk Cases - Matching

Case ID+	Priority*	Status*	Category*	Type*	Item*	Summary*
HD00000000000008	Low	Closed	Facilities	Ergonomics	Assessment	I need an e...
HD00000000000009	Medium	Closed	IT Services	Account Administration	IP Assignment Or Change	Need an IP...
HD00000000000010	High	Closed	Networking	Access to Files/Drives	Permissions	Error when c...
HD00000000000013	Low	Closed	Software	Other	Report Writer	Error using r...
HD00000000000015	Medium	Closed	Networking	Access to Files/Drives	Configuration	Cannot map...
HD00000000000016	Low	Closed	Facilities	Furniture/Accessories	Chair	need quest...

Remedy IT Service Management for the Enterprise

Help Desk Case

Summary* I need an ergonomic assessment. **Case Type*** Incident

Description* I am having back pain and ... **Case ID+** HD00000000000008 **Status*** Closed

Category* Facilities **Group+** Facilities **Pending** Pending

Type* Ergonomics **Individual+** Felix Fac **Closure Code** Automatically Closed

Item* Assessment **Request Impact** Low **Escalated?** No

Priority* Low

Auto-ReAssign

Requester Information | Activity | Duplicates | Solutions | Tasks | SLAs | Related Items | Problem Management | Attachments

Attachments

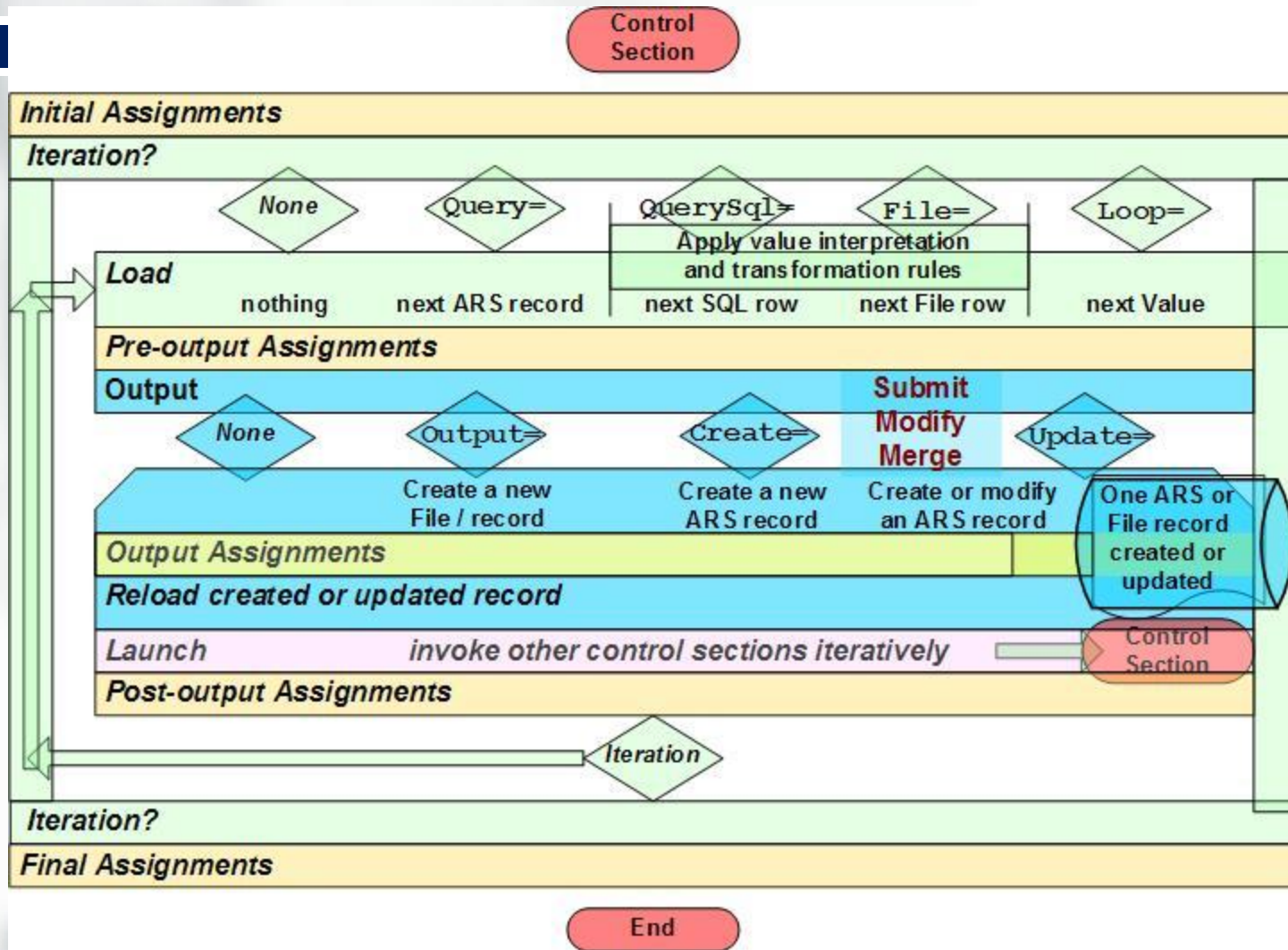
File Name	Size	Attach...
		Attach...
		Attach...
		Attach...

Save | Print Case | Reports | Bulletin Board | Reminders | Create Problem | Close [Help](#)

19

Meta-Update Scripting

20



20

ITSM 6: HD 8 Add Attachments

21

```
Administrator: Cmd Box
2010-10-14 10:40:06.45
e:\Dta\BST\Dev\arutils\_samples\910-ITSM-6-to-7> sthmpud7trcdbg HPD-6-AddAtt.ini Do -p HD000000000000 CI-Src.jpg

Meta-Update Version 4.86 for ARS lib 7.0
(c) Copyright 1996-2010 by Software Tool House Inc.
www.softwaretoolhouse.com
104040.444 i [Do] Qry: 1 of 1: HD000000000000 Low Closed Facilit
104040.774 i [Do] Qry: 1 of 1: Merged schema: HPD:HelpDesk, Id: HD000000000000 OldId=HD000000000000
104040.775 i [Do] Qry: eof 1 record OK; 0 records with errors; total: 1.
104040.776 i Statistics:
104040.777 i Sections: 1
104040.778 i Maximum section depth: 1
104040.778 i Assignment Sections: 1
104040.779 i Queries: 1
104040.780 i Query records: 1 errors: 0
104040.780 i Output Schemas: 0
104040.781 i Output Schema records: 0 created
104040.782 i Output Schema records: 1 updated (with 0 skipped)
104040.783 i Outputs OK: 1
104040.783 i Outputs Errors: 0
104040.784 i Outputs Aborts: 0
104040.785 i Input Errors: 0
104040.795 i terminating successfully in 9 sec.

2010-10-14 10:40:40.80
e:\Dta\BST\Dev\arutils\_samples\910-ITSM-6-to-7> sthmpud7trcdbg HPD-6-AddAtt.ini Do -p HD000000000000 CTI-xlate.jpg

Meta-Update Version 4.86 for ARS lib 7.0
(c) Copyright 1996-2010 by Software Tool House Inc.
www.softwaretoolhouse.com
104113.868 i [Do] Qry: 1 of 1: HD000000000000 Low Closed Facilit
104114.120 i [Do] Qry: 1 of 1: Merged schema: HPD:HelpDesk, Id: HD000000000000 OldId=HD000000000000
104114.121 i [Do] Qry: eof 1 record OK; 0 records with errors; total: 1.
104114.121 i Statistics:
104114.122 i Sections: 1
104114.122 i Maximum section depth: 1
104114.123 i Assignment Sections: 1
104114.124 i Queries: 1
104114.124 i Query records: 1 errors: 0
104114.125 i Output Schemas: 0
104114.125 i Output Schema records: 0 created
104114.126 i Output Schema records: 1 updated (with 0 skipped)
104114.127 i Outputs OK: 1
104114.127 i Outputs Errors: 0
104114.128 i Outputs Aborts: 0
104114.128 i Input Errors: 0
104114.139 i terminating successfully in 10 sec.

2010-10-14 10:41:14.22
e:\Dta\BST\Dev\arutils\_samples\910-ITSM-6-to-7> sthmpud7trcdbg HPD-6-AddAtt.ini Do -p HD000000000000 CTI-xlate.xlsx_
```

ITSM 6: Add Attachments

22

```
Administrator: Cmd Box
2010-10-14 10:40:06.45
e:\Dta\BST\Dev\arutils\sa
Meta-Update Version 4.8
(c) Copyright 1
www.softwar
104040.444 i [Do] Qry: 1 o
104040.774 i [Do] Qry: 1 o
104040.775 i [Do] Qry: eof
104040.776 i Statistics:
104040.777 i Secti
104040.778 i Maxim
104040.778 i Assig
104040.779 i Quesi
104040.780 i Query
104040.780 i Outpu
104040.781 i Outpu
104040.782 i Outpu
104040.783 i Outpu
104040.783 i Outpu
104040.784 i Outpu
104040.785 i Input
104040.795 i terminating s

2010-10-14 10:40:40.80
e:\Dta\BST\Dev\arutils\sa
Meta-Update Version 4.8
(c) Copyright 1
www.softwar
104113.868 i [Do] Qry: 1 o
104114.120 i [Do] Qry: 1 o
104114.121 i [Do] Qry: eof
104114.121 i Statistics:
104114.122 i Secti
104114.122 i Maxim
104114.123 i Assig
104114.124 i Quesi
104114.124 i Query
104114.125 i Outpu
104114.125 i Outpu
104114.126 i Outpu
104114.127 i Outpu
104114.127 i Outpu
104114.128 i Input
104114.128 i Input
104114.139 i terminating s

2010-10-14 10:41:14.22
e:\Dta\BST\Dev\arutils\_samples\910-ITSM-6-to-7> sthmpd7trcdbg HPD-6-AddAtt.ini Do -p HD00000000000000000000 CTI-xlate.xlsx_

[Do]
Query = Hpd, &
      HPD:HelpDesk, &
      '1' = "$Arg, CaseId$"
Update = Hpd
Merge = Yes, NoWorkflow
Assign = Hpd-asg-upd

[Hpd-asg-upd]
@Cmd = @if ("$Hpd, Attachment1$" == "")
      Attachment1 = Arg, FleNme
@Cmd = else
@Cmd = @if ("$Hpd, Attachment2$" == "")
      Attachment2 = Arg, FleNme
@Cmd = else
@Cmd = @if ("$Hpd, Attachment3$" == "")
      Attachment3 = Arg, FleNme
@Cmd = else
@Cmd = Abort, E, No space for attachments in HPD:HelpDesk $Hpd, 1$
@Cmd = endif
@Cmd = endif
@Cmd = endif
```

22

ITSM 6: Attachments Added

23

Help Desk Case (Modify)

Help Desk Cases - Matching

Case ID+	Priority*	Status*	Category*	Type*	Item*	Summary*
HD00000000000008	Low	Closed	Facilities	Ergonomics	Assessment	I need an erg...
HD00000000000009	Medium	Closed	IT Services	Account Administration	IP Assignment Or Change	Need an IP...
HD00000000000010	High	Closed	Networking	Access to Files/Drives	Permissions	Error when c...
HD00000000000013	Low	Closed	Software	Other	Report Writer	Error using r...
HD00000000000015	Medium	Closed	Networking	Access to Files/Drives	Configuration	Cannot map...
HD00000000000016	Low	Closed	Facilities	Furniture/Accessories	Chair	need quest...

Remedy IT Service Management for the Enterprise

Help Desk Case

Summary* I need an ergonomic assessment.

Description* I am having back pain and ...

Case ID+ HD00000000000008

Category* Facilities

Type* Ergonomics

Item* Assessment

Case Type* Incident

Status* Closed

Group+ Facilities

Individual+ Felix Fac

Request Impact Low

Priority* Low

Auto-ReAssign

Requester Information | Activity | Duplicates | Solutions | Tasks | SLAs | Related Items | Problem Management | Attachments

Attachments

File Name	Size	Attach...
*CI-Src...	200 KB	Attach...
*CTI-xl...	379 KB	Attach...
CTI-xl...	16 KB	Attach...

Save | Print Case | Reports | Bulletin Board | Reminders | Create Problem | Close [Help](#)

23

ITSM 6: Notes Diary

24

The screenshot displays the Remedy IT Service Center interface. At the top, a table titled "Help Desk Cases - Matching" lists several cases with columns for Case ID+, Priority*, Status*, Category*, Type*, Item*, and Summary*. Below the table, the "Help Desk Case" details are shown, including fields for Summary*, Description*, Category*, Type*, and Item*. A "Work Log" section is visible, containing a "Diary History" list and a "Diary Editor" text area. The "Diary History" list contains three entries with timestamps and descriptions of events. The "Diary Editor" is currently empty. At the bottom of the case details, there are buttons for "Save", "Print Case", "Reports", and "Bulletin Board".

Case ID+	Priority*	Status*	Category*	Type*	Item*	Summary*
HD00000000000008	Low	Closed	Facilities	Ergonomics	Assessment	I need an er
HD00000000000009	Medium	Closed	IT Services	Account Administration	IP Assignment Or Change	Need an IP
HD00000000000010	High	Closed	Networking	Access to Files/Drives	Permissions	Error when c
HD00000000000013	Low	Closed	Software	Other	Report Writer	Error using r
HD00000000000015	Medium	Closed	Networking	Access to Files/Drives	Configuration	Cannot res
HD00000000000016	Low	Closed				

Help Desk Case (sth-m3) -- Work Log

File Edit View

Diary History:

- 20/09/2002 9:47:57 PM Felix Fac
The ergonomic consultant is on site today for the appointment.
- 21/09/2002 12:18:33 AM Felix Fac
The consultant completed the assessment and adjusted her work area configuration.
- 29/10/2002 12:13:47 AM AR_ESCALATOR
Case HD00000000000008 was automatically closed on 3/7/99 2:47:03 PM.

Diary Editor:

OK Cancel

24

ITSM 6 to 7.6 Help Desk Migration

25

```
Command Prompt
150747.334 i [DoOne] Msg: Sample ITSM 6.0 to 7.0 migration script For Help Desk; Version: 100
150748.459 i [DoOne] Msg: Default requester: CTM:People PPL000000000005, Login: appadmin, Full Name: App Admin
150748.474 i [DoOne] Qry: 1 of 1: HD0000000000008 Low Closed Facilit
150748.474 i [DoOne] Qry: 1 of 1: Launching: 1 of 1 [DoHPD]
150748.474 i [DoHPD] Msg: HPD: HD0000000000008 has no requester; using Submitter as requester and customer: Erica Engineer
150748.474 W [DoHPD] Msg: Doing attachments on HPD: HD0000000000008
150748.912 i [DoHPD] One:
150748.912 i [DoHPD] One: Launching: 1 of 4 [PplReq]
150748.912 i [PplReq] Sql: 1 of 1: 0.
150748.912 W [PplReq] Sql: 1 of 1: Msg: HPD: HD0000000000008 requester: Erica Engineer not found; using: appadmin instead
150751.287 i [PplReq] Sql: eof 1 record OK; 0 records with errors; total: 1.
150751.287 i [DoHPD] One: Launching: 2 of 4 skipped for Eif (<"$HpdSrcU, DoContact$" == "1")>PplCust
150751.287 i [DoHPD] One: Launching: 3 of 4 [PplAsg] from Eif (<"$HpdSrc, Assigned To Group+" != "" && "$HpdSrc, Assignee Login Name$" != "">PplAsg
150751.724 i [PplAsg] Qry: eof 0 record OK; 0 records with errors; total: 0.
150809.849 i [DoHPD] One: Launching: 4 of 4 [DoHPD-2]
150812.334 i [DoHPD-2] One:
150812.849 i [DoHPD-2] One: rflkpNew: Loading File CTI-xlate.csv loaded for Lookup [asg-Xlt-CTI]
150812.849 i [DoHPD-2] One: FFDfGet: eof on CTI-xlate.csv; 31 records read + 1st field record
150812.849 i [DoHPD-2] One: rflkpNew: File CTI-xlate.csv loaded for Lookup [asg-Xlt-CTI]: 31 entries of 31 records with 0 skipped.
150812.849 i [DoHPD-2] One: rflkpNew: Loading File CTI-xlate.csv loaded for Lookup [asg-Xlt-CTI-pl]
150812.865 i [DoHPD-2] One: FFDfGet: eof on CTI-xlate.csv; 31 records read + 1st field record
150812.865 i [DoHPD-2] One: rflkpNew: File CTI-xlate.csv loaded for Lookup [asg-Xlt-CTI-pl]: 31 entries of 31 records with 0 skipped.
150812.865 i [DoHPD-2] One: Msg: HPD: HD0000000000008 has no requester; using Submitter as requester: Erica Engineer
150812.896 i [DoHPD-2] One: Merged schema: HPD:Help Desk, Id: INC000000000162 OldId=INC000000000162
150812.912 i [DoHPD-2] One: Launching: 1 of 8 [DoWrkLog]
150813.162 i [DoWrkLog] Lp: 1 of 3: Dry: 2002/09/20, Felix Fac, The ergonomic consultant
150813.177 i [DoWrkLog] Lp: 1 of 3: Update of HPD:WorkLog WLG000000000462 skipped; no changes detected
150813.177 i [DoWrkLog] Lp: 2 of 3: Dry: 2002/09/21, Felix Fac, The consultant completed
150813.193 i [DoWrkLog] Lp: 2 of 3: Update of HPD:WorkLog WLG000000000463 skipped; no changes detected
150839.349 i [DoWrkLog] Lp: 3 of 3: Dry: 2002/10/29, AR_ESCALATOR, Case HD000000000008 was
150839.365 i [DoWrkLog] Lp: 3 of 3: Update of HPD:WorkLog WLG000000000464 skipped; no changes detected
150839.365 i [DoWrkLog] Lp: eof 3 record OK; 0 records with errors; total: 3.
150839.365 i [DoHPD-2] One: Launching: 2 of 8 [DoWrkLog-Att] from Eif (<"$HpdSrcU, DoAtt $" == "1">DoWrkLog-Att
150839.365 i [DoWrkLog-Att] One:
150839.724 i [DoWrkLog-Att] One: Merged schema: HPD:WorkLog, Id: WLG000000000465 OldId=WLG000000000465
150843.349 i [DoWrkLog-Att] One: 1 record OK; 0 records with errors; total: 1.
150843.349 i [DoHPD-2] One: Launching: 3 of 8 [DoWrkLog-Req-NF] from Eif (<"$HpdSrcU, DoWL-Req $" == "1">DoWrkLog-Req-NF
150843.349 i [DoWrkLog-Req-NF] One:
150843.412 i [DoWrkLog-Req-NF] One: Merged schema: HPD:WorkLog, Id: WLG000000000466 OldId=WLG000000000466
150843.412 i [DoWrkLog-Req-NF] One: 1 record OK; 0 records with errors; total: 1.
150843.412 i [DoHPD-2] One: Launching: 4 of 8 skipped for Eif (<"$HpdSrcU, DoWL-Cust $" == "1">DoWrkLog-Cust-NF
150843.412 i [DoHPD-2] One: Launching: 5 of 8 skipped for Eif (<"$HpdSrc, _dataport:Express" == "Yes" && (<"$HpdSrc, Priority$" == "Urgent" || "$HpdSrc, Priority$" == "High")
150843.412 i [DoHPD-2] One: Launching: 6 of 8 [DoAudLog]
150844.537 i [DoAudLog] executing waiting $PROCESS$ Application-Query-Delete-Entry HPD:HelpDesk_AuditLogSystem 'Original Request ID' =
'INC000000000162' or 'Log Key 1'
151030.505 i [DoAudLog] Qry: eof 0 record OK; 0 records with errors; total: 0.
151030.505 i [DoHPD-2] One: Launching: 7 of 8 [DoTasks]
151037.584 i [DoTasks] Qry: eof 0 record OK; 0 records with errors; total: 0.
151037.584 i [DoHPD-2] One: Launching: 8 of 8 [DoAssoc] from Eif (<"$Config, DoAssoc $" == "1">DoAssoc
151038.084 i [DoAssoc] Qry: eof 0 record OK; 0 records with errors; total: 0.
```

ITSM 6 to 7.6 Help Desk Migration

26

```
[DoHPD]
AssignInit      = ReqPpl-asg-Init
Launch          = PplReq
Launch          = @if ("${HpdSrcV, DoContact$" == "1") PplCust
Launch          = @if ("${HpdSrc, Assigned To Group+$" != "" &&
                    "${HpdSrc, Assignee Login Name$" != "" )
                    PplAsg
Launch          = DoHPD-2

[DoHPD-2]
# ITSM 7:  HPD:Help Desk  "Incident"  create / update -----
# This section is Launched for every 6.0 ticket Tag: HpdSrc
#
# Tags available
#   HpdSrc          an @Prod ITSM 6.0 HPD:HelpDesk rec
#
# It creates an Incident Ticket on the 7 server using Merge with NoFilters
# It then launches sections:
#   DoWrkLog        to loop through the Notes Diary field
#   DoWrkLog-Att    loops ${HpdSrc, Notes$ diary entries updating WorkLog recs
#   DoTasks         Queries CHG:Tasks for related tasks and builds
#                   TMS:Tasks, TMS:SummaryData, TMS:Association
#   DoAssoc         If configured or set, processes the SHR:Association records
#   DoSurvey        If configured, updates a SRM:Survey record
#   DoSrmReq        If configured, updates a SRM:Request record
#
Update          = HpdTgt,
                HPD:Help Desk,
                '179'      = "${HpdSrc, 179$"
Merge           = Yes, NoWorkflow
AssignNew       = Hpd-asg-new
Assign         = Hpd-asg-upd
Launch         = DoWrkLog
Launch         = @if ("${HpdSrcV, DoAtt   $" == "1") DoWrkLog-Att
Launch         = @if ("${HpdSrcV, DoWL-Req $" == "1") DoWrkLog-Req-NF
Launch         = @if ("${HpdSrcV, DoWL-Cust $" == "1") DoWrkLog-Cust-NF
Launch         = @if ("${HpdSrc, _dataport:Express" == "Yes" &&
                    ("${HpdSrc, Priority$" == "Urgent" ||
                     "${HpdSrc, Priority$" == "High" ) )
                    DoWrkLog-Exp
Launch         = DoAudLog
```

26

ITSM 7.6: WL: Attachments

27

Incidents - Matching

Incident ID*	Last Name*	First Name*	St
HD0000000000015	Admin	App	Ca
HD0000000000013	Admin	App	Err
HD0000000000010	Admin	App	Err
HD0000000000009	Admin	App	Ne
HD0000000000008	Admin	App	IT

Incident HD000000000008 (Modify)

Work Info Type*: Working Log

Locked*: Yes No

Date+: 10/8/2010 12:00:00 AM

View Access*: Internal Public

Source: [Dropdown]

Summary*: Original HPD Attachments

Notes: Original HPD Attachments migrated to this Work Log entry

Limit 3 Attachments

File Name	File Size	Attach Label
CTI-xlate...	2 KB	Attachment 1
trc.23	142 KB	Attachment 2
error.log	11 KB	Attachment 3

Submitter*: Migration

Submit Date*: 10/8/2010 12:00:00 AM

Type	Summary	Files	Submit Date
Working Log	Original HPD Attachments		10/8/2010 12:00:00 AM
Working Log	Migration: ticket's requester was: Erica Engineer		10/8/2010 12:00:00 AM
Working Log	Case HD000000000008 was automatically closed on 3/7/99 2:47		10/29/2002 12:13:47 A
Working Log	The consultant completed the assessment and adjusted her work ar		9/21/2002 12:18:33 AM
Working Log	The ergonomic consultant is on site today for the appointment.		3/20/2002 9:47:57 PM

ITSM 7.6: WL: Attachments

28

BMC Remedy
File Edit
Incidents
Incident ID*
HD0000000
HD0000000
HD0000000
HD0000000
HD0000000
Incid
Aut
Bro
26 Cus
Inci
Sel
Sel
Links
View Auc
Financial
Tasks
Categoriz
Funcio
Reminde
Ready

[DoWrkLog-Att]

```
# HpdSrcV DoWL-Req-Text string; text of the description (short)
# HpdSrcV DoWL-Req-Text-1 string; text of the description
# This grabs the Ticket's Attachments and creates a single specific
# "Attachments" HPD:WorkLog record.
# Do not launch if the attachments are null.
```

```
Update = WrkTgt, &
        HPD:WorkLog, &
        'Incident Number' = "$HpdTgt, Incident Number$" AND &
        'Short Description' = "Attachments" AND &
        'Submitter*' = "Migration"
Assign = Wrk-Att-asg
AssignNew = Wrk-Att-asg
Merge = Yes
```

[Wrk-Att-asg]

```
Incident Number = HpdTgt, Incident Number
Incident Entry ID = HpdTgt, 1
Submitter = Migration
Submit Date = $date$
Last Modified By = Migration
Last Modified Date = $date$
Short Description = Attachments
Description = Original HPD Attachments
Detailed Description = Original HPD Attachments migrated to this Work Log entry
Status = Enabled
Secure Work Log = Yes
View Access = Internal
Work Log Submitter = Migration
Work Log Submit Date = $date$
Work Log Date = $date$
Work Log Type = "Working Log"
z2AF Work Log01 = @if ("$HpdSrc, Attachment1$" != "") HpdSrc, Attachment1
z2AF Work Log02 = @if ("$HpdSrc, Attachment2$" != "") HpdSrc, Attachment2
z2AF Work Log03 = @if ("$HpdSrc, Attachment3$" != "") HpdSrc, Attachment3
```

Help

Public

1 AM
0 AM
47 A
3 AM
PM

ITSM 7.6: WL: Missing Requester

29

```
[PplReq]
# Will lookup the submitter and get his people record into PplReq
# If there are no records, we'll point it at PplReqDmy
# and build a nice text message with the contents of the ITSM 6
# SHR:People
QuerySql      = ReqCnt,
              ,
              select count(*) from CTM_People
              where Remedy_Login_ID = '$X, Req$'
AssignPost    = ReqPpl-asg-Term

[PplCust]

[ReqPpl-asg-Term]
@Cmd          = @if (" $ReqCnt, 1$" == "0")
@Cmd          = Msg, W, "HPD: $HpdSrc, 1$ requester: $X, Req$ not found;
                    using: $PplReqDmy, Remedy Login ID$ instead"
@Cmd          = Ref, HpdSrcV, DoWL-Req, "1"
@Cmd          = Ref, HpdSrcV, DoWL-Req-Text, "Migration: ticket's requester was: $X, Req$"
@Cmd          = @if (" $X, Req$" == " $X, ReqB$" )
LoadQ         = @Prod, PplReq-6, SHR:People, 'Login*' = " $X, Req$"
@Cmd          = Ref, HpdSrcV, DoWL-Req-Text-1, @ReqPpl-asg-Text
@Cmd          = Ref, PplReq-6, /delete
@Cmd          = else
@Cmd          = Ref, HpdSrcV, DoWL-Req-Text-1, @ReqPpl-asg-Text-2
@Cmd          = endif
@Cmd          = Ref, X, Req, "$PplReqDmy, Remedy Login ID$"
@Cmd          = Ref, PplReq, PplReqDmy, @equ
@Cmd          = else
```

Help

Work Info (itsm7rtm) -- Notes

File Edit

The ticket's original ITSM 6 requester with login "Erica Engineer" was CTM:People table

Login: Erica Engineer
ID: 0000000000000002
Full Name: Erica Engineer
Last Name: Engineer
First Name: Erica
Telephone: 222-2221
Region: USA
Site: 25 Bay St, Mountain View, CA
Department: Engineering

Cancel

29

ITSM 7.6: WL: Missing Requester

30

```
[DoHPD-2]
Update      = HpdTgt,
             HPD:Help Desk,
             '179'      = "$HpdSrc, 179$"
Merge       = Yes, NoWorkflow
AssignNew   = Hpd-asg-new
Assign      = Hpd-asg-upd
Launch      = DoWrkLog
Launch      = @if ("$HpdSrcV, DoAtt    $" == "1") DoWrkLog-Att
Launch      = @if ("$HpdSrcV, DoWL-Req $" == "1") DoWrkLog-Req-NF
```

```
[DoWrkLog-Req-NF]
# This simply creates a new WL entry indicating the
# original requester was not found. It picks up the
# SHR:People record from the source server and forms a
# text string.
Update      = WrkTgt,
             HPD:WorkLog,
             'Incident Number' = "$HpdTgt, Incident Number$"
             'Short Description' = "$Config, AddDta-Lbl-Req-NF$"
             'Submitter*'      = "Migration"
Assign      = Wrk-Req-NF-asg
AssignNew   = Wrk-Req-NF-asg
Merge       = Yes
```

```
[Wrk-Req-NF-asg]
Incident Number      = HpdTgt, Incident Number
Incident Entry ID    = HpdTgt, 1
Submitter            = Migration
Submit Date          = $date$
Last Modified By     = Migration
Last Modified Date   = $date$
Short Description     = Config, AddDta-Lbl-Req-NF
Description           = HpdSrcV, DoWL-Req-Text
Detailed Description = HpdSrcV, DoWL-Req-Text-1
Status               = Enabled
Secure Work Log      = Yes
View Access          = Internal
```

Work Info (itsm7rtm) -- Notes

The ticket's original ITSM 6 requester with login "Erica Engineer" was not found in the ITSM 7.0 CTM:People table

Login: Erica Engineer
ID: 0000000000000002
Full Name: Erica Engineer
Last Name: Engineer
First Name: Erica
Telephone: 222-2221
Region: USA
Site: 25 Bay St, Mountain View, CA
Department: Engineering

OK Can

30

Conclusion

31

- Meta-Update is the only tool available to automate the value transformations and the ability to follow chains of records needed to perform a complete data migration from prior releases of ITSM or from differing on-boarding data structures.

Thank You

Questions

32

- ❑ Check out the Web Site
www.softwaretoolhouse.com
- ❑ See Learning, Script Library
- ❑ Request a Trial License with
a Live Install WebEx
Training session
- ❑ Contact us at:
sales@softwaretoolhouse.com



Ben Chernys
Software Tool House Inc.

CA + 1 403 240 4377 GMT - 7 + DST
DE +49 171 380 2329 GMT +1 + DST

Thank You

Questions

33

- ❑ Check out the Web Site
www.softwaretoolhouse.com
- ❑ See Learning, Script Library
- ❑ Request a Trial License with
a Live Install WebEx
Training session
- ❑ Contact us at:
sales@softwaretoolhouse.com



Software Tool House Inc

See us at our
vendor booth

Ben Chernys
Software Tool House Inc.

CA + 1 403 240 4377 GMT - 7 + DST
DE +49 171 380 2329 GMT +1 + DST