

HP Service Manager Upgrade Assessment Toolkit

for supported Windows® operating system

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User Guide

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1	Introducing the Service Manager Upgrade Assessment Toolkit	3
	Assessment Toolkit	3
	Assessment Report	3
2	Getting Started with the Assessment Toolkit	5
	Software Compatibility	5
	Building Signatures for Service Manager Tables	6
	Setting Up the Assessment Toolkit	7
3	Working with the Assessment Toolkit	9
	Generating Assessment Reports	9
	(Optional) Regenerating Failed Reports	14
4	Customizing the Assessment Reports	15
	Customizing Report Template	15
	Aspects Need Attention When Creating New Template	15
	Customizing Master Report Template	16
	Creating Individual Report Template.....	16
	Configuring Common Parameter	16
	Customizing High Level Report Configuration	18
	Configuring General Information High Level Report	18
	Configuring Overall Assessment High Level Report	18
	Configuring Detailed Assessment High Level Report	19
	Configuring Service Manager Assessment High Level Report	19
	Configuring RDBMS Assessment High Level Report.....	19
5	Assessment Report Suites	21
	System Setting and Configuration Reports	22
	Customized Reports	23
	Advanced Reports	25
	Large Data Reports	27
	High Level Report	32

1 Introducing the Service Manager Upgrade Assessment Toolkit

This chapter provides introduction of the Service Manager Upgrade Assessment Toolkit (hereinafter referred to as Assessment Toolkit) and the reports generated by the toolkit.

Topics in this section include:

- [Assessment Toolkit](#) on page 3
- [Assessment Report](#) on page 3

Assessment Toolkit

The Assessment Toolkit is critical for the system upgrade from Service Manger lower version to higher ones. Before system migration or upgrade, HP partners can use the Assessment Toolkit to generate Assessment Report and get an overview of the differences between the related the Service Manager out-of-box (OOB) data and the customized data from a real production environment that needs to be migrated as well. Consequently, HP partners are able to decide what data can or cannot be migrated and how it will be migrated.



Currently, the Assessment Toolkit only provides language support for English, French, German, Chinese and Spanish.

Assessment Report

Generated by the Assessment Toolkit, the Assessment Reports mainly cover the following areas:

- Service Manger server system settings
- Service Manger business module
- Backend database settings covering p4, RDBMS and partially
- Critical data information of Service Manger server which is closely related with the migration
- Customized data detection against OOB data

See [Chapter 3, Working with the Assessment Toolkit](#) for detailed instruction about how to generate and export Assessment Reports.

2 Getting Started with the Assessment Toolkit

This chapter contains information about software compatibility of the Assessment Toolkit and provides preliminary instruction for running the Toolkit on Windows.

Topics in this section include:

- [Software Compatibility](#) on page 5
- [Building Signatures for Service Manager Tables](#) on page 6
- [Setting Up the Assessment Toolkit](#) on page 7

Software Compatibility

The Assessment Toolkit is developed using the following software applications and is considered compatible with these versions only.

- JRE 1.6 (32-bit) and 1.7 (32-bit)
- HP Service Manager 7.11, 9.20, 9.30, 9.31 with Process Designer content pack 9.30.2 (PDCP3), and 9.31 with Process Designer content pack 9.30.3 (PDCP4)



For HP Service Manager, you need to append `heartbeatinterval:60` to the `sm.ini` file in the `<Service Manager installation directory>\Server\RUN` directory.

The Assessment Toolkit supports the following platforms and databases:

- Windows 7, Windows 2003, Windows 2008 R2, Windows 2012
- SQL Server 2000, 2005 and 2008
- Oracle 9, 10 and 11
- DB2 Universal Database (UDP) 8.1, 9.1, 9.5 and 9.7

The Assessment Report can be viewed using the following applications:

- Microsoft Internet Explorer 7 (HTML)
- Mozilla Firefox 3.6 (HTML)
- Opera 11 (HTML)
- Adobe Reader 9 (PDF)
- Microsoft Word 2003 or higher (Doc)

Building Signatures for Service Manager Tables

Before running the Assessment Toolkit to compare related tables in Service Manager and generate reports, you need to build signatures for these tables using the Differential Upgrade Wizard utility. The following instruction describes how to build signatures for the tables:


- 1 Back up records from the *signaturemake* table and *patches* table on Service Manager servers. You can unload them to local .unl files such as *patches_orig.unl* and *signaturemake_orig.unl*, which can be used to recover the original records after signatures building.
- 2 Unzip the Service Manager Upgrade Assessment Toolkit release package with Winzip or Winrar. Or you can unzip the release package with the following command:

```
jar xf sc2sm.assesstool.standalone.jar
```

- 3 Load the unload file to HP Service Manager:
 - a Start a Windows client session and log in to the Service Manager system with a system administrator account. From the System Navigator, click **Tailoring > Database Manager**. Click **More** or the More Actions menu, and select **Import/Load**.
 - b In the Import/Load panel, type `<unzipped Assessment Toolkit home directory>\pre_signature\SM711\pre_unloadscript_sm711.unl` in the File Name field.
 - c Select **winnt** from the File Type drop-down list, and then click **Load FG**.

The following related records will be added to the *signaturemake* table and the *patches* table on Service Manager server:

- *signaturemake* record with table.name *scmandant*
- *signaturemake* record with table.name *eventin*
- *signaturemake* record with table.name *eventout*
- *signaturemake* record with table.name *eventfilter*
- *signaturemake* record with table.name *ocmprofile*
- *signaturemake* record with table.name *FolderDef*
- *signaturemake* record with table.name *FolderRights*
- *signaturemake* record with table.name *Todo*

 You can select a language when you start the Service Manager client session. Only signatures for the selected language will be created.

- 4 Run the Differential Upgrade Wizard to build signatures.
From the HP Service Manager System Navigator, click **Tailoring > Differential Upgrade > Differential Upgrade Wizard**.
- 5 Select **Build Signatures** and click **Next**.
- 6 Type the name of the system in the **System Name** text box.
- 7 Select **SC2SM** from the **Patch Record** drop-down list. This option is created in [step 3](#).
- 8 Browse to locate or define the **Export Filename**. This is an external file that will store the signature records.

- 9 (Optional) Select **Signature RAD components for delete processing** to delete all related RAD panel components.
- 10 (Optional) Select **Run in background** if you want background processing. If you run in background, Service Manager creates a schedule record and creates the unload when the schedule record runs. If you choose Run in background, do the following:
 - Select **Repeat Daily** to create signature records daily. This step is optional.
 - Click the drop-down list to choose the **Date/Time to Run** schedule for background processing.
- 11 Click **Next** to build signatures.
- 12 Check the records in *signatures* table to verify the related tables are properly signed.
- 13 (Optional) To remove the table records added by previous steps and recover the original data after building the signatures, remove all records in *patches* and *signaturemake* tables first. Then you can import the original records from *patches_orig.unl* and *signaturemake_orig.unl* which are backed up.

Setting Up the Assessment Toolkit

The Assessment Toolkit is standalone. You do not need to install it. However, before generating reports, you must set up connections for the Assessment Toolkit to connect with Service Manager servers and get related data. To generate database information related reports, you also need to configure the database server connection for the Assessment Toolkit.

To set up server and database connections for the Assessment Toolkit, follow these steps:

- 1 Install Java SDK1.7.
 - a Download J2SE 5.0 from <http://www.oracle.com/technetwork/java/javase/downloads/jdk7-downloads-1880260.html>.
 - b Install Java SDK1.7.
 - c Verify the installation by using the `java -version` command.
 - ▶ Currently, Service Manager Upgrade Assessment Toolkit supports Java SDK1.7 only. If you have other higher version installed already, you do not need to uninstall it. But JDK1.7 must be set as `JAVA_HOME` by verification in [step c](#).
- 2 Browse to the unzipped Assessment Toolkit home directory and double-click `SCAssessTool.exe` to launch the Assessment Toolkit.
- 3 In the menu, click **Connect > Server**. The Service Manager connection dialog box opens.

4 Type or select the connection parameters.

Table 1 SC/SM connection parameters

Parameter	Description
Server	The IP address of the server that hosts the Service Manager service.
Port	The port number that your computer uses to connect with the server. Tip: You can refer to <code>sc.ini</code> or <code>sm.ini</code> in the server for identifying the correct port number.
Endpoint	The type of the server that your computer connects with. Select SM for Service Manager server connection.
Username	The name that you use to log in to the server. This username should be privileged as the system administrator, which is falcon by default.
Password	The password that you use to log in to the server.

You can click **Test Connection** to test the connection.

5 Click **OK** to close the SC/SM connection dialog box.

6 In the menu, click **Connect > Database**. The database connection dialog box opens.

7 Type the connection parameters.

Table 2 DB connection parameters

Parameter	Description
Database Type	The type of database is identified automatically when the DB connection dialog opens.
Server	The IP address of the computer that hosts the database.
Port	The port number that your computer uses to connect with the database. Tip: <ul style="list-style-type: none">• The port number of Oracle by default is 1521.• The port number of MSSQL by default is 1433. Note that there is no default value in MSSQL Server 2008, this value must be manually configured.• The port number of DB2 by default is 50000.
Sid/DB Name	The service name of the database that your computer connects with.
Username	The name that you use to log in to the database.
Password	The password that you use to log in to the database.

You can click **Test Connection** to test the connection.

8 Click **OK** to close the DB connection dialog box.

The connection parameters are stored locally after each successful connection. These parameters will be retrieved and displayed at the next connection event.

3 Working with the Assessment Toolkit

This chapter provides detailed instruction about how to generate and export the Assessment Reports.

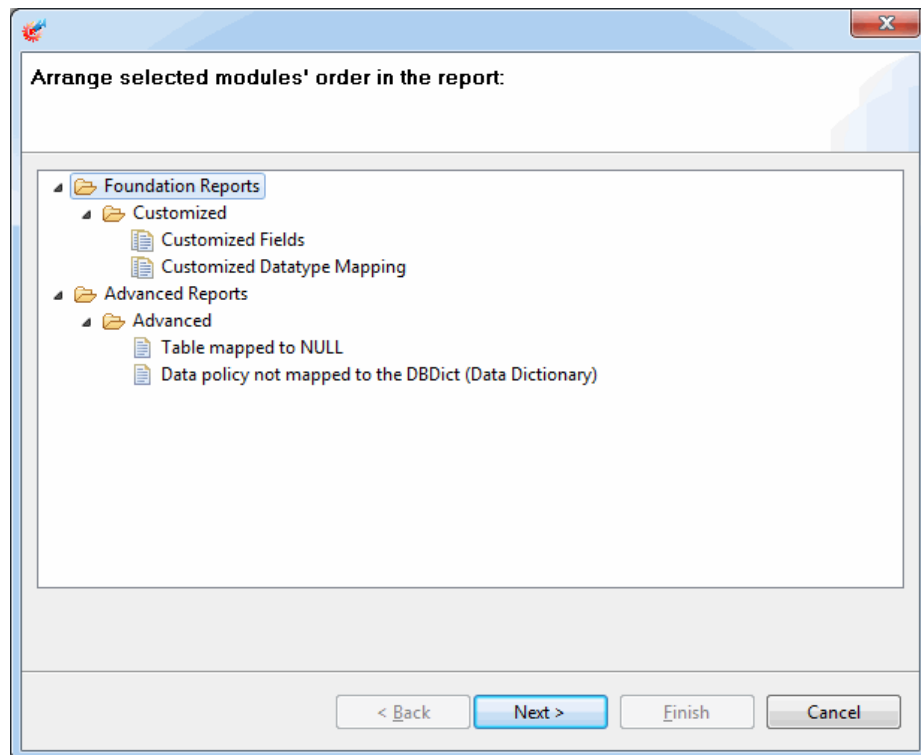
Topics in this section include:

- [Generating Assessment Reports](#) on page 9
- (Optional) [Regenerating Failed Reports](#) on page 14

Generating Assessment Reports

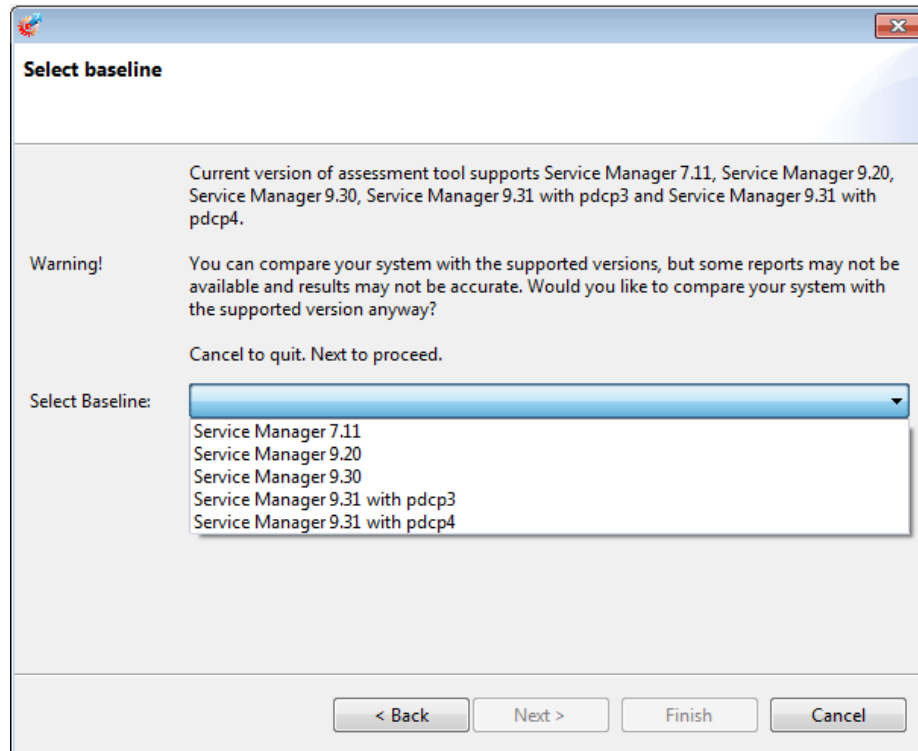
To generate the Service Manager data assessment reports, follow these steps:

- 1 Launch the Assessment Toolkit and set up connection as described in [Setting Up the Assessment Toolkit](#).
- 2 From the Report Explorer, select one report or multiple reports in the hierarchy.
- 3 Right-click on any of the selected reports and select **Run Report** in the menu opened. The report generation wizard opens. Or you can click **Report > Run** in the menu to open the report generation wizard.

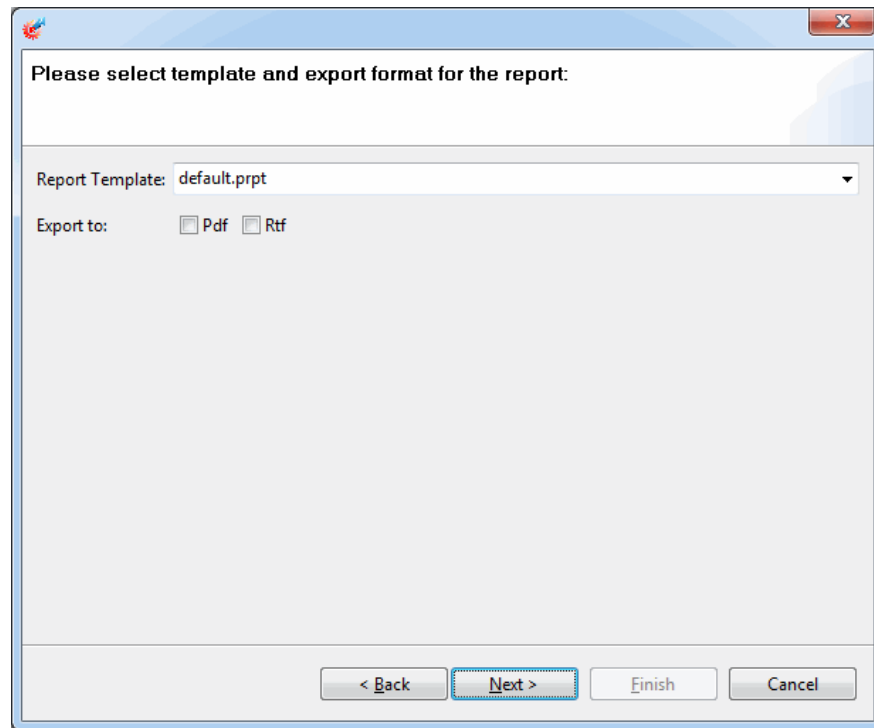


You can rearrange the selected reports by dragging and dropping. Note that the reports can be moved in the same module only. Click **Next** to proceed.

- 4 (Optional) The Select baseline page opens only when the target baseline folder of specific Service Manager version does not exist. In this page, you can select another baseline from the drop-down list.



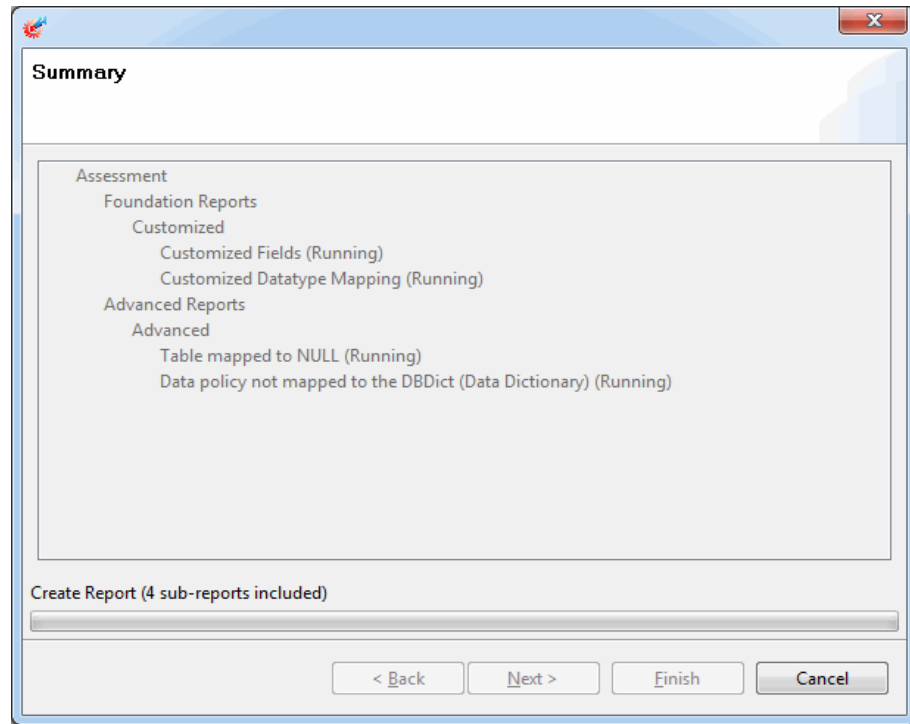
- 5 Select the default master report template (default.prpt) or your customized template from the Report Template drop-down list:



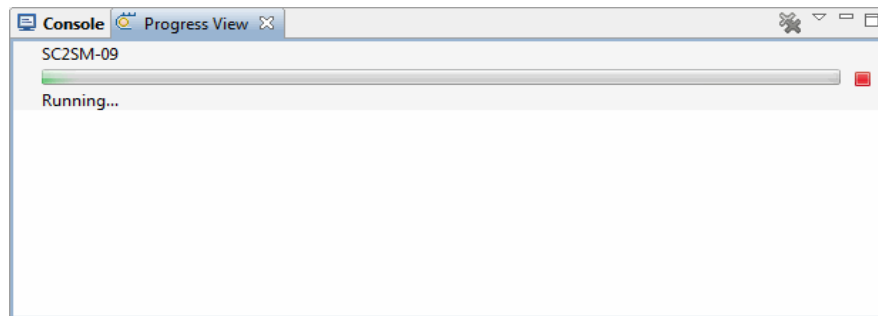
For more information about the master report template customization, see [Customizing Report Template](#) on page 15.

- 6 In the wizard window, select **Pdf, Doc** or both options to export the master report. The Assessment Toolkit will convert the generated report to your selected format and save it to your computer. Click **Next**.

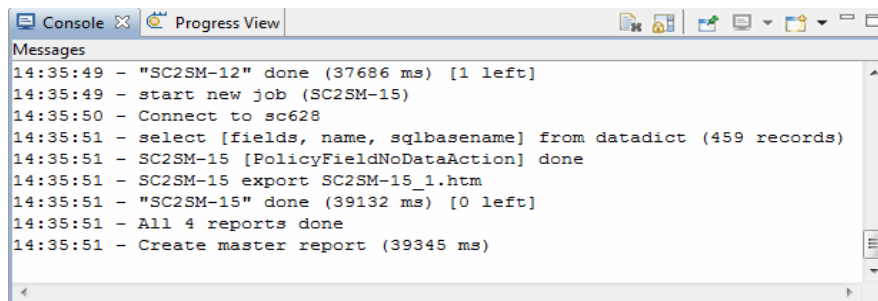
- The Assessment Toolkit begins to generate the selected reports, and the overall status is displayed in the progress bar. You can click **Cancel** to terminate and exit the generation process of all reports.



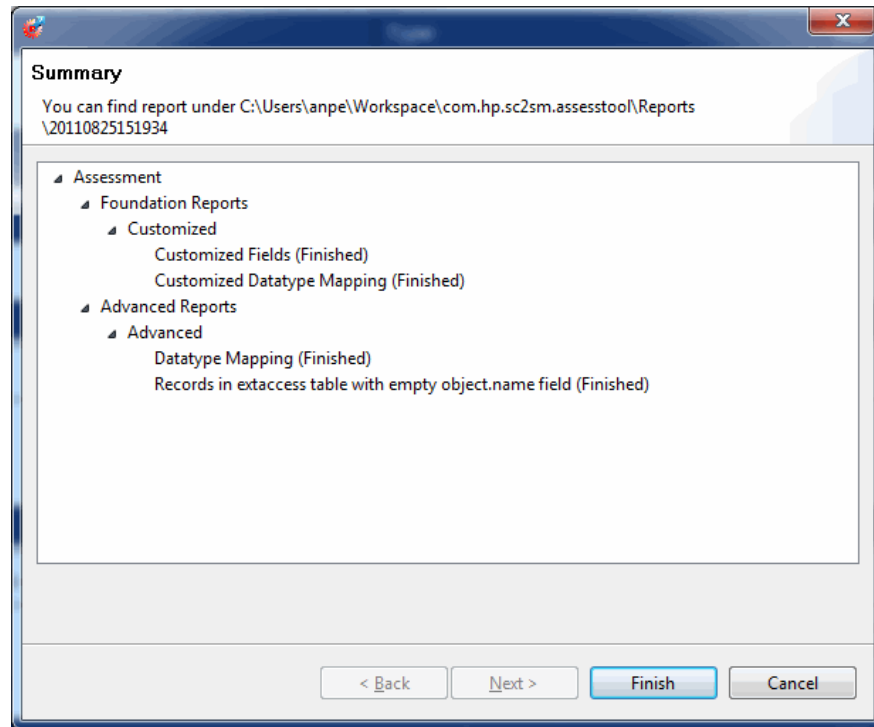
Separate progress bar for each report is displayed in Progress View panel of the Assessment Toolkit. You can click the corresponding red icon to terminate the generation process of any single report.



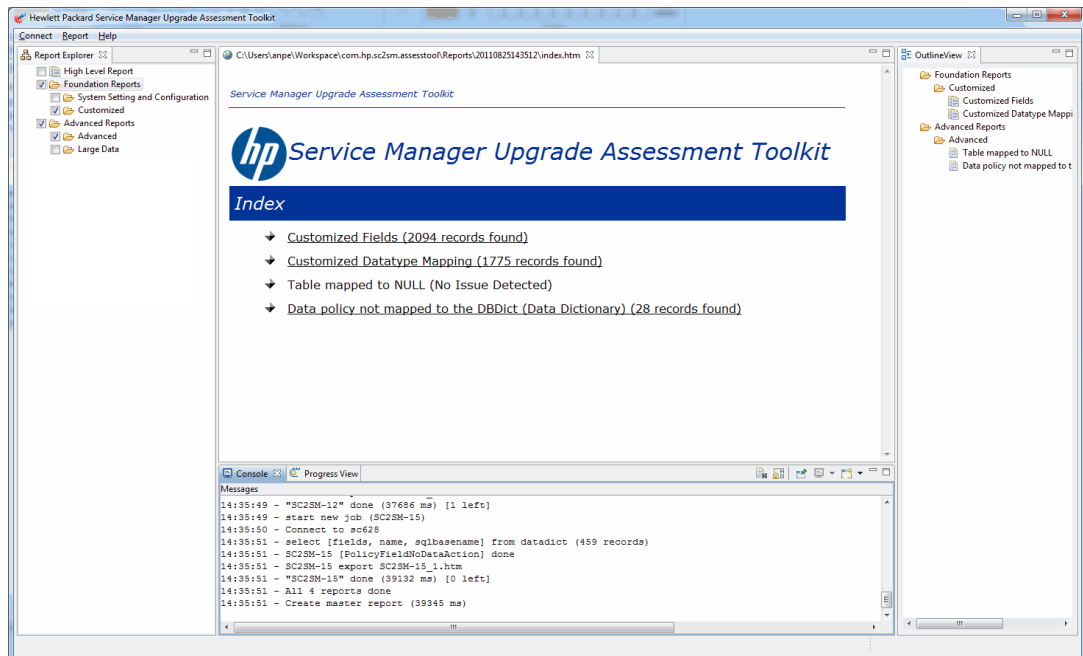
The reports processing is also indicated by the console messages. All errors and key information are logged in Console panel as illustrated in the following example:



- 8 When the process is completed, the reports generation results are summarized and displayed:



- 9 Review your report generation results. If any reports failed to generate, click **Back** and refer to [\(Optional\) Regenerating Failed Reports](#) for the required steps once the problem get fixed. Otherwise click **Finish** to display the reports index page:



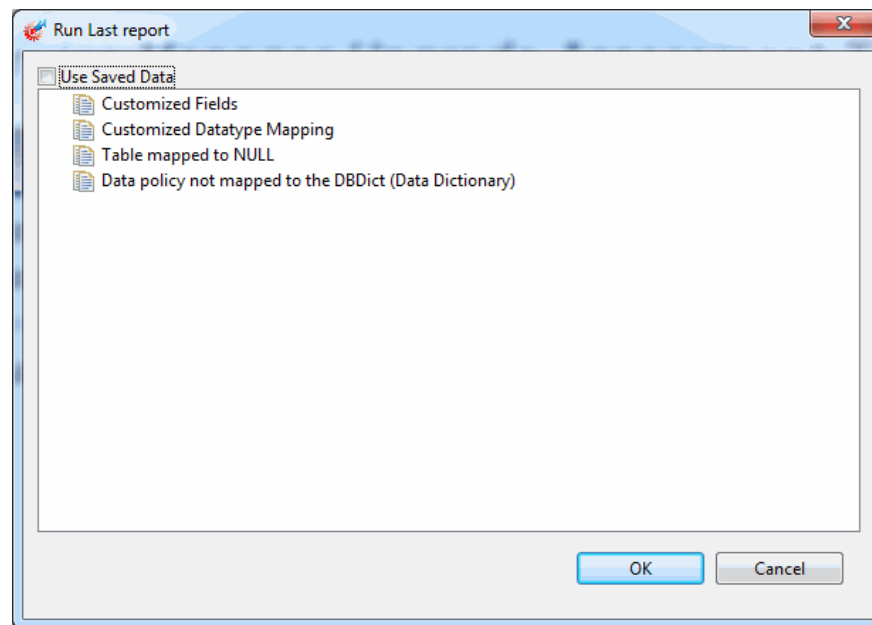
You can click the links to view the reports in HTML format. All exported reports are stored locally in the <Service Manager Upgrade Assessment Toolkit home directory>\reportHtml\timestamp folder.

- ▶ When generating the Assessment Report, logged data which records processing failures, errors messages and processing duration of the assessment utility by utility module is stored in the <Service Manager Upgrade Assessment Toolkit home directory>\log folder.

(Optional) Regenerating Failed Reports

To regenerate the failed reports when regenerating the master report, follow these steps:

- 1 In the menu, click **Report > Run last** to open the following dialog. IDs of the failed reports are displayed in the Error Report List:



- 2 Select **Use Saved Data** and click **OK**, the Assessment Toolkit will regenerate the failed reports only. The reports which are successfully generated in [step 7](#) will be retrieved from the local storage and appended to the new master report. By selecting this option, the report generating time can be significantly reduced, particularly for those reports containing big data volume.

- ▶ Note that the **Use Saved Data** option is unselected by default. Without this option, the Assessment Toolkit will retrieve report data from the current connected Service Manager server regardless of the server environment alternation since last report generation, and regenerate all the selected reports from the beginning. This can be time consuming especially when the reports contain a lot of data in actual production environment.

- ▶ The local data storage will not be purged automatically. If you encountered the error messages such as the disk space is full, you need to manually clean up the disk space.

4 Customizing the Assessment Reports

This chapter describes how to customize the default Assessment Report settings such as the report templates and parameter configuration. A brief introduction about new report creation is also included in this chapter.

Topics in this section include:

- [Customizing Report Template](#) on page 15
- [Configuring Common Parameter](#) on page 16
- [Customizing High Level Report Configuration](#) on page 18

Customizing Report Template

You can create new Assessment Report templates or make further changes to the default templates for the master report and the individual reports.

Aspects Need Attention When Creating New Template

Pentaho Report Designer is a report designer tool bundled in the Pentaho Open Source Business Intelligence suites with a graphical user interface for creating and editing report definitions. The resulting .prpt files can be executed by the Assessment Toolkit as report templates.

The following steps only describe the aspects you need to pay attention to when creating custom report templates for the Assessment Reports. For more information about how to create a report, refer to the Pentaho Report Designer help.

- 1 Launch the Pentaho Report Designer.
- 2 Create a new report and save it to your computer. This is the new report template.
- 3 Do the following in the new report template:
 - a Click **Report Header**, type a report title.
 - b (Optional) Type a description for this report.
 - c Click **No Data** and then add individual reports as necessary. The individual reports should be listed with sequence numbers.
- 4 Save and close the report.

Customizing Master Report Template

The out-of-box master report template is `default.prpt`, which is stored in `<Service Manager Upgrade Assessment Toolkit home directory>\config\template`.

To customize the master report template, follow these steps:

- 1 Create a new template or modify the `default.prpt` file using Pentaho Report Designer.
- 2 Copy your customized master report template to the `<Service Manager Upgrade Assessment Toolkit home directory>\config\template` folder.
- 3 When generating the master report with the Assessment Toolkit later, you can select the newly created or customized master template from the **Report Template** drop-down list as described in [step 5 of Generating Assessment Reports](#).

Creating Individual Report Template

To create the template for an individual report, follow these steps:

- 1 Create a new template using Pentaho Report Designer. The name of this template must be in the following format:
`<report id>.prpt`
For example, `SC2SM-08.prpt`. You can refer to the configuration file (`reports.xml`) for the ID of an individual report.
- 2 Copy your customized individual report template to the `<Service Manager Upgrade Assessment Toolkit home directory>\config\template\subreport` folder.
- 3 Modify the report configuration file (`reports.xml`) and add a template parameter for the target report. When generating the master report with the Assessment Toolkit later, the customized individual report template will be used for the target report.

See the following code example for individual report template parameter configuration. The bold line indicates that your customized template is applied to the Customized Records report:

```
<report id="SC2SM-08">
  <!-- Template file names for this report. This template file must be
saved under config\template\subreport. -->
  <param key="template" value="SC2SM-08.prpt"/>
```

Configuring Common Parameter

The out-of-box report configuration file is `reports.xml`, which is stored in `<Service Manager Upgrade Assessment Toolkit home directory>\config`. This configuration file can be used as a starting point for the development of more detailed, customer-specific reports. You can customize the configuration for each report in `reports.xml` before report generations.

See the following code example for some common report parameters used in report generation:

```
<report id="SC2SM-28" name="Check for records that are truncated due to
RDBMS mapping" desc="Examines the Service Manager database to identify
all records(by table) which exceed the maximum records length. This
report is not required for Service Manager.">
    <action
class="com.hp.sc2sm.assesstool.report.action.advance.RecordExceedMaxLen
gthAction">
        <params key="sqldatatype">
            <value>varchar</value>
            <value>varchar2</value>
            <value>char</value>
            <value>nchar</value>
            <value>nvarchar</value>
            <value>nvarchar2</value>
            <value>raw</value>
        </params>
        <params key="tables">
            <value>Alertlog</value>
            <value>ApprovalLog</value>
            <value>menu</value>
        </params>
        <table>
            <column id="tablename" title="Table" />
            <column id="fieldname" title="Field" />
            <column id="record" title="Record" />
            <column id="recordlength" title="Record Length" />
            <column id="maxfieldlength" title="Max Field Length" />
        </table>
    </action>
</report>
```

In this example, the following common parameters can be configured:

- report id: ID of this report.
- name: Name of this report.
- description: Description of this report.

The other parameters may differ between various reports. For the reports which need mandatory configuration, detailed parameter information is provided in [Assessment Report Suites](#).

Customizing High Level Report Configuration

The out-of-box High Level Report configuration file is `reports.xml` as well. You can customize the configuration for each section before report generations.

Configuring General Information High Level Report

See the following code example for General Information High Level Report configuration. The parameters that can be customized are displayed as bold lines:

```
<!-- The parameter value of Target_Version will be retrieved from this
configuration file and displayed in high level report general
information section. This parameter can be customized. -->
<parameter key="Target_Version" value="Service Manager 9.30" />
<!-- The Column parameter defines the table column information. If the
column name is changed, make sure to modify it in report template file
as well. -->
    <table>
        <column id="Customer" />
        <column id="Date" />
        <column id="Base Version" />
        <column id="Target Version" />
    </table>
```

Configuring Overall Assessment High Level Report

See the following code example for Overall Assessment High Level Report configuration. The parameters that can be customized are displayed as bold lines:

```
<!-- The threshold parameters define the Service Manager assessment and
the RDBMS assessment related threshold values, based on which the status
icons (normal, warning or error) are displayed in the high level report.
-->
    <param key="error" value="10" />
    <param key="warn" value="4" />
<!-- The transactiontables parameter defines the table list which will
be compared against Service Manager out-of-box tables to get the count
of tables which have customized fields. You can customize this parameter
to add more tables to the list or remove tables from the list. -->
    <params key="tables">
        <value>Alert</value>
        <value>Alertlog</value>
        <value>Approval</value>
```

Configuring Detailed Assessment High Level Report

Configuring Service Manager Assessment High Level Report

See the following code example for Service Manager Assessment High Level Report configuration. The parameters that can be customized are displayed as bold lines:

```
<!-- The threshold parameters define the Service Manager assessment
related threshold values, based on which the status icons (normal,
warning or error) are displayed in the high level report. -->
    <param key="error" value="10" />
    <param key="warn" value="2" />

<!-- The tables parameter defines the table list which will be scanned
for customized records. You can customize this parameter to add more
tables to the list or remove tables from the list. -->
    <params key="tables">
        <value>displayoption, screen.id</value>
        <value>validity</value>
        <value>link, name</value>
        <value>environment, name</value>
    </params>
```

Configuring RDBMS Assessment High Level Report

Configuration of the RDBMS Assessment High Level Report includes the `table` parameter and the `threshold` parameter, both of which are described in the previous sections. You can refer to [Configuring General Information High Level Report](#) for detailed information about how to configure the `table` parameter, and then refer to [Configuring Overall Assessment High Level Report](#) for how to configure the `threshold` parameter.

5 Assessment Report Suites

The Assessment Toolkit provides HP partners with a suite of Assessment Reports. Each report is designed to meet the analytical needs of a generic Service Manager business user. With Assessment Reports, you can easily estimate migration effort and identify potential data migration problems. This chapter describes each Assessment Report with brief description.

Topics in this section include:

- [System Setting and Configuration Reports](#) on page 22
- [Customized Reports](#) on page 23
- [Advanced Reports](#) on page 25
- [Large Data Reports](#) on page 27
- [High Level Report](#) on page 32



For some reports which need mandatory configuration, detailed parameter information is also provided in this chapter. Make sure to customize the configuration for these reports accordingly in `reports.xml` before report generations. Refer to the following list for the reports which need mandatory configuration:

- Database Size
- Customized records
- Table with null/duplicate key
- Records with the prefix if within their ID
- Checking Field lengths for tables mapped from P4 to RDBMS
- Not licensed OOB schedule records
- Check the schedule/eventout/eventin cleanup
- List any request line items or task records, SYSBLOB, SYSATTACHMENT which are orphaned
- Check for records that are truncated due to RDBMS mapping

System Setting and Configuration Reports

System Setting and Configuration Reports provide detailed information about several types of Service Manager system setting-related and configuration-related data reports.

Report name	Description
Source version of Applications / RTE	Displays the current Service Manager RAD Application version as well as the RTE (Run Time Environment) version.
Table Size	Lists the top 10 tables with the biggest size and displays the size of each table to assist with the assessment as this will impact the upgrade utility's time when executed.
RDBMS information	Lists the actual RDBMS details in order to provide sufficient information of how the Service Manager RDBMS is currently configured as well as the actual state. For example, the Assessment Toolkit will check and return the database type and version, codepage, character set, etc.
List tables whose case-sensitive is not set	The Assessment Toolkit examines the RDBMS against the Service Manager application data mapping table to verify whether all fields have been mapped using upper, lower and mixed-case. This report lists the tables which are not set to be case-sensitive. This is required when the Service Manager instance is set to case-sensitive.
Database Size	<p>Lists the physical size of the database in KB/MB/GB. This is required to judge whether a data archive is required prior to an upgrade or as part of a system health check.</p> <p>You can add template parameters for this report as below:</p> <pre><report id="SC2SM-03"> <!-- Template file names for this report. There should be several template files configured for this report if the customer want to customize the template file for this report. For each DB type, there should be one template file. All report template files must be saved under config\template\subreport, and the template file name must contain the DB type. For example, the SC2SM-03_DB2.prpt template file is dedicated for DB2 database. --> <params key="template"> <value>SC2SM-03_DB2.prpt</value> <value>SC2SM-03_SQLSERVER.prpt</value> <value>SC2SM-03_ORACLE.prpt</value> </params> </report></pre>

Customized Reports

Customized Reports provide customized data related reports.

Report name	Description
Customized Tables	The Assessment Toolkit searches the Service Manager database for customized tables which have been added / deleted / modified that would be different from an OOB (Out-of-the-box) version. This report lists all customized tables.
Customized Fields	The Assessment Toolkit searches the Service Manager database for customized columns / fields have been added / deleted / modified that would different from an OOB version. This report lists all customized fields.

Report name	Description
Customized Records	<p>Lists all customized records for the following tables to find where these tailoring objects have changed from the OOB <i>version, inbox, macro, wizard, menu, format, formatctrl, link, Object, Process, States, displayscreen, displayoption, scripts, code</i>. This will assist in both estimating the time required with conflict resolution as well as identifying changes objects during a health check to gauge the complexity of a potential upgrade.</p> <p>You can add template and other parameters for this report as below:</p> <pre data-bbox="634 512 1482 1528"> <report id="SC2SM-08"> <!-- Template file names for this report. This template file must be saved under config\customized_records. --> <param key="template" value="SC2SM-08.prpt"/> <param key="compareDetail" value="false" /> <param key="showModifyDetail" value="false" /> <params key="tables"> <value>dbdict</value> <value>menu</value> <value>format</value> <value>link</value> <value>Object</value> <value>scripts</value> <value>displayscreen</value> <value>macro</value> <value>Process</value> <value>States</value> <value>wizard</value> <value>inbox</value> <value>formatctrl</value> <value>displayoption</value> <value>code</value> </params> </report> </pre>
Customized datatype mapping	Lists all datatype mapping which does not match the OOB datatype mapping for all the standard OOB tables.

Advanced Reports

Advanced Reports provide reports for detail SC/SM key data which relates closely to future migration.

Report name	Description
Datatype mapping	Lists all database types used to map tables to the RDBMS from P4. For each database type, this report provides the mapping detail (taken from the sqldbinfo record) and the table / field using a particular data type to assist in diagnosing any data problems that may be encountered during the upgrade.
Table mapped to 'n' data types for MSSQL	Lists all tables that are mapped using <i>n</i> , <i>nchar</i> and <i>nvarchar</i> data types on SQL Server. This report is targeted for Service Manager instances searching.
Table mapped to NULL	Lists all tables that are mapped using NULL tables, which need to be identified prior to running the upgrade.
Records in extaccess table with empty object.name field	The Assessment toolkit searches the extaccess definition and return the list of records where the <code>object.name</code> field has no value. These records need to be fixed prior to running the upgrade utility in order to avoid failures.
Table/field/record mapped as binary Objects	Lists all tables and specific fields/records, where that have been mapped as binary objects within a table. This information is useful for both upgrading Service Manager or as a general system health check of Service Manager.
Data policy not mapped to the DBDict (Data Dictionary)	Lists all data policy records with no corresponding dbdict record. This information is useful when upgrading Service Manager but not required for general Service Manager health check.
Checking the lengths of the datapolicy sqlbasename field value	For all data policy records, the Assessment toolkit verifies that the <code>sqlbasename</code> field is populated and its length is less than/equal to 13 characters. This report lists all records that do not meet this criteria. This validation is required to ensure that any corrections may required prior to running the upgrade from SericeCenter to Service Manager.

Report name	Description
Checking Field lengths for tables mapped from P4 to RDBMS	<p>The Assessment Toolkit checks the field lengths in the RDBMS against the mapping table. This report lists the fields lengths for systems which are mapped out to RDBMS.</p> <p>You can configure parameters for this report as below:</p> <pre data-bbox="621 384 1482 1398"> <report id="SC2SM-18"> <!-- List table name, field name and field type(depends on database) which need to be checked. For the field length, it can be configurable in parameter value for each below. --> <param key="notification str.condition" value="varchar2(255)" /> <param key="inbox query" value="varchar2(256)" /> <param key="inbox normalized.query" value="varchar2(255)" /> <param key="inbox short.query" value="varchar2(256)" /> <param key="inbox short.normalized.query" value="varchar2(256)" /> <param key="inbox inbox.name" value="varchar2(256)" /> <param key="operator password" value="varchar2(137)" /> <param key="signatures object.name" value="varchar2(255)" /> <param key="upgradepseudolog message" value="varchar2(255)" /> <param key="upgradeobjects object.name" value="varchar2(255)" /> <param key="SYSATTACHMENTS topic" value="varchar2(40)" /> </report> </pre>
Validation check on the weekly.duration field in the caldutyhours table	<p>Lists all conditions in the weekly.duration field that will bring failure to the Service Manager upgrade process when you choose to upgrade SLA records (make sure the weekly.duration field is populated in the caldutyhours table correctly).</p>
List the count of all records within the M (Main) and A (Array) tables	<p>The Assessment toolkit checks how the tables are mapped. If all the tables are mapped using array tables, this may not be the most efficient method and could be tuned. Data returned from the report provides a count of the records within the M and A tables as well as table identification.</p>
Search queries in SC/SM that are NOT fully indexed	<p>Lists all queries that are not fully indexed in either format control or inboxes.</p>

Report name	Description
List P4 shadowed tables to RDBMS	Lists any P4 files that have been shadowed to an RDBMS database table.
Record count for all tables	Lists record counts for all SC/SM tables.
List all the arrays used as keys	Lists all the fields mapped as array type and used as keys prior to upgrade.

Large Data Reports

Large Data Reports consist of six individual reports, which cover huge volume data processing. When generating these reports, the Service Manager server performance will be significantly degraded even with server Out of Memory exception. It is recommended that only one report is selected to run under this category.

Report name	Description
Table with null/duplicate key	<p>The Assessment toolkit examines data and validates the presence of null/duplicate keys. This report lists the tables with null/duplicate keys. This information is required prior to an upgrade as the results need to be examined prior to running and upgrade or during a system health check for database tuning.</p> <p>You can add parameters for this report as below:</p> <pre><!-- In the actions section, you need to config which tables to be scanned. Otherwise, the Assessment toolkit will scan the data in all tables. --> <params key="tables"> <value>activity</value> <value>inbox</value> </params></pre>

Report name	Description
Records with the prefix if within their ID	<p>Lists all records with a given prefix, which is identified within their identification number (ID). This prefix should be a sign that they have migrated from another system previously.</p> <p>You can add parameters for this report as below:</p> <pre data-bbox="634 384 1482 1003"> <report id="SC2SM-20"> <action id="prefixId"> <!-- Lists all tables which should be included in this report. --> <params key="tables"> <value>displayscreen</value> <value>displayoption</value> </params> <!-- Lists all prefix need to be matched against the IDs of the tables' records. --> <params key="prefix"> <value>im</value> <value>listpages</value> </params> </action> </report> </pre>
Check the schedule/eventout/eventin cleanup	<p>The Assessment toolkit checks the status of the tables - Schedule/Eventin/Eventout to determine whether they are being properly cleaned up and will show records with the failed processing status.</p> <p>You can configure parameters for this report as below:</p> <pre data-bbox="634 1171 1482 1696"> <report id="SC2SM-23"> <!-- Configure the exact value of the failed status for server activities. --> <param key="message" value="failed processing" /> <!-- Lists all tables which should be included in this report. Key is table name, value is the field to be checked. --> <action id="StatusCheckAction"> <param key="schedule" value="status" /> <param key="eventout" value="evstatus" /> <param key="eventin" value="evstatus" /> </action> </report> </pre>

Report name	Description
Not licensed OOB schedule records	<p data-bbox="631 235 1433 296">Lists all the records within the OOB schedule table that may be active but not within licensed modules and therefore be disabled.</p> <p data-bbox="631 306 1300 338">You can configure parameters for this report as below:</p> <pre data-bbox="631 363 1471 1348"> <report id="SC2SM-21"> <!-- List all mapping details between licensed module and the class of schedule table. --> <param key="sla" value="SLA" /> <param key="problem" value="Problem Management" /> <param key="change" value="Change Management" / > <param key="contract" value="Contract Management" /> <param key="ocm" value="Request Management" /> <param key="KMUpdate" value="Knowledge Management" /> <!-- List the values of the class in schedule table that are included in Foundation module. All of them are considered to be licensed, although they are not list in the "Licensed Product" of "Version Information".--> <params key="Foundation"> <value>agent</value> <value>report</value> <value>gie</value> <value>event</value> <value>lister</value> <value>marquee</value> </params> </report> </pre>


Report name	Description
<p>Check for records that are truncated due to RDBMS mapping</p>	<p>The Assessment toolkit checks the Service Manager database to identify all records (by table) which exceed the maximum records length. This report is not required for Service Manager.</p> <p>You can configure parameters for this report as below:</p> <pre data-bbox="621 380 1481 1537"> <report id="SC2SM-28"> <action id="tableCount"> <!-- Lists all RDBMS datatypes that contain the field length constraint, such as VARCHAR(60), VARCHAR2(60), CHAR(1), etc. The Assessment Toolkit only compares the field length based on the datatype defined as following. Otherwise, the comparison will be ignored. --> --> <params key="sqldatatype"> <value>varchar</value> <value>varchar2</value> <value>char</value> <value>nchar</value> <value>nvarchar</value> <value>nvarchar2</value> <value>raw</value> </params> <!-- The "tables" key indicates the tables list where the Assessment Toolkit reads the records for comparison. To read all tables in SC/SM server, use <value>all</value>. However, this is not recommended because when the records of all tables are queried, the system performance will be significantly degraded. --> --> <params key="tables"> <value>Alertlog</value> <value>ApprovalLog</value> <value>menu</value> </params> </action> </report> </pre>

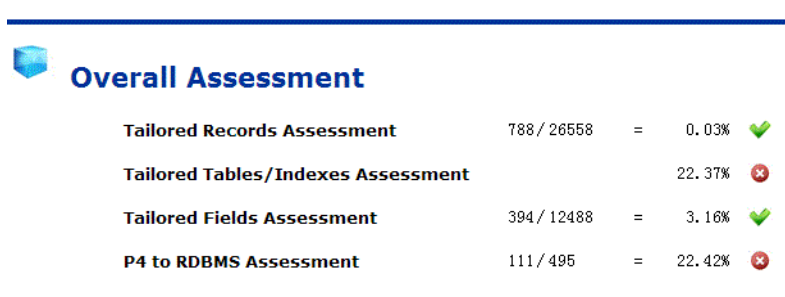
Report name	Description
List any request line items or task records, SYSBLOB, SYSATTACHMENT which are orphaned	<p>The Assessment toolkit checks all the request line items/change tasks, searches and lists all line items with null parent request (orphaned). For SYSATTACHMENTS/SYSBLOB, the Toolkit searches and lists all where the parent interaction, incident, change, request, etc. does not exist (orphan attachment/blob).</p> <p>You can configure parameters for this report as below:</p> <pre data-bbox="621 447 1482 1083"> <!-- List module and talbe relationship in sysblob and sysattachment tables as below. Rule key="modulename in sysattachment table-table name in sc/sm field name" --> <params key="moduleRelation"> <value>incidents-incidents incident.id</value> <value>problem-probsummary id</value> <value>rootcause-rootcause id</value> <value>knownerror-knownerror id</value> <value>kmattachments-kmattachments id</value> <value>kmdocument-kmdocument id</value> <value>svcCatalog-svcCatalog name</value> <value>civisualizationdecorator-civisualizationdecor ator name</value> <value>civisualizationdevice-civisualizationdevice d evice.type&amp;device.subtype</value> </params> </pre>

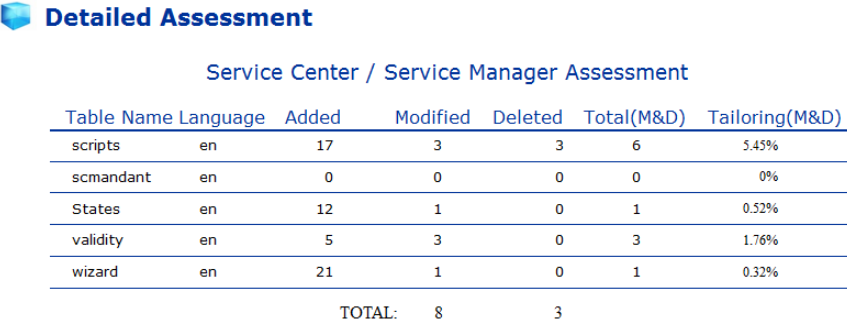
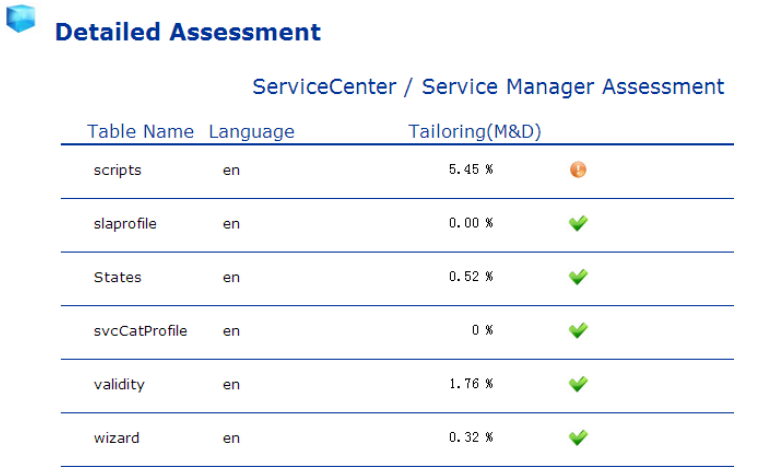


















High Level Report

High Level Report consists of summary information that covers almost all the report areas. This report does not provide any detailed report data as generated in other Assessment Reports. Instead, only general information such as the result count, the level value and the status icon (normal, warning or error) are displayed in this report. To configure the thresholds for each report where warning or error levels are reached, see [Configuring Overall Assessment High Level Report](#).

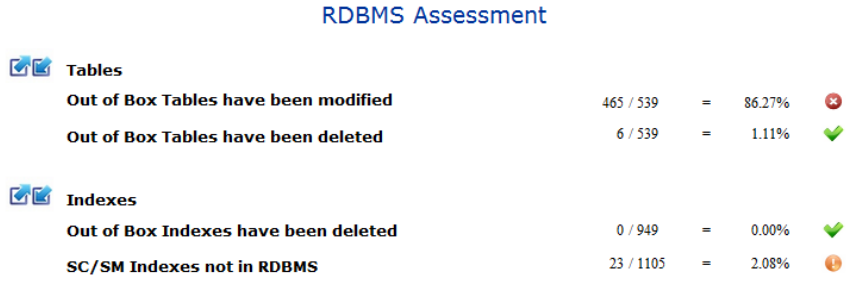
The following reports are included in High Level Report:

Report name	Description								
General Information high level report	<p>Provides general Service Manager server migration or upgrade related information as listed below:</p> <ul style="list-style-type: none">• Customer: The Service Manager customer name, which is retrieved from the table on the servers.• Date: The report generation date.• Base Version: The current Service Manager server version.• Target Version: The target Service Manager version which will be migrated to. This value should be configured in high level report configuration file as described in Configuring General Information High Level Report. <p>You can refer to the following screenshot as an example:</p> <div data-bbox="730 1045 1364 1270"><p>General Information</p><table><tr><td>Customer:</td><td>Peregrine Systems Inc.</td></tr><tr><td>Date:</td><td>2011-07-18</td></tr><tr><td>BaseVersion:</td><td>SC6.2</td></tr><tr><td>Target Version:</td><td>Service Manager 9.30</td></tr></table></div>	Customer:	Peregrine Systems Inc.	Date:	2011-07-18	BaseVersion:	SC6.2	Target Version:	Service Manager 9.30
Customer:	Peregrine Systems Inc.								
Date:	2011-07-18								
BaseVersion:	SC6.2								
Target Version:	Service Manager 9.30								

Report name	Description																				
Overall Assessment high level report	<p>Provides overall Service Manager server table customized fields and RDBMS conversion related information as listed below:</p> <ul style="list-style-type: none"> Tailored Records Assessment: The overall percentage of customized records of all tables defined under “SM/SC assessment” of “Detailed assessment”. Tailored Tables/Indexes Assessment: $\text{Summary RDBMS percentage} = \frac{\text{Out Of Box Tables have been modified} + \text{Out Of Box Tables have been deleted} + \text{Out Of Box Indexes exist} + \text{SC/SM Server Out Of Box Indexes exist}}{4}$ The Assessment toolkit compares the Summary RDBMS percentage with RDBMS summary, and displays normal, warning or error icon in this report. Tailored Fields Assessment: The count of changes in Service Manager tables’ fields. The table list can be configured in high level report configuration file as described in Configuring Overall Assessment High Level Report. $\text{Value of Service Manager Assessment} = \left(\frac{\text{customizedFieldCount}}{\text{fieldCount}} \right) \times 100$ $\text{fieldCount} = \text{Sum of all tables' fields count}$ $\text{customizedFieldCount} = \text{Sum of customized tables' fields count}$ P4 to RDBMS Assessment: The count of the tables in current Service Manager servers that have been converted from P4 to RDBMS. $\text{Value of RDBMS Assessment} = \left(\frac{\text{dbTableCount}}{\text{tableCount}} \right) \times 100$ $\text{tableCount} = \text{all tables count}$ $\text{dbTableCount} = \text{count of tables have been converted to database from p4}$ <p>You can refer to the following screenshot as an example:</p> <div style="border: 1px solid #0056b3; padding: 10px; margin-top: 10px;">  <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="4" style="text-align: left;"> Overall Assessment</th> </tr> </thead> <tbody> <tr> <td style="width: 60%;">Tailored Records Assessment</td> <td style="width: 15%;">788 / 26558</td> <td style="width: 10%;">=</td> <td style="width: 15%;">0.03% </td> </tr> <tr> <td>Tailored Tables/Indexes Assessment</td> <td></td> <td></td> <td>22.37% </td> </tr> <tr> <td>Tailored Fields Assessment</td> <td>394 / 12488</td> <td>=</td> <td>3.16% </td> </tr> <tr> <td>P4 to RDBMS Assessment</td> <td>111 / 495</td> <td>=</td> <td>22.42% </td> </tr> </tbody> </table> </div>	Overall Assessment				Tailored Records Assessment	788 / 26558	=	0.03%	Tailored Tables/Indexes Assessment			22.37%	Tailored Fields Assessment	394 / 12488	=	3.16%	P4 to RDBMS Assessment	111 / 495	=	22.42%
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Report name	Description																																																																						
Detailed Assessment high level report	<p data-bbox="630 279 1279 310">Service Manager Assessment high level report:</p> <p data-bbox="630 327 1472 453">Discovers the customized records which are significant to Service Manager upgrade for some tables. The table list can be configured in reports.xml (showNum , the value can be true or false) as described in Configuring Overall Assessment High Level Report.</p> <p data-bbox="630 470 1472 564">Note: The Total(M&D) column consists of the total number of the modified and the deleted tables. The Tailoring(M&D) column consists of the percentage of the modified and the deleted tables.</p> <p data-bbox="630 581 1321 613">You can refer to the following screenshot as an example:</p> <p data-bbox="630 630 824 661">showNum=true</p> <div data-bbox="630 695 1472 1018">  <table border="1" data-bbox="678 800 1472 982"> <thead> <tr> <th>Table Name</th> <th>Language</th> <th>Added</th> <th>Modified</th> <th>Deleted</th> <th>Total(M&D)</th> <th>Tailoring(M&D)</th> </tr> </thead> <tbody> <tr> <td>scripts</td> <td>en</td> <td>17</td> <td>3</td> <td>3</td> <td>6</td> <td>5.45%</td> </tr> <tr> <td>scmandant</td> <td>en</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0%</td> </tr> <tr> <td>States</td> <td>en</td> <td>12</td> <td>1</td> <td>0</td> <td>1</td> <td>0.52%</td> </tr> <tr> <td>validity</td> <td>en</td> <td>5</td> <td>3</td> <td>0</td> <td>3</td> <td>1.76%</td> </tr> <tr> <td>wizard</td> <td>en</td> <td>21</td> <td>1</td> <td>0</td> <td>1</td> <td>0.32%</td> </tr> <tr> <td colspan="3">TOTAL:</td> <td>8</td> <td>3</td> <td></td> <td></td> </tr> </tbody> </table> </div> <p data-bbox="630 1062 831 1094">showNum=false</p> <div data-bbox="704 1142 1472 1606">  <table border="1" data-bbox="761 1262 1432 1606"> <thead> <tr> <th>Table Name</th> <th>Language</th> <th>Tailoring(M&D)</th> </tr> </thead> <tbody> <tr> <td>scripts</td> <td>en</td> <td>5.45 % </td> </tr> <tr> <td>slaprofile</td> <td>en</td> <td>0.00 % </td> </tr> <tr> <td>States</td> <td>en</td> <td>0.52 % </td> </tr> <tr> <td>svcCatProfile</td> <td>en</td> <td>0 % </td> </tr> <tr> <td>validity</td> <td>en</td> <td>1.76 % </td> </tr> <tr> <td>wizard</td> <td>en</td> <td>0.32 % </td> </tr> </tbody> </table> </div>	Table Name	Language	Added	Modified	Deleted	Total(M&D)	Tailoring(M&D)	scripts	en	17	3	3	6	5.45%	scmandant	en	0	0	0	0	0%	States	en	12	1	0	1	0.52%	validity	en	5	3	0	3	1.76%	wizard	en	21	1	0	1	0.32%	TOTAL:			8	3			Table Name	Language	Tailoring(M&D)	scripts	en	5.45 % 	slaprofile	en	0.00 % 	States	en	0.52 % 	svcCatProfile	en	0 % 	validity	en	1.76 % 	wizard	en	0.32 % 
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Report name	Description
RDBMS Assessment high level report	<p>Provides detailed backend RDBMS related information as listed below:</p> <ul style="list-style-type: none"> <p>Out Of Box Tables have been modified:</p> <p>The value of percentage indicates all OOB RDBMS tables which have been modified in DDL.</p> <p><i>Value of percentage = (Tablemodifiedcount / Tablecount) x 100</i></p> <p><i>Tablemodifiedcount = The count of all OOB RDBMS tables which have been modified in DDL</i></p> <p><i>Tablecount = The count of all OOB RDBMS tables in DDL</i></p> <p>Out Of Box Tables have been deleted:</p> <p>The value of percentage indicates all OOB RDBMS tables which have been deleted.</p> <p><i>Value of percentage = (Tabledeletedcount / Tablecount) * 100</i></p> <p><i>Tabledeletedcount = The count of all OOB RDBMS tables which have been deleted in DDL</i></p> <p><i>Tablecount = The count of all OOB RDBMS tables in DDL</i></p> <p>Out Of Box Indexes have been deleted:</p> <p>The value of percentage indicates all indexes within OOB RDBMS tables which have been deleted from current RDBMS.</p> <p><i>Value of percentage = (Indexednotexistedcount / OOBindexcount) x 100</i></p> <p><i>Indexednotexistedcount = The count of indicate all indexes within OOB RDBMS tables which have been deleted from current RDBMS</i></p> <p><i>OOBindexcount = The count of all OOB RDBMS indexes in DDL</i></p> <p>SC/SM Indexes not in RDBMS:</p> <p>The value of percentage indicates all indexed within OOB Service Manager tables which have been defined in Service Manager servers but not exist in current RDBMS.</p> <p><i>Value of percentage = (Indexesnotexistedcount / ServerIndexescount) x 100</i></p> <p><i>Indexesnotexistedcount = The count of all indexed within OOB Service Manager tables which have been defined in Service Manager servers but not exist in current RDBMS.</i></p> <p><i>ServerIndexescount = The count of all indexes in current server</i></p> <p>To generate related information in this report, make sure to log in to the database first as stated in Setting Up the Assessment Toolkit on page 7.</p>

Report name	Description																							
	<p>You can refer to the following screenshot as an example:</p>  <p>The screenshot shows an 'RDBMS Assessment' report. It is divided into two sections: 'Tables' and 'Indexes'. Each section lists specific findings with their counts, percentages, and status icons (red X for error, green check for success, and yellow warning for warning).</p> <table border="1"> <thead> <tr> <th>Category</th> <th>Item</th> <th>Count</th> <th>Percentage</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td rowspan="2">Tables</td> <td>Out of Box Tables have been modified</td> <td>465 / 539</td> <td>86.27%</td> <td>✖</td> </tr> <tr> <td>Out of Box Tables have been deleted</td> <td>6 / 539</td> <td>1.11%</td> <td>✔</td> </tr> <tr> <td rowspan="2">Indexes</td> <td>Out of Box Indexes have been deleted</td> <td>0 / 949</td> <td>0.00%</td> <td>✔</td> </tr> <tr> <td>SC/SM Indexes not in RDBMS</td> <td>23 / 1105</td> <td>2.08%</td> <td>⚠</td> </tr> </tbody> </table>	Category	Item	Count	Percentage	Status	Tables	Out of Box Tables have been modified	465 / 539	86.27%	✖	Out of Box Tables have been deleted	6 / 539	1.11%	✔	Indexes	Out of Box Indexes have been deleted	0 / 949	0.00%	✔	SC/SM Indexes not in RDBMS	23 / 1105	2.08%	⚠
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	SC/SM Indexes not in RDBMS	23 / 1105	2.08%	⚠																				

To generate individual reports included in High Level Report, it is a mandatory step to configure the template parameters for them. The default template file is SC2SM-00-[report name].prpt, which is stored in <Service Manager Upgrade Assessment Toolkit home directory>\config\template\subreport. See the following code example for High Level Report template parameter configuration:.

```

<report id="SC2SM-00" name="High Level Report" paging="false"
header="false">
  <!-- This template parameter is mandatory and it defines the report
template file used by High Level Report. -->
  <param key="template" value="SC2SM-00-info.prpt" />
  <param key="template" value="SC2SM-00-overall.prpt" />
  <param key="template" value="SC2SM-00-smdetail.prpt" />
  <param key="template" value="SC2SM-00-rdbmsdetail.prpt" />
</report>

```