Migrating Your IT Charge Manager Environment from SAS Version 6 to SAS Version 8

Introduction

You do not need to read this document if you are installing IT Charge Manager for the first time.

This document explains how to migrate your IT Charge Manager Release 2.0 (ITCM 2.0) that is currently running under SAS Version 6 to IT Charge Manager Release 2.3 (ITCM 2.3) running under SAS Version 8. Please read through the instructions before acting on them, because the choices may make a difference at your site.

Preparation

1. **IMPORTANT!** Make backup copies of your SAS Version 6 PDBs that you want to migrate.
2. Verify that the release level of IT Service Vision (ITSV) on the server host is compatible with SAS Version 8 ITCM 2.3. The release level of your ITSV should be 2.3 or later. The release level of the SAS software that your ITSV is installed on should be 8.1 or later.
3. Complete the migration of your ITSV environment from SAS Version 6 to SAS Version 8 by following the instructions in the document "Migrating Your IT Service Vision Environment from SAS Version 6 to SAS Version 8." You should have the Version 6 ITSV PDBs successfully converted to Version 8 ITSV PDBs prior to migrating your ITCM environment.
4. **IMPORTANT!** Make backup copies of the Version 8 ITSV PDBs.
5. Make a backup copy of your ITCM 2.0 site definitions. Whenever you invoke ITCM 2.0, you are greeted by the Welcome to IT Charge Manager window. The Welcome window displays the Site Definition that you have defined. You will find the data set storing the site definition at your ITCM 2.0 installation path,
   `drive:\[SAS Version 6 Install Path]\addon\cpe\chm\ec\ecsite\ec_sites.sd2`.
   To make a backup copy of this data set, use either the MS-DOS command or Windows Explorer to copy the ec_sites data set to a new location.

   For example, if `c:\sas6\addon\cpe\chm\ec\ecsite\ec_sites.sd2` is the site definition data set for ITCM 2.0, the MS-DOS command for making a backup copy in a new location, `c:\backup`, is

   `COPY c:\sas6\addon\cpe\chm\ec\ecsite\ec_sites.sd2 c:\backup`

   You will need to replace the default site definitions data set provided by ITCM 2.3 with this backup data set. A later section in this document will explain the process of recovering your site definitions in ITCM 2.3.

6. Install ITCM 2.3 on SAS Version 8 and the most recent maintenance package of ITCM 2.3 according to the Installation Guide for IT Charge Manager Software for Windows.

Your SASUSER Library

The first time you use ITCM 2.3, it will create a default SASUSER library. However, you might have information in your ITCM 2.0 SASUSER library that you want to continue to use for ITCM 2.3. Following are the instructions to copy the contents of the ITCM 2.0 SASUSER library to the ITCM 2.3 library.

1. Determine the location of your ITCM 2.0 SASUSER library by invoking ITCM 2.0 and selecting **Globals** from the pull-down menu. Click **Program Editor** and type the following statements in the Program Editor window:

    ```
    OPTIONS SOURCE NOTES;

    LIBNAME SASUSER LIST;

    PROC DATASETS DD=SASUSER;

    RUN;
    ```

2. Select the **Locals** pull-down menu and click **Submit**.
3. Select the **Globals** pull-down menu and click **Log**. You should see statements similar to those below. Your SASUSER library is identified by the label Physical Name. In this example, the location of the SASUSER library is **d:\SAS6\Addon\cpe\chm\ec\sasuser**.

    2 LIBNAME SASUSER LIST;
    NOTE: Libref= SASUSER
    Engine= V612
    Filefmt= 607

    Physical Name= d:\SAS6\Addon\cpe\chm\ec\sasuser

    3 PROC DATASETS DD=SASUSER;

    -----Directory-----

    Libref: SASUSER
    Engine: V612
    Physical Name: d:\SAS6\Addon\cpe\chm\ec\sasuser

    # Name Memtype Indexes
    --

    1 EIS CATALOG
    2 MBUSER DATA YES
    3 PARMS CATALOG
    4 PROFILE CATALOG
    5 PROFILE2 CATALOG
    6 SASMBC DATA YES
    7 SASMBI DATA

    4 RUN;

4. Record the physical name of your Version 6 SASUSER library. Exit ITCM 2.0 by selecting **Exit IT Charge Manager and SAS**.
5. Invoke IT Charge Manager Release 2.3 for SAS Version 8. In the Welcome to IT Charge Manager window, click **Exit** and select **Exit IT Charge Manager Only**.
6. Select **View** from the pull-down menu and click **Program Editor**. Maximize the Program Editor window and type the statements shown in Step 1.
7. Select the **Run** pull-down menu and click **Submit**.
8. Select the **View** pull-down menu and click **Log**. Maximize the Log window. You should see the location of the ITCM 2.3 SASUSER library indicated by Physical Name. Record the physical name of your Version 8 SASUSER library.
9. Select the **File** pull-down menu and click **Exit** to exit ITCM 2.3. Now you are ready to proceed with the conversion of the SASUSER library.
10. Invoke SAS Version 8 for Windows outside of ITCM 2.3.

    Note: Do not invoke SAS Version 8 by launching ITCM 2.3. Although the option exists to exit ITCM only and stay in SAS, if you do this the SASUSER library will be locked and cannot be modified.

11. In the Program Editor, type the following code, edit the location of your SASUSER libraries, and submit the edited code.

    ```
    LIBNAME olduser 'location-of-your-ITCM 2.0-SASUSER-library' ACCESS=READONLY;

    LIBNAME newuser 'location-of-your-ITCM 2.3-SASUSER-library';

    PROC COPY IN=olduser OUT=newuser;

    RUN;
    ```

12. Select **Log** from the **View** pull-down menu. You should see notes indicating that the contents of the old SASUSER have been successfully copied to the new SASUSER library.
13. Select **Exit** from the **File** pull-down menu and exit SAS Version 8.

Your Site Libraries for IT Charge Manager

Following are the instructions for copying the contents of the ITCM 2.0 site libraries to the ITCM 2.3 site libraries.

1. Find the location of your ITCM 2.0 site libraries. You can determine the location of these libraries by invoking ITCM 2.0 and selecting a site in the list box "Select Site to Administrator or Define." You should see the IT Charge Manager Site Prefix in the Site Properties box below.

    - On an OS/390 server host:

      If your ITCM 2.0 site prefix is OLDSITE, you should find the site libraries as follows:

        - OLDSITE.EC.AUTO

- OLDSITE.EC.DATA
- OLDSITE.EC.LIB
- OLDSITE.EC.SCNTL
- OLDSITE.EC.SITE

- On an NT server host:

  If your ITCM 2.0 site prefix is `c:\oldsite`, you should find the site
  libraries as follows:

  - `c:\oldsite\ec`
  - `c:\oldsite\ec\auto`
  - `c:\oldsite\ec\data`
  - `c:\oldsite\ec\lib`
  - `c:\oldsite\ec\scntl`
  - `c:\oldsite\ec\site`

2. Decide what you want your ITCM 2.3 site prefix to be.
3. Allocate space for storing the ITCM 2.3 site libraries.

   - On an OS/390 server host:

     Run IEFBR14 or use ISPF 3.2 to allocate space for the ITCM 2.3 site
     libraries. You will need to allocate the libraries as shown below for each
     site. For allocation you can use the same DCB= as the one for the ITCM 2.0
     library. If your ITCM 2.3 site prefix is NEWSITE, allocate space for

     - NEWSITE.EC.AUTO
     - NEWSITE.EC.DATA
     - NEWSITE.EC.LIB
     - NEWSITE.EC.SCNTL
     - NEWSITE.EC.SITE

   - On an NT server host:

     If your ITCM 2.3 site prefix is `c:\newsite`, create the following directories:

     - `c:\newsite\ec`
     - `c:\newsite\ec\auto`
     - `c:\newsite\ec\data`
     - `c:\newsite\ec\lib`
     - `c:\newsite\ec\scntl`
     - `c:\newsite\ec\site`

4. Copy the contents of the ITCM 2.0 site libraries to the ITCM 2.3 site libraries.

   - On an OS/390 server host:

     a. Start with OLDSITE.EC.DATA and OLDSITE.EC.SITE. These two

libraries contain SAS objects such as catalogs, data sets, and views. The SAS COPY procedure is used to convert the SAS objects from Version 6 to Version 8.

Invoke SAS Version 8 on the server host and type the following statements in the Program Editor window. Edit the location of your ITCM site library and submit the edited code for the two libraries, respectively.

```
LIBNAME oldlib 'location-of-your-ITCM 2.0-site-library'

       DISP=SHR;

LIBNAME newlib 'location-of-your-ITCM 2.3-site-library';

PROC COPY IN=oldlib OUT=newlib;

RUN;
```

For example, if OLDSITE.EC.SITE is your ITCM site library, the edited statements should be

```
LIBNAME oldlib 'OLDSITE.EC.SITE' DISP=SHR;

LIBNAME newlib 'NEWSITE.EC.SITE';

PROC COPY IN=oldlib OUT=newlib;

RUN;
```

If you check the ITCM 2.3 site libraries at this point, you should see SAS Version 8 objects such as catalogs, data sets, and views that have been converted from the corresponding SAS Version 6 objects in the old site libraries.

b. For the rest of the old site libraries, such as OLDSITE.EC.SCNTL and OLDSITE.EC.SLG, you need to use ISPF 3.3, IEBCOPY, or IEBGENER in a batch job to copy the contents to the new site libraries. (Depending on the data that is processed into your old site libraries, you might find that some of the libraries are empty.)

- On an NT server host:

a. Start with `c:\oldsite\ec\data` and `c:\oldsite\ec\site`. These two libraries contain SAS objects such as catalogs, data sets, and views. The SAS COPY procedure is used to convert the SAS objects from Version 6 to Version 8.

Invoke SAS Version 8 on the server host and type the following statements in the Program Editor window. Edit the location of your ITCM site library and submit the edited code for the two libraries, respectively.

For example, if `c:\oldsite\ec\site` is your ITCM site library, the edited statements should be

```
LIBNAME oldlib 'c:\oldsite\ec\site' ACCESS=READONLY;

LIBNAME newlib 'c:\newsite\ec\site';

PROC COPY IN=oldlib OUT=newlib;

RUN;
```

If you check the ITCM 2.3 site libraries at this point, you should see SAS Version 8 objects such as catalogs, data sets, and views that have been converted from the corresponding SAS Version 6 objects in the old site libraries.

b. For the rest of the old site libraries, such as `c:\oldsite\ec\scntl` and `c:\oldsite\ec\slg`, you need to use either the MS-DOS command or Windows Explorer to copy the contents to the new site libraries. (Depending on the data that is processed into your old site libraries, you might find that some of the libraries are empty.)

For example, if `c:\oldsite\ec\scntl` is the site library, the MS-DOS command for copying the contents of the old site library to the new site library is

```
COPY c:\oldsite\ec\scntl\*.* c:\newsite\ec\scntl
```

Your PDBs

In the Preparation section earlier, you successfully migrated your PDBs from SAS Version 6 to SAS Version 8. If you check the contents of the new Version 8 PDB, you should see nine standard ITSV libraries (e.g., detail, day, and so on) in the new PDB library. If in doubt, check with your site's IT Service Vision administrator or the person who migrated the IT Service Vision environment from SAS Version 6 to SAS Version 8.

The following steps describe how to migrate the PDB contents that are ITCM specific from the Version 6 PDB to the new Version 8 PDB.

1. Allocate space for storing the ITCM PDB libraries in the new Version 8 PDB.

    • On an OS/390 server host:

    Run IEFBR14 or use ISPF 3.2 to allocate space for the ITCM PDB libraries. For allocation you can use the same DCB= as the one for the ITCM 2.0 library. If your Version 8 PDB is located at NEWPDB, allocate space for

       ▪ NEWPDB.EC.CNTL

- NEWPDB.EC.PDB
- NEWPDB.EC.SUSP
- NEWPDB.EC.WORK

- On an NT server host:

  If your Version 8 PDB is located at `c:\newpdb`, create the following directories:

  - `c:\newpdb\ec`
  - `c:\newpdb\ec\cntl`
  - `c:\newpdb\ec\pdb`
  - `c:\newpdb\ec\susp`
  - `c:\newpdb\ec\work`

2. Copy the contents of the Version 6 PDB libraries to the Version 8 PDB.

   - On an OS/390 server host:

     a. In your Version 6 PDB, for example, OLDPDB, you should have three libraries, OLDPDB.EC.PDB, OLDPDB.EC.SUSP, and OLDPDB.EC.WORK. These libraries contain SAS objects such as catalogs, data sets, and views. You will need to run the SAS COPY procedure to convert the SAS objects from Version 6 to Version 8. (Depending on the data that is processed into your old PDB libraries, you might find that some of the libraries are empty.)

       Invoke SAS Version 8 on the server host and type the following statements in the Program Editor window. Edit the locations of your PDB libraries and submit the edited code for the three libraries, respectively.

```
LIBNAME oldpdbec 'location-of-your-ITCM 2.0-PDB-library'

        DISP=SHR;

LIBNAME newpdbec 'location-of-your-ITCM 2.3-PDB-library';

PROC COPY IN=oldpdbec OUT=newpdbec;

RUN;
```

       If OLDPDB.EC.PDB is your old PDB library, the edited statements should be

```
LIBNAME oldpdbec 'OLDPDB.EC.PDB' DISP=SHR;

LIBNAME newpdbec 'NEWPDB.EC.PDB';

PROC COPY IN=oldpdbec OUT=newpdbec;

RUN;
```

If you check the Version 8 PDB libraries at this point, you should see SAS Version 8 objects such as catalogs, data sets, and views that have been converted from the corresponding SAS Version 6 objects in the old PDB libraries.

b. For the rest of the libraries, such as OLDPDB.EC.CNTL, OLDPDB.EC.PLG, and OLDPDB.EC.SEQ, you need to use ISPF 3.3, IEBCOPY, or IEBGENER in a batch job to copy the contents to their corresponding libraries in the NEWPDB. For example, use ISPF3.3 to copy OLDPDB.EC.CNTL to NEWPDB.EC.CNTL.

- On an NT server host:

a. In your Version 6 PDB, for example, `c:\oldpdb`, you should have three libraries, `c:\oldpdb\ec\pdb`, `c:\oldpdb\ec\susp`, and `c:\oldpdb\ec\work`. These libraries contain SAS objects such as catalogs, data sets, and views. You will need to run the SAS COPY procedure to convert the SAS objects from Version 6 to Version 8. (Depending on the data that is processed into your old PDB libraries, you might find that some of the libraries are empty.)

Invoke SAS Version 8 on the server host and type the following statements in the Program Editor window. Edit the locations of your PDB libraries and submit the edited code for the three libraries, respectively.

```
LIBNAME oldpdbec 'location-of-your-ITCM 2.0-PDB-library'

        ACCESS=READONLY;

LIBNAME newpdbec 'location-of-your-ITCM 2.3-PDB-library';

PROC COPY IN=oldpdbec OUT=newpdbec;

RUN;
```

If `c:\oldpdb\ec\pdb` is your old PDB library, the edited statements should be

```
LIBNAME oldpdbec 'c:\oldpdb\ec\pdb' ACCESS=READONLY;

LIBNAME newpdbec 'c:\newpdb\ec\pdb';

PROC COPY IN=oldpdbec OUT=newpdbec;

RUN;
```

If you check the Version 8 PDB libraries at this point, you should see SAS Version 8 objects such as catalogs, data sets, and views that have been converted from the corresponding SAS Version 6 objects in the old PDB libraries.

b. For the rest of the libraries, such as `c:\oldpdb\ec\cntl`, `c:\oldpdb\ec\plg`, and `c:\oldpdb\ec\seq.sas`, you need to use either the MS-DOS command or Windows Explorer to copy the contents to the new PDB libraries.

For example, if `c:\oldpdb\ec\cntl` is the PDB library, then the MS-DOS command for copying the contents of the Version 6 PDB library to the new PDB library is

```
COPY c:\oldpdb\ec\cntl\*.* c:\newpdb\ec\cntl
```

Your Account View Extract File

You can skip this section if you do not have the Account View extract file of ITCM 2.0.

The following instructions tell you how to migrate your Account View extract file from ITCM 2.0 to ITCM 2.3:

1. Find the location of the Account View extract file that you downloaded from ITCM 2.0.
2. Choose a location on your computer where you want to store the ITCM 2.3 Account View extract file that is being migrated from ITCM 2.0.
3. Convert the Account View extract file from ITCM 2.0 to ITCM 2.3.

Invoke SAS Version 8 of Windows and type the following statements in the Program Editor window. Edit the directories where your Account View extract files are located and submit the edited code.

```
LIBNAME oldav 'directory-where-your-ITCM 2.0 Account
View-extract-file-is-located'
ACCESS=READONLY;

LIBNAME newav 'directory-where-your-ITCM 2.3 Account
View-extract-file-is-located';

PROC COPY IN=oldav OUT=newav;

RUN;
```

Launch IT Charge Manager Software, Release 2.3

1. Before you invoke ITCM 2.3, you need to replace the default site definition provided by ITCM 2.3 with your own site definitions. The default site definition is found at `drive:\[SAS Version 8 Install Path]\cpe\chm\ec\ecsite\ec_sites.sas7bdat`. Obtain the directory name of the backup ec_sites data set that you made in the Preparation section. Invoke SAS Version 8 on Windows. Then type the statements below in the Program Editor window, edit them, and submit the edited code.

```
LIBNAME olddef 'directory-which contains-the-backup-ec_sites-table'
```

```
        ACCESS=READONLY;

   LIBNAME newdef 'drive:\[SAS Version 8 Install Path]\cpe\chm\ec\ecsite';

   PROC COPY IN=olddef OUT=newdef;

     SELECT EC_SITES;

   RUN;
```

2. Invoke IT Charge Manager Release 2.3 for SAS Version 8. You should see your site definitions of ITCM 2.0 displayed in the Welcome to IT Charge Manager window.
3. Select a site and modify the text fields, such as IT Charge Manager Site Prefix, displayed in the Site Properties box. Check with your ITSV administrator if you need assistance with the following modifications.

   - Change the IT Charge Manager Site Prefix to refer to the same site prefix that you decided earlier at step 2 in the section Your Site Libraries for IT Charge Manager.
   - Modify the IT Service Vision SITELIB to reflect the SAS Version 8 ITSV site library.
   - Verify that the logon script file is valid for invoking SAS Version 8 on the server.
   - If your site resides in a local Windows environment, you need to change the CPUSEROPT data set to the one for SAS Version 8 ITSV.

4. Click the **Save Properties** button to save the information in the Site Properties box.
5. Click **Open** to open the site.
6. If the site is located on an OS/390 server host, select the **Site Administration** tab and click **Manage Site Defaults and Accounting Calendar**. Click **Execution Control** on the right. Modify the JCL parameters to correctly reflect the settings for your SAS Version 8 system. Click **OK** to save the modifications.
7. Under the **Site Administration** tab, click **Manage Site Defaults and Accounting Calendar**. Click **Calendar Definitions** on the right. Verify the calendar definitions for this site and click **OK**. This will update the definitions and upload them to the server. This step is required to ensure the correct regeneration of the calendar definitions through ITCM 2.3.
8. Choose a PDB by clicking the PDB selection button in the upper-left corner. Select the **Manage PDBs** tab. Select **Define Rate Models, Charges, and Assignments**.
9. If your site is located on an OS/390 server host, click **Execution Control** on the right. Verify the JCL statements and click **OK**.
10. Click **Data Base Definition** on the right.
11. Select the item called **Apply Selections and Edit, Manual Submit**. Click **OK**. The Edit and Submit CPDDUTL Batch Job window should open.
12. Verify the code of the batch job and make any necessary modifications.
13. Click the **Submit** pull-down menu and select **Save, Submit, and End** to run the Data Base Definition job (CPDDUTL), which updates the dictionary.

    For OS/390 server, you must disconnect from the site in ITCM 2.3 in order for the Data Base Definition job to finish running. ITCM 2.3 automatically detects this and presents a window to facilitate the disconnection as soon as you submit the job.

14. To ensure that your batch jobs refer to the appropriate data sets in your new PDB and site

libraries after the migration, regenerate the batch job code through the ITCM 2.3 graphical user interface.

- For Consolidation

    a. Select the **Operation** tab in the ITCM 2.3 main window. Select **Consolidate Data**.
    b. Select an invoice period and click **Apply Selections and Edit, Manual Submit**. Click **OK**. The Edit and Submit CONSOL Batch Job window should open.
    c. Verify the code of the batch job and make any necessary modifications.
    d. Save the batch job. If appropriate, submit the job via the **Submit** pull-down menu at this time.
    e. Repeat steps a through d for other invoice periods.

- For To-Date Consolidation

    a. Select the **Reports** tab in the ITCM 2.3 main window. Select **To-Date Consolidation**.
    b. Select an invoice period and click **Apply Selections and Edit, Manual Submit**. Click **OK**. The Edit and Submit CONSOLz Batch Job window should open.
    c. Verify the code of the batch job and make any necessary modifications.
    d. Save the batch job. If appropriate, submit the job via the **Submit** pull-down menu at this time.
    e. Repeat steps a through d for other invoice periods.

- For Standard Invoices

    a. Select the **Operation** tab in the ITCM 2.3 main window. Select **Run Standard Invoices**.
    b. Select an invoice period and click **Apply Selections and Edit, Manual Submit**. Click **OK**. The Edit and Submit SCHRPT Batch Job window should open.
    c. Verify the code of the batch job and make any necessary modifications.
    d. Save the batch job. If appropriate, submit the job via the **Submit** pull-down menu at this time.
    e. Repeat steps a through d for other invoice periods.

- For To-Date Reporting

    a. Select the **Reports** tab in the ITCM 2.3 main window. Select **To-Date Reporting**.
    b. Select an invoice period and click **Apply Selections and Edit, Manual Submit**. Click **OK**. The Edit and Submit todate Batch Job window should open.

      c. Verify the code of the batch job and make any necessary modifications.
      d. Save the batch job. If appropriate, submit the job via the **Submit** pull-down menu at this time.
      e. Repeat steps a through d for other invoice periods.

- For Site Configuration

      a. Select the **Reports** tab in the ITCM 2.3 main window. Select **Site Configuration**.
      b. Click **Apply Selections and Edit, Manual Submit**. Click **OK**. The Edit and Submit conrpt Batch Job window should open.
      c. Verify the code of the batch job and make any necessary modifications.
      d. Save the batch job. If appropriate, submit the job via the **Submit** pull-down menu at this time.

15. Repeat steps 5 through 14 for each PDB of the selected site.