AMIGO ITSM Upgrade Planning Worksheet

1. Upgrade Dates and Environment (**Complete planning tables**)

Milestone	Date (if known)
Upgrade planning start date	
Upgrade testing start date	
Planned production Go-Live date	
Upgrade Method	In Place / Staged

Product	Current Version/Patch	Target Version*	*Latest Service Pack / Patch
Remedy AR System			
Remedy Midtier			
Atrium Core - CMDB			
Remedy ITSM Suite			
Service Request Management			
Service Level Management			
Other Applications/Integrations			

*NOTE: Always use the latest Service Pack installer for Target Version and check and apply the latest patches for that version. Check and apply any recommended hotfixes - refer to KA#000164912

Component	Setting/Value	Additional Information/Comments
AR Server OS & Version		
AR Server Java Version		
Memory on AR Servers		
# of AR Servers in Server Group		
Database & Version		
Midtier Server OS & Version		
Midtier Java Version		
Memory on Midtier Servers		
# of Midtier Servers		
Tomcat Version		

2. Upgrade Plan Review Elements (should be included in your documented upgrade plan)

    a. Pre-Installation
        i. Setup/prep of development, QA, and production environments
        ii. Create a snapshot*

    b. Installation – 20.02 Zero Down Time (ZDT) Upgrade
        i. Upgrade platform (AR, CMDB, AI) on all nodes in server group
        ii. Upgrade applications

    c. Post Installation
        i. Adjust customizations*
        ii. Upgrade integrations (for compatibility with AR Server/Applications)**
        iii. Perform upgrade testing
        iv. Create migration package*/Import of migration package*
        v. Database backup

        vi. Delta Data Migration***
            1. Process test in QA
            2. Production migration
            3. Final cutover migration

        vii. Re-Index Full Text Search

    d. Test Plan for validation of functionality
        i. Existing functionality
        ii. New feature(s) functionality
        iii. Integrations
        iv. Performance Testing

    e. End User Training

    f. User Acceptance Testing (UAT)

    g. Go-Live
        i. Go/No-Go Criteria
        ii. Contingency/Rollback plan

*Only need if customization have been made to the environment
**Only needed if you have integrations, or integrations require an update
***Only needed for staged upgrade