



# Cisco Remote Expert Manager 1.9 Migration Guide

---

Release 1.9

Revised: February 26, 2014, OL-30924-01



**Note**

---

All advertising materials mentioning features or use of this software must display the following acknowledgement: "*This product includes software developed by the University of California, Berkeley and its contributors.*"

---

## Overview

This guide provides detailed information on how to migrate current installations of Remote Expert Manager (REM) 1.8.x to 1.9.

Topics in this guide include:

- [REM Migration, page 1](#)

## REM Migration

To migrate REM 1.8.x to 1.9.x, a remote backup server is required. It can be your old REM 1.8.x VM. In the step set below, the REM 1.8.x VM will be used as the remote backup server. Please make sure that your remote backup server is up and running before starting migration.



**Note**

---

A RE agent license is required for each agent in REM release 1.9. Refer to the “Managing Licenses” section of the *Cisco Remote Expert Manager 1.9 Administration Guide* for instructions on how to obtain and add agent licenses to the REAC.

---

Perform the following steps to migrate (upgrade) the REM:



**Note**

---

The steps below refer to a HA set up. A single node set up has the same steps but the number of VMs for REM will be one (1) instead of two (2).

---

**Step 1** Take a backup from REM 1.8.x:

- a. Download the archive-creator.tgz file to a temporary folder (e.g. /tmp) in your REM 1.8.x VM. Extract the file by using the command:

```
tar -xzf archive-creator.tgz
```

It will create a sub-directory called “scripts” and a file called “backup” in that sub-directory.

- b. Replace backup script by doing the following:

```
cd /var/rem/tools/backup/scripts/
```

```
mv backup backup.original
```

```
cp /tmp/scripts/backup
```

```
chmod 744 backup
```

- c. Specify the location to store backup archive and related files:

1. Enter the following command:

```
vi /var/rem/tools/backup/conf/backup.properties
```

2. Find the following lines and change their values accordingly:

- feature\_enable=True



**Note** The value “True” enables the backup feature. The value “False” disables the backup feature.

- workspace=<Backup directory>



**Note** Provide the absolute path to the temporary location where backup related files are created. By default, the directory would be “/tmp/remote-expert/backup”.

- name=<IP of REM 1.8.x>



**Note** This is an identifier to indicate from where the backup archive comes. For example, if the IP address of REM 1.8.x is 172.20.20.10, enter “172.20.20.10”.

- server\_ip[1]=<IP of remote backup server>



**Note** This is the IP of remote backup server. If using the REM 1.8.x VM, enter that IP address, such as “172.20.20.10”.

- server\_username[1]=<Login user name for remote backup server>



**Note** In this example, the old REM 1.8.0.x is being used as the remote backup server so the login user name would be “admin”.

- server\_password[1]=<Login password for the user>



**Note** In this example, the old REM 1.8.0.x is being used as the remote backup server so the login password would be “cisco!123”.

- smtp=<IP or FQDN of SMTP server>



**Note** If email notification is required, provide SMTP information in this line.

- to=myemail@mycompany.com



**Note** If SMTP is configured, enter the recipient’s valid email address.

- d. Run backup script:

```
cd /var/rem/tools/backup/scripts/
./backup
```

- e. Once the backup script is complete, it will create a backup archived file under the <workspace>/archive/ directory on the remote backup server. The file name will contain “rem”, the date, the time, the IP address, and “.tgz”. In our example migration, the “rem\_Nov-04-2013\_09-00-30\_172.20.20.10.tgz” file was created in the “/tmp/remote-expert/backup/archive/” directory.
- f. Use the following naming conventions based on your version of REM 1.8.x to rename the archived file:
- REM 1.8.0 GA: “1.8.0-27-194-<dateString>.tgz”
  - REM 1.8.0 REGS: “1.8.0-28-32-<dateString>.tgz”
  - REM 1.8.1: “1.8.1-1-280-<dateString>.tgz”

**Step 2** Deploy two VMs for the REM 1.9 ISO.

- Both VMs should have 2 NICs.
- Configure proper IP addresses for both VMs (public and private IPs). An example of proper IP addressing is the following:
  - The first REM has a public IP address of 172.20.20.21 and a private IP address of 192.168.10.100.
  - The second REM has a public IP address of 172.20.20.21 and a private IP address of 192.168.10.101.

**Step 3** Configure both VMs as two single node REMs.

**Step 4** Log into the REAC of the first REM. Verify that it is up and running (i.e. experts, kiosks, documents, and DB). Perform the same check for the second REM.

**Step 5** Using the TUI of the first REM, perform the restore operation by using the archived file created in Step 1. Duplicate this operation on the second REM.

**Step 6** Re-configure the REM (see Chapter 1 of the *Cisco Remote Expert Manager 1.9 Installation Guide* on how to configure the rem.properties file). After configuring the rem.properties file, run IAS and answer ‘y’ to all questions and enter the data requested. Re-configure the two REMs as HA setup (including the configuration of SSH Key Exchange). Execute IAS on the master node (i.e. the first REM).

**Step 7** After IAS is complete, stop the database in TUI on the slave node (i.e. the second REM).

- Step 8** Log into REAC via the virtual IP (e.g. 172.20.20.25). Go to the DB Cluster tab and ensure that the DB of the slave node is down (i.e. shows as red).
- Step 9** SSH into the slave node using the TUI and restart the database.
- Step 10** Log into REAC via the virtual IP. Go to the DB Cluster tab, choose the DB of the slave node, and click the **Activate** button. Verify that both DBs are up and running.
- Step 11** Update the Expert Types in REAC:
- a. Navigate to the Expert Type tab in REAC.
  - b. Choose an Expert Type and click the **Modify** button.
  - c. Enter a valid IVR Phone Number.




---

**Note** ExpertType+Locale combination should be unique and the IVR number for the expert type should be same irrespective of the locales. For example, if the Commercial Lending expert type group has four locales (English, Spanish, French, and German) then the IVR number for the Commercial Lending group should be same for all locales.

---

- d. Choose the Locale.
  - e. Update the Queue Video.
  - f. Enter the caption that should display in the REIC under the expert type image.
  - g. Upload an image without a caption so it is language-neutral.
  - h. Click the **Update** button to save the changes.
  - i. Repeat above substeps for all Expert Types.
  - j. If you use the Help expert type, choose a Help expert type and click the **Modify** button.
  - k. Choose **Help** from the Expert Type drop-down menu.
  - l. Enter a valid IVR Phone Number.
  - m. Choose the Locale.
  - n. Upload the image for the Help button.
  - o. Click the **Update** button to save the changes.
  - p. Repeat above substeps for all Help locales.
- Step 12** Add agent licenses in REAC.
- Step 13** Modify video information in REAC:
- a. Navigate to the Video tab in REAC.
  - b. Choose a video and click the **Modify** button.
  - c. Provide the proper video URL.
  - d. Upload a thumbnail image.
  - e. Repeat above substeps for all video files.
- Step 14** Modify document information in REAC:
- a. Navigate to Document tab in REAC.
  - b. Select a document and click the **Modify** button.
  - c. Upload the document by clicking the **Browse** button.

d. Repeat above substeps for all document files.

**Step 15** Verify that the IEC has the correct policy in the IEM. Reboot the kiosk using the REAC.

**Step 16** Make a call from the kiosk.

---

