

Best Practices for Siebel 8.x Upgrades

Collaborate 2008
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Agenda

- Update on Siebel 8.x.
- Review Siebel upgrade.
- Review best practices for doing the Siebel upgrade.
- Siebel ST eScript engine.
- Going live with Siebel 8.



Robert and Ponder Pro Serve

- Joined Siebel in 1998.
- Specialized in Siebel upgrades and performance tuning while at Siebel.
- Leading speaker on Siebel upgrades while at Siebel.
- Works in the field helping customers perform Siebel upgrades.
- Currently works for Ponder Pro Serve. Small consulting company with true experts in Siebel.
- Dedicated Oracle partner interested in making Siebel customers successful.



Siebel 8.0 Update

- Currently around 270 customers with active Siebel 8.0 service profiles.
- Adoption has picked up greatly since initial release in January 2007.
- Most 8.0 customers are coming from version 7.5.
- Combination of 8.0.0.2 fix pack and QF 210 should be very stable for most customers.

Siebel 8.1 Update

- Oracle currently working on testing and getting 8.1 out the door.
- Development was finished on 8.1 about 1 year ago.
- Was initially targeted for March 2008 release.
- Current expectation is release will come sometime before summer.
- February Statement of Direction is available.
- For Oracle DBMS 11g supported initially.

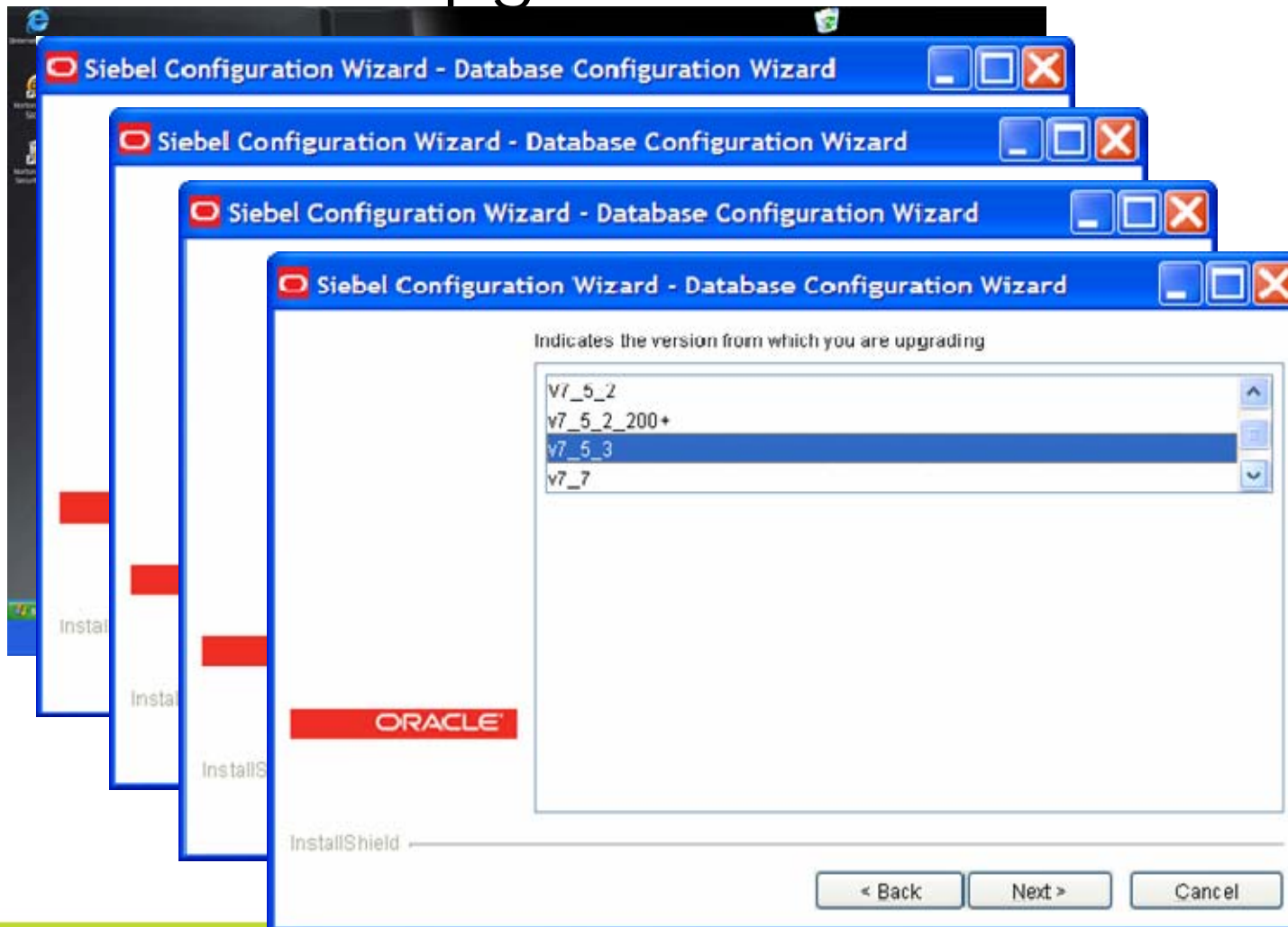
Introduction

- Siebel upgrade is just too big to cover all aspects in one hour.
- We have several upgrade presentations that cover lots of topics we won't be able to get to today. See ponderproserve.com/support.
- Want to cover Siebel 8.x best practices and focus in on a few that we have not covered in detail before.
- Examples assume you are a Siebel 7.5 customer upgrading to Siebel 8.0.

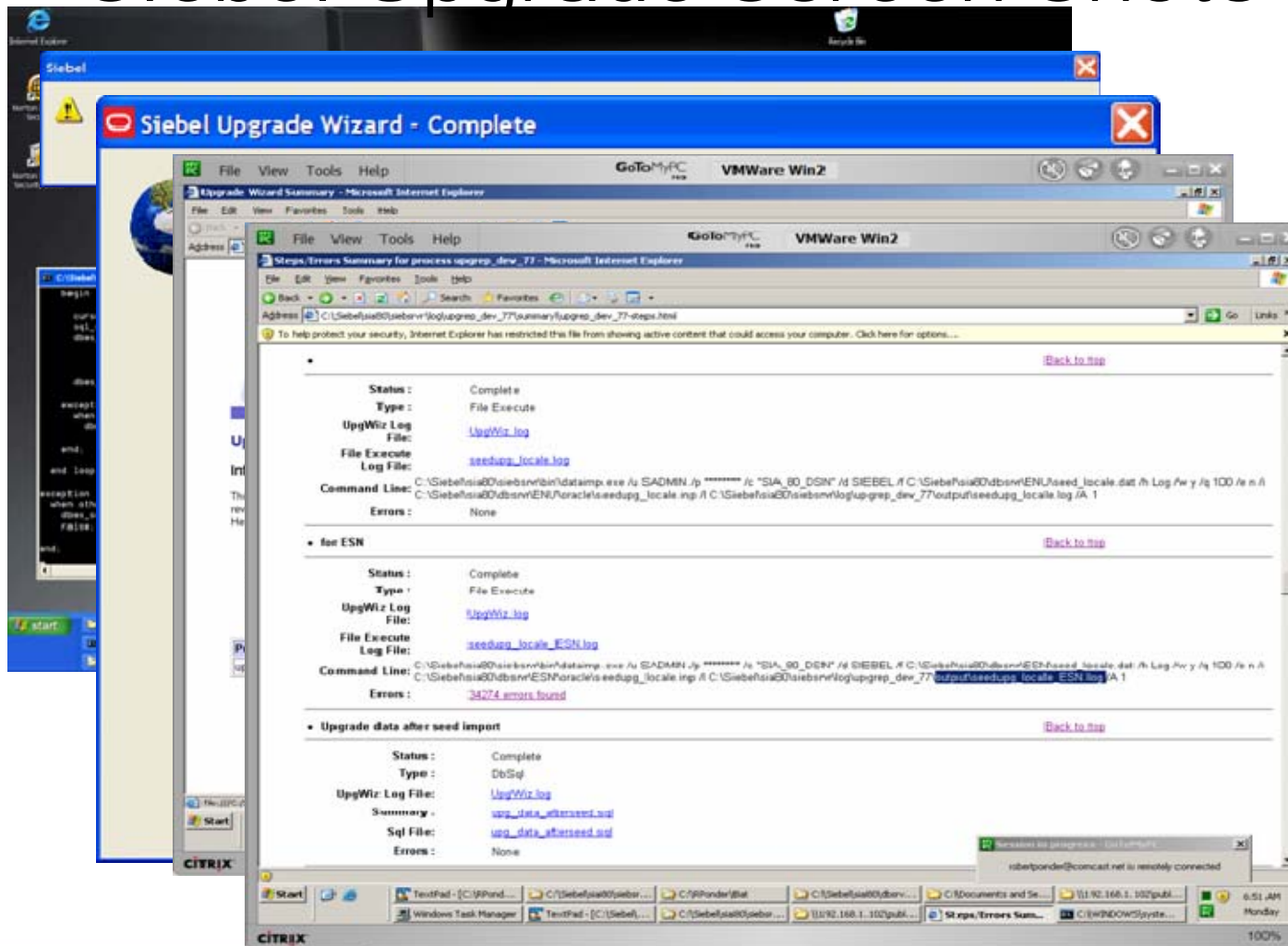
Siebel Upgrade Overview

- Much more than just pressing one button!
- Upgrep, Merge, Upgphys.
- Many manual step both before and after the upgrade.
- For most 7.x customers will be a project consisting of a lot of testing.
- Might also involve other challenges such as DBMS/OS upgrade or even DBMS platform change.
- Big challenge is figuring out everything that will break/change ahead of time so your level of effort will be accurate.
- Siebel CRM is front office so risk of any issues on production go live is very serious!

Siebel Upgrade Screen Shots I



Siebel Upgrade Screen Shots II



Siebel Upgrade Screen Shots III

The image displays a sequence of Siebel Tools upgrade screens. The primary focus is the **Merge Repositories** dialog, which maps existing repositories to new ones during an upgrade. Below this, the **Upgrade Check List** dialog is visible. The background shows the **Warning** dialog and the **Application Upgrades - Object List** window, which includes an **Object Explorer** on the left side. A **Windows Task Manager** window is also present, showing system performance metrics.

CPU Usage		Physical Memory (K)	
Handles	5232	Total	209428
Threads	755	Available	15232
Processes	76	System Cache	30676
Commit Charge (K)		Kernel Memory (K)	
Total	1831572	Total	119944
Limit	453-800	Paged	8962
Peak	1861716	Nonpaged	30252

Siebel Upgrade Screen Shots IV

The screenshot displays the Siebel Tools interface during an upgrade process. A prominent blue banner at the top reads "Post Merge Utilities Running". The main window shows the "Attribute Differences" view with a context menu open over the "Upgrade Utilities" option. The menu includes options like "Complete Projects...", "Check Out...", "Lock Project", "Unlock Project", "Import from Archive...", "Generate Mid-Level Release...", "Compare Objects", "Search Repository...", and "Upgrade Utilities".

The background window shows a table with repository information:

Prior Standard Repository	Prior Customized Repository	New Standard Repository
Prior v7.X Siebel Repository	Prior Customer Repository	New Siebel Repository

Below this is another table showing object details:

Object Name	ForceActive	Control Locale	Top Parent Name	Top Parent Type	Ancestor Applied
ENU-STD	ForceActive	Control Locale	Service Request List Applet	Applet	
ENU-STD	ForceActive	Control Locale	Product List Applet	Applet	
ENU-STD	ForceActive	Control Locale	Product List Applet	Applet	
ENU-STD	ForceActive	Control Locale	Product List Applet	Applet	
ENU-STD	ForceActive	Control Locale	Product List Applet	Applet	

At the bottom, there is a table for "Attribute Differences":

Attribute	Conflict	Resolution	Override	Prior Standard	Prior Customized	New Standard

The interface also shows a file explorer on the left with "Siebel Objects" expanded, and a status bar at the bottom indicating "Item: 1 of 1" and "Language: ENU".

Planning

- Building accurate estimates.
- Determine upgrade goals and objectives.
- Which new features will be used?
- Any opportunities to return to OOTB?
- Do we have the right team in place for this project?
- In addition to Siebel what else needs to be upgraded?



Typical Siebel 7.5 to 8.0 Experience

- Should be pretty happy with initial upgrade results.
- Upgrade should run pretty quickly for most.
- Have to run “return to standard” if your last upgrade used ICL option.
- SRF won’t compile due to ST eScript engine errors.
- Receive Data Quality Universal Connector feature is not licensed errors when navigating to contacts/accounts. See 475432.1 for fix.
- Have to fix issue 12-1GL6FRT with s_audit_item or upgrep won’t run.
- May find that workflow steps are not connected properly. See 1549167.1 for fix.

What is the Upgrade Going to Do To My Application?

- Varies greatly based on what you have done with Siebel.
- Heavily changed OOTB applets will likely have issues.
- Some applets might have the wrong web template selected.
- Likely will get some errors due to configuration issues.
 - SBL-DAT-00607: Join 'S_SRC' in business component 'WF Action' has the multi-valued field 'Campaign Id' as the source field.
- Newer version of Siebel is likely be more picky about incorrect configurations that the previous version allowed.
- Specific modules might change and impact what you have done (E.g. Data Quality).

Siebel 8 Upgrade Surprises

- First encounter with ST eScript engine.
- FirstLogic and other data quality interfaces change to use new Siebel DQ module and API.
- Application find changes.
- Genesys Gplus architecture for Siebel changes to now include new communications gateway server.
- Web Client Automation Server no longer allows browser script business service to return outputPS as of 7.7 and above.

Automate Everything You Can Early

- Automated daily full compile and genbscript with push to app server.
- QTP base functionality test of daily build.
- Server component definition and parameter settings via command line srvrmgr.
- Monitoring for slow SQL and other performance issues.



Find All Your Errors ASAP

- The obvious ones appear on the UI and are easily spotted.
- Check OM log files for level 1 errors and level 2 warnings.
- Watch for any FDR files in siebsrvr\bin.
- Check Tools log file for compilation errors.



New eScript Strong Type ST Engine

- ST eScript engine runs considerably faster than old T engine and has a number of new features in Tools.
- Don't have to declare vars with types to receive full performance benefit (so don't ... unless).
- Recommend you try to migrate to the new engine as part of your upgrade but there will be LOE.
- Depending on amount of code you may require several days/weeks for this migration.
- Mainly involves fixing errors you have in your current code. There can be a lot of these.
- Some caught at compile time but others found during testing at runtime.

ST Errors Caught by the Compiler

- If you do a POC upgrade it is pretty easy to find these just by doing object compiles.
- We like to do a searches for a given pattern once we find our first occurrence.
- Some examples:
 - TheApplication()RaiseErrorText (missing .)
 - var errmsg == ""; (== instead of =)
 - var myVar = null; (double declare)

ST Errors Caught at Runtime

- These are harder to estimate since compiler does not catch them.
- We use same find first and search for rest technique here too.
- Some examples:
 - `TheApplication.ActiveViewName;` (no parens)
 - `#include "eaisiebel.js"` (see 521683.1)
 - `var myVar; ... Clib.strftime(myVar` (need to init)
 - `BusComp_PreSetFieldValue = CancelOperation;`
(this is not VB)

Upgrade a Copy of Production

- If possible upgrade a copy of your production environment and leave previous version on standby.
- Copy of DBMS as bare minimum.
- New Siebel enterprise if possible.
 - Old environment often needs new hardware anyway so this works out well.
- Allows us to do several things:
 - Build and configure Siebel enterprise way ahead of go live weekend.
 - Do practice runs of actual production upgrade.
 - Test upgraded application in production setting ahead of go live weekend.

Example Practice Run Siebel 7.5 -> 8.0 – First Run

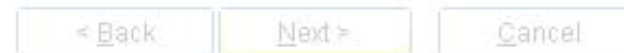
- Install Siebel enterprise.
- Export/Import prod DBMS into 10G.
- Gather DBMS statistics (7.5 schema).
- Export 7.5 DBMS statistics so we don't have to repeat this step again.
- Run Siebel upgrade process.
- Gather DBMS statistics (8.0 schema).
- Export 8.0 DBMS statistics including schema and system statistics.
- Configure Siebel enterprise (saved in siebns.dat for the most part).
- Migrate CM objects from test to prod.
- Test upgraded application.
- Save off any items you can reuse on the real upgrade.

Example Practice Run Siebel 7.5 -> 8.0 – Second thru Go Live Runs

- Export/Import prod DBMS into 10G.
- Import 7.5 DBMS statistics.
- Run Siebel upgrade process.
- Import 8.0 DBMS statistics.
- Reconfigure Siebel enterprise parameters not stored in siebns.dat (e.g. rshost URL under web service integration)
- Migrate CM objects from test to prod or from last prod saved.
- Test upgraded application.

Getting Help on Your Siebel Upgrade

- We answer a lot of questions on ittoolbox.com from consultants doing major upgrades for Siebel customers who appear to have never ran the Siebel upgrade before.
- Know of at least two instances where inexperienced resources installed the wrong version of Siebel 8 and tried to run the upgrade!
- A consulting company can say “we” have lots of Siebel upgrades under our belt but how many has the person who will be doing your upgrade done?
- A call for Siebel upgrade accreditation thru Oracle’s partner network.



Questions & Answers



Resources

- Database Upgrade Guide.
- Oracle Online Community (Ospace) is now live and can be found at:
 - <http://www.oracle.com/applications/community/index.html>.
 - There is a forum called Install / Upgrade / Manage
- SupportWeb -> Installation and Upgrade -> Install/Upgrade Portal, especially Alert 1322: Siebel 8.0 Upgrade – Important Steps to a Successful 8.0 Upgrade.
- <http://www.ponderproserve.com/support.html> for several other detailed .ppt, especially Part I & II OAUG web seminar.

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