SIEBEL 7
eBusiness

PLANNING AN UPGRADE TO SIEBEL 7

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Contents

Introduction

This guide provides an overview of best practices for planning upgrade resources, estimating the upgrade timeline, and managing the data migration process.

This guide does not provide detailed information or step-by-step instructions for upgrading your Siebel applications. For that type of information, see the *Upgrade Guide* for the operating system you are using.

Although job titles and duties at your company may differ from those listed in the following table, the audience for this guide consists primarily of employees in these categories:

Project Mangers	Persons responsible for planning and managing implementation projects.
Database Administrators	Persons who administer the database system, including data loading, system monitoring, backup and recovery, space allocation and sizing, and user account management.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, configure, and add new functionality to Siebel applications.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.
Siebel Architect	Persons responsible for designing the overall system architecture, including identifying hardware requirements and sizing guidelines.

Additional Resources

The following Siebel guides contain information relevant to planning your Siebel upgrade:

- *Upgrade Guide* for the operating system you are using, for example, *Upgrade Guide for Microsoft Windows* or *Upgrade Guide for UNIX*.
- *Siebel Tools Reference*
- *Planning a Successful Siebel Implementation*
- Release Notes and Siebel Alerts available on SupportWeb at http://ebusiness.siebel.com/supportweb/
- *System Requirements and Supported Platforms* available on SupportWeb at http://ebusiness.siebel.com/supportweb/

The following Siebel resources can provide additional support for your upgrade:

- Siebel Expert Services
- Siebel Global Competency

About the Upgrade Process

The upgrade is typically carried out in one of the following sequences, depending on which version you are upgrading from:

If you are upgrading from Release 5.x or 6.x to the new release of Siebel 7

1. Upgrade the development environment.
2. Migrate user interface and scripting customizations to the Siebel 7 Web Client framework.
3. Upgrade the test environment and complete testing.
4. Upgrade the production environment.

If you are upgrading from Release 7.x to the new release of Siebel 7

1. Upgrade the development environment.
2. Upgrade the test environment and test.
3. Upgrade the production environment.

NOTE: For a detailed description of the upgrade process, see the *Upgrade Guide* for your operating system.

Revision History

Planning an Upgrade to Siebel 7, Version 7.0

1 Planning an Upgrade

The upgrade to Siebel 7 is an opportunity to use new functionality and optimize your existing Siebel environment.

A successful upgrade planning process consists of the following steps:

1. **Evaluate the complexity of the upgrade.** Determine the complexity of the upgrade effort based on Siebel modules implemented, number of integration points, number of interfaces, total number of scripts, and number of user-interface scripts. See "Evaluating Upgrade Complexity Based on Customization" on page 12.

2. **Assess the current Siebel environment.** Perform a detailed assessment of the current Siebel environment to determine how the current implementation will be affected by upgrade to Siebel 7 architecture. The assessment will help you to identify areas where you can take advantage of new Siebel functionality to meet business requirements. See "Assessing the Current Siebel Environment" on page 15.

3. **Analyze new product functionality.** Analyze the new Siebel product to identify functionality in the new release that may meet business requirements that were not met by functionality in the prior release or that replaces functionality in the prior release. See "Analyzing New Functionality" on page 27.

4. **Estimate the level of effort to upgrade.** Determine the level of effort required to upgrade based on the results of your complexity evaluation, current environment assessment, and new functionality review. This will help you to estimate resources, timeline, and costs. See "Estimating the Level of Effort to Upgrade" on page 28.

5. **Establish the upgrade team.** Assemble a cross-functional upgrade team that is proficient in the technologies introduced in the latest release of Siebel 7 and understands Siebel architecture and performance best practices. See "Establishing the Upgrade Team" on page 29.

6 **Review interface migration tasks.** Determine the effort to migrate modified applets and views (associating applets with Web template items and mapping them to Web template controls), scripts, EIM interfaces, and workflows. See "Assessing Interface Migration Tasks" on page 31.

7 **Plan for upgrade tuning.** Tuning your production upgrade scripts can significantly reduce downtime during the final stages of your Siebel 7 upgrade. Examples of upgrade tuning include eliminating SQL statements that do not affect any data, executing long-running SQL statements in parallel, and executing table creation, table rebuilds, and index creation in parallel. See "Tuning the Production Upgrade Scripts" on page 38.

8 **Identify data migration tasks.** After completing a development environment upgrade and any necessary reconfiguration and unit testing, you must migrate configuration changes and certain types of data and files from the development environment to your test or production environment. See "Identifying Data Migration Tasks" on page 40.

9 **Provide for end user training.** Analyze the impact of change on the end user community and develop a plan for end user training and adoption. See "Planning End User Training" on page 43.

In summary, the upgrade of your Siebel application requires detailed understanding of customizations made to your current deployment, analysis of the components within your enterprise, analysis of how to use new functionality provided by Siebel software, and strict adherence to industry best practices and best practices identified in this guide.

The upgrade planning process will produce a roadmap for the entire upgrade project that outlines infrastructure, deployment, and training requirements.

Use the results of this process to develop a project plan that identifies required skills and resources for developing and deploying the upgraded application. This will help you with advance budgeting of resources, time, and training.

For information and guidance beyond what is provided in this guide, contact your Siebel Global Service Practice Manager.

Upgrade Best Practices

Here are important best practices to follow when planning an upgrade.

- Review *System Requirements and Supported Platforms*, Release Notes, and Siebel Alerts related to upgrades to verify your upgrade path. These documents are available on Siebel SupportWeb at http://ebusiness.siebel.com/supportweb/
- Gather all relevant documentation that describes the current implementation, for example, requirements documents, design documents, and architecture context diagrams.
- Do not start a new development effort until after the new version has been rolled out. This is especially important when you are upgrading from Siebel 5.x or 6.x to Siebel 7.x. There are significant user interface differences between the two versions, and you must change existing functionality before moving on to customized functionality.
- Implement a change management program. For example, communicate roll-out dates to users, schedule training, allow adequate time for users to adjust to the enhancements, and provide a process for end users to provide feedback to the project team.
- User adoption is critical to a successful upgrade. Provide access to a test environment that allows users to become familiar with the new version of the application, and provide end-user training on the upgraded application.
- Consider database layout in your planning. Plan to tune the database and database server for the upgrade, because settings and parameters for upgrade differ from those required for OLTP.
- If you are migrating multiple languages from a prior version, plan extra time (one to two weeks) for the repository merge process. The expected merge time may increase with the number of languages in the repository. You also might need to plan for additional installation-related tasks.
- If you are installing new languages that were not part of your prior repository, do not add them until after the repository merge process occurs. This will minimize the time required for the merge and the number of conflicts that you may encounter. For more information, see the *Siebel Server Installation Guide* for the operating system you are using.

- For DB2 UDB platforms, consider increasing the size of your tablespaces prior to going live. Make sure that your custom tablespaces are large enough for upgraded Siebel 7 tables by using a Siebel upgrade utility called `tblsize`. For information about this utility, see the *Upgrade Guide* for the operating system you are using.

Evaluating Upgrade Complexity Based on Customization

At a high-level, you can use the following categories to characterize the complexity of your upgrade project.

- **Basic.** Horizontal Siebel applications with few or no customizations and fewer than three interfaces.
- **Moderate.** Horizontal Siebel Applications with light scripting and ten interfaces or less.
- **Complex.** Siebel Horizontal or Vertical Applications with complex scripting and up to 30 interfaces.
- **Extreme.** Siebel Horizontal or Vertical Applications with extensive scripting and 30 or more integration points.

Table 1 lists benchmarks for each complexity category based on the modules implemented, the number of real-time integration points, the number of batch interfaces, the total number of scripts, and the number of user interface-intensive scripts.

These complexity categories are guidelines only. The characteristics of your particular implementation drive your requirements. For example, you might have some characteristics of an extremely complex upgrade, but if you have basic interfaces or no customizations, then the overall complexity of your upgrade may be only moderate.

Table 1. Complexity Categories

Complexity	Module	Integration	Scripts
Basic	Horizontal application, end user only	Real time: 0 Interfaces: 3 or fewer	Total Scripts: 10 or less UI: 0
Moderate	Horizontal or vertical application, customer, with simple UI branding	Real time: 2 - 5 Interfaces: 3 - 10	Total Scripts: 10 - 50 UI: 0 - 10
Complex	Horizontal or vertical application, end user and customer	Real time: 5 - 10 Interfaces: 10 - 30	Total Scripts: 50 - 100 UI: 10 – 30 Scripts using Active X controls for information exchange with Siebel Scripts using complex functionality such as terminal emulation windows
Extreme	Horizontal or vertical application, end user and customer, with one or more of the following data migrations: ■ Data migration from a highly customized schema ■ Specialized migration such as eAuction, Analytics, ISS, or mobile solution products ■ Migration from a horizontal application to a vertical application ■ Migration of a system with near-zero-downtime requirements	Real time: 10 or more Interfaces: 30 or more	Total Scripts: 100 or more UI: 30 or more Scripts with desktop interaction via DLL or COM: 4 or more Scripts using Active X controls for information exchange with Siebel Scripts using complex functionality such as terminal emulation windows

Table 2 lists three scenarios that include estimates of resources and duration of the upgrade effort based on upgrade complexity.

Table 2. Example Scenarios

Upgrade/Migration Scenario	Level of Complexity	Staffing	Duration
From Release 6.3 Horizontal to Release 7.5 Horizontal.	Moderate	3 to 4 resources	8 weeks
From Release 6.x eComm Vertical to Release 7.5 eComm Vertical	Complex	8 to 10 resources	6 months
From Release 6.3 Horizontal to Release 7.5 Financial Services Vertical	Extreme	20 resources	12 to 20 months

Assessing the Current Siebel Environment

Each new version of Siebel applications introduces new functionality and product enhancements that differ from prior versions. When upgrading to a new version of Siebel applications, it is essential that you analyze how your current implementation will be affected by the upgrade.

Your assessment of the current Siebel environment should include the following areas:

- Infrastructure Assessment
- Business Process Assessment
- Integration Assessment
- Script Assessment
  - Application
  - Business components
  - Applets
  - Business service
- Reports Assessment
- Repository Object Assessment
  - Data objects, such as base tables and EIM tables
  - Business objects, such as business components and joins
  - User interface objects, such as applets and views

You must analyze each area to determine the level of effort that will be required during the upgrade and to estimate resources and costs. This will also help you identify areas where you can take advantage of new Siebel functionality to meet business requirements.

Use the "Upgrade Assessment Worksheet" on page 46 to collect information about your existing implementation of Siebel eBusiness Applications, business issues, and infrastructure.

A thorough assessment will produce the following tools for upgrade planning:

- Application assessment documentation that describes in detail the changes in the application and recommendations.
- Inventory of all modified objects, including an estimate of the level of effort that will be required to migrate the changes to the new version.
- Application roadmap that includes recommendations for a deployment strategy, a required skills and resources, and training requirements.
- Project plan that estimates time and costs associated with the upgrade.

Assessment Staffing

Assemble a team of people who have detailed knowledge of the existing implementation, an understanding of the new architecture, and an understanding of upgrade best practices. Consider including people who have been involved with previous Siebel upgrades.

The assessment team should include the following members:

- Business Analyst—100% involvement
- Configuration/scripting specialist—50% - 100% involvement
- Infrastructure/Integration Architect—50% - 100% involvement
- Upgrade Specialist—100% involvement
- Project Advisor—25% involvement

Infrastructure Assessment

Analyze the existing infrastructure to determine whether it is sufficient for the Siebel 7 environment. Consider the characteristics of your infrastructure:

- Number of Siebel Servers required
- Number of Web servers required
- New architecture of the environment using these servers

- Security technologies, such as LDAP or ADSI
- Network architecture
- Total number of users
- Integration with other applications
- Future direction of the application

The Siebel 7 architecture offers several deployment options. The Smart Web Client architecture supports a zero-footprint deployment with the Business Object Layer centralized on the Siebel Server. As the user community expands, additional Siebel Servers or CPUs can be added to scale the deployment horizontally.

Conduct a performance and scalability test before going to production to establish the baseline characteristics of your implementation.

CAUTION: A comprehensive sizing review by Siebel Expert Services is recommended to verify topology, configuration, and sizing assumptions for large deployments.

Sizing Review

An Expert Services sizing review will help deployments with more than 500 users to plan for the following large-deployment characteristics:

- **Performance requirements of different Siebel applications may vary significantly.** For example, the user community roles and responsibilities within the application framework vary. This will impact the sizing and configuration as a varying mix of modules and functionality will be required to achieve the desired business objectives.
- **Users may be geographically dispersed.** For example, Siebel Call Center users may be located in multiple geographic locations.
- **Demands of one application might exceed those of other applications.** For example, an organization using Siebel Analytics might add more users to the Siebel Analytics application than to other Siebel applications.
- **Ancillary third-party applications might have their own sizing requirements.** For example, heavy usage of reporting requires a separate server to deploy the Actuate eReporting Server and its components.

- **Siebel eBusiness Applications may be integrated with other applications.** ASiebel application might be integrated with another application by an integration server to read data to or write data from the Siebel eBusiness Application.
- **Hardware may host multiple Siebel applications.** For example, production deployments usually consist of the same hardware to host multiple Siebel applications and Siebel Servers.

A detailed sizing review provides guidelines for your implementation's hardware and database sizing, backup and recovery strategies, and database configuration. The results of a sizing review will help you with the following tasks:

- Sizing the database server and Siebel Server correctly for user and data growth.
- Sizing hardware for running server resources such as EIM, Workflow, or Assignment Manager.
- Sizing an environment for Analytics.
- Understanding Siebel architecture to determine how server components are used.
- Understanding capacity requirements for Siebel Remote and Replication.
- Verifying correct database configuration to prevent database degradation.
- Rectifying nonstandard or invalid server configurations.
- Determining the correct number of disks required to achieve the required RAID configuration.
- Understanding data integrity requirements for the Siebel Gateway, Siebel Server, and Siebel File System.
- Defining best practices to maintain database integrity specific to your organization's requirements.

To request a sizing review for your implementation, contact Siebel Expert Services or your Technical Account Manager (TAM). An Expert Services Sizing Review takes approximately two days. (An additional day is necessary to size an implementation that includes Siebel Analytics.) The product of a sizing review is a report of all findings and recommendations, and a follow-up conference call with the upgrade team and Siebel technical account manager.

Business Process Assessment

Analyze your current business processes to identify functionality in the new version that may meet business requirements that were not met by functionality in the previous version or that replaces functionality in the prior version.

- Review your business requirements and how they are implemented in the current application. Then review how your business requirements might be implemented in the new version of Siebel applications. This exercise may help identify any areas that would benefit from redesign in the application rather than migrating the existing solution.
- Map existing business processes and requirements to Siebel 7.x functionality. For example, there are a number of 5.x or 6.x screens and views that are replaced with different screens and views in version 7.x. You must identify these differences and then modify your views and responsibilities accordingly.
- Identify modules of Siebel Applications that have a significant user load and a large number of records. Also identify modules that have a significant number of new features in the new release. These are often high-risk modules and it is good to be aware of them early in the upgrade process.

Siebel ePlan Service

For complex or extreme environments, consider using the Siebel ePlan service to develop an implementation strategy that maximizes your use of Siebel functionality and optimizes your business processes.

To develop a Siebel ePlan, Siebel Certified Consultants use a requirements management toolkit to map industry-specific and customer-specific business models to Siebel functionality. Business processes are predefined for the Financial Services, Life Sciences, Consumer, and Communications industry sectors.

A Siebel ePlan produces the following planning tools:

- Mapping of your business models to Siebel functionality
- Strategic implementation plan
- Phased implementation plan that includes estimates of cost and level of effort for each project phase
- High-level technology plan

Integration Assessment

Analyze integration points to and from Siebel applications and external systems.

- Review all integration points and their inbound and outbound data structures. Determine whether or not those data structures are valid in the context of the new version.

  NOTE: In some cases, you may be able to use new 7.x functionality to meet existing integration requirements.

- Identify non-standard integration points (for example, direct database access using SQL) and try to replace using standard integration features available in the new version.
- Identify any interfaces at the object layer, such as CORBA Object Manager, and validate them in the context of the new architecture. You may need to update the software component level or even rearchitect your integration solution. This is often necessary with customer application interfaces used with the Web Client and not the Mobile Web Client

Level of Effort for Integration

If you are upgrading from version 5.x or 6.x, for planning purposes, categorize your integration effort based on the number of real-time integration points and number of batch interfaces. Use the categories Table 3 to help plan your integration.

NOTE: The following estimates will vary according to the characteristics of your implementation. For example, you might have 20 integration points but no changed objects.

Table 3. Level of Effort for Integration

Effort	Example	Person Days
Basic	No real-time integration points 3 or fewer one-way batch interfaces	2
Low	2-5 real-time integration points 3-10 one-way batch interfaces	5
Medium	5-10 real-time integration points 10 - 30 two-way batch interfaces	20
High	10 or more real-time integration points that include synchronous and asynchronous real-time integration points 30 or more two-way batch interfaces	30

Script Assessment

When planning your upgrade, analyze the current scripts and plan how they will be migrated to the new version. When migrating from Siebel 5.x or 6.x to Siebel 7.x, most scripts on applications, business components and business services are easily migrated to the new version. However, there are three types of scripts that often require extra effort to migrate:

- Applet scripts
- Scripts that reference the UI
- Scripts that interact with desktop applications

Level of Effort for Script Migration

If you are upgrading from version 5.x or 6.x, for planning purposes, categorize scripts based on how easy they will be to migrate. Use the categories Table 4 to help plan your script migration:

Table 4. Level of Effort for Script Migration

Effort	Example	Person Days
Basic	Scripts that are not UI-intensive, but will still require some effort to test.	5
Low	Scripts that perform UI functions like setting properties. These scripts typically have minimum references, business rules, and obsolete methods.	15
Medium	Scripts that are user interface-intensive, but are easily split into different functions. These scripts may have a moderate amount of references to business rules and may require a moderate amount of rework to replace obsolete event handlers and methods.	30
High	Scripts that are user interface-intensive or interact with the user's desktop. These scripts are not easily broken down into different modules or functions. They require a lot of analysis to understand. They contain many references to business rules and to obsolete event handlers and methods.	50

The complexity of the script itself does not determine how difficult it will be to migrate, but rather its interaction with the UI does. For example, although a script may have 300 lines and interact with multiple business components, as long as there is no UI interaction in the script, it should be easily upgraded to Siebel 7.x.

For a more detailed discussion about migrating scripts, see "Migrating Scripts" on page 32.

Reports Assessment

Use the guidelines in Table 5 to estimate the level of effort to migrate custom reports. Siebel standard reports are automatically migrated to Siebel 7 and do not need any changes.

Migration of custom reports includes validation of the fields used in a report, verification of access to the report from relevant views, regeneration of report metadata, and recompilation of the report executable in a new version of Actuate report designer.

The complexity of a custom report depends on the complexity of logic and report layout. Document your report customizations, and ask your report designer to review this information before migrating reports.

Table 5. Level of Effort for Custom Reports Migration

Effort	Number of Custom Reports	Complexity of Layout	Complexity of Logic	Person Days
Basic	Less than 5	Simple listing	None	Five
Low	5-10	Simple listing	None, totals	Five to 10
Medium	10-20	Master detail, cross tab	Rollup, totals, calculations	10 to 15
High	More than 20	Cross tabs, hierarchical, scripted/custom coded	Calculations, multi-currency, custom filters	More than 20

Person-day estimates in Table 5 assume that the report designer is familiar with Siebel technologies and is a trained user of Siebel Tools and Actuate report designers. Expect your report migration to take more time for complex layouts or complex reports that include custom methods on fields.

If you need to generate reports for analysis, conditional filtering, or aggregation on a large set of records (more than 500), consider using Siebel Analytics.

If your custom reports must be localized for a multilingual Siebel deployment, you need to perform additional steps. See *Siebel Reports Administration Guide* for instructions about how to migrate reports.

Repository Object Assessment

Determine what configuration changes were made during development of your current repository, and estimate the effort to migrate the configuration to the new version of your Siebel application.

Data Objects

When a new version of Siebel applications includes changes to the data model, some tables become obsolete or are replaced by new tables in the new version. For a list of obsolete tables and their equivalent replacements in the new version, see the *Upgrade Guide* for the operating system you are using.

Review the following objects in your current repository to identify preupgrade configuration tasks:

- **Extensions to obsolete tables.** You must reconfigure these extensions in the new version and manually migrate data stored in these tables to the new version.
- **Custom foreign key columns that point to obsolete tables.** You must reconfigure each column to point to the equivalent table in the new version.
- **EIM mappings that reference obsolete tables.** You must reconfigure these mappings in the new version.
- **Mappings for tables related to 7.x access control (S_PARTY).** You must reconfigure these mappings in the new version.
- **Conflicts between custom indexes and standard indexes.** You must resolve any identified conflicts.
- **Workflow policy program objects based on extensions to obsolete tables.** You must remap workflow objects (such as assignment attributes, workflow policy columns, or workflow policy objects) to valid columns in new version.

Business Objects

Review the following business objects to identify configurations based on obsolete tables or tables that are part of the access control (S_PARTY) model:

- Joins invalidated by the new data model.
- Links invalidated by the new data model.

User Interface Objects

When upgrading from version 5.x or 6.x to Siebel 7, the postupgrade task of migrating user interface objects, such as applets and views, to the Siebel 7 Web client may result in layout changes that will require additional adjustment and configuration.

Review user interface objects to identify those that are likely to require more configuration work after the upgrade. For example, look for the following characteristics of a highly customized user interface in pre-Siebel 7 architecture:

- A large number of controls (more than 70) on a single applet.
- A highly customized dot-com application with extensive changes to Web templates and use of JavaScript in the template file itself.

NOTE: Release 7.5.3 product enhancements may eliminate the requirement for this effort. See the *Upgrade Guide* for your operating system for more information.

Searching for Modified Objects

To find changes to objects in the repository you can use Siebel Tools to query for objects that have changed since a given date. In Siebel Tools, choose View > Options, and then in the Changed Date section of the General tab, enter the date and time on which development in the current repository began. All records changed since that date will be marked as changed. You can then select the Flat tab in the Object Explorer, select an object type, and then in the Object List Editor, query for records that have a non-null value in the changed property field.

You can also populate the Prior Custom and New Standard repositories inside the Tools > Upgrade > Upgrade Application view of Siebel Tools. Prior Standard and New Custom are left blank. Click the Merge button to create a list of changes to all object types.

For detailed information, see the *Upgrade Guide* for the operating system you are using. For example, *Upgrade Guide for Microsoft Windows* or *Upgrade Guide for UNIX*.

Other Areas that May Require Special Attention

The following areas may need special attention when migrating to Siebel 7.x applications:

- SmartScripts may need to be handled differently in some languages
- Custom methods in applet scripts on buttons
- Complex Position/Division/Organization hierarchy
- Configurator models
- Contact proxy logins
- Open Orders/Quotes
- Customized handheld applications
- Customized wireless applications
- PRM or eChannel will require additional pre-merge steps
- Custom EIM mappings
- Complex Organization/Partner structure in eChannel
- Personalization rules connected to the Employee business component
- Workflow process with error conditions and desktop interaction
- Data model changes, such as extension tables on S_CONTACT or S_ORG_EXT
- Extension columns on S_EMPLOYEE

Analyzing New Functionality

Analyze the new Siebel product to identify functionality that satisfies your business requirements or replaces functionality in the prior release.

Here are a few examples of new features available in Siebel 7:

- Infrastructure changes
  - Unicode support
  - Updated platform support
- Functional enhancements
  - Vertical scrollbars
  - Association applets are refined
  - Right-click
  - Bookmarks for Siebel records and links
  - Customer dashboard enhancements
- Product enhancements
  - **Siebel Remote.** Auto-sync, local access control through responsibility
  - **Assignment Manager.** Rule groups, rule sequences
  - **Siebel Analytics.** Improved upgrade, scalability, and data visibility

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NOTE: Consider that an upgrade requires a significant one-time administrative effort to set up the product catalog and categories, and to set up access control.

Estimating the Level of Effort to Upgrade

Estimating the effort to upgrade will help you to plan resources, time, and cost. To estimate the effort for your upgrade, analyze the results of the assessments described in the previous sections:

- "Evaluating Upgrade Complexity Based on Customization" on page 12
- "Assessing the Current Siebel Environment" on page 15
- "Analyzing New Functionality" on page 27

If you are upgrading from Release 5.x or Release 6.x and you want Siebel Global Services to perform these assessments for you, consider enrolling in the Siebel 7 Upgrade Requirements and Planning Workshop.

Siebel 7 Upgrade Requirements and Planning Workshop

In the Upgrade Requirements and Planning Workshop, a Siebel Global Services professional analyzes your current environment with respect to Siebel 7 architecture, and identifies business processes, integrations, and customizations that require attention during the upgrade.

This workshop produces a roadmap, a level-of-effort estimate for your upgrade project, and a high-level project plan that includes future infrastructure, deployment, and training requirements. For more information about Siebel Upgrade and Migration Services, contact Siebel Global Services.

Establishing the Upgrade Team

Assemble a project team with the right skill set. Team members must be proficient in the technologies introduced in the latest release and understand the new architecture and performance best practices. A successful upgrade requires:

- Detailed understanding of customizations in the previous implementation.
- Familiarity with the conventions of the operating system in which your Siebel Servers run.
- Expertise in network connectivity and software installation on the application server and client operating systems.
- User accounts with access privileges to install new software.
- Expertise in database installation, tuning, and administration of the relational database management system (RDBMS).

How you staff your upgrade project may vary according to the requirements for your project, but generally, you need team members working in the following roles:

- **Business analyst.** Business analysts map your existing business requirements to out-of-the-box functionality in the new version to identify gaps and reduce the need for additional configuration. They will help with testing and training, and coordinate with other business resources.
- **Migration specialist.** Migration specialists are responsible for upgrading the back-end systems, including the development, user acceptance testing (UAT), pre-production, and production environments. This includes handling migration issues, validating hardware and software requirements, and assisting with all system administration tasks related to migrating to a new version of Siebel applications.
- **Scripting specialist.** Scripting specialists are technical analysts skilled in JavaScript and Web application development. They will work with technical architects, Siebel Expert Services, and other project team members to design and develop JavaScripts and custom Web applications.

- **Customer resources.** Customer resources such as database administrator, system administrators, and desktop support analysts must represent the implementation's existing functionality and provide back-up infrastructure support during the upgrade.

Other specialized resources may be required if you have complex configurations, business processes, integrations, or infrastructure. For example, you might need an EAI integration specialist to identify how to replace complex integrations with standard modules or functionality in the new version. If your implementation runs on IBM zSeries hardware, you might need a technical architect skilled with DB2 UDB for OS/390 and z/OS.

Assessing Interface Migration Tasks

When planning your Siebel upgrade, you must account for the following migration efforts:

- Migrating Modified Applets and Views
- Migrating Scripts
- Migrating EIM Interfaces

Details and instructions for performing these tasks are covered in the *Upgrade Guide* for the operating system you are using.

Migrating Modified Applets and Views

In Siebel 7, the Siebel Web Client replaced the clients of previous versions. The Siebel Web Client runs in a browser and does not require any software installed on a user's machine. During the upgrade process all standard Siebel applets and views are upgraded to support the Siebel 7 Web Client framework. However, modifications made to 5.x or 6.x applets and views are not migrated as part of the upgrade process. Migrate these modifications to the new version using the Web Client Migration Wizard.

The following types of 5.x and 6.x user-interface objects must be migrated to the Siebel 7 Web Client:

- New applets
- New views
- Modified applets (applets to which you have added or deleted controls or list columns)
- Modified views (views to which you have added or deleted applets)

For detailed information about migrating user interface elements to the Siebel 7 Web Client, see the *Upgrade Guide* for the operating system you are using.

Take the following measures to more easily migrate your custom applets and views:

- Simplify your user interface design, because fewer customizations take less effort to upgrade.
- Avoid trying achieve the exact look and feel of the previous Siebel application to avoid extensive customization.
- Compare your 5.x or 6.x applets and views to Siebel 7 model applets and views to determine if you need to make modifications. For example, you might need to add applets to the model view or map additional controls to the model list applets.
- Test the wizards before running them against an entire repository.
- Plan for additional configuration of list applets that have many list columns.
- Plan for post-migration configuration of new or modified form applets. The level of effort is based on the number of new or modified form applets and on the number of custom controls on the applets.
- After using the Web Client Migration Wizard, review each applet or view using the Web layout editor in Siebel Tools to determine if they have the desired layout. Make changes as appropriate.
- Allocate time to gather feedback about the user interface from business users. The objective of the configuration effort is to optimize the user interface to meet user requirements.

Migrating Scripts

Scripts in Siebel 7 are classified as either browser scripts or server scripts. In general, server scripts are oriented towards data access and manipulation of business components, and browser scripts are oriented towards UI interaction. Scripts are migrated as either browser script, server script, or as a combination of the two. This is significantly different from prior versions.

You might need to modify scripts that reference event handlers or methods that are obsolete in the new version.

Understanding Browser and Server Scripts

Server Scripts are designed to enhance object-interactivity and integration with legacy applications as well as other services. Written in either Siebel VB (for Windows only) or Siebel eScript (for all supported Siebel Server operating systems), server scripts run on the Siebel Server. Server scripts are executed in the context of the Siebel Object Manager. Tasks performed by server scripts include the following examples:

- Creating an instance of a business component and updating a field.
- Creating an instance of a business component and executing a query that retrieves records of the business component.
- Retrieving data from or sending data to the database.

Browser scripts are designed to enhance user interactivity and desktop integration. Written in JavaScript, browser scripts run on the client's Web browser. Browser scripts are executed in the browser at run time. Tasks performed by browser scripts include the following examples:

- Displaying the progress of a lengthy process by displaying a progress bar or text on the Client Status bar.
- Enabling or disabling a control, or changing the background color of a control, based on a user condition.
- Interacting with the desktop applications such as a script that accesses personal contacts stored in Microsoft Outlook.

Browser scripts are written in JavaScript. Therefore, if you have written code in Siebel 6.X using Siebel VB or Siebel eScript, then you must rewrite it in JavaScript.

Migration Decision: Browser or Server Script?

If you are migrating from Siebel 5.x or 6.x, you must review the characteristics of each script to determine whether to migrate it as a browser script or a server script. Scripts that manipulate the user interface (UI) are typically migrated as browser scripts. Scripts that interact with the server are typically migrated as server scripts.

Table 6 describes script migration scenarios.

Table 6. Script Migration

If a script contains...	It migrates as a...
Combination of code that interacts with the UI and the server.	Server script (by default)
Code that interacts with the server only	Server script
Code that interacts with the UI only	Browser script of the corresponding object
Desktop interaction	Browser script

Carefully categorize scripts that access operating system functions as either browser scripts or server scripts. Re-evaluate references to OS-specific behavior or location to make sure they are interacting with the intended environment (the client computer or the Siebel Server).

The most common script migration scenario is for a script containing a combination of code that interacts with the UI and code that interacts with the server. Because you cannot pull a random block out of a script to place it on the browser, analyze whether part of a UI-interactive script needs to be moved to a browser script, and consider the sequence of execution—browser scripts are executed before server scripts.

A script containing code that only interacts with the server requires no development effort, but there are a few things that you should consider:

- Both Siebel VB and Siebel eScript are supported on server scripts.
- In Siebel 7, scripts written in different languages can coexist in the same repository, but a given object will only support one language at a time.
- If a script must be designed for a heterogeneous Web server, then you should write it as Siebel eScript, because eScript is platform independent while Siebel VB will work only on Windows environments.

A script containing code that only interacts with the UI is executed at the client machine before the request is submitted to the server.

A script that interacts with the desktop could be migrated as a server script if the logic is executed on the server away from the user's UI.

Determining Which Scripts to Migrate

To generate a list of repository differences between the standard Siebel 7 repository and your customized Siebel 5.x or 6.x repository, use the repository merge tool.

To use the repository merge tool for this purpose, specify only the Prior Customized Repository and the New Standard Repository fields, instead of specifying four repositories to perform a merge. (See the *Upgrade Guide* for the operating system you are using for instructions about how to perform a repository merge.)

Review the list of repository differences to determine which scripts to migrate.

Scripting Best Practices

The following scripting best practices can increase Siebel 7 performance and scalability, reduce deployment risks and costs, and help you maximize the return on your investment in Siebel 7 applications.

- **Only use indexed fields in scripting queries.**

  Most customers have thousands of accounts in the Siebel accounts table. By creating an index for those accounts—for example, tying all accounts to an account number—and then using that index field in the query script, you can increase query speeds considerably.

  If you use non-indexed fields, the server searches every record to find the desired account, leading to slower performance.

- **Release Siebel objects to increase available memory.**

  Because memory is allocated to Siebel objects used in scripts, you must release the objects to free the memory. To release Siebel objects, set the object to null in the script.

  Release dependent objects before releasing independent objects. If an independent object is released first, the dependent objects are not removed from memory, resulting in unpredictable outcomes.

  If you do not release Siebel objects, they are not removed from memory, resulting in memory overflow and leakage that affects performance and scalability. This issue often occurs in deployments of Siebel Call Center because business objects are constantly queried in the call center environment.

- **Use the Option Explicit statement in all scripts.**

  Use the Option Explicit statement to force a compile-time check for all declared variables and their data types.

  If you do not use the Option Explicit statement, variables with no declared data type are classified as variants, which use more memory. For example, if Option Explicit is not used in a Visual Basic script, an incorrectly classified string variable could receive numeric data, making debugging difficult.

- **Make sure error handling is in place for all scripts.**

  Even if a script does not manipulate Siebel objects and does not access the operating system, it may be changed in the future. Implement error-handling constructs for all scripts to make sure that errors are always handled no matter how or when the script is modified.

- **Make sure that shared programs on the server are threadsafe.**

  Make sure that programs shared by multiple Siebel clients can support requests from multiple clients at the same time. If you do not take this precaution, you might encounter concurrency and scalability problems.

- **Do not overuse the "Immediate Post Change" property.**

  Setting the Immediate Post Change property on a Field object forces the PreSetFieldValue event to execute. During the implementation design phase, decide which fields to validate immediately. Consider that setting a large number of fields to this property results in slower performance.

  The Immediate Post Change property is new in Siebel 7. To set the Immediate Post Change property in Siebel Tools, navigate to the Buscomp screen and open the Fields node.

Migrating EIM Interfaces

Siebel data model changes that occur during an upgrade affect EIM behavior. To prepare interface tables for EIM data loading, use the UTLEIMDIFF utility to identify differences in all interface tables between two repositories. For more information, see *Siebel Enterprise Integration Manager Administration Guide*.

Use the following best practices for your EIM interface migration.

- Look for the following changes in user keys:
  - Additions to the number of columns in keys (for example, the POSITION_ID in EIM_ACCOUNT has two additional columns, POSTN_BU and POSTN_LOC, as part of the user keys).
  - A total change of user keys (for example, EIM_CONTACT).
- Make provisions for the S_PARTY table and related user keys. Be careful when you populate EIM tables, because S_PARTY is a required table in Siebel 7.
- Make sure that all EIM tables connected to S_PARTY do not have duplicate user keys in the same batch.
- Plan to convert all 5.x or 6.x datetime columns to UTC columns during an upgrade to Siebel 7.
- Verify that all database parameters are appropriately set. Typically, the database parameters required for upgrade are not sufficient for data migration. See *Upgrade Guide* for your operating systems for required database parameters.

Tuning the Production Upgrade Scripts

Tuning can significantly reduce overall downtime during your Siebel 7 production upgrade. Examples of upgrade tuning include elimination of SQL statements that do not affect any data, parallelization of the most expensive SQL statements, and parallelization of table creation, table rebuilds, and index creation.

The upgrade scripts provided by Siebel are generic in nature and migrate the entire application functionality to the upgraded Siebel version given an upgrade path, database platform, and language. In the three cases described below, tuning can help optimize the production upgrade scripts and minimize down time.

- Most customers use only a part of the customized application functionality, resulting in populating only some of the base tables. Therefore, it is possible to contain the scripts to upgrade only the desired application functionality.
- Upgrade scripts delivered with this release may contain SQL statements that run against the tables whether or not they contain any data. Such SQL executions may be redundant for a production upgrade.
- You cannot determine the most expensive schema creation and manipulation statements without analyzing the customizations and nature of application data. If you identify schema creation and manipulation statements that take the longest time to run, you can execute them in parallel to decrease the total time for the production upgrade.

Understanding the Effort to Tune

The purpose of tuning the production upgrade scripts is to minimize application downtime, thereby reducing the impact to your brand or image, loss of productivity, and potential loss of revenue. Plan your resources and test environment for tuning the upgrade scripts before you perform a production upgrade to Siebel 7.

The following factors, in order of importance, affect the tuning effort:

- Acceptable downtime for your production upgrade
- Extent of customizations at the data layer
- How much application functionality is used
- Number of remote, connected or Web client end users

- Database size and platform
- Siebel version from which you are upgrading

While tuning the production upgrade scripts is the key to minimizing downtime, this process requires thorough understanding of upgrade scripts, extreme caution, and a trained approach.

Tuning the upgrade scripts can only be performed by Siebel Expert Services or Global Competency, who are provided with the necessary documentation, training, and support by engineering. Contact Siebel Expert Services or Global Competency to get an estimate of your tuning effort. Resource estimation should also account for a test environment that contains production data for tuning of the upgrade scripts.

Identifying Data Migration Tasks

After completing a development environment upgrade, review each of the following types of data or files and identify changes that you must migrate to the test or production environment. Although this is essentially a data migration task, it should be considered part of the upgrade process.

NOTE: If you are upgrading from Release 5.x or 6.x, you must modify your existing data migration processes to include any new objects introduced in Release 7.x.

- **Siebel Repository File (SRF).** Copy the SRF from the development environment to the correct location in the test or production environment. See *Configuration Guidelines* on the *Siebel Bookshelf* for detailed information.
- **Web Templates and related files.** Migrate modified Web templates and related files, such as images, to the appropriate location in the test or production environment. See *Configuration Guidelines* for detailed information.
- **Reports.** Migrate .ROX files and associated .txt files that contain language-specific static strings in reports to the target environment. The Reports Server uses the .ROX files to generate reports and pulls static strings from the associated .txt files. See *Siebel Reports Administration Guide* for more detailed information about migrating .ROX and associated .txt files.
- **Lists of Values (LOVs).** If you added LOVs or LOV types to the development environment, you must also add them to the production environment. Use the LOV Administration view to manually add these to the production environment. For new LOV types with many values, use EIM to do an automated batch upload. See *Applications Administration Guide* for detailed information
- **New Responsibilities and Views.** Any new views and responsibilities you have added in your development environment must be also registered in the test or production environment and associated with employees. This is an administrative function and as such is generally added manually in the production environment using the Responsibility Administration view. For a large number of new responsibilities, responsibilities that have large number of existing employee associations, and so on, using EIM is also an option. See *Applications Administration Guide* for detailed information.

- **Workflow Processes.** Use the XML based Export and Import utility available from a button in the Workflow Process Administration view. See *Siebel Business Process Designer Administration Guide* for detailed information.
- **Workflow Policies.** Depending on the number and complexity of Workflow Policies, they can be entered manually using the Workflow Policy Administration view or using EIM (EIM_WFM_ tables). See *Siebel Business Process Designer Administration Guide* for detailed information.
- **Assignment Rules.** If you have new assignment rules you can add them manually using the Assignment Rule Administration view or using EIM depending on the number and complexity of the rules. See *Siebel Assignment Manager Administration Guide* for detailed information.
- **Product Configurator Rules.** Use the Export/Import functionality provided by Siebel Product Configurator to export from test and import into production. See *Product Administration Guide* for detailed information.
- **Smart Scripts.** Use Export/Import functionality provided by Siebel SmartScripts to export from test and import into production. See *Siebel SmartScript Administration Guide* for detailed information.
- **Client Side Business Services.** Client side business services can be migrated using Export/Import functionality from the Siebel Client Business Services Administration view. See *Siebel Tools Reference* for detailed information.

NOTE: No additional import is required for Tools Business Services, because they are part of the Siebel Repository File and will migrate as part of the repository migration process.

- **State Model.** After testing, you must manually create the state model in the production environment. Be sure that the end date is set to a prior date until the state model is entered in its entirety. See *Siebel Business Process Designer Administration Guide* for detailed information.

- **Pre-defined queries (PDQ).** Creating new pre-defined queries is considered a administrative function and as such is generally added manually in the production environment. Users add predefined queries as needed, but administrators may enter complex PDQs using the PDQ Administration view. EIM can also be used for bulk load of tested PDQs from test to production. See *Applications Administration Guide* for detailed information.

Migrating Data

To migrate files and data from one environment to another, use one of the following utilities, as appropriate for the type of data you are migrating.

- **Repository Migration.** See *Siebel Tools Reference* for detailed information.
- **EIM.** See *Siebel Enterprise Integration Manager Administration Guide* for detailed information.
- **Export/Import.** See the relevant guide on the *Siebel Bookshelf* for the type of data you are migrating for information about utilities provided as standard functionality in modules such as Business Process Designer, Product Configurator, and SmartScripts.
- **Development to Production.** Also see *Developing and Deploying Siebel eBusiness Applications* for information about migrating data from a development environment to a test or production environment.

Planning End User Training

Analyze the impact of change on your end user community and develop a plan for end user training and adoption.

Siebel provides the following training options:

- Siebel 7 Migration Training
  - 4-Day Instructor-led Workshop
  - CD-ROM Package
  - Web-based Package
- Siebel 7 Core Architecture, Functions and Enabling Technology classes
- Web-based courses
  - Navigation
  - Migration
  - Siebel Industry Products
  - Selling
  - Technical and Functional Topics
- Siebel 7 Certification and Delta Certification Training

For more information, contact Siebel University at http://siebeluniversity.siebel.com.

Upgrade Assessment Worksheet 2

Use the Upgrade Assessment Worksheet to collect information about your existing implementation of Siebel eBusiness Applications, business issues, and infrastructure. This information will help you to determine a high-level strategy for your upgrade to Siebel 7.

Upgrade Assessment Worksheet

Print this worksheet and record the following information for your upgrade assessment.

Section 1: Contact Information

Account Name: _____

Customer Contact: _____

Email: _____

Phone: _____

Siebel Team: _____

Technical Account Manager: _____

Sales Consultant: _____

District Manager: _____

Additional Information: _____

_____

_____

Section 2: Application Information

Name of application(s) to be upgraded, for example, Call Center, eCustomer: _____

_____

_____

Architecture implemented (check all that apply):

- ❑ Siebel Dedicated Client
- ❑ HTML Thin Client
- ❑ Windows Thin Client
- ❑ Java Thin Client
- ❑ Siebel Wireless Client
- ❑ Siebel Handheld Client

  Handheld Platform:
- ❑ Siebel Voice

Current Siebel version: _____

Number of mobile users: _____

Section 3: Configuration Information

Siebel modules with high or medium complexity:

- ❑ Siebel Dedicated Client
- ❑ HTML Thin Client
- ❑ Windows Thin Client
- ❑ Java Thin Client
- ❑ Siebel Wireless Client
- ❑ Siebel Handheld Client

  Handheld Platform:
- ❑ Siebel Voice

Any desktop interaction through scripts? (list all that apply)

_____

_____

_____

Any launching of External Applications from within the Siebel Client? (excluding EAI activities)

- ❑ Yes
- ❑ No

Section 4: Integration Information

Percentage of time spent during your original implementation on integration: _____

Number of external integration points: _____

Number of external applications: _____

EAI technologies used: (check all that apply)

- ❑ EIM
- ❑ Integration Objects
- ❑ VBC's
- ❑ Adapters:
- ❑ Connectors:
- ❑ Siebel Data Control
- ❑ COM, CORBA, EJB
- ❑ Custom Business Services
- ❑ J2EE Interface:

Section 5: Unicode Database Information

Number of environments (databases) to migrate to a Unicode database: _____

Code page currently deployed: _____

Section 6: Unicode Integration Information

EAI Technologies used for outbound integration: (check all that apply)

- ❑ EIM
- ❑ Integration Objects
- ❑ VBC's
- ❑ Adapters:
- ❑ Connectors:
- ❑ Siebel Data Control
- ❑ COM, CORBA, EJB
- ❑ Custom Business Services
- ❑ J2EE Interface:

Will all inbound interfaces comply with Unicode character set?

- ❑ Yes
- ❑ No

Section 7: Enterprise Infrastructure Information

Do you have multiple languages installed?

- ❑ Single language installed
- ❑ Multiple languages installed

Primary language: _____

Additional languages:
(for a multilingual deployment) _____

_____

_____

Is your Enterprise deployed across geographical data centers?

- ❑ Yes
- ❑ No

Section 8: Database Infrastructure Information

Approximate size of production database: _____

Database platform and version used for the production database: _____

Upgrade Assessment Worksheet

3 Upgrade Planning Worksheets

Use the Upgrade Planning Worksheets to collect information that the upgrade team needs when performing an upgrade.

The Upgrade Planning Worksheets should be photocopied and completed separately for each environment that you are upgrading. Give a copy of these worksheets to each member of the upgrade team.

Team Lead Summary Worksheet

Section 1: Upgrade Team Members

Upgrade Team Lead: _____

System Administrator: _____

Database Administrator: _____

_____

Section 2: Deployment Overview

RDBMS Type:

_____

Enterprise Server Information:

Server Name	Type	Owner	Number of Users	Server OS

Enterprise Server Names and Directories Worksheet

Section 3: Server Names

	Network Host Name	Installation Directory
Enterprise Server/Siebel Root:		
Siebel Database Server:		
File System Location and Path:		
Siebel Gateway:		
CORBA Object Manager (if applicable):		

Siebel Server Name	Network Host Name	Installation Directory

Siebel Accounts, VIPs, and Static IPs Worksheet

Section 4: Siebel Account Information

	Login/User ID	Password
Resonate Manager Account or Siebel Service Owner:		
Resonate Monitoring Account:		
Anonymous Employee User ID:		
Contact User ID:		

Section 5: VIP and Static IP Addresses

Default Gateway: _____

Gateway VIP: _____

Subnet Mask: _____

Server Name	Static IP

Ports and RDBMS Details Worksheet

Section 6: Ports and ODBC Data Source Name

Synch Manager: _____

Request Manager: _____

Object Manager: _____

ODBC Data Source Name: _____

_____

Section 7: RDBMS Information

DB Alias/Connect String/Server DB Name: _____

DB Owner Name (if applicable): _____

Tableowner Account Username: _____

Tableowner Account Password: _____

Siebel DB File Groups (if applicable): _____

4-KB Data Tablespace (if applicable): _____

16-KB Data Tablespace (if applicable): _____

32-KB Data Tablespace (if applicable): _____

Siebel Data Tablespace (if applicable): _____

Index Tablespace (if applicable): _____

DB2 Instance Name (if applicable): _____

4 Upgrade Scenario

This scenario provides an example of tasks involved in an upgrade from Siebel version 6.3 to version 7.5. Review this scenario to help you plan for your upgrade project. This appendix contains the following topics:

About this Scenario

This scenario consists of two phases: "Scenario for Upgrading the Development Environment" on page 61 and "Scenario for Upgrading the Test or Production Environment" on page 74. Each phase is organized into sets of tasks: preupgrade tasks, upgrade tasks, and postupgrade tasks. Each set of tasks includes the day on which each task occurs, a description of the task, and the role of the project team member who would typically perform the task.

The tasks required for your upgrade will vary from the tasks described in this scenario, based on factors such as your upgrade path, database platform, and the operating system you are using. For detailed procedures and information about the upgrade process, see the *Siebel Bookshelf* for the *Upgrade Guide* for the operating system you are using.

The tasks in this scenario are based on the following assumptions:

- Oracle database upgrade from version 8.0.5 to version 8.1.7
- Operating system upgrade from Windows NT to Windows 2000 Advanced Server
- Siebel eBusiness Application upgrade from Release 6.3 to Release 7.5
- Basic or moderate complexity upgrade. See "Evaluating Upgrade Complexity Based on Customization" on page 12.
- Size of development database: less than 20 gigabytes
- Size of production database: 30 gigabytes
- No customized scripts to migrate
- No load balancing of Siebel Servers
- Siebel Servers not clustered

Scenario for Upgrading the Development Environment

The tasks in this section outline the process for upgrading the development environment. The development environment upgrade is divided into three sets of tasks:

- "Preupgrade Tasks for the Development Environment Scenario" on page 61
- "Upgrade Tasks for the Development Environment Scenario" on page 65
- "Postupgrade Tasks for the Development Environment Scenario" on page 70

Preupgrade Tasks for the Development Environment Scenario

Table 7 lists the tasks that need to be completed in preparation for upgrading the development environment. See *Upgrade Guide for Microsoft Windows* for detailed information about each task

Table 7. Preupgrade Tasks for the Development Environment Scenario

Step	Date	Owner	Task
1	*Day 1*	Siebel Upgrade Consultant	Carefully review *System Requirements and Supported Platforms*. ■ Verify that your Oracle database is using a supported code page. ■ Verify that the sort order on the Oracle client is binary.
2	*Day 1*		Save all pending changes.
3	*Day 1*	Siebel Upgrade Consultant, DBA	Back up the preupgrade development environment database.
4	*Day 1*	Siebel Upgrade Consultant	Confirm the backup made in Step 3.
5	*Day 1*	DBA	Upgrade Oracle database server software from 8.0.5 to 8.1.7.
6	*Day 1*		Adjust the database server configuration parameters to the settings defined in *Upgrade Guide for Microsoft Windows* to allow for database growth during upgrade.
7	*Day 2*	Siebel Upgrade Consultant	Back up the Siebel File System.

Table 7. Preupgrade Tasks for the Development Environment Scenario

Step	Date	Owner	Task
8	*Day 2*	Siebel Upgrade Consultant	Complete workflow manager tasks. Make sure there are no records in the following tables: ■ S_ESCL_REQ ■ S_ESCL_ACTN_REQ
9	*Day 2*		Save any interface table data.
10	*Day 2*		Preserve custom indexes on tables.
11	*Day 2*		Disable any customized database triggers and views.
12	*Day 2*		Determine if there are any customized business components based on the most frequently used obsolete tables: ■ S_EMPLOYEE ■ S_EMPLOYEE_ATT ■ S_ORG_INT ■ S_ORG_INT_ATT ■ S_POSTN_RPT_REL
13	*Day 2*		Are there any customized EIM mappings that are based on obsolete tables?
14	*Day 2*	Siebel Developers, Siebel Upgrade Consultant	All Siebel Tools developers check in and unlock projects.
15	*Day 2*	Siebel Remote Users, Siebel Developers, Siebel Upgrade Consultant	All remote users synchronize their local databases.
16	*Day 2*	Siebel Upgrade Consultant	Disable transaction merger.
17	*Day 2*		Document any customized docking objects and visibility rules. Involve Siebel Expert Services if there is any customization.
18	*Day 2*		If you use eChannel, eConfigurator, Forecasting, Quotes, or Calendars, prepare application data for upgrade.

Table 7. Preupgrade Tasks for the Development Environment Scenario

Step	Date	Owner	Task
19	*Day 2*	Siebel Upgrade Consultant	Complete *Upgrade Planning Worksheet* to record the parameters that will be used during the upgrade. You can find the Upgrade Planning Worksheet in *Upgrade Guide for Microsoft Windows*.
20	*Day 2*		Stop the following services: ■ Siebel Server for the development environment ■ Siebel Gateway for the development environment ■ Oracle services
21	*Day 2*		■ Uninstall all but one of the Siebel 6.3 Tools applications from Siebel Tools developers' workstations. One Siebel Tools application is required to perform subsequent tasks in the upgrade. ■ Uninstall Siebel 6.3 database software on development environment. ■ Uninstall Siebel 6.3 application server on development environment. ■ Uninstall Siebel 6.3 gateway server used by development environment. ■ Uninstall Oracle client 8.0.5.
22	*Day 2*		Delete all directories related to the development environment servers and restart the machine.
23	*Day 2*	Desktop Administrator	Install Windows 2000 SP2.
24	*Day 2*		Install Internet Explorer (the most recent version and service pack).
25	*Day 2*		Install IIS 5.0. Make sure you can browse the IIS default page without a firewall error.
26	*Day 2*		Install Microsoft Office, Microsoft Outlook, and Adobe Acrobat Reader.
27	*Day 2*	Desktop Administrator, Siebel Upgrade Consultant	Set up the Siebel administrator account (`SADMIN`). See *Siebel Server Installation Guide for Microsoft Windows* for detailed instructions.

Table 7. Preupgrade Tasks for the Development Environment Scenario

Step	Date	Owner	Task
28	*Day 2*	Siebel Upgrade Consultant	Set IE security levels (for example, to allow Active X).
29	*Day 2*		Export applets, business components, reports, and integration objects from Siebel 6.0 Tools for use later in the process.
30	*Day 2*		Export extension columns from Siebel 6.0 Tools for use later in the process.
31	*Day 2*		Log in to Siebel Tools version 6.0, search for applets and business components with attached scripts. Export query results.
32	*Day 2*		In Siebel Tools version 6.0, rename `Siebel Repository` to `Prior Customer Repository`.
33	*Day 2*		Back up and delete all extra repositories in Siebel Tools. You only need `Prior Customer Repository`.
34	*Day 2*		Record your license keys.

Upgrade Tasks for the Development Environment Scenario

Table 8 lists the tasks required to upgrade the development environment. See *Upgrade Guide for Microsoft Windows* for detailed information about each task.

Table 8. Upgrade Tasks for the Development Environment Scenario

Step	Date	Owner	Task	Duration
1	*Day 2*	Siebel Upgrade Consultant	Test client database connectivity using Oracle SQL PLUS and OBDC connectivity.	
2	*Day 2*		Install the following for version 7.5: ■ Siebel Client ■ Siebel Tools ■ Siebel Sample Database Test version 7.5 Siebel Client and Tools connectivity to the sample database to verify that Siebel 7 software is functioning correctly. Make sure the sample section of the Siebel Client and Tools configuration files point to the correct path.	2 hours
3	*Day 2*		Install the version 7.5 Siebel Gateway. See *Siebel Server Installation Guide for Microsoft Windows* for detailed instructions. Make sure the service starts.	1 hour
4	*Day 2*		Install the version 7.5 Siebel Enterprise Server and Siebel Server(s) to version 7.5. See *Siebel Server Installation Guide for Microsoft Windows* for detailed instructions. Make sure the service starts.	1 hour for each server
5	*Day 2*		Configure the Siebel Enterprise and Siebel Servers, and enable necessary components. If Resonate is used or if Siebel Servers are clustered, this step requires considerably more time.	1 hour for each server
6	*Day 2*		Apply a Siebel Maintenance Release, if applicable, to the Siebel Gateway, Siebel Server, Tools, and Client.	
7	*Day 2*		Install the version 7.5 Siebel Database Server software onto one Siebel Server that has already been upgraded to version 7.5.	30 min.
8	*Day 2*		Install version 7.5 Siebel Web Server Extension.	1 hour

Table 8. Upgrade Tasks for the Development Environment Scenario

Step	Date	Owner	Task	Duration
9	*Day 2*	Siebel Upgrade Consultant	Upgrade the Siebel database schema, following the procedure in *Upgrade Guide for Microsoft Windows*.	7 hours
10	*Day 3*		Print the list of acceptable errors, errors.rtf, located under *SIEBEL_ROOT*\dbsrvr\oracle.	
11	*Day 3*		Back up the database schema upgrade log files from *SIEBEL_ROOT*\siebsrvr\log: ■ upgwiz.log ■ upgwiz_01.log, and so on Review all errors against the acceptable errors listed in errors.rtf. If you encounter an error that does not appear in errors.rtf, then it is an unacceptable error. Report the condition to Siebel Technical Support, do not rerun the Upgrade Wizard, and do not proceed with the upgrade. See *Upgrade Guide for Microsoft Windows* for more information.	
12	*Day 3*	Siebel Upgrade Consultant, DBA	Back up the premerge development environment database. This backup will enable you to restore to your pre-merge database if you need to recover from a failed merge.	
13	*Day 3*	Siebel Upgrade Consultant	Verify that the database backup made in Step 12 was successful.	
14	*Day 3*	DBA	Optimize your Oracle 8.1.7 database to improve performance of a repository merge. See *Upgrade Guide for Microsoft Windows* for instructions.	
15	*Day 3*	Siebel Upgrade Consultant	Copy all files from the 6.3 file system to the \att subdirectory of the version 7.5 Siebel File System. Update the file system for attachment records that are based on obsolete tables.	
16	*Day 3*		Add Siebel 7 license keys using Siebel Tools version 7.5.	

Table 8. Upgrade Tasks for the Development Environment Scenario

Step	Date	Owner	Task	Duration
17	*Day 3*	Siebel Upgrade Consultant	Prepare the Prior Customer Repository for the merge in Siebel Tools 7.5. ■ Migrate strings ■ Merge labels and fields ■ Merge Web templates Locate the following files in `Tools\TEMP\` ■ `Labelmerge.txt` ■ `Templatemerge.txt`	30 min.
18	*Day 3*		Review and back up the string migration log file: *`SIEBEL_ROOT`*`\tools\objects\stringmigration.log`.	
19	*Day 3*		Set ancestry objects for applets, business components, integration objects, and reports. Setting ancestry objects must be performed after upgrading the repository (upgrep) and before the repository merge.	1-3 hours
20	*Day 3*		Optimize the machine on which you are running the repository merge. See *Upgrade Guide for Microsoft Windows* for instructions.	
21	*Day 3*		Perform the repository merge using Siebel Tools version 7.5. See *Upgrade Guide for Microsoft Windows* for instructions.	6 hours; 10-16 hours for highly customized applications
22	*Day 4*		Review merge status in Siebel Tools to make sure the status is `Complete`. See *Upgrade Guide for Microsoft Windows* for instructions.	
23	*Day 4*		Review object attribute differences for conflicts that may have occurred during repository merge. ■ Review the Object Differences applet of the Application Upgrade Object list view. ■ Review the Attribute Differences applet of the Application Upgrade Attributes list view. See *Upgrade Guide for Microsoft Windows* for instructions to resolve conflicts.	8 hours

Table 8. Upgrade Tasks for the Development Environment Scenario

Step	Date	Owner	Task	Duration
24	*Day 4*	Siebel Upgrade Consultant	If the merge failed, restore the database from the backup made in Step 12, and restart from Step 15 on page 66. The merge is a critical step of upgrade. If the merge failed, it's safe to restart from where the upgrade of your Siebel database schema finished.	
25	*Day 4*		Review the repository merge log files. ■ Review the `merge.txt` file under *`SIEBEL_ROOT`*`\Tools\bin`. ■ Review and backup `upgwiz*.log` files.	
26	*Day 4*	Siebel Upgrade Consultant, DBA	Backup the database after a successful repository merge.	
27	*Day 4*	Siebel Upgrade Consultant	Verify that the database backup made in Step 26 was successful.	
28	*Day 4*		Generate EIM temporary columns for custom mappings. In Siebel 7.5 Tools, choose Tools > Upgrade > Generate EIM Processing Columns.	1 min.
29	*Day 4*		Upgrade the custom database schema, following the procedure in *Upgrade Guide for Microsoft Windows*.	1 hour
30	*Day 4*		Back up the database schema upgrade log files from *`SIEBEL_ROOT`*`\siebsrvr\log:` ■ `upgwiz.log` ■ `upgwiz_01.log`, and so on Review all errors against the acceptable errors listed in `errors.rtf`. as you did in Step 11 on page 66.	
31	*Day 4*		Review the list of business components that require manual migration: *`SIEBEL_ROOT`*`\siebsrvr\log\upgcust.log.` Business components that require manual migration are those that are mapped to obsolete tables, or those that contain fields that are mapped to the extension columns of the obsolete tables.	
32	*Day 4*		Query in Siebel Tools version 7.5 to verify that `New Customer Repository` was renamed to `Siebel Repository`.	

Table 8. Upgrade Tasks for the Development Environment Scenario

Step	Date	Owner	Task	Duration
33	*Day 4*	Siebel Upgrade Consultant, DBA	Back up the upgraded development environment database.	
34	*Day 4*	Siebel Upgrade Consultant	Verify that the database backup made in Step 33 was successful.	

Postupgrade Tasks for the Development Environment Scenario

Table 9 lists the tasks to complete after upgrading the development environment. See *Upgrade Guide for Microsoft Windows* for detailed information about each task.

Table 9. Postupgrade Tasks for the Development Environment Scenario

Step	Date	Owner	Task	Duration
1	*Day 4*	Siebel Upgrade Consultant	Manually archive the `state.log` log file.	
2	*Day 4*		Identify custom extensions that were on tables that are now obsolete, and move these extensions to alternate tables in 7.5. For a list of tables that require attention, review the `xtndobstbl.log` file under *`SIEBEL_ROOT`*`\siebsrvr\log`. Identify any joins in these tables, and review Siebel Tools for custom assignment or workflow objects that map to extension columns in obsolete tables.	4-8 hours
3	*Day 4*		Review the `upgcust.log` file under *`SIEBEL_ROOT`*`\siebsrvr\log`. to identify and resolve any business component and join conflicts.	4-8 hours
4	*Day 4*		If you are implementing Organization visibility, set visibility modes for access control. ■ Verify whether or not the current application uses multi-organization visibility. ■ In Siebel Tools, query for business components with the Popup Visibility Type property set to Catalog, change value to Organization if necessary. ■ Query for applets with the Auto Query Mode property, set to New Query or 'None' to no value if necessary. ■ Query for views with the Visibility Applet Type property set to Catalog, change value to Organization if necessary.	4 hours
5	*Day 4*		Review the `mapclash.log` file under *`SIEBEL_ROOT`*`\siebsrvr\log` to identify and resolve duplicate EIM mappings (custom EIM mappings that conflict with Siebel System provided mappings).	8 hours

Table 9. Postupgrade Tasks for the Development Environment Scenario

Step	Date	Owner	Task	Duration
6	*Day 4*	Siebel Upgrade Consultant	Back up the new custom repository into the `custrep.dat` file located under *`SIEBEL_ROOT`*`\siebsrvr\Oracle`. You need this file for the production repository upgrade.	
7	*Day 4*		Compile a new Siebel Repository File (SRF) using Siebel 7.5 Tools with all projects selected. The new Siebel repository will be created after a successful upgrade of the custom database schema. Save the compiled SRF to the directory, `\client\objects\enu`.	27 min.
8	*Day 4*		Connect to the server database using the new SRF file.	
9	*Day 5*		Regenerate the database template file used by Siebel Remote. See *Upgrade Guide for Microsoft Windows* for more information.	
10	*Day 5*		Extract Siebel Tools developers and clients by executing a database extract server task (DBEXTRACT) from the new Siebel Server for a developer. For instructions, see *Siebel Tools Reference*. Confirm that a developer can initialize a local database.	2 hours
11	*Day 5*		If you deploy to mobile users with local databases, run the DICTUTL utility to verify that all dock objects and rule definitions are correct.	
12	*Day 5*		Review the `dictutl2.log` file located under *`SIEBEL_ROOT`*`\siebsrvr\bin`.	
13	*Day 5*		Review duplicate login IDs. ■ From the application-level menu, select User Administration > Users view. ■ Query for `*+*`. This query will produce a list of all names that are appended with `+row_id`.	
14	*Day 5*		Upgrade the encryption method from the standard encryptor to the RC2 encryption method. Set business component field user properties to the values defined in *Upgrade Guide for Microsoft Windows*.	8 hours

Table 9. Postupgrade Tasks for the Development Environment Scenario

Step	Date	Owner	Task	Duration
15	*Day 5*	Siebel Upgrade Consultant	Set up global time zone support. For detailed instructions, see *Siebel Tools Reference*. If you are extending date-time columns for a future configuration: ■ Set the Physical Type column property to *UTC Date Time.* ■ Set the Type property of business component field column property to *DTYPE_UTCDATETIME.*	8 hours
16	*Day 6*		Run the Web Client Migration Wizard to upgrade custom view and applet definitions. In Siebel 7.5 Tools, select Tools > Upgrade > Web Client Migration. For detailed instructions, see *Upgrade Guide for Microsoft Windows*.	5 min.
17	*Day 6*		Review the migrated applets and views and identify the following by query the Comments field. ■ New applet or new view migrated: *MigN* ■ Modified applet or view migrated: *MigM* ■ New applet or view to be migrated: *TBMN* ■ Modified applet or view to be migrated: *TBMM* ■ Verify the result through edit layout. If necessary, manually regenerate customized applets in Siebel 7.5.	
18	*Day 6*		Use the Web Layout Wizard to migrate applets or views. ■ In Siebel Tools, highlight the applets or views (must belong to same class), right click and then select Web Layout Wizard. ■ Select the model applet, and for list applets, select the maximal visible columns.	
19	*Day 6*		Manually adjust list applet columns sequence and form applet fields layout, as necessary.	8 hours

Table 9. Postupgrade Tasks for the Development Environment Scenario

Step	Date	Owner	Task	Duration
20	*Day 6*	Siebel Upgrade Consultant	Review client side interfaces: ■ Outbound customer applications, for example, one that invokes a desktop application such as Excel from a Siebel Client. ■ Inbound customer applications, for example, automation interface in the Windows client.	16 hours for two interfaces
21	*Day 6*		Configure the Siebel File System Manager. If the File System Manager is set up incorrectly, users cannot access attachments.	
22	*Day 6*	Siebel Expert Services, Siebel Upgrade Consultant	Modify dock objects.	
23	*Day 10*	Siebel Upgrade Consultant	Back up the new custom repository export file, `custrep.dat`, located under *`SIEBEL_ROOT`*`\siebsrvr\Oracle`. You need this file for repository upgrade of the test and production environments.	

Scenario for Upgrading the Test or Production Environment

The tasks in this section outline the process for upgrading the test or production environment. The test or production environment upgrade is divided into three sets of tasks:

- "Preupgrade Tasks for the Test or Production Environment Scenario" on page 74
- "Upgrade Tasks for the Test or Production Environment Scenario" on page 77
- "Postupgrade Tasks for the Test or Production Environment Scenario" on page 80

Preupgrade Tasks for the Test or Production Environment Scenario

Table 10 lists the tasks to complete in preparation for upgrading the test or production environment. See *Upgrade Guide for Microsoft Windows* for detailed information about each task.

Table 10. Preupgrade Tasks for the Test or Production Environment Scenario

Step	Date	Owner	Task
1	*Day 10*	Siebel Upgrade Consultant, DBA	Back up the preupgrade production database. Copy the production database to create a testing database.
2	*Day 11*		Verify the database backup made in Step 1.
3	*Day 11*	DBA	Upgrade Oracle database server software from 8.0.5 to 8.1.7.
4	*Day 11*	Siebel Upgrade Consultant, DBA	Adjust the database server configuration parameters to the settings defined in *Upgrade Guide for Microsoft Windows* to allow for database growth during upgrade.
5	*Day 11*	Siebel Upgrade Consultant	Copy the production Siebel File System to your test environment. Set the test environment file system with the correct sharing privilege.
6	*Day 11*		Complete all the workflow manager tasks. Make sure there is no record in S_ESCL_REQ table.
7	*Day 11*		Save any interface table data.
8	*Day 11*		Disable any customized database triggers and views.

Table 10. Preupgrade Tasks for the Test or Production Environment Scenario

Step	Date	Owner	Task
9	*Day 11*	Siebel Remote Users, Siebel Developers, Siebel Upgrade Consultant	All remote users synchronize their local databases.
10	*Day 11*	Siebel Upgrade Consultant	Disable transaction merger.
11	*Day 11*		If you use eChannel, eConfigurator, Forecasting, Quotes, or Calendars, prepare application data for upgrade.
12	*Day 11*		Complete *Upgrade Planning Worksheet* to record the parameters that will be used during the upgrade. You can find the Upgrade Planning Worksheet in *Upgrade Guide for Microsoft Windows*.
13	*Day 11*		Stop the following services: ■ Siebel Server for the test environment ■ Siebel Gateway for the test environment ■ Oracle services
14	*Day 11*	Siebel Upgrade Consultant	■ Uninstall all but one of the Siebel 6.3 Tools applications from Siebel Tools developers' workstations. One Siebel Tools application is required to perform subsequent tasks in the upgrade. ■ Uninstall Siebel 6.3 database software on the test environment. ■ Uninstall Siebel 6.3 application server on the test environment. ■ Uninstall Siebel 6.3 gateway server for the test environment. ■ Uninstall Oracle client 8.0.5.
15	*Day 11*		Delete all directories related to test environment servers and and restart the machine.
16	*Day 11*	Desktop Administrator	Install Windows 2000 SP2.
17	*Day 11*		Install Internet Explorer (the most recent version and service pack).
18	*Day 11*		Install IIS 5.0. Make sure you can browse the IIS default page without firewall error.
19	*Day 11*		Install Microsoft Office, Microsoft Outlook, and Adobe Acrobat Reader.

Table 10. Preupgrade Tasks for the Test or Production Environment Scenario

Step	Date	Owner	Task
20	*Day 11*	Desktop Administrator, Siebel Upgrade Consultant	Set up the Siebel administrator account (`SADMIN`). See *Siebel Server Installation Guide for Microsoft Windows* for detailed instructions.
21	*Day 11*	Siebel Upgrade Consultant	Set IE security levels (for example, to allow Active X).
22	*Day 11*		Log into Siebel 6.0 Tools, and rename `Siebel Repository` to `Prior Customer Repository`.
23	*Day 11*		Backup and delete all extra repositories in Siebel 6.0 Tools. You only need `Prior Customer Repository`.

Upgrade Tasks for the Test or Production Environment Scenario

Table 11 lists the tasks necessary to upgrade the test or production environment. See *Upgrade Guide for Microsoft Windows* for detailed information about each task.

Table 11. Upgrade Tasks for the Test or Production Environment Scenario

Step	Date	Owner	Task	Duration
1	*Day 11*	Siebel Upgrade Consultant	Test client database connectivity using Oracle SQL PLUS and OBDC connectivity.	
2	*Day 11*		Install the following for version 7.5: ■ Siebel Client ■ Siebel Tools ■ Siebel Sample Database Test version 7.5 Siebel Client and Tools connectivity to the sample database to verify that Siebel 7 software is functioning correctly. Make sure the sample section of the Siebel Client and Tools configuration files point to the correct path.	
3	*Day 11*		Install the version 7.5 Siebel Gateway. See *Siebel Server Installation Guide for Microsoft Windows* for instructions. Share the Siebel Gateway with the development environment.	
4	*Day 11*		Install version 7.5 Siebel Enterprise Server and Siebel Server(s). See *Siebel Server Installation Guide for Microsoft Windows* for instructions. Make sure the service starts.	10 min.
5	*Day 11*		Configure the Siebel Enterprise and Siebel Servers, and enable necessary components.	
6	*Day 11*		Apply a Siebel Maintenance Release, if applicable, to the Siebel Gateway, Siebel Server, Tools, and Client.	
7	*Day 11*		Install the version 7.5 Siebel Database Server software onto one Siebel Server that has already been upgraded to version 7.5.	10 min.
8	*Day 11*		Install version 7.5 Siebel Web Server Extension.	

Table 11. Upgrade Tasks for the Test or Production Environment Scenario

Step	Date	Owner	Task	Duration
9	*Day 11*	Siebel Upgrade Consultant	Export the latest repository file, `customer.dat`, from the development environment to the following directory in the test environment: *`SIEBEL_ROOT`*`\dbsrvr\Oracle`. Change the name of the repository file to `custrep.dat`.	2 hours
10	*Day 11*		Upgrade the Siebel database schema, following the procedure in *Upgrade Guide for Microsoft Windows*.	9 hours
11	*Day 11*		Print the list of acceptable errors, errors.rtf, located under *`SIEBEL_ROOT`*`\dbsrvr\oracle`.	
12	*Day 12*		Review and back up the database schema upgrade log files from *`SIEBEL_ROOT`*`\siebsrvr\log:` ■ `upgwiz.log` ■ `upgwiz_01.log`, and so on Review all errors against the acceptable errors listed in `errors.rtf`. If you encounter an error that does not appear in `errors.rtf`, then it is an unacceptable error. Report the condition to Technical Support, do not rerun the Upgrade Wizard, and do not proceed with the upgrade. See *Upgrade Guide for Microsoft Windows* for more information.	
13	*Day 12*	Siebel Upgrade Consultant, DBA	Back up the database after a successful upgrade of the Siebel database schema.	
14	*Day 12*	Siebel Upgrade Consultant	Verify that the database backup made in Step 13 was successful.	
15	*Day 12*	Siebel Upgrade Consultant, DBA	Optimize the Oracle 8.1.7 database to allow for database growth during upgrade. See *Upgrade Guide for Microsoft Windows* for instructions.	
16	*Day 12*	Siebel Upgrade Consultant	Upgrade the custom database schema, following the procedure in *Upgrade Guide for Microsoft Windows*.	57 min.
17	*Day 12*		Back up the database schema upgrade log files from *`SIEBEL_ROOT`*`\siebsrvr\log:` ■ `upgwiz.log` ■ `upgwiz_01.log`, and so on Review all errors against the acceptable errors listed in `errors.rtf`. as you did in Step 12.	

Table 11. Upgrade Tasks for the Test or Production Environment Scenario

Step	Date	Owner	Task	Duration
18	*Day 12*		Query in Siebel 7.5 Tools to verify that `New Customer Repository` was renamed to `Siebel Repository`.	
19	*Day 12*		Add Siebel 7 license keys using Siebel 7.5 Tools.	
20	*Day 12*	Siebel Upgrade Consultant, DBA	Back up the upgraded development environment database.	
21	*Day 12*	Siebel Upgrade Consultant	Verify that database backup made in Step 20 was successful.	

Postupgrade Tasks for the Test or Production Environment Scenario

Table 12 lists the tasks to complete after upgrading the test or production environment. See *Upgrade Guide for Microsoft Windows* for detailed information about each task.

Table 12. Postupgrade Tasks for the Test or Production Environment Scenario

Step	Date	Owner	Task	Duration
1	*Day 12*	Siebel Upgrade Consultant	■ Copy all files from the 6.3 file system to the `\att` subdirectory of the version 7.5 Siebel File System. ■ Update the file system attachment records that are based on obsolete tables.	
2	*Day 12*		Generate reporting relationships so the three visibility hierarchies—position, organization, and access groups—will display the correct information. See *Upgrade Guide for Microsoft Windows* for instructions.	30 min. to compile; 1 min. to generate reporting relationships
3	*Day 12*		Manually migrate data from custom extensions that are now obsolete. For a list of tables that require attention, review the `xtndobstbl.log` file under *`SIEBEL_ROOT`*`\siebsrvr\log`. Identify any joins in these tables, and review Siebel Tools for custom assignment or workflow objects that map to extension columns in obsolete tables.	
4	*Day 12*		Compile a new Siebel Repository File (SRF) using Siebel 7.5 Tools with all projects selected. The new Siebel repository will be created after a successful upgrade of the custom database schema. Save the compiled SRF to the directory, `\client\objects\enu`.	
5	*Day 12*		Connect to the Siebel Database Server using the new SRF file.	
6	*Day 12*		If you deploy to mobile users with local databases, run the DICTUTL utility to verify that all dock objects and rule definitions are correct.	
7	*Day 12*		Review the `dictutl2.log` file located under *`SIEBEL_ROOT`*`\siebsrvr\bin`.	

Table 12. Postupgrade Tasks for the Test or Production Environment Scenario

Step	Date	Owner	Task	Duration
8	*Day 12*	Siebel Upgrade Consultant	Review duplicate login IDs. ■ From the application-level menu, select User Administration > Users view. ■ Query for `*+*`. This query will produce a list of all names that are appended with `+row_id`.	
9	*Day 12*		Upgrade the encryption method from the standard encryptor to the RC2 encryption method.	4 hours
10	*Day 12*		Set up global time zone support. For detailed instructions, see *Siebel Tools Reference*.	6 hours
11	*Day 12*		Synchronize server components. From the application-level menu, choose View > Site Map > Server Administration > Enterprise Configuration > Batch Component.	
12	*Day 13*		Create a BASE package.	
13	*Day 13*		Create a language package.	
14	*Day 13*		Create the Siebel upgrade wizard kit.	2 hours
15	*Day 13*		Create the Siebel client executable kit.	2 hours
16	*Day 13*		Create the Siebel client executable_enu kit.	2 hours
17	*Day 13*		Add components to upgrade kits.	1 hour
18	*Day 13*		Activate the upgrade kits.	
19	*Day 13*		Apply versions.	
20	*Day 13*		Distribute the upgrade kits.	
21	*Day 13*		Regenerate the database template file. See *Upgrade Guide for Microsoft Windows* for more information.	
22	*Day 13*		Extract mobile users.	
23	*Day 13*		Upgrade connected clients.	
24	*Day 13*		Upgrade mobile clients.	

Index

No Index available for this guide.