Oracle® Business Intelligence Applications Upgrade Guide

Version 7.9

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Contents

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1 What's New in This Release

Oracle Business Intelligence Applications consists of components that were formerly available from Siebel Systems as Siebel Business Analytics Applications (both CRM and Enterprise) with a number of significant enhancements.

The *Oracle Business Intelligence Applications Upgrade Guide* contains information about upgrading to Oracle Business Intelligence Applications from different versions of Siebel Business Analytics Applications.

Oracle recommends reading the Oracle Business Intelligence Applications Release Notes before installing, using, or upgrading Oracle Business Intelligence Applications. The Oracle Business Intelligence Applications Release Notes are available:

- On the Oracle Business Intelligence Applications CD-ROM.

- On the Oracle Technology Network at http://www.oracle.com/technology/documentation/bi_apps.html (to register for a free account on the Oracle Technology Network, go to http://www.oracle.com/technology/about/index.html).

What's New in *Oracle Business Intelligence Applications Upgrade Guide*, Version 7.9

Every section of the *Oracle Business Intelligence Applications Upgrade Guide* was extensively revised to support Release 7.9 of the software.

Changes to Oracle Business Analytics Warehouse Schema

The Siebel Data Warehouse (also referred to as the Siebel Relationship Management Warehouse) was renamed to Oracle Business Analytics Warehouse.

The Oracle Business Analytics Warehouse schema contains the following changes:

- **System columns.** New system columns were added to support incremental ETL processes, audit trail functionality, and multi-tenancy applications.

- **SCD dimensions.** Dimension tables are now SCD capable. New effectivity date columns were added.

- **Obsolete tables.** _SCD dimension tables were made obsolete.

- **Deleted obsolete Columns.** Dropped columns from W_ORG_D that were made obsolete to resolve performance issues on Oracle databases.

- **Consolidated Customer Entity.** Integrated the CONTACT-type customer into W_ORG_D to create a single CUSTOMER entity in the data model.

- **Renamed columns for Teradata database support.** Renamed columns (type, status, and so on) in the data model to enable creation of columns on Teradata databases.

Changes to Oracle BI Repository

The Siebel Analytics repository (SiebelAnalytics.rpd) was renamed to the Oracle Business Intelligence Applications repository (OracleBIApplicationsApps.rpd).

The Oracle BI repository contains the following changes:

■ **Naming conventions.** Logical tables have been renamed to start either with "Dim," to indicate dimension tables, or "Fact," to indicate fact tables.

■ **Data security.** The position security design was modified to use the new table W_POSITION_DH instead of W_PARTY_LOGIN. For more information about data security, see the *Oracle Business Intelligence Applications Installation and Configuration Guide*.

■ **Presentation layer.** Some old catalogs have been replaced with new catalogs. The catalogs that have been replaced are designated with a STOP icon in the presentation layer; these catalogs will be deleted in a future release. It is highly recommended that you migrate your reports to the corresponding new catalogs.

■ **Time dimension.** A common time dimension is used in all new catalogs to indicate a unified time dimension across all facts. Some secondary date dimensions are still exposed when necessary, but they are not conformed to all facts, and, thus, should be used cautiously.

2 Overview of Oracle BI Applications Upgrade

This chapter provides an overview of the Oracle Business Intelligence Applications upgrade process. It includes the following topics:

Supported Upgrade Paths

Oracle Business Intelligence Applications Upgrade Guide provides instructions for upgrading to Oracle Business Intelligence Applications version 7.9 from the previous versions of Siebel Analytics beginning with version 7.5.x.

The major stages of the upgrade process are the same for each of these upgrade paths, except for the upgrade from version 7.5.x. The upgrade from version 7.5.x requires that you upgrade your data warehouse schema and migrate your data first from version 7.5.x to 7.7, and then upgrade your schema and migrate your data from version 7.7. to 7.9.

You can upgrade directly to Oracle Business Intelligence Applications versions 7.9 from any of the previous versions listed below.

- Siebel Business Analytics 7.7
- Siebel Business Analytics 7.7.1.x
- Siebel Business Analytics 7.8.x
- Siebel Business Analytics for Life Sciences 7.8.0, 7.8.1, and 7.8.2

  NOTE: To upgrade from Life Sciences version 7.8.3 or 7.8.4, follow the upgrade instructions for Siebel Business Analytics 7.8.x.

Preupgrade Considerations

You should consider the following points before you begin your upgrade:

- Review the *System Requirements and Supported Platforms for Oracle Business Intelligence Applications* on Siebel SupportWeb to make sure your database platform versions are supported.

■ The upgrade process is not only a technical process. You will also need to analyze the impact of the schema changes on your current custom implementation. The extent of your customizations will have an impact on the length of time required for the upgrade.

In addition, at different stages of the upgrade you will also need to analyze your organization's business requirements. For example, at the stage in which you are upgrading the Oracle Business Intelligence repository, you will need to know which repository objects are not in use so that they can be trimmed from the repository. To determine this information, you will need to know what reports are in use.

■ You should determine what customizations were made to your existing DAC repository before you begin the upgrade process. Moving the customizations in your existing DAC repository into the new DAC repository is a manual process.

■ For each stage of the upgrade process, you need to allocate a reasonable amount of time to validate the results of that stage and address any problems. In addition, final user acceptance testing must confirm that the entire upgrade process was successful.

■ When you upgrade the Siebel Analytics Web Catalog to the Oracle BI Presentation Catalog, it is highly recommended that you use side-by-side environments and have users review and compare reports and dashboard content between the previous version and the upgraded version.

For the other stages of the upgrade, you can upgrade your environments in place. However, for comparison and benchmarking purposes, it is recommended that you upgrade using side-by-side environments.

■ When you move from a development environment to test or production environments, you must perform the following stages of the upgrade process for each environment:

 ■ Upgrade the Platform

 ■ Upgrade the Applications

 ■ Migrate Data

You can migrate the DAC, Informatica, and Oracle BI repositories into the production environment after you merge and test them.

For a description of the major stages of the upgrade process, see .

Best Practices for Preparing to Upgrade

This section provides best practice steps you need to perform before you begin the upgrade process.

■ Review this guide, *Oracle Business Intelligence Applications Upgrade Guide*, in its entirety.

■ Rename and copy into a different location your current repositories, Web catalog, and DAC installation folder from your existing environment. The file names and locations listed below represent the standard names and locations of files that shipped with previous versions of Siebel Business Analytics Applications.

When you backup the DAC repository, you export the DAC metadata, in XML format (using the DAC's Export tool), into a different database, which can be used later as a reference. For instructions, see the *Oracle Business Intelligence Data Warehouse Administration Console Guide*.

Type	Name	Location
DAC metadata repository	*.xml	SiebelAnalytics\DAC\export
Analytics repository	SiebelAnalytics.rpd	SiebelAnalytics\Repository
Informatica repository	Siebel_DW_rep.rep	SiebelAnalytics\dwrep\Informatica\Repository
Web catalog	<file_name>.webcat	SiebelAnalyticsData\Web\catalog
DAC installation folder	DAC	SiebelAnalytics\DAC

■ Gather information that describes the current implementation, including the following:

■ Version of the Siebel transactional database to which you upgraded.

■ Version of the Siebel Business Analytics platform from which you are upgrading.

To determine the Analytics platform version from which you are upgrading, launch the Siebel Analytics Administration Tool, and click Help > Administration Tool in the toolbar. A message box provides the platform version.

■ Version of Siebel Business Analytics Applications from which you are upgrading.

To determine the version of Siebel Business Analytics Applications from which you are upgrading, launch the Data Warehouse Administration Console (DAC), and click Help > Metadata Version. A message box provides the metadata version, which will be either 7.7, 7.7.1, or 7.8.

❏ If your metadata version is 7.7, you are running Siebel Analytics 7.7.

❏ If your metadata version is 7.7 and your transactional database version is 6.3.x, you are running the Siebel Analytics Bridge - 6.3.

❏ If your metadata version is 7.7 and your transactional database version is 7.5.x, you are running the Siebel Analytics Bridge - 7.5.

❏ If your metadata version is 7.7.1, you are running Siebel Analytics Bridge 7.7.1.x.

❏ If your metadata version is 7.8, you are running Siebel Business Analytics Applications version 7.8.x.

NOTE: If the DAC is not a component of your Analytics installation, you are running Analytics 7.5.x.

Major Stages of Oracle BI Applications Upgrade

Figure 1 shows the upgrade flow for the major stages of the Oracle Business Intelligence Applications upgrade process. Table 1 provides the documentation you should refer to for each stage of the upgrade. For the detailed steps and tasks associated with each stage, see Table 2.
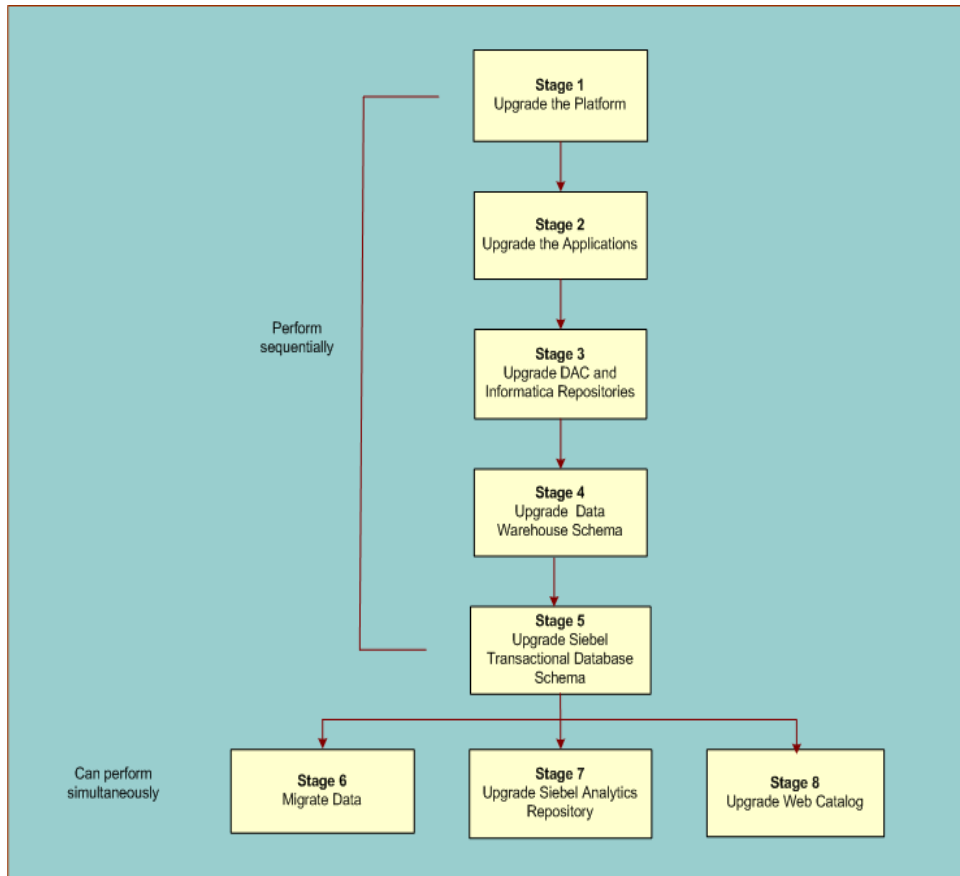
Figure 1.   Oracle Business Intelligence Applications Upgrade Flow

Sequence of Upgrade Stages

You must complete stages one through five sequentially, in the following order: 1) upgrade the Siebel Business Analytics platform to the Oracle BI Infrastructure; 2) upgrade the Siebel Business Analytics Applications to the Oracle Business Intelligence Applications; 3) upgrade the metadata in the DAC and Informatica repositories; 4) upgrade the data warehouse schema; 5)upgrade the Siebel transactional database schema.

You can perform stages six through eight simultaneously; that is, you can migrate data into the upgraded data warehouse (stage six), upgrade the Siebel Analytics repository (stage seven), and upgrade the Web catalog (stage eight) at the same time. However, you cannot test the results of your Web catalog upgrade, which you do in the procedure , until you have finished migrating your data.

Table 1.   Major Stages of the Oracle Business Intelligence Applications Upgrade and Related Documentation

Stage		Related Documentation
1	Upgrade the Siebel Business Analytics Platform to Oracle BI Infrastructure. **NOTE:** The Oracle Business Intelligence infrastructure is code-independent from the Oracle Business Intelligence Applications.	■ *Oracle Business Intelligence Infrastructure Upgrade Guide*
2	Upgrade the Siebel Business Analytics Applications to Oracle Business Intelligence Applications.	■ *Oracle Business Intelligence Applications Upgrade Guide*
3	Upgrade the DAC and Informatica repositories.	■ *Oracle Business Intelligence Applications Upgrade Guide* ■ *Oracle Business Intelligence Data Warehouse Administration Console Guide*
4	Upgrade the data warehouse schema.	■ *Oracle Business Intelligence Applications Upgrade Guide*
5	Upgrade the Siebel transactional database schema.	■ *Oracle Business Intelligence Applications Upgrade Guide*
6	Migrate data into the upgraded data warehouse.	■ *Oracle Business Intelligence Applications Upgrade Guide*
7	Upgrade the Siebel Analytics repository to the Oracle BI repository.	■ *Oracle Business Intelligence Applications Upgrade Guide* ■ *Oracle Business Intelligence Server Administration Guide*
8	Upgrade the Siebel Business Analytics Web Catalog to the Oracle BI Presentation Catalog.	■ *Oracle Business Intelligence Applications Upgrade Guide* ■ *Oracle Business Intelligence Infrastructure Upgrade Guide* ■ *Oracle Business Intelligence Presentation Services Administration Guide*

CAUTION: It is highly recommended that you consider obtaining support from Professional Services to assist with the end-to-end upgrade process.

NOTE: Upgrading Oracle's Siebel Customer Relationship Management applications is out of the scope of this document. Upgrading your current version of Siebel CRM applications is optional.

3 Upgrading Oracle BI Applications

This chapter provides the detailed tasks required to upgrade Oracle Business Intelligence Applications. The following topics are included:

- Detailed Tasks for Upgrading to Oracle BI Applications on page 13
- Upgrading Oracle BI Infrastructure on page 15
- Upgrading Oracle BI Applications on page 15
- Upgrading the DAC Repository on page 15
- Upgrading to Informatica Version 7.1.4 on page 18
- Upgrading the Informatica Repository on page 18
- Upgrading the Data Warehouse Schema on page 19
- Process of Upgrading the Siebel Transactional Database Schema on page 21
- Migrating Data into the Upgraded Data Warehouse on page 22
- Verifying ETL Customizations on page 52
- Process of Upgrading the Siebel Analytics Repository on page 52
- Process of Upgrading the Analytics Web Catalog on page 57

Detailed Tasks for Upgrading to Oracle BI Applications

Table 2 provides the detailed steps and corresponding tasks you need to perform to upgrade to Oracle Business Intelligence Applications. It also provides a link to the instructions for each task or a cross-reference for an alternative guide.

You must perform stages one and two sequentially. You can perform stages three, four, and five simultaneously, but you must perform the tasks for these stages in the order listed in Table 2.

Table 2.   Detailed Task List for Upgrading Oracle Business Intelligence Applications

Step	Instructions for Task Corresponding to Step
Stage 1: Upgrade the Platform	
1 Upgrade the Siebel Business Analytics Platform to Oracle BI Infrastructure.	*Oracle Business Intelligence Infrastructure Upgrade Guide.*
Stage 2: Upgrade the Applications	

Table 2.   Detailed Task List for Upgrading Oracle Business Intelligence Applications

Step	Instructions for Task Corresponding to Step
2 Upgrade the Siebel Business Analytics Applications to Oracle Business Intelligence Applications.	*Oracle Business Intelligence Applications Installation and Configuration Guide*.
Stage 3: Upgrade the DAC and Informatica Repositories	
3 Upgrade the Data Warehouse Administration Console (DAC) repository.	Upgrading the DAC Repository on page 15.
4 Upgrade the Informatica platform.	Upgrading to Informatica Version 7.1.4 on page 18
5 Upgrade the Informatica repository.	Upgrading the Informatica Repository on page 18
Stage 4: Upgrade the Data Warehouse Schema	
6 Upgrade the data warehouse schema.	Upgrading the Data Warehouse Schema on page 19
Stage 5: Upgrade Siebel Transactional Database Schema	
7 Upgrade the Siebel Transactional Database Schema	Process of Upgrading the Siebel Transactional Database Schema on page 21
8 Import new schema definitions into the Siebel transactional Database.	■ Importing New Schema Definitions into the Siebel Transactional Database on page 21
9 Verify the Siebel transactional database upgrade.	■ Verifying the Siebel Transactional Database Upgrade on page 22
Stage 6: Migrate Data	
10 Migrate data into the upgraded data warehouse.	Process of Upgrading the Siebel Analytics Repository on page 52
11 Verify ETL customizations.	Verifying ETL Customizations on page 52.
Stage 7: Upgrade the Siebel Analytics Repository	
12 Upgrade the Siebel Analytics repository to the Oracle BI repository.	Process of Upgrading the Siebel Analytics Repository on page 52.
a Prepare for the Analytics repository upgrade.	■ Preparing for the Analytics Repository Upgrade on page 53
b Equalize the Analytics repositories.	■ Equalizing the Analytics Repositories on page 54.
c Compare the Analytics repositories	■ Comparing the Analytics Repositories on page 55.
d Merge the Analytics repositories.	■ Merging the Analytics Repositories on page 55.

Table 2.   Detailed Task List for Upgrading Oracle Business Intelligence Applications

Step		Instructions for Task Corresponding to Step
e	Regression test the Analytics repository merge.	■ Regression Testing the Analytics Repository Merge on page 57.
Stage 8: Upgrade the Web Catalog		
13	Upgrade the Siebel Business Analytics Web Catalog to the Oracle BI Presentation Catalog.	Process of Upgrading the Analytics Web Catalog on page 57
a	Trim the Web Catalog.	■ Trimming the Input Web Catalog on page 58
b	Upgrade the Analytics Web Catalog to the Oracle BI Presentation Catalog.	■ Upgrading the Analytics Web Catalog to the Oracle BI Presentation Catalog on page 58
c	Test the results of the Presentation Catalog upgrade.	■ Testing the Results of the Presentation Catalog Upgrade on page 59

Upgrading Oracle BI Infrastructure

For information on upgrading the Siebel Analytics platform to the Oracle Business Intelligence Infrastructure, see the *Oracle Business Intelligence Infrastructure Upgrade Guide*.

Upgrading Oracle BI Applications

For instructions on installing the Oracle BI Applications, see *Oracle Business Intelligence Applications Installation and Configuration Guide*.

Upgrading the DAC Repository

Before you begin this procedure, do the following:

■ Determine what customizations were made to your existing DAC repository. Moving the customizations in your existing DAC repository into the new DAC repository is a manual process.

■ Make sure you have renamed and backed up your existing DAC repository into a different database. When you backup the DAC repository, you export the DAC metadata, in XML format (using the DAC's Export tool), into a different database, which can be used later as a reference. For instructions, see the *Oracle Business Intelligence Data Warehouse Administration Console Guide*.

■ Create and configure a new DAC repository according to the instructions in *Oracle Business Intelligence Applications Installation and Configuration Guide*.

■ Make sure you have set up the DAC system properties, Informatica Server, Informatica Repository Server, and database connections according to the instructions in *Oracle Business Intelligence Applications Installation and Configuration Guide*.

■ Make a copy of your preconfigured source system container. (You cannot change the metadata in the preconfigured container. You must make a copy of it in order to be able to modify the objects it contains. For instructions, see *Oracle Business Intelligence Data Warehouse Administration Console Guide*.

In this step you will manually move your customizations from your previous DAC repository into the new DAC repository.

To manually move your customizations from the previous DAC repository into the new DAC repository

1 In the DAC, open the copy of the source system container into which you want to move your customizations.

2 Import the custom data warehouse tables:

    a Navigate to Design > Tables.

    b Right-click and select Import from Database > Import Database Tables.

    c In the Data Sources drop-down list, select DataWarehouse.

    d Click Read Tables.

    e Select the tables you want to import, and then click Import Tables.

3 Import the custom columns for the tables you imported in Step 2:

    a In the Tables tab, query for the tables you imported in Step 2.

    b Right-click and select Import from Database > Import Database Columns.

    c In the Importing Columns… dialog box, select "All records in the list," and click OK.

    d In the Data Sources drop-down list, select DataWarehouse.

    e Click Read Columns.

    f Select the columns you want to import, and then click Import Columns.

    g Navigate to Tables > Columns and add the Foreign Key to Table and Foreign Key to Column attributes for the newly imported columns.

4 Import the indices for the custom data warehouse tables.

    a In the Tables tab, query for the tables you imported in Step 2.

    b Right-click and select Import Indices.

    c In the Importing Indices… dialog box, select "All records in the list," and click OK.

    d In the Data Sources drop-down list, select DataWarehouse.

    e Click Read Indices.

    f Select the indices you want to import, and then click Import Indices.

5 Import the custom source tables:

  a Navigate to Design > Tables.

  b Right-click and select Import from Database > Import Database Tables.

  c In the Data Sources drop-down list, select the appropriate source.

  d Click Read Tables.

  e Select the tables you want to import, and then click Import Tables.

   NOTE: You do not have to import columns for the custom source tables. Columns for source tables are not required.

6 Import columns for any standard data warehouse tables that were extended, and add the appropriate attributes in the DAC.

7 Create new custom logical and physical task folders.

  a In the DAC, navigate to Tools > Seed Data > Task Folders.

  b To create a custom logical folder, click New.

  c In the Name field, enter a name for the custom logical folder, for example, Custom Logical.

  d In the Type field, select Logical.

  e To create a custom physical folder, click New.

  f In the Name field, enter a name for the custom physical folder, for example, Custom Physical.

  g In the Type field, select Physical.

8 Register the folders you created in Step 7 in the Source System Folders tab.

  a Navigate to Design > Source System Folders.

  b Click New.

  c Enter the name of the Custom Logical folder in the Logical Folder field.

  d Enter the name of the Custom Physical folder in the Physical Folder field, and save the record.

9 Modify the task attributes for workflows in the custom folder that are modified standard mappings, that is, standard (out-of-the-box) mappings from the previous release that you copied into the Informatica custom folder.

  a Navigate to the Tasks tab and query for the Informatica workflow names that are in the Informatica custom folder under Command for Incremental Load or Command for Full Load.

   NOTE: You need to review the workflows in the custom folder in Informatica Workflow Manager.

  b For each task, change the Folder Name (in the Edit child tab) to the Custom Logical folder name.

  c For each task, right-click and select Synchronize Tasks.

  d In the Task Synchronization dialog box, select Selected Record Only, and click OK.

   This step adds source and target tables to the task.

      e   Click Yes in the Synchronizing Task(s)… dialog box to proceed.

          An informational message will indicate the results of the process.

      f   Click OK.

10 Add tasks that were created as new tasks in the current implementation.

      a   In the DAC, navigate to Tasks > Edit.

      b   For each new task, copy the names of the Informatica workflows into the fields Command for Incremental Load and Command for Full Load.

      c   Assign the appropriate values for the remaining fields in the Edit child tab.

      d   In the Tasks tab, query for the tasks you entered in Step b.

      e   Right-click the list of query results, and in the Task Synchronization dialog box, select "All records in the list," and click OK.

          This step adds source tables and target tables to the task.

      f   Click Yes in the Synchronizing Task(s)… dialog box to proceed.

          An informational message will indicate the results of the process.

      g   Click OK.

NOTE: If your customizations included new fact tables, you will need to create and assemble new subject areas as well as create and build new execution plans. If your customizations included extending dimension tables, you will need to reassemble your existing subject areas and rebuild your existing execution plans. You will also need to set the appropriate execution plan attributes, such as Prune Days. For instructions, see *Oracle Business Intelligence Data Warehouse Administration Console Guide*.

You will verify the DAC repository upgrade in the procedure "Verifying ETL Customizations" on page 52, which you perform after the data migration.

Upgrading to Informatica Version 7.1.4

For information on upgrading to Informatica version 7.1.4, see the Informatica documentation, which is provided in the Third_Party_Software\Informatica\Informatica 7.1.4 PowerCenter Doc folder of the Oracle Business Intelligence Applications CD-ROM.

NOTE: You do not need to uninstall the previous version of Informatica before running the installation program. However, you need to stop the Informatica service before you install the Informatica Server and stop the Repository Server service before you install the Repository Server.

Upgrading the Informatica Repository

Follow this procedure to upgrade the Informatica repository.

To upgrade the Informatica repository

1 Make sure you have backed up and renamed your current Informatica repository.

For instructions, see the Informatica documentation, which is provided in the Third_Party_Software\Informatica\Informatica 7.1.4 PowerCenter Doc folder of the Oracle Business Intelligence Applications CD-ROM.

2 Copy the Oracle_BI_DW_Base.rep file from the folder OracleBI\dwrep\Informatica\Repository into the folder Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup.

3 Launch the Informatica Repository Console and restore Oracle_BI_DW_Base.rep (located in Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup).

4 Copy the custom folder from your previous Informatica repository to the newly created Informatica repository:

a Launch the Informatica Repository Manager, and connect to both your previous and newly created Informatica repositories.

b Copy the Custom folder in your previous repository into the newly created Informatica repository.

c Create an individual workflow for each of the mappings in the Custom folder.

d New system columns were added to the Oracle Business Analytics Warehouse for Oracle BI Applications version 7.9. Review your custom mappings to determine whether the new columns need to be added to the mapping.

e Register the mappings in the DAC.

You will verify your customized mappings in the procedure "Verifying ETL Customizations" on page 52, which you perform after the data migration.

Upgrading the Data Warehouse Schema

NOTE: This procedure applies to all upgrade paths except for upgrades from version 7.5.x. If you are upgrading from version 7.5.x, go directly to one of the following procedures: "To migrate data from version 7.5.x to 7.9 (Horizontal)" on page 22, or "To migrate data from version 7.5.x to 7.9 (Vertical)" on page 34. These procedures provide instructions for upgrading the data warehouse schema.

This procedure adds new tables, columns, and indexes to the existing data warehouse schema. It does not alter or disrupt your existing data. During this procedure, you will run four different scripts. Below is a description of what each script does.

Data Warehouse Schema Upgrade Scripts (for All Versions Except 7.5.x)

■ **UPGRADE.ctl.** This script upgrades older schemas to the Siebel Industry Applications 7.8.4 version. It adds new tables and columns and modifies existing columns. It also adds lookup tables. This script is necessary for all previous versions of Siebel Business Applications and Siebel Industry Applications.

■ **790_UPGRADE_PRE_CTL_SCRIPT.sql.** For all database types except for DB2, this script renames columns to support Teradata databases. It also adds default values in columns in case a column changes from nullable to not null, and truncates all fact and dimension staging tables.

For DB2 databases, this script does not rename columns. Instead, the new columns are updated with the old values in the 790_UPGRADE_PRE_DIMENSION_SCRIPT.sql.

■ **DW.ctl.** This script upgrades the schema to the version Oracle BI Applications 7.9.

■ **790_UPGRADE_PRE_DIMENSION_SCRIPT.sql.** This script creates backup tables for the dimension and fact tables that are being updated during the 7.8.4 to 7.9 upgrade. The backup tables are called <table_name>_784.

This script also sets the SRC_EFF_FROM_DT and EFFECTIVE_FROM_DT to 1/1/1899 in the tables where these columns were defaulted to SYSDATE in DW.ct.

For DB2 databases, this script contains update commands to load new column names from the old column names.

To upgrade the data warehouse schema

1 Run the UPGRADE.ctl script.

This script upgrades older schemas to the version of Siebel Industry Applications 7.8.4, from which in a later step you will upgrade to version 7.9.

   a Navigate to the folder OracleBI\dwrep\Upgrade\CTLFiles.

   b Use the DDLimp utility to run the UPGRADE.ctl script. Use the following command:

```
..\OracleBI\dwrep\bin\DDLIMP /U <USER> /P <PASSWORD> /C <ODBC connect string>
/G SSE_ROLE /R Y /F <..\OracleBI\dwrep\UPGRADE.CTL>
/L <..\oracleBI\dwrep\UPGRADE.log>
```

For example:

```
DDLIMP /U SADMIN /P SADMIN /C SIEBEL_OLTP /G SSE_ROLE
/R Y /F C:\OracleBI\dwrep\UPGRADE.CTL /L C:\OracleBI\dwrep\UPGRADE.log
```

Notes:

❑ /P <PASSWORD> - The password for Oracle's CRM OLTP.

❑ /C <ODBC connect string> - The name of the ODBC connect string.

❑ For Oracle databases, use the Siebel Merant ODBC Drivers.

❑ In addition, you can use the following commands:

❑ /W Y - If the OLTP database is Oracle and Unicode.

❑ /Z Y - If the OLTP database is DB2 or SQL Server and Unicode.

❑ /B <TABLE_SPACE_NAME> - If you want to create these tables in a separate table space. For DB2, This must be specified as 32K tablespace.

❑ /X <INDEX_TABLE_SPACE_NAME> - If you want to create the indexes in a separate tablespace. For DB2, This must be specified as 32K tablespace.

❑ /Y - Storage File for DB2/390.

❑ /R - Regrant tables.

2 Run the 790_UPGRADE_PRE_CTL_SCRIPT.sql script.

   a Open the SQL client for your database type, for example, SQLPLUS for Oracle, Query Analyzer for SQL Server, or a command window for DB2.

   b Navigate to the folder OracleBI\dwrep\Upgrade\DbScripts\<database type>.

   c Open the 790_UPGRADE_PRE_CTL_SCRIPT.sql file, and copy the contents into the SQL client.

   d Execute the script.

3 Navigate to the folder OracleBI\dwrep\Upgrade\CTLFiles, and use the DDLimp utility to run the DW.ctl script.

Use the command provided in Step 1, but substitute the correct script name.

4 Run the 790_UPGRADE_PRE_DIMENSION_SCRIPT.sql script.

   a Open the SQL client for your database type.

   b Navigate to the folder OracleBI\dwrep\Upgrade\DbScripts\<database type>.

   c Open the 790_UPGRADE_PRE_DIMENSION_SCRIPT.sql file, and copy the contents into the SQL client.

   d Execute the script.

Process of Upgrading the Siebel Transactional Database Schema

This procedure upgrades transactional database objects that relate to Oracle Business Intelligence Applications. It does not upgrade transactional database objects for CRM applications.

This process includes the following tasks:

■ Importing New Schema Definitions into the Siebel Transactional Database on page 21

■ Verifying the Siebel Transactional Database Upgrade on page 22

Importing New Schema Definitions into the Siebel Transactional Database

Follow this procedure to import new schema definitions into the Siebel transactional database.

To import new schema definitions into the Siebel transactional database

■ Use the DDLimp utility to run the DDL_OLTP.ctl script that is located in the OracleBI\dwrep\Upgrade\CTLFiles folder.

Verifying the Siebel Transactional Database Upgrade

Follow this procedure to verify the following tables were created in the Siebel transactional database.

To verify the transactional database upgrade

■ For all upgrade paths, verify the following tables were created in the Siebel transactional database:

- ■ S_ETL_R_IMG_1 through S_ETL_R_IMG_166
- ■ S_ETL_I_IMG_1 through S_ETL_I_IMG_166
- ■ S_ETL_D_IMG_1 through S_ETL_D_IMG_166
- ■ S_ETL_PARAM
- ■ S_ETL_PRD_ATTR
- ■ S_ETL_PRD_REL

Migrating Data into the Upgraded Data Warehouse

To migrate data into the upgraded data warehouse, follow the appropriate procedure listed in Table 3 based on the version of Analytics from which you are upgrading.

Table 3.   Procedures for Migrating Data

From Version	Procedure
Siebel Analytics 7.5.x (Horizontal)	■ To migrate data from version 7.5.x to 7.9 (Horizontal) on page 22
Siebel Business Analytics 7.7, 7.7.1.x, or 7.8 (Horizontal)	■ To migrate data from versions 7.7, 7.7.1.x, or 7.8 to 7.9 (Horizontal) on page 29
Siebel Industry Applications 7.5.x (Vertical)	■ To migrate data from version 7.5.x to 7.9 (Vertical) on page 34
Siebel Industry Applications 7.7, 7.7.1.x, or 7.8 (Vertical)	■ To migrate data from versions 7.7, 7.7.1.x, or 7.8 to 7.9 (Vertical) on page 41
Life Sciences 7.8.0, 7.8.1, or 7.8.2 (Vertical)	■ To migrate data from Life Sciences 7.8.0, 7.8.1 or 7.8.2 to 7.9 on page 47

To migrate data from version 7.5.x to 7.9 (Horizontal)

NOTE: Upgrading from version 7.5.x requires two stages. In the first stage, you upgrade the data warehouse schema and migrate the data from version 7.5.x to 7.7. In the second stage, you upgrade the data warehouse schema and migrate the data from version 7.7 to 7.9.

1 Upgrade the data warehouse schema from version 7.5.x to 7.7 by using the DDLimp utility to run the script ddlsme_HOR_77.ctl script.

   a Navigate to the folder OracleBI\dwrep\Upgrade\CTLFiles.

   b Use the DDLimp utility to run the ddlsme_HOR_77.ctl script. Use the following command:

```
..\OracleBI\dwrep\bin\DDLIMP /U <USER> /P <PASSWORD> /C <ODBC connect string>
/G SSE_ROLE /R Y /F <..\OracleBI\dwrep\ddlsme_HOR_77.ctl>
/L <..\oracleBI\dwrep\ddlsme_HOR_77.log>
```

For example:

```
DDLIMP /U SADMIN /P SADMIN /C SIEBEL_OLTP /G SSE_ROLE
/R Y /F C:\OracleBI\dwrep\ddlsme_HOR_77.ctl /L
C:\OracleBI\dwrep\ddlsme_HOR_77.log
```

Notes:

   ❏ /P <PASSWORD> - The password for Oracle's CRM OLTP.

   ❏ /C <ODBC connect string> - The name of the ODBC connect string.

   ❏ For Oracle databases, use the Siebel Merant ODBC Drivers.

   ❏ In addition, you can use the following commands:

   ❏ /W Y - If the OLTP database is Oracle and Unicode.

   ❏ /Z Y - If the OLTP database is DB2 or SQL Server and Unicode.

   ❏ /B <TABLE_SPACE_NAME> - If you want to create these tables in a separate table space. For DB2, This must be specified as 32K tablespace.

   ❏ /X <INDEX_TABLE_SPACE_NAME> - If you want to create the indexes in a separate tablespace. For DB2, This must be specified as 32K tablespace.

   ❏ /Y - Storage File for DB2/390.

   ❏ /R - Regrant tables.

2 Copy the file Upgrade.rep file from the folder OracleBI\dwrep\Upgrade\Informatica\Repository into the folder Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup.

3 Launch the Informatica Repository Console and restore Upgrade.rep (located in Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup).

4 Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\ParameterFiles and copy the file 753_TENERIFE_UPG_PARAMS.txt into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.

5 Rename 753_TENERIFE_UPG_PARAMS.txt to TENERIFE_UPG_PARAMS.txt.

6 In Informatica Workflow Manager, navigate to the folder UPGRADE_753_to_770_HOR, and execute the following workflows in the order indicated:

   a Upgrade_R_Image

   b Upgrade_Unspecifieds

   c Upgrade_Agree

    d   Upgrade_Asset

    e   Upgrade_Opty

    f   Upgrade_Order

    g   Upgrade_Quote

    h   Upgrade_Response

    i   Upgrade_ServiceRequest

    j   Upgrade_Others

    k   Upgrade_Visibility

    l   UpgradeSlowlyChangingDimensionStartDates

    m   DAC_Metadata_Upgrade_Workflow

7 Upgrade the data warehouse schema from version 7.7 to 7.9 by following the steps in the procedure .

8 Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\SrcFiles and copy the *.csv files into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.

9 Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\ParameterFiles and copy the file 770_TENERIFE_UPG_PARAMS.txt into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.

10 Rename 770_TENERIFE_UPG_PARAMS.txt to TENERIFE_UPG_PARAMS.txt.

11 In the file TENERIFE_UPG_PARAMS.txt:

    a   Search for the parameter $$SourceConnection.

    b   Set the value to one of the following options, based on your Siebel applications (OLTP) version:

        ❑   SEBL_63

        ❑   SEBL_753

        ❑   SEBL_771

        ❑   SEBL_78

        ❑   SEBL_80

        ❑   SEBL_VERT_753

        ❑   SEBL_VERT_771

        ❑   SEBL_VERT_78

        ❑   SEBL_VERT_80

    For example, if your Siebel applications (OLTP) version is Siebel Industry Applications 7.5.x, the parameter should appear as:

    $$SourceConnection=SEBL_VERT_753

12 In the file TENERIFE_UPG_PARAMS.txt:

a Search for the parameter $$Source_Container.

b Set the value to one of the following options, based on your Siebel applications (OLTP) version:

- ❏ Siebel 6.3

- ❏ Siebel 7.5.3

- ❏ Siebel 7.5.3 Vertical

- ❏ Siebel 7.7.1

- ❏ Siebel 7.7.1 Vertical

- ❏ Siebel 7.8

- ❏ Siebel 7.8 Vertical

- ❏ Siebel 8.0

- ❏ Siebel 8.0 Vertical

For example, if your Siebel applications (OLTP) version is Siebel Industry Applications 7.5.x, the parameter should appear as:

`$$Source_Container=Siebel 7.5.3 Vertical`

13 In the file TENERIFE_UPG_PARAMS.txt, edit the ETL_PROC_WID parameter as follows:

`MPLT_GET_ETL_PROC_WID. $$ETL_PROC_WID=<latest ETL_PROC_WID value from your database>`

You can get this value from W_PARAM_G.ETL_PROC_WID.

14 In the Informatica Workflow Manager, open the Relational Connection Browser (Connections > Relational), and do the following:

a Edit the preconfigured ODBC connection PARAM_OLTP_SIEBEL to point to the Siebel transactional database.

b Edit the preconfigured ODBC connection DataWarehouse to point to the newly upgraded data warehouse database.

c Edit the preconfigured ODBC connection PARAM_DAC_OLD to point to the previous DAC repository database (the version from which you are upgrading).

d Edit the preconfigured ODBC connection PARAM_DAC_NEW to point to the new DAC repository database (the version to which you are upgrading).

15 In Informatica Workflow Manager, navigate to the folder UPGRADE_770_to_79, and execute the following workflows in the order indicated:

a MARKETING_LOAD

b Update_Dimensions

c Update_Dimension_Unspecified

d Update_Facts

e SIL_PositionDimensionHierarchy_Full

f Load_INT_ORG_DH

g DIMENSION_LOAD

h DIMENSION_UNSPECIFIED_UPDATE

i FACT_UPDATE

16 Run the Reset_infa_seq_gen.bat script to initialize the Informatica sequence generator for incremental runs:

a Navigate to the directory \OracleBI\dwrep\Upgrade\DbScripts\<database type>.

b Open the Reset_infa_seq_gen.bat script, and review the parameters at the top of the file.

c Replace the existing values for the parameters to reflect your environment (the parameters are database-specific).

For Oracle databases:

Parameter	Setting

TARGET_USERID_PWD	`<olap schema user-name>/<olap schema password>@<olap database TNS name>`
	
	For example:
	
	`TARGET_USERID_PWD=siebel/siebel@siebel_olap`

INFA_USERID_PWD	`<user-name of Informatica Repository database that contains the adapter mappings repository metadata>/ <password of the Informatica Repository database>@<TNS name of the database for the Informatica Repository>`
	
	For example:
	
	`INFA_USERID_PWD=INFAREP/INFAREP@infa.corp.siebel.com`

INFA_REP	Name of the Informatica Repository where the adapter mappings are available.
INFA_U	User name of the administrator of the Informatica Repository.
INFA_P	Password for the administrator of the Informatica Repository.
INFA_SRV	Name of the Informatica Server.

For Microsoft SQL Server databases:

Parameter	Setting
OLAP_SERVER	Name of the SQL Server for the OLAP database.
OLAP_DB	Name of the database on which OLAP data is available.
OLAP_U	User name for logging into the database on which OLAP data is available.
OLAP_P	Password for logging into the database on which OLAP data is available.
INFA_SERVER	Name of the SQL Server for the Informatica Repository database.
INFA_DB	Name of the database on which Informatica Repository metadata is available.
INFA_U	User name for logging into the database on which Informatica Repository metadata is available.
INFA_P	Password for logging into the database on which Informatica Repository metadata is available.

Parameter	Setting
INFA_REP	Name of the Informatica Repository where adapter mappings are available.
INFA_REP_U	User name of the administrator of the Informatica Repository.
INFA_REP_P	Password of the administrator of the Informatica Repository.

For IBM DB2 databases:

Parameter	Setting
TARGET_USERID_PWD	<olap schema user-name>/<olap schema password>@<olap database name> For example: TARGET_USERID_PWD=siebel/db2@OLAP_DB2DB
INFA_USER	User name for logging into the database on which Informatica metadata is available.
INFA_PWD	Password for logging into the database on which Informatica Repository metadata is available.
INFADB_ALIAS	Name of the database in which Informatica Repository metadata is available.
INFA_REP	Name of the Informatica Repository where the adapter mappings are available.
INFA_U	User name of the administrator of the Informatica Repository.
INFA_P	Password of the administrator of the Informatica Repository.
INFA_SRV	Name of the Informatica Server.

d Run the script.

NOTE: Because the Reset_infa_seq_gen.bat file contains user names and passwords, it is recommended that you delete the file after the upgrade process is complete.

17 To verify the data migrated successfully:

a Check whether any of the Informatica mapping log files stored in the directory \Informatica PowerCenter 7.1.4\Server\SessLogs indicates errors or failures.

b Check whether the SQL scripts (790_UPGRADE_PRE_CTL_SCRIPT.sql and 790_UPGRADE_PRE_DIMENSION_SCRIPT.sql) that you ran in the SQL client of the database failed or errored out while executing.

c Check the log files for the CTL files (Upgrade.ctl and DW.ctl) that you ran using the DDLimp command to determine whether any of the runs failed.

If you did not detect any errors or failures in the steps above, then the data migration was successful.

18 (Optional) If the data migration was successful, drop the tables that were created during the upgrade process, such as, W_xxxx_x_784 tables, LKP_xxxx_x, and W_ASSET_D_TMP.

This step frees the space occupied by these backup tables.

To migrate data from versions 7.7, 7.7.1.x, or 7.8 to 7.9 (Horizontal)

1 Copy the file Upgrade.rep file from the folder OracleBI\dwrep\Upgrade\Informatica\Repository into the folder Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup.

2 Launch the Informatica Repository Console and restore Upgrade.rep (located in Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup).

3 Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\SrcFiles and copy the *.csv files into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.

4 Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\ParameterFiles and copy the file <previous version of Siebel Analytics>_TENERIFE_UPG_PARAMS.txt into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.

5 Rename the file <previous version of Siebel Analytics>_TENERIFE_UPG_PARAMS.txt to TENERIFE_UPG_PARAMS.txt.

6 In the file TENERIFE_UPG_PARAMS.txt:

   a Search for the parameter $$SourceConnection.

   b Set the value to one of the following options, based on your Siebel applications (OLTP) version:

   ❑ SEBL_63

   ❑ SEBL_753

   ❑ SEBL_771

   ❑ SEBL_78

   ❑ SEBL_80

   ❑ SEBL_VERT_753

   ❑ SEBL_VERT_771

   ❑ SEBL_VERT_78

   ❑ SEBL_VERT_80

   For example, if your Siebel applications (OLTP) version is Siebel Industry Applications 7.5.x, the parameter should appear as:

   $$SourceConnection=SEBL_VERT_753

7 In the file TENERIFE_UPG_PARAMS.txt:

   a Search for the parameter $$Source_Container.

   b Set the value to one of the following options, based on your Siebel applications (OLTP) version:

❑ Siebel 6.3

❑ Siebel 7.5.3

❑ Siebel 7.5.3 Vertical

❑ Siebel 7.7.1

❑ Siebel 7.7.1 Vertical

❑ Siebel 7.8

❑ Siebel 7.8 Vertical

❑ Siebel 8.0

❑ Siebel 8.0 Vertical

For example, if your Siebel applications (OLTP) version is Siebel Industry Applications 7.5.x, the parameter should appear as:

`$$Source_Container=Siebel 7.5.3 Vertical`

8 In the file TENERIFE_UPG_PARAMS.txt, edit the ETL_PROC_WID parameter as follows:

`MPLT_GET_ETL_PROC_WID.$$ETL_PROC_WID=<latest ETL_PROC_WID value from your database>`

You can get this value from W_PARAM_G.ETL_PROC_WID.

9 In the Informatica Workflow Manager, open the Relational Connection Browser (Connections > Relational), and do the following:

a Edit the preconfigured ODBC connection PARAM_OLTP_SIEBEL to point to the Siebel transactional database.

b Edit the preconfigured ODBC connection DataWarehouse to point to the newly upgraded data warehouse database.

c Edit the preconfigured ODBC connection PARAM_DAC_OLD to point to the previous DAC repository database (the version from which you are upgrading).

d Edit the preconfigured ODBC connection PARAM_DAC_NEW to point to the new DAC repository database (the version to which you are upgrading).

10 In the Informatica Workflow Manager, navigate to the appropriate folder and execute the workflows in the order specified:

Application Version	Folder Name	Workflow	
7.7 to 7.9 (Horizontal)	UPGRADE_770_to_79	**1**	MARKETING_LOAD
		2	Update_Dimensions
		3	Update_Dimension_Unspecified
		4	Update_Facts
		5	SIL_PositionDimensionHierarchy_Full
		6	Load_INT_ORG_DH
		7	DIMENSION_LOAD
		8	DIMENSION_UNSPECIFIED_UPDATE
		9	FACT_UPDATE
		10	DAC_Metadata_Upgrade_Workflow
7.7.1.x to 7.9 (Horizontal)	UPGRADE_771_to_79	**1**	Update_Dimensions
		2	Update_Dimension_Unspecified
		3	Update_Facts
		4	SIL_PositionDimensionHierarchy_Full
		5	Load_INT_ORG_DH
		6	DIMENSION_LOAD
		7	DIMENSION_UNSPECIFIED_UPDATE
		8	FACT_UPDATE
		9	DAC_Metadata_Upgrade_Workflow
7.8 to 7.9 (Horizontal)	UPGRADE_78_to_79	**1**	SIL_PositionDimensionHierarchy_Full
		2	Load_INT_ORG_DH
		3	DIMENSION_LOAD
		4	DIMENSION_UNSPECIFIED_UPDATE
		5	FACT_UPDATE
		6	DAC_Metadata_Upgrade_Workflow

7 Run the Reset_infa_seq_gen.bat script to initialize the Informatica sequence generator for incremental runs:

    a Navigate to the directory \OracleBI\dwrep\Upgrade\DbScripts\<database type>.

    b Open the Reset_infa_seq_gen.bat script, and review the parameters at the top of the file.

c Replace the existing values for the parameters to reflect your environment (the parameters are database-specific).

For Oracle databases:

Parameter	Setting
TARGET_USERID_PWD	\<olap schema user-name>/\<olap schema password>@\<olap database TNS name> For example: TARGET_USERID_PWD=siebel/siebel@siebel_olap
INFA_USERID_PWD	\<user-name of Informatica Repository database that contains the adapter mappings repository metadata>/ \<password of the Informatica Repository database>@\<TNS name of the database for the Informatica Repository> For example: INFA_USERID_PWD=INFAREP/INFAREP@infa.corp.siebel.com
INFA_REP	Name of the Informatica Repository where the adapter mappings are available.
INFA_U	User name of the administrator of the Informatica Repository.
INFA_P	Password for the administrator of the Informatica Repository.
INFA_SRV	Name of the Informatica Server.

For Microsoft SQL Server databases:

Parameter	Setting
OLAP_SERVER	Name of the SQL Server for the OLAP database.
OLAP_DB	Name of the database on which OLAP data is available.
OLAP_U	User name for logging into the database on which OLAP data is available.
OLAP_P	Password for logging into the database on which OLAP data is available.
INFA_SERVER	Name of the SQL Server for the Informatica Repository database.
INFA_DB	Name of the database on which Informatica Repository metadata is available.
INFA_U	User name for logging into the database on which Informatica Repository metadata is available.
INFA_P	Password for logging into the database on which Informatica Repository metadata is available.

Parameter	Setting
INFA_REP	Name of the Informatica Repository where adapter mappings are available.
INFA_REP_U	User name of the administrator of the Informatica Repository.
INFA_REP_P	Password of the administrator of the Informatica Repository.

For IBM DB2 databases:

Parameter	Setting
TARGET_USERID_PWD	<olap schema user-name>/<olap schema password>@<olap database name> For example: TARGET_USERID_PWD=siebel/db2@OLAP_DB2DB
INFA_USER	User name for logging into the database on which Informatica metadata is available.
INFA_PWD	Password for logging into the database on which Informatica Repository metadata is available.
INFADB_ALIAS	Name of the database in which Informatica Repository metadata is available.
INFA_REP	Name of the Informatica Repository where the adapter mappings are available.
INFA_U	User name of the administrator of the Informatica Repository.
INFA_P	Password of the administrator of the Informatica Repository.
INFA_SRV	Name of the Informatica Server.

   d Run the script.

   NOTE: Because the Reset_infa_seq_gen.bat file contains user names and passwords, it is recommended that you delete the file after the upgrade process is complete.

8 To verify the data migrated successfully:

   a Check whether any of the Informatica mapping log files stored in the directory \Informatica PowerCenter 7.1.4\Server\SessLogs indicates errors or failures.

   b Check whether the SQL scripts (790_UPGRADE_PRE_CTL_SCRIPT.sql and 790_UPGRADE_PRE_DIMENSION_SCRIPT.sql) that you ran in the SQL client of the database failed or errored out while executing.

   c Check the log files for the CTL files (Upgrade.ctl and DW.ctl) that you ran using the DDLimp command to determine whether any of the runs failed.

If you did not detect any errors or failures in the steps above, then the data migration was successful.

9 (Optional) If the data migration was successful, drop the tables that were created during the upgrade process, such as, W_xxxx_x_784 tables, LKP_xxxx_x, and W_ASSET_D_TMP.

This step frees the space occupied by these backup tables.

To migrate data from version 7.5.x to 7.9 (Vertical)

NOTE: Upgrading from version 7.5.x requires two stages. In the first stage, you upgrade the data warehouse schema and migrate the data from version 7.5.x to 7.7. In the second stage, you upgrade the data warehouse schema and migrate the data from version 7.7 to 7.9.

1 Upgrade the data warehouse schema from version 7.5.x to 7.7 by using the DDLimp utility to run the script ddlsme_SIA_77.ctl script.

a Navigate to the folder OracleBI\dwrep\Upgrade\CTLFiles.

b Use the DDLimp utility to run the ddlsme_SIA_77.ctl script. Use the following command:

```
..\OracleBI\dwrep\bin\DDLIMP /U <USER> /P <PASSWORD> /C <ODBC connect string>
/G SSE_ROLE /R Y /F <..\OracleBI\dwrep\ddlsme_SIA_77.ctl>
/L <..\oracleBI\dwrep\ddlsme_SIA_77.log>
```

For example:

```
DDLIMP /U SADMIN /P SADMIN /C SIEBEL_OLTP /G SSE_ROLE
/R Y /F C:\OracleBI\dwrep\ddlsme_SIA_77.ctl /L
C:\OracleBI\dwrep\ddlsme_SIA_77.log
```

Notes:

❏ /P <PASSWORD> - The password for Oracle's CRM OLTP.

❏ /C <ODBC connect string> - The name of the ODBC connect string.

❏ For Oracle databases, use the Siebel Merant ODBC Drivers.

❏ In addition, you can use the following commands:

❏ /W Y - If the OLTP database is Oracle and Unicode.

❏ /Z Y - If the OLTP database is DB2 or SQL Server and Unicode.

❏ /B <TABLE_SPACE_NAME> - If you want to create these tables in a separate table space. For DB2, This must be specified as 32K tablespace.

❏ /X <INDEX_TABLE_SPACE_NAME> - If you want to create the indexes in a separate tablespace. For DB2, This must be specified as 32K tablespace.

❏ /Y - Storage File for DB2/390.

❏ /R - Regrant tables.

2 Copy the file Upgrade.rep file from the folder OracleBI\dwrep\Upgrade\Informatica\Repository into the folder Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup.

3 Launch the Informatica Repository Console and restore Upgrade.rep (located in Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup).

4 Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\ParameterFiles and copy the file 753_TENERIFE_UPG_PARAMS.txt into the SrcFiles directory on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.

5 Rename the file 753_TENERIFE_UPG_PARAMS.txt to TENERIFE_UPG_PARAMS.txt.

6 In Informatica Workflow Manager, navigate to the folder UPGRADE_753_to_770_SIA, and execute the following workflows in the order indicated:

    a Upgrade_R_Image

    b Upgrade_Unspecifieds

    c Upgrade_Agree

    d Upgrade_Asset

    e Upgrade_Opty

    f Upgrade_Order

    g Upgrade_Quote

    h Upgrade_Response

    i Upgrade_ServiceRequest

    j Upgrade_Others

    k Upgrade_Visibility

    l UpgradeSlowlyChangingDimensionStartDates

    m Upgrade_Industry_R_Image

    n Upgrade_Industry_Unspecified

    o Upgrade_LS_ActivityProduct

    p Upgrade_LS_Others

    q Upgrade_Industry_Household

    r Upgrade_FINS_Visibility

    s UpgradeSlowlyChangingDimensionStartDates_Industry

    t DAC_Metadata_Upgrade_Workflow

7 Upgrade the data warehouse schema from version 7.7 to 7.9 by following the steps in the procedure .

8 Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\SrcFiles and copy the *.csv files into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.

9 Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\ParameterFiles and copy the file 770_TENERIFE_UPG_PARAMS.txt into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.

10 Rename 770_TENERIFE_UPG_PARAMS.txt to TENERIFE_UPG_PARAMS.txt.

11 In the file TENERIFE_UPG_PARAMS.txt:

a   Search for the parameter $$SourceConnection.

b   Set the value to one of the following options, based on your Siebel applications (OLTP) version:

❑   SEBL_63

❑   SEBL_753

❑   SEBL_771

❑   SEBL_78

❑   SEBL_80

❑   SEBL_VERT_753

❑   SEBL_VERT_771

❑   SEBL_VERT_78

❑   SEBL_VERT_80

For example, if your Siebel applications (OLTP) version is Siebel Industry Applications 7.5.x, the parameter should appear as:

$$SourceConnection=SEBL_VERT_753

12 In the file TENERIFE_UPG_PARAMS.txt:

a   Search for the parameter $$Source_Container.

b   Set the value to one of the following options, based on your Siebel applications (OLTP) version:

❑   Siebel 6.3

❑   Siebel 7.5.3

❑   Siebel 7.5.3 Vertical

❑   Siebel 7.7.1

❑   Siebel 7.7.1 Vertical

❑   Siebel 7.8

❑   Siebel 7.8 Vertical

❑   Siebel 8.0

❑   Siebel 8.0 Vertical

For example, if your Siebel applications (OLTP) version is Siebel Industry Applications 7.5.x, the parameter should appear as:

$$Source_Container=Siebel 7.5.3 Vertical

13 In the file TENERIFE_UPG_PARAMS.txt, edit the ETL_PROC_WID parameter as follows:

MPLT_GET_ETL_PROC_WID.$$ETL_PROC_WID=<latest ETL_PROC_WID value from your database>

You can get this value from W_PARAM_G.ETL_PROC_WID.

14 In the Informatica Workflow Manager, open the Relational Connection Browser (Connections > Relational), and do the following:

a Edit the preconfigured ODBC connection PARAM_OLTP_SIEBEL to point to the Siebel transactional database.

b Edit the preconfigured ODBC connection DataWarehouse to point to the newly upgraded data warehouse database.

c Edit the preconfigured ODBC connection PARAM_DAC_OLD to point to the previous DAC repository database (the version from which you are upgrading).

d Edit the preconfigured ODBC connection PARAM_DAC_NEW to point to the new DAC repository database (the version to which you are upgrading).

15 Define the alignment rule to be used for ETL loads.

a Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\SrcFiles and copy the file AlignmentType_LS_782.csv into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.

b Rename the file AlignmentType_LS_782.csv to AlignmentType.csv.

c Open the file AlignmentType.csv, and enter one of the following alignment item types under the ALIGN_TYPE field:

❏ Zipcode

❏ Account/Contact

❏ Brick

d Save the file.

NOTE: The Oracle Business Analytics Warehouse allows only one alignment type to be used for ETL loads during upgrade.

16 In Informatica Workflow Manager, navigate to the folder UPGRADE_770_to_79, and execute the following workflows in the order indicated:

a MARKETING_LOAD

b Upgrade_Dimensions_Industry

c Update_Dimensions

d Update_Dimension_Unspecified

e Update_Facts

f Upgrade_LS_Dimensions

g Upgrade_LS_Facts

h SIL_PositionDimensionHierarchy_Full

i Load_INT_ORG_DH

j DIMENSION_LOAD

k DIMENSION_UNSPECIFIED_UPDATE

l FACT_UPDATE

17 Run the Reset_infa_seq_gen.bat script to initialize the Informatica sequence generator for incremental runs:

a Navigate to the directory \OracleBI\dwrep\Upgrade\DbScripts\<database type>.

b Open the Reset_infa_seq_gen.bat script, and review the parameters at the top of the file.

c Replace the existing values for the parameters to reflect your environment (the parameters are database-specific).

For Oracle databases:

Parameter	Setting
TARGET_USERID_PWD	<olap schema user-name>/<olap schema password>@<olap database TNS name> For example: TARGET_USERID_PWD=siebel/siebel@siebel_olap
INFA_USERID_PWD	<user-name of Informatica Repository database that contains the adapter mappings repository metadata>/ <password of the Informatica Repository database>@<TNS name of the database for the Informatica Repository> For example: INFA_USERID_PWD=INFAREP/INFAREP@infa.corp.siebel.com
INFA_REP	Name of the Informatica Repository where the adapter mappings are available.
INFA_U	User name of the administrator of the Informatica Repository.
INFA_P	Password for the administrator of the Informatica Repository.
INFA_SRV	Name of the Informatica Server.

For Microsoft SQL Server databases:

Parameter	Setting
OLAP_SERVER	Name of the SQL Server for the OLAP database.
OLAP_DB	Name of the database on which OLAP data is available.
OLAP_U	User name for logging into the database on which OLAP data is available.
OLAP_P	Password for logging into the database on which OLAP data is available.
INFA_SERVER	Name of the SQL Server for the Informatica Repository database.
INFA_DB	Name of the database on which Informatica Repository metadata is available.
INFA_U	User name for logging into the database on which Informatica Repository metadata is available.
INFA_P	Password for logging into the database on which Informatica Repository metadata is available.

Parameter	Setting
INFA_REP	Name of the Informatica Repository where adapter mappings are available.
INFA_REP_U	User name of the administrator of the Informatica Repository.
INFA_REP_P	Password of the administrator of the Informatica Repository.

For IBM DB2 databases:

Parameter	Setting
TARGET_USERID_PWD	<olap schema user-name>/<olap schema password>@<olap database name> For example: TARGET_USERID_PWD=siebel/db2@OLAP_DB2DB
INFA_USER	User name for logging into the database on which Informatica metadata is available.
INFA_PWD	Password for logging into the database on which Informatica Repository metadata is available.
INFADB_ALIAS	Name of the database in which Informatica Repository metadata is available.
INFA_REP	Name of the Informatica Repository where the adapter mappings are available.
INFA_U	User name of the administrator of the Informatica Repository.
INFA_P	Password of the administrator of the Informatica Repository.
INFA_SRV	Name of the Informatica Server.

   d   Run the script.

   NOTE: Because the Reset_infa_seq_gen.bat file contains user names and passwords, it is recommended that you delete the file after the upgrade process is complete.

18 To verify the data migrated successfully:

   a   Check whether any of the Informatica mapping log files stored in the directory \Informatica PowerCenter 7.1.4\Server\SessLogs indicates errors or failures.

   b   Check whether the SQL scripts (790_UPGRADE_PRE_CTL_SCRIPT.sql and 790_UPGRADE_PRE_DIMENSION_SCRIPT.sql) that you ran in the SQL client of the database failed or errored out while executing.

   c   Check the log files for the CTL files (Upgrade.ctl and DW.ctl) that you ran using the DDLimp command to determine whether any of the runs failed.

If you did not detect any errors or failures in the steps above, then the data migration was successful.

19 (Optional) If the data migration was successful, drop the tables that were created during the upgrade process, such as, W_xxxx_x_784 tables, LKP_xxxx_x, and W_ASSET_D_TMP.

This step frees the space occupied by these backup tables.

To migrate data from versions 7.7, 7.7.1.x, or 7.8 to 7.9 (Vertical)

1 Copy the file Upgrade.rep file from the folder OracleBI\dwrep\Upgrade\Informatica\Repository into the folder Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup.

2 Launch the Informatica Repository Console and restore Upgrade.rep (located in Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup).

3 Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\SrcFiles and copy the *.csv files into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.

4 Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\ParameterFiles and copy the file <previous version of Siebel Analytics>_TENERIFE_UPG_PARAMS.txt into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.

5 Rename the file <previous version of Siebel Analytics>_TENERIFE_UPG_PARAMS.txt to TENERIFE_UPG_PARAMS.txt.

6 In the file TENERIFE_UPG_PARAMS.txt:

   a Search for the parameter $$SourceConnection.

   b Set the value to one of the following options, based on your Siebel applications (OLTP) version:

      ❏ SEBL_63

      ❏ SEBL_753

      ❏ SEBL_771

      ❏ SEBL_78

      ❏ SEBL_80

      ❏ SEBL_VERT_753

      ❏ SEBL_VERT_771

      ❏ SEBL_VERT_78

      ❏ SEBL_VERT_80

   For example, if your Siebel applications (OLTP) version is Siebel Industry Applications 7.5.x, the parameter should appear as:

   $$SourceConnection=SEBL_VERT_753

7 In the file TENERIFE_UPG_PARAMS.txt:

   a Search for the parameter $$Source_Container.

   b Set the value to one of the following options, based on your Siebel applications (OLTP) version:

❑ Siebel 6.3

❑ Siebel 7.5.3

❑ Siebel 7.5.3 Vertical

❑ Siebel 7.7.1

❑ Siebel 7.7.1 Vertical

❑ Siebel 7.8

❑ Siebel 7.8 Vertical

❑ Siebel 8.0

❑ Siebel 8.0 Vertical

For example, if your Siebel applications (OLTP) version is Siebel Industry Applications 7.5.x, the parameter should appear as:

$$Source_Container=Siebel 7.5.3 Vertical

8 In the file TENERIFE_UPG_PARAMS.txt, edit the ETL_PROC_WID parameter as follows:

MPLT_GET_ETL_PROC_WID.$$ETL_PROC_WID=<latest ETL_PROC_WID value from your database>

You can get this value from W_PARAM_G.ETL_PROC_WID.

9 In the Informatica Workflow Manager, open the Relational Connection Browser (Connections > Relational), and do the following:

a Edit the preconfigured ODBC connection PARAM_OLTP_SIEBEL to point to the Siebel transactional database.

b Edit the preconfigured ODBC connection DataWarehouse to point to the newly upgraded data warehouse database.

c Edit the preconfigured ODBC connection PARAM_DAC_OLD to point to the previous DAC repository database (the version from which you are upgrading).

d Edit the preconfigured ODBC connection PARAM_DAC_NEW to point to the new DAC repository database (the version to which you are upgrading).

10 Define the alignment rule to be used for ETL loads.

a Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\SrcFiles and copy the file AlignmentType_LS_782.csv into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.

b Rename the file AlignmentType_LS_782.csv to AlignmentType.csv.

c Open the file AlignmentType.csv, and enter one of the following alignment item types under the ALIGN_TYPE field:

❑ Zipcode

❑ Account/Contact

❑ Brick

d Save the file.

NOTE: The Oracle Business Analytics Warehouse allows only one alignment type to be used for ETL loads during upgrade.

11 In Informatica Workflow Manager, navigate to the appropriate folder and execute the workflows in the order specified:

Application Version	Folder Name	Workflow
7.7 to 7.9 (Vertical)	UPGRADE_770_to_79	**1** MARKETING_LOAD
		2 Upgrade_Dimensions_Industry
		3 Update_Dimensions
		4 Update_Dimension_Unspecified
		5 Update_Facts
		6 Upgrade_LS_Dimensions
		7 Upgrade_LS_Facts
		8 SIL_PositionDimensionHierarchy_Full
		9 Load_INT_ORG_DH
		10 DIMENSION_LOAD
		11 DIMENSION_UNSPECIFIED_UPDATE
		12 FACT_UPDATE
		13 DAC_Metadata_Upgrade_Workflow

Application Version	Folder Name	Workflow
7.7.1.x to 7.9 (Vertical)	UPGRADE_771_to_79	1 Update_Dimensions
		2 Update_Dimension_Unspecified
		3 Update_Facts
		4 Upgrade_LS_Dimensions
		5 Upgrade_LS_Facts
		6 SIL_PositionDimensionHierarchy_Full
		7 Load_INT_ORG_DH
		8 DIMENSION_LOAD
		9 DIMENSION_UNSPECIFIED_UPDATE
		10 FACT_UPDATE
		11 DAC_Metadata_Upgrade_Workflow
7.8 to 7.9 (Vertical)	UPGRADE_78_to_79	1 SIL_PositionDimensionHierarchy_Full
		2 Load_INT_ORG_DH
		3 DIMENSION_LOAD
		4 DIMENSION_UNSPECIFIED_UPDATE
		5 FACT_UPDATE
		6 DAC_Metadata_Upgrade_Workflow

7 Run the Reset_infa_seq_gen.bat script to initialize the Informatica sequence generator for incremental runs:

   a Navigate to the directory \OracleBI\dwrep\Upgrade\DbScripts\<database type>.

   b Open the Reset_infa_seq_gen.bat script, and review the parameters at the top of the file.

c Replace the existing values for the parameters to reflect your environment (the parameters are database-specific).

For Oracle databases:

Parameter	Setting
TARGET_USERID_PWD	<olap schema user-name>/<olap schema password>@<olap database TNS name> For example: TARGET_USERID_PWD=siebel/siebel@siebel_olap
INFA_USERID_PWD	<user-name of Informatica Repository database that contains the adapter mappings repository metadata>/ <password of the Informatica Repository database>@<TNS name of the database for the Informatica Repository> For example: INFA_USERID_PWD=INFAREP/INFAREP@infa.corp.siebel.com
INFA_REP	Name of the Informatica Repository where the adapter mappings are available.
INFA_U	User name of the administrator of the Informatica Repository.
INFA_P	Password for the administrator of the Informatica Repository.
INFA_SRV	Name of the Informatica Server.

For Microsoft SQL Server databases:

Parameter	Setting
OLAP_SERVER	Name of the SQL Server for the OLAP database.
OLAP_DB	Name of the database on which OLAP data is available.
OLAP_U	User name for logging into the database on which OLAP data is available.
OLAP_P	Password for logging into the database on which OLAP data is available.
INFA_SERVER	Name of the SQL Server for the Informatica Repository database.
INFA_DB	Name of the database on which Informatica Repository metadata is available.
INFA_U	User name for logging into the database on which Informatica Repository metadata is available.
INFA_P	Password for logging into the database on which Informatica Repository metadata is available.

Parameter	Setting
INFA_REP	Name of the Informatica Repository where adapter mappings are available.
INFA_REP_U	User name of the administrator of the Informatica Repository.
INFA_REP_P	Password of the administrator of the Informatica Repository.

For IBM DB2 databases:

Parameter	Setting
TARGET_USERID_PWD	<olap schema user-name>/<olap schema password>@<olap database name> For example: TARGET_USERID_PWD=siebel/db2@OLAP_DB2DB
INFA_USER	User name for logging into the database on which Informatica metadata is available.
INFA_PWD	Password for logging into the database on which Informatica Repository metadata is available.
INFADB_ALIAS	Name of the database in which Informatica Repository metadata is available.
INFA_REP	Name of the Informatica Repository where the adapter mappings are available.
INFA_U	User name of the administrator of the Informatica Repository.
INFA_P	Password of the administrator of the Informatica Repository.
INFA_SRV	Name of the Informatica Server.

   d   Run the script.

   NOTE: Because the Reset_infa_seq_gen.bat file contains user names and passwords, it is recommended that you delete the file after the upgrade process is complete.

8   To verify the data migrated successfully:

   a   Check whether any of the Informatica mapping log files stored in the directory \Informatica PowerCenter 7.1.4\Server\SessLogs indicates errors or failures.

   b   Check whether the SQL scripts (790_UPGRADE_PRE_CTL_SCRIPT.sql and 790_UPGRADE_PRE_DIMENSION_SCRIPT.sql) that you ran in the SQL client of the database failed or errored out while executing.

   c   Check the log files for the CTL files (Upgrade.ctl and DW.ctl) that you ran using the DDLimp command to determine whether any of the runs failed.

   If you did not detect any errors or failures in the steps above, then the data migration was successful.

9 (Optional) If the data migration was successful, drop the tables that were created during the upgrade process, such as, W_xxxx_x_784 tables, LKP_xxxx_x, and W_ASSET_D_TMP.

This step frees the space occupied by these backup tables.

To migrate data from Life Sciences 7.8.0, 7.8.1 or 7.8.2 to 7.9

1 Copy the file Upgrade.rep file from the folder OracleBI\dwrep\Upgrade\Informatica\Repository into the folder Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup.

2 Launch the Informatica Repository Console and restore Upgrade.rep (located in Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup).

3 Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\SrcFiles and copy the *.csv files into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.

4 Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\ParameterFiles and copy the file 782_TENERIFE_UPG_PARAMS_LS.txt into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.

5 Rename the file 782_TENERIFE_UPG_PARAMS_LS.txt to TENERIFE_UPG_PARAMS.txt.

6 In the file TENERIFE_UPG_PARAMS.txt:

   a Search for the parameter $$SourceConnection.

   b Set the value to one of the following options, based on your Siebel applications (OLTP) version:

   ❏ SEBL_63

   ❏ SEBL_753

   ❏ SEBL_771

   ❏ SEBL_78

   ❏ SEBL_80

   ❏ SEBL_VERT_753

   ❏ SEBL_VERT_771

   ❏ SEBL_VERT_78

   ❏ SEBL_VERT_80

   For example, if your Siebel applications (OLTP) version is Siebel Industry Applications 7.5.x, the parameter should appear as:

   $$SourceConnection=SEBL_VERT_753

7 In the file TENERIFE_UPG_PARAMS.txt:

   a Search for the parameter $$Source_Container.

   b Set the value to one of the following options, based on your Siebel applications (OLTP) version:

   ❏ Siebel 6.3

   ❏ Siebel 7.5.3

❑ Siebel 7.5.3 Vertical

❑ Siebel 7.7.1

❑ Siebel 7.7.1 Vertical

❑ Siebel 7.8

❑ Siebel 7.8 Vertical

❑ Siebel 8.0

❑ Siebel 8.0 Vertical

For example, if your Siebel applications (OLTP) version is Siebel Industry Applications 7.5.x, the parameter should appear as:

$$Source_Container=Siebel 7.5.3 Vertical

8 In the file TENERIFE_UPG_PARAMS.txt, edit the ETL_PROC_WID parameter as follows:

MPLT_GET_ETL_PROC_WID.$$ETL_PROC_WID=<latest ETL_PROC_WID value from your database>

You can get this value from W_PARAM_G.ETL_PROC_WID.

9 In the Informatica Workflow Manager, open the Relational Connection Browser (Connections > Relational), and do the following:

a Edit the preconfigured ODBC connection PARAM_OLTP_SIEBEL to point to the Siebel transactional database.

b Edit the preconfigured ODBC connection DataWarehouse to point to the newly upgraded data warehouse database.

c Edit the preconfigured ODBC connection PARAM_DAC_OLD to point to the previous DAC repository database (the version from which you are upgrading).

d Edit the preconfigured ODBC connection PARAM_DAC_NEW to point to the new DAC repository database (the version to which you are upgrading).

10 Define the alignment rule to be used for ETL loads.

a Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\SrcFiles and copy the file AlignmentType_LS_782.csv into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.

b Rename the file AlignmentType_LS_782.csv to AlignmentType.csv.

c Open the file AlignmentType.csv, and enter one of the following alignment item types under the ALIGN_TYPE field:

❑ Zipcode

❑ Account/Contact

❑ Brick

d Save the file.

NOTE: The Oracle Business Analytics Warehouse allows only one alignment type to be used for ETL loads during upgrade.

11 In Informatica Workflow Manager, navigate to the folder UPGRADE_LS_782_to_79, and execute the following workflows in the order indicated:

    a Upgrade_LS_Dimensions

    b Upgrade_LS_Facts

    c SIL_PositionDimensionHierarchy_Full

    d Load_INT_ORG_DH

    e DIMENSION_LOAD

    f DIMENSION_UNSPECIFIED_UPDATE

    g FACT_UPDATE

    h DAC_Metadata_Upgrade_Workflow

12 Run the Reset_infa_seq_gen.bat script to initialize the Informatica sequence generator for incremental runs:

    a Navigate to the directory \OracleBI\dwrep\Upgrade\DbScripts\<database type>.

    b Open the Reset_infa_seq_gen.bat script, and review the parameters at the top of the file.

c Replace the existing values for the parameters to reflect your environment (the parameters are database-specific).

For Oracle databases:

Parameter	Setting

TARGET_USERID_PWD	`<olap schema user-name>/<olap schema password>@<olap database TNS name>`
	
	For example:
	
	`TARGET_USERID_PWD=siebel/siebel@siebel_olap`

INFA_USERID_PWD	`<user-name of Informatica Repository database that contains the adapter mappings repository metadata>/ <password of the Informatica Repository database>@<TNS name of the database for the Informatica Repository>`
	
	For example:
	
	`INFA_USERID_PWD=INFAREP/INFAREP@infa.corp.siebel.com`

INFA_REP	Name of the Informatica Repository where the adapter mappings are available.
INFA_U	User name of the administrator of the Informatica Repository.
INFA_P	Password for the administrator of the Informatica Repository.
INFA_SRV	Name of the Informatica Server.

For Microsoft SQL Server databases:

Parameter	Setting
OLAP_SERVER	Name of the SQL Server for the OLAP database.
OLAP_DB	Name of the database on which OLAP data is available.
OLAP_U	User name for logging into the database on which OLAP data is available.
OLAP_P	Password for logging into the database on which OLAP data is available.
INFA_SERVER	Name of the SQL Server for the Informatica Repository database.
INFA_DB	Name of the database on which Informatica Repository metadata is available.
INFA_U	User name for logging into the database on which Informatica Repository metadata is available.
INFA_P	Password for logging into the database on which Informatica Repository metadata is available.

Parameter	Setting
INFA_REP	Name of the Informatica Repository where adapter mappings are available.
INFA_REP_U	User name of the administrator of the Informatica Repository.
INFA_REP_P	Password of the administrator of the Informatica Repository.

For IBM DB2 databases:

Parameter	Setting
TARGET_USERID_PWD	<olap schema user-name>/<olap schema password>@<olap database name>
	For example:
	TARGET_USERID_PWD=siebel/db2@OLAP_DB2DB
INFA_USER	User name for logging into the database on which Informatica metadata is available.
INFA_PWD	Password for logging into the database on which Informatica Repository metadata is available.
INFADB_ALIAS	Name of the database in which Informatica Repository metadata is available.
INFA_REP	Name of the Informatica Repository where the adapter mappings are available.
INFA_U	User name of the administrator of the Informatica Repository.
INFA_P	Password of the administrator of the Informatica Repository.
INFA_SRV	Name of the Informatica Server.

   d Run the script.

   NOTE: Because the Reset_infa_seq_gen.bat file contains user names and passwords, it is recommended that you delete the file after the upgrade process is complete.

13 To verify the data migrated successfully:

   a Check whether any of the Informatica mapping log files stored in the directory \Informatica PowerCenter 7.1.4\Server\SessLogs indicates errors or failures.

   b Check whether the SQL scripts (790_UPGRADE_PRE_CTL_SCRIPT.sql and 790_UPGRADE_PRE_DIMENSION_SCRIPT.sql) that you ran in the SQL client of the database failed or errored out while executing.

   c Check the log files for the CTL files (Upgrade.ctl and DW.ctl) that you ran using the DDLimp command to determine whether any of the runs failed.

If you did not detect any errors or failures in the steps above, then the data migration was successful.

14 (Optional) If the data migration was successful, drop the tables that were created during the upgrade process, such as, W_xxxx_x_784 tables, LKP_xxxx_x, and W_ASSET_D_TMP.

This step frees the space occupied by these backup tables.

Verifying ETL Customizations

While upgrading the Informatica repository, you copied the Custom folder, which contained your mapping customizations, from your previous Informatica repository to the newly created Informatica repository. Then, when you migrated data, you ran an incremental load, which populated data warehouse entities. Now, to verify that your custom mappings were upgraded successfully, check the DAC and Informatica log files to confirm there were no errors during the incremental load process.

Process of Upgrading the Siebel Analytics Repository

This process merges your customizations of a prior release of the Siebel Analytics repository with the new version of the Oracle BI repository. Before you begin this process, make sure you have backed up and renamed your existing Analytics repository.

To upgrade the repository, perform the following tasks:

- Preparing for the Analytics Repository Upgrade on page 53
- Equalizing the Analytics Repositories on page 54
- Comparing the Analytics Repositories on page 55
- Merging the Analytics Repositories on page 55
- Regression Testing the Analytics Repository Merge on page 57

The tasks in this section refer to multiple versions of the Analytics repository. Table 4 provides the names and descriptions of the repositories used in the examples in this section.

Table 4.   Names of Analytics Repositories used in Examples

Name of Repository	Description
SiebelAnalytics_7x.rpd	The standard Siebel Analytics repository for the version you are upgrading from.
	NOTE: Standard Siebel Analytics repositories from previous releases are available in the folder \OracleBI\Upgrade.
OracleBIAnalyticsApps.rpd	The standard Oracle Business Intelligence repository for the version you are upgrading to.

Table 4.   Names of Analytics Repositories used in Examples

Name of Repository	Description
Customer_SiebelAnalytics.rpd	The Siebel Analytics repository that contains your customizations for the version you are upgrading from.
Merged_Repository_OracleBI.rpd	The Oracle Business Intelligence repository that contains your customizations for the version you are upgrading to.

Preparing for the Analytics Repository Upgrade

Follow this procedure to prepare for the repository upgrade.

To prepare for the Analytics repository upgrade

1   Set up a directory for the merge process, such as \OracleBIUpgrade, and create the following subfolders:

   ■   Original

   ■   AfterEqualize

   ■   AfterMerge

   ■   AfterManualWork

   ■   AfterRegressions

2   Copy the original repository (for example, SiebelAnalytics_7x.rpd), the production repository (for example, Customer_SiebelAnalytics.rpd), and the repository from the latest installation (for example, OracleBIAnalyticsApps.rpd) into the folder \OracleBIUpgrade\Original.

   NOTE: If in your current environment you are running Siebel Business Analytics for one or more modules using a Siebel Analytics repository in which you extracted the corresponding projects for the modules from the standard Siebel Analytics repository file you received from the previous release, you need to extract the same projects from the SiebelAnalytics_7x.rpd file and use this as your original repository. (If you have the original repository that you extracted during the last upgrade, you can use it as the original repository file.) This will prevent you from losing any new metadata you would like to add in this upgrade.

   Also, if you customized the Siebel Analytics repository by trimming a large number of objects and you would like to get those objects back during the current upgrade, you need to trim the SiebelAnalytics_7x.rpd file in the same way and use the modified version as the original repository file. This will prevent you from losing any new metadata you would like to add in this upgrade.

Equalizing the Analytics Repositories

The Merge feature in the Administration Tool relies on a change detection algorithm to determine the changes that need to be made to upgrade repositories correctly. For the algorithm to work correctly, it has to determine which objects in the three repositories (for example, SiebelAnalytics_7x.rpd, OracleBIAnalyticsApps.rpd, and Customer_SiebelAnalytics.rpd) are equivalent.

The point of this step is to determine for every object in the OracleBIAnalyticsApps.rpd and the Customer_SiebelAnalytics.rpd whether it is coming from the SiebelAnalytics_7x.rpd.

Equivalence between objects is established using the Administration Tool's Equalize feature. The file that you specify in the Output option (-0) is the only file that is modified during the equalization process.

The Equalize feature has several mechanisms for determining whether an object in two different repositories is semantically the same:

■ **Fully Qualified Name.** If an object in one repository has the same fully qualified name as another object of the same class in another repository, then the two objects are declared equal.

■ **Simple String Substitution.** Equivalence can be declared between two objects of the same class in two repositories whose only difference is that some key characters in their names differ. The equalizerpds executable file ignores those characters while checking fully qualified names. For example, "Core"."W_DAY_D" might be considered equivalent to "Core"."W DAY D" if the characters "_" and " " have been declared as equivalent.

■ **Rename File.** When none of the preceding rules are applicable, equivalence can be manually declared using a script as input to the equalizerpds executable file. Oracle ships the rename files (MAP) for the major releases. The files are located in the OracleBI\Upgrade folder. You can also create your own rename files for customizations not covered in the files that Oracle ships. You can open and edit the rename files in Microsoft Excel.

The syntax of the equalizerpds command is as follows:

```
equalizerpds.exe  -A userid1 [-B [password1]] -C base_repository_name -D userid2 [-E
[password2]] -F repository2_name [-J udml_utf8_file_name_equalization] [-O
ouput_repository_name] [-X] [-Y equalStringSet]

-X          Treat 'Factxxxx' as 'Fact' in Business Model.

-Y          Treat the characters as equals.

/?          Display this usage information and exit.
```

To equalize a repository

1   Copy the appropriate MAP file from the OracleBI\Upgrade folder into the folder where you will execute equalizerpds.exe, for example, \OracleBIUpgrade\Original.

2   Run equalizerpds.exe to equalize the repository from the latest installation (for example, OracleBIAnalyticsApps.rpd) with the original repository (for example, SiebelAnalytics_7x.rpd). An example of the equalizerpds command is as follows:

```
equalizerpds -A Administrator -B SADMIN
-C \\OracleBIUpgrade\Original\SiebelAnalytics_7x.rpd
-D Administrator -E SADMIN
-F \\OracleBIUpgrade\Original\OracleBIAnalyticsApps.rpd
-O \\OracleBIAnalyticsUpgrade\AfterEqualize\OracleBIAnalyticsApps.rpd
-X -J rename7x-79.map
```

The MAP files are located in the \OracleBI\Upgrade folder.

If the equalizerpds.exe executable file runs correctly, no errors are returned.

3 Run equalizerpds.exe to equalize your customized repository (for example, Customer_SiebelAnalytics.rpd) with the original repository (for example, SiebelAnalytics_7x.rpd). An example of the equalizerpds command is as follows:

```
equalizerpds -A Administrator -B SADMIN
-C \\OracleBIUpgrade\Original\SiebelAnalytics_7x.rpd
-D Administrator -E SADMIN
-F \\OracleBIUpgrade\Original\Customer_SiebelAnalytics.rpd
-O \\OracleBIUpgrade\AfterEqualize\Customer_SiebelAnalytics.rpd
```

The execution of equalizerpds that equalizes the customer repository with the original repository does not use the rename file.

Make sure that the original repository is copied unchanged into its new location so that after running the script, all three repositories are contained within the \OracleBIUpgrade\AfterEqualize directory.

4 To verify the process completed successfully, compare the size of the repositories. The output repository (-O) should be close to the same size as the repository you equalized (-F).

Comparing the Analytics Repositories

Follow this procedure to compare your existing repository with the new version to which you are upgrading.

To compare the Analytics repositories

■ Use the Administration Tool's Compare Repositories feature to analyze the differences between your existing repository and the new version of the repository to which you are upgrading. Note where elements have been created, removed, or changed in the new version. Consider whether you can use the new metadata and retire customizations you made in the existing repository.

For instructions on how to use the Administration Tool's Compare Repositories feature, see *Oracle Business Intelligence Server Administration Guide*.

Merging the Analytics Repositories

In this procedure, you execute the main algorithm to upgrade the repository. For more information on merging the repositories, see *Oracle Business Intelligence Server Administration Guide*.

To merge versions of the Analytics repositories

1 Copy the three repositories (for example, SiebelAnalytics_7x.rpd, OracleBIAnalyticsApps.rpd, and Customer_SiebelAnalytics.rpd) to the AfterMerge folder.

2 Open the repository from the latest installation (for example, OracleBIAnalyticsApps.rpd) in the \OracleBIUpgrade\AfterMerge folder.

3 Save the repository with a new name, for example, Merged_Repository_OracleBIAnalyticsApps.rpd.

This new repository will contain the final results of the upgrade.

4 From the Administration Tool menu bar, choose File > Merge.

5 In the Select Original Repository dialog box, select the original repository (for example, SiebelAnalytics_7x.rpd).

6 Enter the password, and click OK.

7 Click Select for the Modified Repository field.

8 In the Select Modified Repository dialog box, select the repository that contains the customizations you made to the previous version of the Analytics repository.

9 Click Open, type the password, and then click OK.

10 In the Decision drop-down list, select the action you want to take regarding the repository change, or accept the default action.

11 To locate subsequent rows with empty Decision fields, click the Decision header cell.

When all rows have a value in the Decision field, the Merge button is enabled.

12 Click Merge.

This process can take up to 40 minutes, depending on the size of the repositories you are working with. A message will alert you when the merge is complete.

13 Click Yes when asked if you want to run a consistency check.

The number of errors returned by the consistency check is an indication of how successful the merge process was. If you receive many errors, for example, over 300, you should analyze the reason for the errors. If the merge process failed to recognize that two objects are the same, you may need to edit the rename file if the object is in the Current repository, or add your own rename file if you have renamed many of the objects and the upgrade engine failed to relate them to the original objects.

You also may need to change the actions you selected in the Decision drop-down list before rerunning the merge. This could save you time by reducing the number of errors that you will need to fix manually.

Once you are satisfied with the results of the merge, you should fix the remaining errors manually. It is important that you fix all errors before moving on to the next step. This repository serves as the input for the next stage.

You should also check that all of your customized objects are present and that no duplicate physical tables were introduced. To check for duplicate tables, search for physical tables using a query such as:

```
where name like '*#1'
```

14 Copy the repository to the folder \OracleBIUpgrade\AfterManualWork.

Regression Testing the Analytics Repository Merge

In performing a regression test for the repository merge, the objective is to collect a set of logical SQL statements that are used for reports and to verify that they continue to work with the new metadata. For this purpose, it is recommended that you perform the following procedure.

To perform regression testing

1 Run the reports that are necessary to include in the regression suite. These reports might be a subset of the reports in the Presentation Catalog.

2 Collect the logical SQL generated in the previous step. You can do this using Usage Tracking or by parsing the query log file.

For information about Usage Tracking, see *Oracle Business Intelligence Server Administration Guide*.

3 Execute the logical SQL against the old repository using the command line utility nQCmd.exe located in \OracleBI\server\bin, and save the results to a file.

For information about the nQCmd.exe utility, see *Oracle Business Intelligence Server Administration Guide.*

4 Edit the logical SQL test scripts to account for the name changes or modifications resulting from the upgrade.

5 Execute the edited logical SQL against the merged repository, and save the results.

6 Compare the results from the steps above and try to explain the differences. If it is determined that these differences are due to the upgrade process, then you have to correct them manually.

This repository now contains the merged content from the new OracleBIAnalyticsApps.rpd and the production repository.

Process of Upgrading the Analytics Web Catalog

You will need to upgrade your current Web Catalog to the new Oracle BI Presentation Catalog if your organization:

■ Has prebuilt applications already installed, and

■ Has customized the current Web Catalog

NOTE: If you made no changes to the previous Siebel Analytics Web Catalog distributed with previous versions of prebuilt applications, you do not need to upgrade the catalog. You can begin using the newer version of the catalog.

CAUTION: Before you upgrade the Siebel Analytics Web Catalog, you must convert it to the Oracle BI Presentation Catalog format. For instructions, see *Oracle Business Intelligence Infrastructure Upgrade Guide*.

This process includes the following tasks:

■ Trimming the Input Web Catalog on page 58

■ Upgrading the Analytics Web Catalog to the Oracle BI Presentation Catalog on page 58

■ Testing the Results of the Presentation Catalog Upgrade on page 59

Trimming the Input Web Catalog

Before you upgrade and merge your current Web Catalog with the new Oracle BI Presentation Catalog, determine which of the existing content you want to keep and which new content you want to incorporate. Review your existing Web Catalog and determine the usage patterns of reports and dashboards. Note that some of the preconfigured content in the existing catalog may appear in the new version in a redesigned format. In addition, the new version includes completely new content. After you have decided the content that is to make up your enterprise Presentation Catalog, trim the input catalogs using the Catalog Manager. For information on trimming catalogs, see *Oracle Business Intelligence Presentation Services Administration Guide*.

Upgrading the Analytics Web Catalog to the Oracle BI Presentation Catalog

Upgrading the Siebel Analytics Web Catalog to the Oracle BI Presentation Catalog makes use of three catalogs:

■ The Original Siebel Analytics Web Catalog. This is the Web Catalog that you received with the currently-installed Siebel applications.

■ The Current Presentation Catalog. This is the Presentation Catalog that is installed in the OracleBIData\web\catalog folder with the installation of Oracle BI Infrastructure.

■ The Modified Web Catalog. This is the Web Catalog that you are currently using.

You use Catalog Manager for this upgrade process. Catalog Manager compares the content in both the Current Presentation Catalog and the Modified Web Catalog with the content in the Original Siebel Analytics Web Catalog, merges any changes into the Current Presentation Catalog, and produces a list of upgrade differences, which you must resolve by indicating how you want the differences handled. If the catalogs have conflicting content, you can choose which catalog the content should be taken from. The end result is a merged Presentation Catalog that contains the site-specific changes, as well as new metadata.

To update the Presentation Catalog to a newer version

1 Make a backup copy of the Modified Web Catalog, rename the folder <catalogname>_old, and move it to a temporary location.

2 Copy the Original Siebel Analytics Web Catalog into the folder that holds your Modified Presentation Catalog and rename it <catalogname>_Original.

3 Start Catalog Manager and open the Current Presentation Catalog in offline mode.

4 Choose Tools > Upgrade Catalog.

5 In the Original Presentation Catalog field, browse to locate the Original Siebel Analytics Web Catalog.

6 In the Modified Presentation Catalog field, browse to locate your Modified Web Catalog, <catalogname>_old.

7 Click OK.

8 Resolve any upgrade differences as follows:

a Review each unresolved difference in the Unresolved differences list.

b For each unresolved difference, select the version that you want to keep.

c Click OK.

NOTE: The log file SiebelAnalyticsMigrationLog.txt holds information about the merge process. This log file is written to the location that holds the Presentation Catalog. If you get an error logged in the file, this means that the path in question had a problem that did not allow the merge mechanism to resolve the merge. No action was taken. To merge that particular item, go into your original Presentation Catalog and merge it manually.

9 Review the upgraded Web Catalog, and, if necessary, set permissions for objects.

10 Save the Current Presentation Catalog.

Testing the Results of the Presentation Catalog Upgrade

NOTE: Before you perform this step, you must first migrate the data into the upgraded data warehouse.

NOTE: The Web Catalog upgrade functionality does not automatically carry over object permissions; therefore, you should review the Web Catalog object permissions before you perform this step.

This step ensures that the upgraded reports and the new preconfigured reports are functional and render correct results within the new, merged Presentation Catalog. This step is typically performed by visually inspecting the final results of the complete end-to-end upgrade process.

For upgraded reports, the preferred approach for comparison purposes is to have side-by-side environments, and have users review specific dashboard content between the two environments. Examine not only the look and feel of the application but also the data contained in the reports to make sure the content remains the same. It is recommended that you request users to use various elements of the user interface to validate results, such as global prompts, column selectors, report filters, drills, and navigations, as they normally do on a day-to-day basis.

Also review the overall visibility and administrative settings in the new Presentation Catalog to ensure they are correct. Pay careful attention to the visibility rules that are established for any content that was migrated during the upgrade. You might have to manually adjust these settings.

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