



# **Going Live with Siebel eBusiness Applications**

Version 7.7, Rev. B  
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# 1

## What's New in This Release

### What's New in Going Live with Siebel eBusiness Applications, Version 7.7, Rev. B

Table 1 lists changes described in this version of the documentation to support release 7.7 of the software.

Table 1. What's New in Going Live with Siebel eBusiness Applications, Version 7.7, Rev. B

Topic	Description
<a href="#">"About Migrating Repositories Between Databases" on page 7</a>	Added a further restriction when migrating between databases.
<a href="#">"Post-Repository Migration Tasks" on page 16</a>	Added this new section on post-repository migration tasks.
<a href="#">"Migrating Web Templates and Related Files" on page 16</a>	Added this new post-repository migration task.
<a href="#">"Re-creating Custom Environment Configurations" on page 17</a>	Added this new post- repository migration task.
<a href="#">"About Rolling Out Updates to Mobile and Dedicated Clients" on page 41</a>	Added a caution note in this section.

### What's New in Going Live with Siebel eBusiness Applications, Version 7.7, Rev. A

Table 2 lists changes described in this version of the documentation to support release 7.7 of the software.

Table 2. What's New in Going Live with Siebel eBusiness Applications, Version 7.7, Rev. A

Topic	Description
<a href="#">"Running the Repository Migration Configuration Utility" on page 9</a>	Updated the Windows procedure to migrate the repository using the Database Server Configuration Utility.

### What's New in Going Live with Siebel eBusiness Applications, Version 7.7

Table 3 lists changes described in this version of the documentation to support release 7.7 of the software.

*Going Live with Siebel eBusiness Applications* is a new title on the *Siebel Bookshelf* and is part of the new *Siebel Deployment Documentation Suite*. This book contains new material in [Chapter 3, "Migrating Customizations Between Applications,"](#) and previously released material in [Chapter 2, "Migrating Repositories Between Databases"](#) and [Chapter 4, "Rolling Out Updates to Mobile and Dedicated Clients."](#)

Table 3. What's New in Going Live with Siebel eBusiness Applications, Version 7.7

Topic	Description
<a href="#">Chapter 3, "Migrating Customizations Between Applications"</a>	Added the new feature Application Deployment Manager (ADM) for release 7.7, which automates the migration of Siebel application run-time customization data, such as Assignment Rules, Responsibilities, and Views, from one environment to another.

# 2

## Migrating Repositories Between Databases

Migrating repositories between databases is a common requirement when going live to a new development, testing, or production environment. This chapter defines and describes the process for migrating repositories.

Part of the process of going live to a new environment may also include a migration of new run-time data customizations. If necessary, perform this task after migrating repository changes. See [Chapter 3, “Migrating Customizations Between Applications”](#) for information on this process.

This chapter includes the following topics:

- [“About Migrating Repositories Between Databases” on page 7](#)
- [“Process for Migrating Repositories” on page 8](#)
- [“Post-Repository Migration Tasks” on page 16](#)

### About Migrating Repositories Between Databases

Migrate the repository and application customizations between databases so the database schema for the user data, the business objects, and the user interface remain synchronized. Populate the test database, and when sufficient testing has taken place, migrate the repository and update the production database schema. For information on migrating application customizations, see [“Migrating Customizations Between Applications” on page 19](#).

For background information on Siebel repositories and schemas, see *Using Siebel Tools*.

For information about setting up your system and database environment, see the *Siebel Installation Guide* for the operating system you are using.

Note the following restrictions and recommendations when migrating repositories between databases:

- Isolate development and test environments from the production environment.
- Do not migrate repository customizations to your production environment until you have completed extensive testing to verify that the customizations work correctly and meet your business requirements.
- Do not migrate repositories between different versions of Siebel applications, as this action leads to an inconsistent environment.
- Do not migrate repositories between different database platforms or operating systems. Contact Siebel Technical Support if this situation arises.

Use the configuration utility, as described in *Using Siebel Tools*, to replace the object definitions. Then distribute a new Siebel repository file (SRF) to the servers and any remote clients. For customizations involving schema changes, you need to use the configuration utility, which:

- Updates the data in the production Siebel Server to the new schema.
- Updates the repository object definitions.

All mobile users need to synchronize prior to the schema update and (if not using Siebel Anywhere) reextract following the upgrade.

If you are using Siebel Anywhere, mobile users need to synchronize the next time they log on to their local database after the migration has occurred. Synchronizing will download new schema changes from the Siebel Server to the mobile user's local database. If they do not synchronize, there will be a mismatch between the local database and the server database.

**NOTE:** Importing a repository and then synchronizing the schema definition in a target system is equivalent to running a repository migration session. However, after importing the repository and before synchronizing the schema definition, it is necessary to rename the older repository to a temporary name and give the imported repository the correct name. For further information on repository importing and exporting, see *Using Siebel Tools*.

## Process for Migrating Repositories

This topic lists the ordered tasks of the process for migrating repositories between databases. For background information on this process, see ["About Migrating Repositories Between Databases" on page 7](#).

**NOTE:** A typical migration session requires the deployment of the new repository and the new non-repository customizations. To deploy (migrate) the repository, use the following process. To migrate non-repository customizations such as views, responsibilities, and lists of values, see ["Migrating Customizations Between Applications" on page 19](#) and *Applications Administration Guide*.

To migrate repositories between databases perform the following tasks:

- 1** Check in all projects—in both the source and target databases. For information on projects and checking in projects, see *Using Siebel Tools*.  
  
If you migrate a database schema with some projects still checked out, the migration will work but the project state will be not locked in the target database.
- 2** Prepare the target database for the new repository. See ["Preparing the Target Database for the New Repository" on page 9](#) for information on this task.
- 3** Run the repository migration configuration utility See ["Running the Repository Migration Configuration Utility" on page 9](#) for information on this task.
- 4** Upgrade mobile databases that are dependent on the target database. See ["Upgrading Mobile Databases" on page 14](#) for information on this task.

**NOTE:** If instructed by Siebel Technical Support, import and export repositories using the Repimexp.exe utility. See ["Importing and Exporting Repositories Using Repimexp" on page 14](#) for information on this task.



## Preparing the Target Database for the New Repository

This topic describes the task of preparing the target database for the new repository. This task is a part of the [“Process for Migrating Repositories” on page 8](#). For background information on migrating repositories, see [“About Migrating Repositories Between Databases” on page 7](#).

Complete the following actions before you migrate the repository to the target database:

- Make sure that all mobile users perform a full synchronization to avoid any unexpected issues in a production environment as a result of database schema changes made to the new repository.
- Stop all Siebel Server tasks and disconnect all database access until migration has been successfully executed.

**NOTE:** All connected users (including the database administrator) must disconnect before running the repository migration Configuration Utility.

- Do a full backup of the production database after all mobile user transactions have been merged.
- Make sure that the production database configuration meets the database requirements outlined in the *Siebel Installation Guide* for the operating system you are using.
- Do not change ODBC parameters or settings for datasources created by the Siebel Server installation.
- Verify the names of all repositories in the target database.

You will later choose a new name that the repository being migrated will have in the target database. It is recommended that you keep the name of your production repository constant. Accordingly, rename the existing production repository to show that it has been superseded. You will also later import a repository, to which you should give the standard name for your production repository.

- Update database statistics.
- Delete older repositories from the production database. This procedure may run for some time. For further information on this task, see *Using Siebel Tools*.

**NOTE:** The repository migration process references two ODBC data sources. One is the source database and the other is the target database. When running the migration task from the source system, it is necessary to create an ODBC data source for the target database manually. This applies to all server and database platforms.

## Running the Repository Migration Configuration Utility

This topic describes the task of running the repository migration configuration utility. This task is a part of the [“Process for Migrating Repositories” on page 8](#). For background information on migrating repositories, see [“About Migrating Repositories Between Databases” on page 7](#).

Running the configuration utility achieves the following results:

- Exports the designated repository from the source database
- Imports the designated repository into the target database

- Exports the logical schema definition from the specified repository to a DDL file
- Synchronizes the physical schema of the target database with this logical schema definition

**NOTE:** If you have a custom table space defined on DB2 UDB for OS/390, the Database Server Configuration Utility used in the migration process is tablespace-aware.

Take note of the following items before running a repository migration:

- When migrating repositories over a wide area network (WAN) and running the repository migration utility from the target environment, only the process of exporting the source repository to a flat file takes place on the WAN. All other processing takes place on the local area network (LAN) of the target environment.
- For multilingual installations where the source repository contains additional language strings, all languages are copied with the repository to the target environment.
- Siebel eBusiness Applications version 7.x do not support customized database triggers. If you have created customized triggers on your Siebel base tables, you must disable them before migrating the schema. You will then need to recreate the triggers after the migration is finished.

### ***To migrate a repository on Windows***

- 1 Launch the Database Server Configuration Utility by choosing Start > Programs > Siebel Enterprise Server *version\_number* > Configure DB Server.  
The Gateway Server Address screen appears.
- 2 Specify your Siebel Gateway Name Server Address and Enterprise Server Name and click Next.  
The Siebel Server Directory screen appears.
- 3 In the Siebel Server Directory screen, either accept the default value or choose the Browse button to select a directory, and then click Next.  
The Siebel Database Server Directory screen appears.
- 4 In the Siebel Database Server Directory screen, either accept the default value or choose the Browse button to select a directory, and then click Next.  
The RDBMS Platform screen appears.
- 5 In the RDBMS Platform screen, select the platform for your environment and then click Next.  
The Siebel Database Operations screen appears.
- 6 In the Siebel Database Operations screen, select Migrate Repository from the list of operations, and then click Next.  
The following succession of screens appears.

- 7 Progress by completing the information in each screen, and then clicking Next.

Screen	Description
ODBC Data Source Name	Enter the ODBC data source name.
Database User Name	Enter the source database user name and source database password.
Database Table Owner	Enter the source database table owner and source table owner password.
Source Database Repository Name	Enter the database repository name and the target database repository name.
Target RDBMS Platform	Select the target RDBMS platform. IBM DB2 UDB v7.1 is the default.
Target Database Encoding	Select whether the target database is Unicode.
Target Database ODBC Datasource	Enter the target database ODBC datasource.
Target Database User Name	Enter the target database user name and password.
Target Database Table Owner	Enter the target database table owner and table owner password.
Index Table Space Name (DB2-specific)	<p>If you choose IBM DB2 for the target database platform, you get this screen.</p> <p>Enter the index table space name and 4-KB Table Space Name.</p>
16-KB Table Space Name (DB2-specific)	<p>If you choose IBM DB2 for the target database platform, you get this screen.</p> <p>Enter the 16-KB table space name and 32-KB table space name.</p>
Index Table Space Name (Oracle-specific)	<p>If you choose Oracle as the target database platform, you have only two questions about index and table space. There are no 4-KB, 16-KB, and 32-KB tablespaces in Oracle.</p> <p>For Microsoft SQL server, there are no screens about tablespaces.</p>
Configuration Parameter Review	Summary screen gives a list of your choices. You can accept this configuration by clicking finish.

### ***To migrate the repository on UNIX***

- 1 Source environment variables from *\$SIEBEL\_ROOT* by typing:

```
source siebenv.csh
```

- 2 Set the following environment variables:

- *SIEBEL\_ROOT* should be the path of your Siebel eBusiness Application installation directory.
- *LANGUAGE* should be set to the language in which the Configuration Wizard prompts appear; for example, *enu* for U.S. English.

If either of these values is incorrect or empty, reset them using one of the following commands:

- `setenv LANGUAGE language_code` (where *language\_code* represents your display language)
- `setenv SIEBEL_ENTERPRISE Enterprise_Name`

- 3 Navigate to *\$SIEBEL\_ROOT/bin* and enter:

```
dbsrvr_config.ksh
```

This launches the Database Server Configuration Wizard.

- 4 Review the values of the following environment variables and confirm whether or not the settings are correct by entering either Y or N.

- *SIEBEL\_ROOT*
- *LANGUAGE*

NOTE: If either the *SIEBEL\_ROOT* or *LANGUAGE* value is not set or is incorrect, you must correct them before proceeding.

- 5 Specify the path of your Siebel Server root directory, or accept the default by pressing ENTER.
- 6 Specify the path of your database server root directory, or accept the default by pressing ENTER.
- 7 Enter the number that corresponds to your database platform.
- 8 From the Select Repository Operations menu, choose Migrate Repository (4).

- 9 Progress by completing the information in each screen.

Screen	Description
RDBMS Platform	Select an RDBMS platform. IBM DB2 UDB v7.1 is the default.
Target Database Encoding	Select whether or not the target database is Unicode.
ODBC Data Source Name	Enter the ODBC data source name.
Database User Name	Enter the database user name and database password.
Database Table Owner	Enter the target database table owner and table owner password.
Source Database Repository Name	Enter the source database repository name.
Target Database Repository Name	Enter the target database repository name.
Target RDBMS Platform	Select the target RDBMS platform. IBM DB2 UDB v7.1 is the default.
Target Database ODBC Datasource	Enter the target database ODBC datasource.
Target Database User Name	Enter the target database user name and password.
Target Database Table Owner	Enter the target database table owner and table owner password.
Index Table Space Name (DB2-specific)	<p>If you choose IBM DB2 for the target database platform, this screen appears.</p> <p>Enter the index table space name and 4-KB table space name.</p>
16K Table Space Name (DB2-specific)	<p>If you choose IBM DB2 for the target database platform, this screen appears.</p> <p>Enter the 16-KB table space name and 32-KB table space name.</p>
Index Table Space Name (Oracle-specific)	<p>If you choose Oracle as the target database platform, you have only two questions about index and table space. There are no 4-KB, 16-KB, and 32-KB tablespaces in Oracle.</p> <p>For Microsoft SQL server, there are no screens about tablespaces.</p>
Configuration Parameter Review	Summary screen gives a list of your choices. You can accept this configuration by entering Y.

**NOTE:** Updating statistics with a full table scan is the job of the database administrator once any repository migration, upgrade, or installation finishes.

## Upgrading Mobile Databases

This topic describes the task of upgrading mobile databases. This task is a part of the [“Process for Migrating Repositories” on page 8](#). For background information on migrating repositories, see [“About Migrating Repositories Between Databases” on page 7](#).

Follow these steps to upgrade mobile databases:

**1** Stop and restart Siebel Remote server components.

If you have mobile users in your target database environment, stop and restart the Siebel Server, regardless of whether you are using Siebel Anywhere.

When you have restarted the processes, wait until the Transaction Processor (alias TxnProc) and the Transaction Router (alias TxnRoute) have processed all pending transactions before proceeding with the remaining steps.

**2** Regenerate local database templates.

Use the Siebel Server component Generate New Database (alias GenNewDb) to regenerate the local database template file to update its schema to the same version as the database server.

**3** Reextract mobile users.

If you are not using Siebel Anywhere to upgrade your mobile clients, reextract all mobile users, using the component Database Extract (alias DbXtract).

If mobile databases are not reextracted, users will still be able to synchronize—no error message will be generated. This functionality allows Siebel Anywhere, which users might use to upgrade mobile databases, to continue working.

If you are using Siebel Anywhere, refer to *Developing and Deploying Siebel eBusiness Applications* for instructions on propagating schema extensions.

## Importing and Exporting Repositories Using Repimexp

Import and export repositories using the repimexp.exe program only if your migration requires special parameters settings that are inaccessible through the batch files or if you need to perform a file dump. In all other cases, use the configuration utility.

For information on using the configuration utility, see [“Running the Repository Migration Configuration Utility” on page 9](#). For further information on the process of migrating repositories, see [“Process for Migrating Repositories” on page 8](#).

The repimexp.exe program imports, exports, or creates a file dump of a repository. It can also import an INTL table. INTL tables contain language-specific information and are a part of the repository.

**To import a repository using repimexp**

- In the command line, type the following:

```
repimexp /A I /G language_codes
```

where:

*language\_codes* = a list such as ENU, FRA, JPN. Use ALL for all languages.

**NOTE:** If you want to import your repository with locale objects, you must specify at least one language code. Otherwise, no locale objects will be imported, and the repository will not have any text in the user interface when you compile the imported repository.

**To export a repository using repimexp**

- In the command line, type the following:

```
repimexp /A E argument_list
```

Export uses the arguments listed in [Table 4](#).

Table 4. Parameter Settings Passed as Export Arguments to repimexp.exe

Parameter	Required	Description
/U <userName>	Yes	Siebel administrator user name.
/P <password>	Yes	Siebel password.
/C <ODBC data source>	Yes	ODBC data source. The default is the value in the SIEBEL_DATA_SOURCE environment variable.
/D <table owner>	Yes	Siebel database table owner. The default is the value in the SIEBEL_TABLE_OWNER environment variable.
/R <repository>	Yes	Repository name. The default is Siebel Repository.
/F <dataFile>	Yes	Data file, including path, to which to export.
/T <Y N>	No	Test only, do not export into database.
/V <Y N>	No	Verify data. The default is N.
/N <0 1 2>	No	Change creation and update information: 0= no change

## Post-Repository Migration Tasks

After a successful repository migration, there are other tasks required to migrate or re-create nonrepository configurations from one environment to another. Review the following list to update data and information to the new environment, if required:

- Enterprise customizations data, such as views, responsibilities, assignment rules, and so on. To migrate these customizations, see [Chapter 3, "Migrating Customizations Between Applications."](#)
- Web Templates and related files. To migrate these files, see ["Migrating Web Templates and Related Files" on page 16.](#)
- Custom configurations such as parameter values and component definitions. To re-create these configurations, see ["Re-creating Custom Environment Configurations" on page 17.](#)

After these nonrepository items are migrated, roll out the updates to mobile and dedicated clients. For more information on this task, see [Chapter 4, "Rolling Out Updates to Mobile and Dedicated Clients."](#)

## Migrating Web Templates and Related Files

Every Siebel Server installation includes a set of files that define how the application appears in a Web browser. These include:

- Web templates (.swt files)
- Images (.gif and .jpg files)
- Cascading style sheets (.css files)

If you make changes to any of these files in your source environment, you must copy the modified files to the target environment.

### ***To move Web templates and related files***

- 1 Copy any new or modified files of the following types from the source Siebel Server to the target Siebel Server:

Files	File Location
Web Templates	siebsrvr_root\WEBTEMPL
Images	siebsrvr_root\webmaster\images\language_code
Cascading Style Sheets	siebsrvr_root\webmaster\files\language_code



## Re-creating Custom Environment Configurations

When migrating from one environment to another, re-create any custom environment configurations from the source environment in the target environment, if necessary. Custom environment configurations include data such as custom component definitions and parameter values. This information is stored in the Siebel Gateway `siebns.dat` file and is not migrated as part of a repository migration.

Re-create custom environment configurations in one of two ways:

- Use the Server Manager GUI or command-line interface program (`srvrmgr`) to create these custom configurations manually in the new target environment. For information on creating custom component definitions or setting values for parameters, see *Siebel System Administration Guide*.
- Use the Server Manager command-line interface program (`srvrmgr`) with input scripts to automate this task in the new target environment. This is the preferred method because scripts can be saved and reapplied in future environment updates of the same version. For information on using scripts with `srvrmgr`, see *Siebel System Administration Guide*.

**NOTE:** If reapplying a `srvrmgr` script to re-create custom environment configurations, make sure to edit the script if the target environment is a new Siebel version (as in the case of a Siebel upgrade). New parameters or `srvrmgr` commands may be available with the new version.



# 3

## Migrating Customizations Between Applications

Migrating application run-time customization data from one Siebel application environment to another is a common requirement when going live to a new development, test, or production environment. The Application Deployment Manager (ADM) feature automates the migration of the Siebel application run-time customization data.

Part of the process of going live to a new environment may also include a migration of a new repository. If necessary, perform this task prior to migrating any customizations. See [Chapter 2, “Migrating Repositories Between Databases”](#) for information on this process.

This chapter includes the following topics:

- [“About Migrating Customizations Between Applications” on page 19](#)
- [“Best Practices for Migrating Data Using ADM” on page 22](#)
- [“Process for Migrating Customizations Between Applications” on page 23](#)
- [“Reviewing the ADM Data Migration” on page 37](#)
- [“Troubleshooting ADM Migration” on page 39](#)

### About Migrating Customizations Between Applications

Application Deployment Manager (ADM) is a feature that automates the process of migrating enterprise customization data (views, responsibilities, assignment rules, and so on) from one Siebel application environment to another. For example, ADM can move customization data from a development environment to a testing environment. ADM eliminates the former process of transferring this data manually.

**NOTE:** The term *migrating* is used in the ADM context as the moving of data from one environment to another. No changes to the data take place during migration.

The bulk of the administrative tasks to migrate data using ADM are performed at the Application Deployment Manager screen in the Siebel application GUI. These tasks are intended for those with Siebel administrator responsibility. The ADM set-up process in the ADM GUI creates a template in which one data type can be migrated on a regular basis, if required. The fundamental structure of this template is the deployment project. The deployment project consists of one or more data types that can be migrated.

The process for migrating ADM involves configuration, GUI set-up, and deployment. See [“Process for Migrating Customizations Between Applications” on page 23](#) for further information on this process and links to their tasks.

The following data types are available for migration with ADM:

- Assignment Rule
- List of Value (LOV)
- Public Predefined Query (PDQs)
- Expense Types
- Product Feature
- Product Line
- Responsibility
- View
- State Model
- User List

These data types are preconfigured in the standard Siebel eBusiness application.

## About ADM Data Type Relationships

Creating Application Deployment Manager (ADM) data type relationships is only necessary if certain data types must be deployed before other data types. Creating this relationship makes sure that related data types are deployed as a single transaction to the target system. If any of the related data types are not applied correctly, then all related data types are not migrated to the target system.

For descriptions on creating or removing data type relationships, see ["Creating ADM Data Type Relationships" on page 27](#).

### Example of ADM Data Type Relationship

An example of an ADM data type relationship is as follows: A List of Values (LOV) plus a State Model configured on that LOV. Therefore, the LOV must be governed by a State Model.

To set up this relationship in ADM add the LOV data type as a child record to the State Model.

With this relationship setup, the records of the LOV (LOV Type record and LOV value records) are inserted into the database first followed by the State Model records. If there is an error in moving either the State Model or the LOV records, then both are not allowed to exist separately on the target system. If the State Model encounters a database error, then the previously inserted LOV records are removed (rolled back) so that the errors are corrected and the session can be retried.

## About ADM Deployment Filters

Application Deployment Manager (ADM) deployment filters allow the migration of specially selected records of a particular data type. Creating ADM deployment filters is a part of creating ADM deployment projects.

For information on creating deployment filters in deployment projects, see [“Creating ADM Deployment Filters” on page 30](#).

ADM deployment filters can also be set or modified when creating deployment sessions. See [“Creating Deployment Sessions Using ADM” on page 32](#) for further information on this task.

The deployment filter applies to the primary business component defined within an integration object, and can be set on any field defined on the primary business component and present in the integration object. Each data type is represented by a Siebel integration object. See [“Creating Integration Objects for ADM” on page 24](#) for further information on Siebel integration objects. For detailed information on business components, see *Configuring Siebel eBusiness Applications*.

The format for the deployment filter value entered into the Filter field of the data type record is as follows:

```
[Field_Name] operator 'Filter_Criterion'
```

where:

*Field\_Name* = The name of the field on which to filter records. For a list of available fields for each data type, click the select button in the Field List field. Make sure the field name is enclosed in brackets.

*operator* = A standard Siebel query operator that defines the filter. For example, like or =. For a list of Siebel query operators, see *Using Siebel Tools*.

*Filter\_Criterion* = The criterion by which to filter the field name. The wild card character can be used as part of the criterion. For example, names beginning with ‘A\*’. The filter criterion is case-sensitive and must be enclosed in quotes.

**NOTE:** Use multiple filters for one data type by using the logical AND or OR operators.

Some deployment filter examples follow:

- [Name] like 'ABC\*' or [Name] = 'My StateModel'

This example filters the data type State Models using the Name field. The primary business component for State Models is State Model, the field containing the state model name is Name.

- [Activation Date]>'12/29/2001 14:58:29'

This example filters the data type Assignment Rules using the Activation Date field. All assignment rules with a start date greater than 12/29/2001 are filtered for migration.

## Best Practices for Migrating Data Using ADM

Review the following information as recommendations of best practice when migrating data customizations using ADM.

- Do not set up a large number of data types. Keep the number of project items low to assist with error management. If the deployment scenario contains more than ten line items, break up the project into separate projects. This action helps improve usability.
- Maintain strong development guidelines, especially with naming conventions. Consistent development guidelines assist in the creation of deployment filters.
- The Application Deployment Manager (ADM) is best suited for a high-frequency and low-volume deployment scenario. It is highly recommended to set up a deployment filter on all items. Review Siebel Enterprise Integration Manager (Siebel EIM) as a more appropriate tool for transferring large data volumes. For information on Siebel EIM, see *Siebel Enterprise Integration Manager Administration Guide*.
- Maintain a compatible database codepage between the source and target environments. If in doubt, contact Siebel Technical Support.
- When creating additional data areas, validate the integration object structure first before using it with the ADM framework. Use a simple workflow process in the process simulator to validate the integration object. For information on this workflow processes and the process simulator, see *Siebel Business Process Designer Administration Guide*.
- When working with files for deployment, always use a network share name in the UNC format. On Windows, do not use drive letters. Remember that file name is specified for importing from the GUI but the directory name must be specified for exporting.
- Note that the deployment occurs in an asynchronous mode and the Server Request Broker (SRBroker) and Server Request Processor (SRProc) component parameters affect how fast the requests are processed. By default, no adjustments are necessary.

# Process for Migrating Customizations Between Applications

The process for migrating run-time data customizations uses the Application Deployment Manager (ADM) feature and involves two stages: One-time setup and deployment.

For background information on migrating data using ADM, see [“About Migrating Customizations Between Applications” on page 19](#).

## One-Time Set-Up Stage

To complete the one-time set-up stage for migrating customizations using ADM, perform the following tasks:

- 1 [“Creating Integration Objects for ADM” on page 24](#)
- 2 [“Creating Content Objects for ADM” on page 24](#)
- 3 [“Configuring Batch Workflows for ADM Command-Line Interface Deployment” on page 25](#)
- 4 [“Setting Up the Application Environment for Data Migration” on page 26](#)
- 5 [“Creating ADM Data Types” on page 26](#)
- 6 [“Creating ADM Data Type Relationships” on page 27](#)
- 7 [“Creating ADM Deployment Projects” on page 28](#)
- 8 [“Creating ADM Deployment Filters” on page 30](#)
- 9 [“Enabling the ADM Deployment Project” on page 31](#)

## Deployment Stage

To complete the deployment stage for migrating customizations using ADM, perform the following tasks:

- 1 [“Creating Deployment Sessions Using ADM” on page 32](#).
- 2 Deploy the ADM Deployment Session. Choose one of the following three methods to deploy ADM sessions:
  - [“Deploying Sessions Using the Application Deployment Manager GUI” on page 33](#)
  - [“Deploying Sessions Using Export Files” on page 34](#)
  - [“Deploying Sessions Using Command-Line Interface” on page 35](#)

## Creating Integration Objects for ADM

Creating an integration object for Application Deployment Manager (ADM) is a task in the [“Process for Migrating Customizations Between Applications” on page 23](#). This task expands the data types that can be migrated using ADM.

**NOTE:** The preconfigured data types do not require any configuration in Siebel Tools.

The integration object specifies the format and structure of the set of data you want to migrate.

Use the EAI Object Wizard in Siebel Tools to create integration objects. For background information on integration objects and for details on using the EAI Object Wizard, see *Integration Platform Technologies: Siebel eBusiness Application Integration Volume II*.

**NOTE:** Intermediate-level knowledge of the Siebel EAI architecture and integration is a prerequisite before performing these tasks.

### To create an ADM Integration Object

- 1** Identify the business object that corresponds to the data type requiring migration using ADM. This business object must have only one primary business component.
- 2** In Siebel Tools, select File > New Object.
- 3** From the New Object screen, select Integration Object.  
The EAI Object Wizard guides you through the process of setting up an integration object.
- 4** Adjust the user keys of the integration object. For further information on user keys for integration objects, see *Integration Platform Technologies: Siebel eBusiness Application Integration Volume II*.
- 5** Validate the integration object by selecting the integration object and clicking Validate.
- 6** Review the report and modify your integration object as needed.

## Creating Content Objects for ADM

Creating a content object for Application Deployment Manager (ADM) is a task in the [“Process for Migrating Customizations Between Applications” on page 23](#). This task expands the data types that can be migrated using ADM.

**NOTE:** The preconfigured data types do not require any configuration in Siebel Tools.

Before creating a content object, make sure you have created an integration object for the data you want to migrate. See [“Creating Integration Objects for ADM” on page 24](#).

The content object specifies the data that will be migrated from one Siebel application to another. Each content object is composed of a business object and an integration object.



Content objects are also used by Content Center. The following procedure references properties necessary for ADM functionality. For Content Center functionality, additional properties must be set for the Content object. For further information on Content Center, see *Applications Administration Guide*.

**NOTE:** One content object can be used by both Content Center and ADM at the same time.

### ***To create content object for ADM***

- 1 In Siebel Tools, navigate to Content Objects type.
- 2 Create a new record.
- 3 Add the data type business object to the content object record.
- 4 Add the data type integration object to the content object record.
- 5 Create child records. On the child record, enter the name of a view that does not have any visibility setting (admin view) by selecting from the picklist.

The child record determines which view will be used during the preview functionality in the ADM GUI. This view must correspond to the business object of the data area.

## **Configuring Batch Workflows for ADM Command-Line Interface Deployment**

Configure Application Deployment Manager (ADM) batch workflows in Siebel Tools to enable migration of deployment sessions using Server Manager command-line interface (srvrmgr program). This task is a one-time only requirement, and is an optional task in the ["Process for Migrating Customizations Between Applications"](#) on page 23. This task is not required if you plan to migrate deployment sessions using the ADM GUI or by using export files.

### ***To configure Siebel Tools for ADM command-line deployment***

- 1 Launch Siebel Tools.
- 2 In the Object Explorer of Siebel Tools, select the Workflow Process object.
- 3 Locate the following workflow processes:
  - UDA Batch Deployment
  - UDA Batch Import
- 4 If not revised earlier, click Revise.
- 5 For the workflow process UDA Batch Deployment, navigate to the WF Process Props view; in the Default Strings column, configure the property ExportFilePath to a shared network path.

ADM stores export files to this location.

- 6 For the workflow process UDA Batch Import, navigate to the WF Process Props view; in the Default Strings column, configure the property Import File Directory to a shared network path.

ADM retrieves import files from this location.

- 7 Deploy the workflow processes from Siebel Tools.

For further information on this procedure, see *Siebel Business Process Designer Administration Guide*.

- 8 Activate both workflow processes in the application GUI.

For information on this procedure, see *Siebel Business Process Designer Administration Guide*.

**NOTE:** Activate the UDA Batch Deployment workflow on the source system and the UDA Batch Import workflow on the target system.

## Setting Up the Application Environment for Data Migration

Before migrating configuration or administrative data from one Siebel application to another using Application Deployment Manager (ADM), make sure certain application environment functions are set up and running.

This set-up check is a task in the ["Process for Migrating Customizations Between Applications" on page 23](#).

Make sure the following are set up and functioning in the application environment prior to running ADM:

- Enable the following server component groups or confirm availability: Workflow Management (Workflow), Enterprise Application Integration (EAI) and System Management (System). For information on enabling server components and server component groups, see *Siebel System Administration Guide*.
- Synchronize server components. For information on synchronizing server components see *Siebel System Administration Guide*.
- Activate necessary workflows that have a name starting with UDA. For information on activating workflows, see *Siebel Business Process Designer Administration Guide*.

## Creating ADM Data Types

Creating Application Deployment Manager (ADM) data types is a task in the ["Process for Migrating Customizations Between Applications" on page 23](#). Use the ADM GUI to complete this task. Creating an ADM data type establishes a reference to the content object, for example, an assignment rule or price list.

### To create an ADM data type

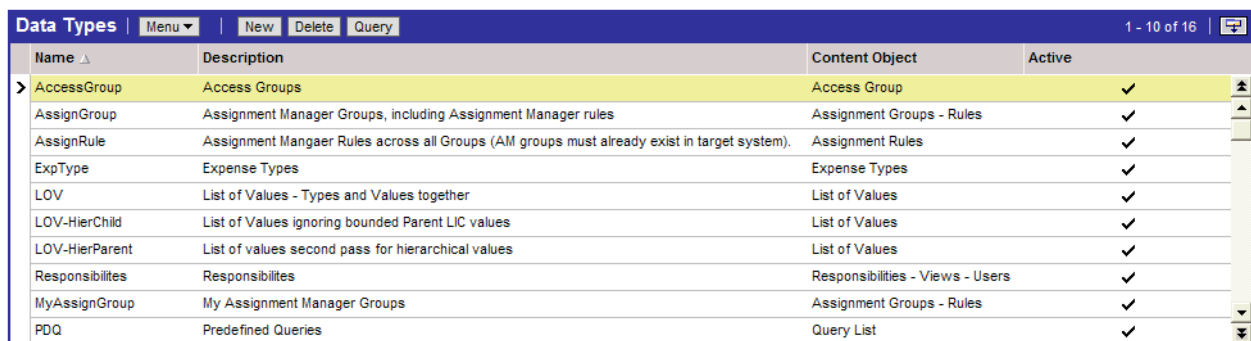
- 1 From the application-level menu, choose Navigation > Site Map > Application Deployment Manager screen.
- 2 From the link bar, click Data Type Details.
- 3 In the Data Types Details list, click the menu button and then New Record.
- 4 In the Data Type Object field, select the content object associated with the data type you want to migrate, for example, a product line or list of values.

**NOTE:** If a content object is not available, make sure it is configured in Siebel Tools. See [“Creating Integration Objects for ADM” on page 24](#) for further information.

- 5 In the Name field, type in a descriptive name for the data type.
- 6 Click the menu button and then Save Record.

ADM sets the Data Type Active field check box by default. Clearing this field sets the data type to inactive. In this state, the data type cannot be added to a deployment project, a subsequent task in [“Process for Migrating Customizations Between Applications” on page 23](#).

Figure 1 shows an example of creating an ADM data type.



Name	Description	Content Object	Active
AccessGroup	Access Groups	Access Group	✓
AssignGroup	Assignment Manager Groups, including Assignment Manager rules	Assignment Groups - Rules	✓
AssignRule	Assignment Manager Rules across all Groups (AM groups must already exist in target system).	Assignment Rules	✓
ExpType	Expense Types	Expense Types	✓
LOV	List of Values - Types and Values together	List of Values	✓
LOV-HierChild	List of Values ignoring bounded Parent LIC values	List of Values	✓
LOV-HierParent	List of values second pass for hierarchical values	List of Values	✓
Responsibilities	Responsibilities	Responsibilities - Views - Users	✓
MyAssignGroup	My Assignment Manager Groups	Assignment Groups - Rules	✓
PDQ	Predefined Queries	Query List	✓

Figure 1. Creating an ADM Data Type

## Creating ADM Data Type Relationships

Creating Application Deployment Manager (ADM) data type relationships is only necessary if certain data types must be deployed before other data types. This task is a step in [“Process for Migrating Customizations Between Applications” on page 23](#)

For background information on ADM data type relationships, see [“About ADM Data Type Relationships” on page 20](#).

Set up parent-child relationships between data types using the Data Type Explorer view.

### To add a child relationship to an ADM data type

- 1 From the application-level menu, choose Navigation > Site Map > Application Deployment Manager screen.

- 2 From the link bar, click Data Type Explorer.
- 3 In the Data Types list or Data Type explorer list, select the data type of interest.
- 4 Click the Add button to access the data type list.
- 5 Select the child data type of interest from this list.

The selected child data type appears under the parent data type in the Data Type Explorer view.

### To remove a child relationship from an ADM data type

- 1 From the application-level menu, choose Navigation > Site Map > Application Deployment Manager screen.
- 2 From the link bar, click Data Type Explorer.
- 3 In the Data Types list or Data Type explorer list, select the data type of interest.
- 4 In the child data type list, select the child data type to remove.
- 5 Click the Remove button.

Figure 2 shows an example of creating an ADM data type child relationship between StateModel and LOV data types.

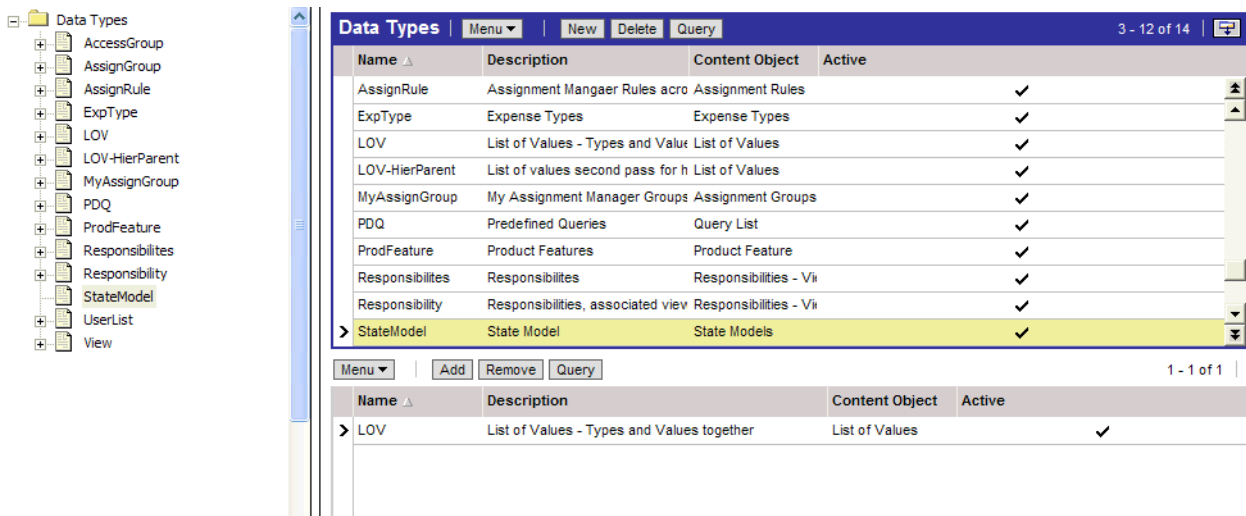


Figure 2. Creating a Child Data Type Relationship

## Creating ADM Deployment Projects

Creating Application Deployment Manager (ADM) deployment projects is a step in ["Process for Migrating Customizations Between Applications" on page 23](#). A project is the template that can be reused to migrate the same data types on a regular basis. A project can contain many data types.

### To create an ADM deployment project

- 1 From the application-level menu, choose Navigation > Site Map > Application Deployment Manager screen.
- 2 From the link bar, click Deployment Projects.
- 3 In the Deployment Projects list, click the menu button and then New Record.
- 4 Fill in the project record fields as necessary. See the following table for details on some of these fields.

Field	Description
Name	Name for the deployment project.
Target System	Target system for deploying the migration information. This should be the URL to the target EAI object manager.
Target User Name	User name required to access the target system.
Active Flag	Set by default, this flag signifies the project is available for deployment as a deployment session. Clear this field to make sure this project is not deployed.
Export to File	Check this field if migrating data by using export files. See <a href="#">"Deploying Sessions Using Export Files" on page 34</a> for information on this process.
Session Configurable	Check this field if further configurations are required when accessing this project as a deployment session. If this value is checked, the project field Export to File is read-only, as are the project data type fields, Active and Deployment Filter.

- 5 In the Deployment Project data type list, populate the new project with data types by clicking the menu button then New Record. For each record:
  - a Select a previously created data type from the Data Type Name drop-down list.

**NOTE:** If the data type of interest is not available, it may be set to inactive. Check to make sure the Active field is set in the Data Type Details view.

- b Fill in the other data type record fields as necessary. See the following table for details on some of these fields.

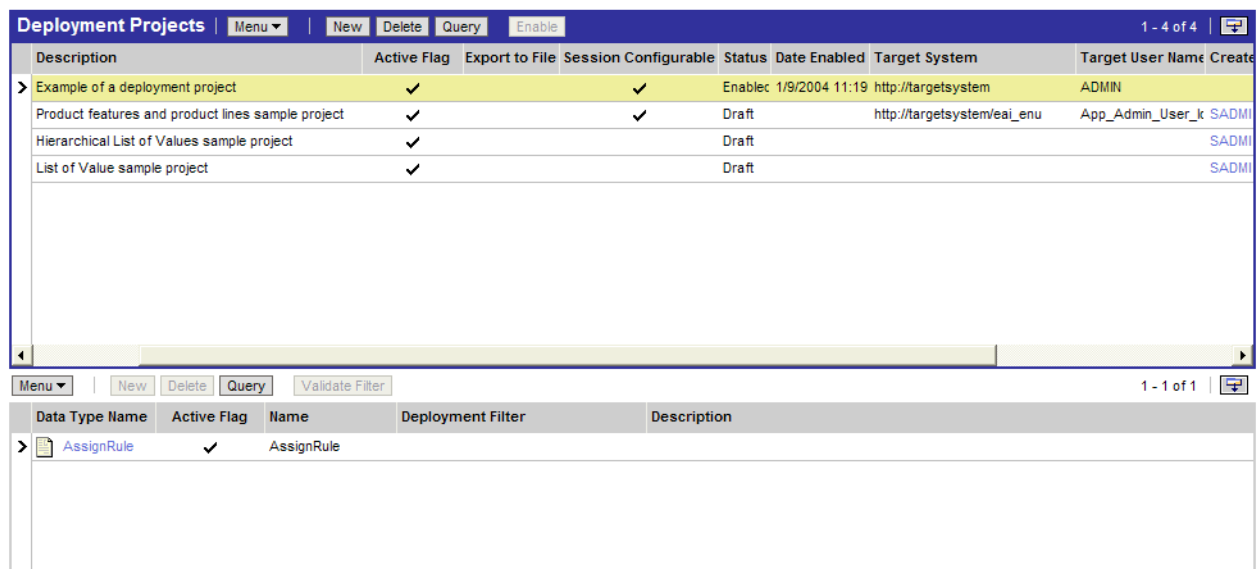
Field	Description
Active	Clear the active field to inactivate a data type within a project. Use this feature to migrate a deployment project without migrating the data from the inactivated data types.
Deployment Filter	See <a href="#">“Creating ADM Deployment Filters” on page 30</a> for details on this field.

- 6 Add other data types as required to the draft deployment project.

**NOTE:** If a relationship is set up between two data types, only the parent data type is visible in the picklist. Child data types are automatically added to the project and will maintain the relationship within the project.

- 7 From the Deployment Projects list, click the menu button and then Save Record.

Figure 3 shows an example of creating an ADM project.



The screenshot displays two tables from the Siebel eBusiness Applications GUI. The top table, titled 'Deployment Projects', has columns: Description, Active Flag, Export to File, Session Configurable, Status, Date Enabled, Target System, Target User Name, and Create. It lists four projects: 'Example of a deployment project' (Active, Enabled), 'Product features and product lines sample project' (Active, Draft), 'Hierarchical List of Values sample project' (Active, Draft), and 'List of Value sample project' (Active, Draft). The bottom table, titled 'Data Type', has columns: Data Type Name, Active Flag, Name, Deployment Filter, and Description. It lists one data type: 'AssignRule' (Active, AssignRule).

Description	Active Flag	Export to File	Session Configurable	Status	Date Enabled	Target System	Target User Name	Create
Example of a deployment project	✓		✓	Enabled	1/9/2004 11:19	http://targetsystem	ADMIN	
Product features and product lines sample project	✓		✓	Draft		http://targetsystem/eai_enu	App_Admin_User_k	SADM
Hierarchical List of Values sample project	✓			Draft				SADM
List of Value sample project	✓			Draft				SADM

Data Type Name	Active Flag	Name	Deployment Filter	Description
AssignRule	✓	AssignRule		

Figure 3. Creating an ADM Project

## Creating ADM Deployment Filters

Creating Application Deployment Manager (ADM) data filters is an optional, but highly recommended, task of the ADM Server Manager GUI set-up process. This task is a step in the [“Process for Migrating Customizations Between Applications” on page 23](#).

The deployment filter allows the migration of specially selected records of that particular data type. It is recommended to use a filter for each data type. For further information about deployment filters, see [“About ADM Deployment Filters” on page 20](#).

### ***To create an ADM deployment filter***

- 1 From the application-level menu, choose Navigation > Site Map > Application Deployment Manager screen.
- 2 From the link bar, click Deployment Projects.
- 3 In the Deployment Projects list, select the Project of interest.
- 4 In the Deployment Project data types list, select the Data Type of interest.
- 5 In the Deployment Filter field, create a search expression to filter out only those items of a data type matching the condition for migration.

**NOTE:** For details on the format for deployment filters, see [“About ADM Deployment Filters” on page 20](#).

- 6 To make sure the filter is accurate, click the Validate Filter button.

## **Enabling the ADM Deployment Project**

Enabling the Application Deployment Manager (ADM) deployment project is a task in the [“Process for Migrating Customizations Between Applications” on page 23](#).

Enabling the project:

- Validates data filters created on the data types.
- Enables the project for use in deployment sessions.
- Locks the project values, that is, nothing can change except the Active field. (If you inactivate the project by clearing the Active field, you cannot deploy the project.)

**NOTE:** After a project is enabled, it cannot be updated but can be set inactive to prevent further usage. To update an enabled project, copy the project and provide a different name.

### ***To enable the ADM deployment project***

- 1 From the application-level menu, choose Navigation > Site Map > Application Deployment Manager screen.
- 2 From the link bar, click Deployment Projects.
- 3 In the Deployment Projects list, select the draft deployment project of interest. (The Status field of the draft deployment project record appears as Draft.)
- 4 Click the Enable button to activate the project.

ADM populates the Status field with Enabled and the Publication Date/Time field with the data and time of the project activation.

## Creating Deployment Sessions Using ADM

Creating deployment sessions using the Application Deployment Manager (ADM) is a task in the [“Process for Migrating Customizations Between Applications” on page 23](#).

Before creating a deployment session, make sure that required configurations are complete and a deployment project exists.

### ***To create a deployment session***

- 1 From the application-level menu, choose Navigation > Site Map > Application Deployment Manager screen.
- 2 In the Deployment Sessions list, click the menu button and then New Record.
- 3 In the Project Name field drop-down list, select the deployment project of interest.

ADM populates several fields in the record with information from the deployment project.

**NOTE:** Only enabled deployment projects are available for addition to a deployment session. See [“Enabling the ADM Deployment Project” on page 31](#) for further information on this task.

- 4 If necessary, clear the Deployment Lock field to change the Deploy button to read-only status. (Click the Refresh button to see this change.) When the Deployment Lock field is selected, the individual listed in the Locked By field is the only person who can deploy the deployment session. (In normal operations, the Locked By flag is always checked.)

**NOTE:** The Deployment Lock flag is useful in complex environments where multiple individuals work together. For example, one person can create and unlock the session, which allows another person to login, lock, and deploy that session.

- 5 If necessary, change the values in the Filter field and Active field of the deployment project's data types. These fields are accessible only if the deployment project field Session Configurable was checked during the creation of the deployment project.
- 6 To refresh the data in the Deployment Sessions view, click the Refresh button.



Figure 4 shows an example of creating an ADM deployment session.

The screenshot displays the 'Deployment Sessions' window. At the top, there is a menu bar with options: Menu, New, Delete, Query, Deploy, and Refresh. Below this is a table with the following columns: Session Id, Project Name, Description, Status, Export to File, Deployment Lock, Locked By, Log, Target System, and Target User Login. A single row is visible with the following data: Session Id: 88-1IMEP, Project Name: Example Project, Description: Example Session, Status: New, Export to File: (empty), Deployment Lock: (checked), Locked By: SADMIN, Log: (empty), Target System: http://targetsystm, Target User Login: ADMIN. Below the table is a scroll bar. At the bottom of the window, there is another menu bar with options: Menu, Query, and Validate Filter. Below this is a table with the following columns: Name, Active Flag, Data Type Name, Status Code, Deployment Filter, and Comments. A single row is visible with the following data: Name: AssignRule, Active Flag: (checked), Data Type Name: AssignRule, Status Code: Filter Validated, Deployment Filter: (empty), Comments: (empty).

Session Id	Project Name	Description	Status	Export to File	Deployment Lock	Locked By	Log	Target System	Target User Login
88-1IMEP	Example Project	Example Session	New		✓	SADMIN		http://targetsystm	ADMIN

Name	Active Flag	Data Type Name	Status Code	Deployment Filter	Comments
AssignRule	✓	AssignRule	Filter Validated		

Figure 4. Creating an ADM Session

## Deploying Sessions Using the Application Deployment Manager GUI

Deploying sessions by using the ADM GUI is one means to migrate data from one Siebel application environment to another, and is a task in the [“Process for Migrating Customizations Between Applications” on page 23](#). For other deployment options, see the following sections:

- [“Deploying Sessions Using Export Files” on page 34](#)
- [“Deploying Sessions Using Command-Line Interface” on page 35](#)

Before deploying a session, make sure that required configurations are complete and a deployment session exists. See [“Creating Deployment Sessions Using ADM” on page 32](#) for information on creating deployment sessions and other required configurations.

### ***To migrate a deployment session***

- 1** From the application-level menu, choose Navigation > Site Map > Application Deployment Manager screen.
- 2** From the link bar, click Deployment Sessions.
- 3** Select the deployment session of interest. Make sure the Deployment Lock field is checked.
- 4** Click the Deploy button.

- 5 Enter the password for the target system user and then click the Deploy button.

The Status field of the deployment session record changes to Submitted. Click the Refresh button to further update the status of the deployment.

**NOTE:** The volume of data and the number of items within a session contribute to the processing time.

- 6 Check the details of the deployment by reviewing ADM log files and the EAI queue. See [“Reviewing the ADM Data Migration” on page 37](#) for further information on these tasks.

## Deploying Sessions Using Export Files

Deploying sessions using export files is one means to migrate data from one Siebel application environment to another, and is a task in the [“Process for Migrating Customizations Between Applications” on page 23](#). For other deployment options, see the following sections:

- [“Deploying Sessions Using the Application Deployment Manager GUI” on page 33](#)
- [“Deploying Sessions Using Command-Line Interface” on page 35](#)

Before deploying a session, make sure that required configurations are complete and a deployment session exists. See [“Creating Deployment Sessions Using ADM” on page 32](#) for information on creating deployment sessions and other required configurations.

To migrate data using export files, perform the following tasks:

- 1 Export a deployment session from the source system to a deployment session XML file.
- 2 Import the deployment session XML file to the target system.

### ***To export a deployment session file***

- 1 Access the source system, that is, the system from which you want to migrate data.
- 2 From the application-level menu, choose Navigation > Site Map > Application Deployment Manager screen.
- 3 From the link bar, click Deployment Sessions.
- 4 Select the deployment session of interest. Make sure the Export to File and the Deployment Lock fields are checked.
- 5 Click the Deploy button.
- 6 Enter the network path for the export directory, then click the Export button. (Do not specify a file name. ADM automatically generates a file name based on the items within the session.)

For example, on Windows, if the network administrator sets up a shared directory called stage\_1 on the server OMEGA, then the network path supplied to ADM should be \\OMEGA\\stage\_1.

Click the Refresh button to update the status of the deployment.

**NOTE:** The network path is relative to the Siebel Server. It is recommended to set up a common area for file operations, which is accessible from all the Siebel Servers. Additional set-up tasks may be necessary depending on the Siebel Server operating system.

- 7 Navigate to the network path entered in the previous step to review and access the export file.
- 8 Check the details of the deployment by reviewing ADM log files and EAI queue. See [“Reviewing the ADM Data Migration” on page 37](#) for further information on these tasks.

**NOTE:** The volume of data and the number of items within a session contribute to the processing time.

### ***To import a deployment session file***

- 1 Access the target system, that is, the system to which you want to migrate data.
- 2 Make sure the source file is accessible.
- 3 From the application-level menu, choose Navigation > Site Map > Application Deployment Manager screen.
- 4 From the link bar, click Deployment Sessions.
- 5 In the Deployment Sessions list, click the menu button and then Deploy from File.
- 6 Enter the network path and file name for the import file, then click the Import button.

**NOTE:** The import process requires the file name as input. If the export session generated multiple files, the import step needs to be executed for each file.

- 7 Check the details of the deployment by reviewing the target application object manager log files and EAI queue. See [“Reviewing the ADM Data Migration” on page 37](#) for further information on these tasks.

## **Deploying Sessions Using Command-Line Interface**

Deploying sessions using the Server Manager command-line interface (srvrmgr program) is one means to migrate data from one Siebel application environment to another, and is a task in the [“Process for Migrating Customizations Between Applications” on page 23](#). For other deployment options, see the following sections:

- [“Deploying Sessions Using the Application Deployment Manager GUI” on page 33](#)
- [“Deploying Sessions Using Export Files” on page 34](#)

Before deploying sessions using the command-line interface, make sure that required configurations are complete and deployment sessions exist. See [“Creating Deployment Sessions Using ADM” on page 32](#) for information on creating deployment sessions and other required configurations. Also make sure ADM batch workflows are configured in Siebel Tools. See [“Configuring Batch Workflows for ADM Command-Line Interface Deployment” on page 25](#) for a description of this task.

To migrate deployment sessions using the Server Manager command-line interface, perform the following tasks:

- 1 From the source system Server Manager command-line interface, deploy sessions using export files to a shared network path.

- 2 From the target system Server Manager command-line interface, import the deployment session files to the target system.

### **To export deployment sessions using Server Manager command-line interface**

- 1 In the source system, make sure deployment sessions intended for srvrmgr deployment have the field Export to File checked. See [“Creating Deployment Sessions Using ADM” on page 32](#) for further information on deployment sessions.
- 2 In the source system, make sure the Deployment Lock value is checked and your Server Manager user ID is in the Locked By field for each session.

**NOTE:** You can only migrate locked deployment sessions with your user ID.

- 3 Start Server Manager command-line interface (srvrmgr program) with your user ID.  
For details on this procedure, refer to *Siebel System Administration Guide*.
- 4 Verify the server component Workflow Process Manager (WfProcMgr) is online.  
If not, enable the Workflow component group and restart the Siebel Server. For details on these procedures, see *Siebel System Administration Guide*.

- 5 Enter the following command at the Server Manager command-line interface prompt:  
start task for comp wfProcMgr server *Siebel\_Server\_Name* with ProcessName="UDA Batch Deployment", RowID="*Session\_ID*"

where:

*Siebel\_Server\_Name* = Name of the Siebel Server.

UDA Batch Deployment = Name of the workflow process. This value is case-sensitive.

*Session\_ID* = Session ID of deployment session.

- 6 Check the details of the deployment by reviewing the source system ADM log files and EAI queue. By default, an EAI queue entry is created in case of any deployment errors on the target system. See [“Reviewing the ADM Data Migration” on page 37](#) for further information on these tasks.

### **To import deployment sessions using Server Manager command-line interface**

- 1 Make sure export deployment files exist in shared network location.
- 2 Start Server Manager command-line interface (srvrmgr program) with your user ID in the target system.

For details on this procedure, refer to *Siebel System Administration Guide*.

- 3 Verify the server component Workflow Process Manager (alias WfProcMgr) is online.  
If not, enable the Workflow Management component group (alias Workflow) and restart the Siebel Server. For details on these procedures, see *Siebel System Administration Guide*.
- 4 Enter the following command at the Server Manager command-line interface prompt:

start task for comp WfProcMgr server *Siebel\_Server\_Name* with ProcessName="UDA Batch Import", RowID="*Session\_ID*"

where:

*Siebel\_Server\_Name* = Name of the Siebel Server.

UDA Batch Import = Name of the workflow process. This value is case-sensitive.

*Session\_ID* = Session ID of the deployment session used to generate the export files.

- 5 Check the details of the batch deployment by reviewing the source system ADM log files and EAI queue. See ["Reviewing the ADM Data Migration" on page 37](#) for further information on these tasks.

**NOTE:** One import step reads in all previously generated files by the export session executed on the source system.

## Reviewing the ADM Data Migration

Review an Application Deployment Manager (ADM) migration by:

- Monitoring the status field of the deployment session record
- Accessing the log file for the deployment session
- Reviewing the EAI queue

For information on deployment sessions and the process for migrating data, see ["Process for Migrating Customizations Between Applications" on page 23](#).

For background information on ADM, see ["About Migrating Customizations Between Applications" on page 19](#).

### Reviewing Deployment Session Status

The deployment session status field can have the values described in [Table 5](#).

Table 5. Deployment Session Status Field Values

Status Value	Description
New	State of the deployment session after creation but prior to deployment.
Submitted	State of the deployment session while in process of deployment.
Deployment Completed	State of a complete and successful deployment. See <a href="#">"Accessing ADM Migration Log Files" on page 38</a> log file for further details on the deployment.
Deployment Failed	State of a failed deployment. See <a href="#">"Accessing ADM Migration Log Files" on page 38</a> log file for details on why the deployment was unsuccessful.

Table 5. Deployment Session Status Field Values

Status Value	Description
Incomplete Deployment	State of an incomplete deployment. Incomplete deployment occurs when there are multiple items within the session. One of these items encountered an error while others completed successfully. Users need to copy the session and retry. Successful items could be inactivated.
Validation Failed	State of a deployment session that cannot access the target system (either password or target path is incorrect). A session with this status can be deployed again once the error is corrected.

**NOTE:** With the exception of Validation Failed and New, all sessions must be copied or re-created to be deployed again.

## Accessing ADM Migration Log Files

Access ADM migration log files to review or troubleshoot the migration of a deployment session. After a deployment session completes or fails, ADM creates a log file in the deployment session record. The log files provide details on any failures, as well as source and target environment information.

To access other migration logging in the EAI queue, see [“Accessing ADM Migration Logging from EAI Queue” on page 38](#).

### To access ADM migration log files

- 1 From the application-level menu, choose Navigation > Site Map > Application Deployment Manager screen.
- 2 From the link bar, click Deployment Sessions.
- 3 In the Deployment Sessions list, click the deployment session record of interest.
- 4 In the Log field, click on the log file number.
- 5 Review log file details in the Log view.

## Accessing ADM Migration Logging from EAI Queue

Migration logging data is also logged by default to the EAI queue in case of errors. This data is accessible from the Administration - Integration screen of the target system. For further information on the EAI queue, see *Siebel Connector for SAP R/3*.

**NOTE:** A user property setting on the Session business component determines EAI Queue logging behavior: Never, Always, and On Error. File imports are always logged unless this property setting value is Never.

To access other ADM logging files, see [“Accessing ADM Migration Log Files” on page 38](#).

### To access ADM migration logging from EAI queue

- 1 In the target system application-level menu, choose Navigation > Site Map > Administration - Integration screen.
- 2 From the link bar, select EAI Queue.
- 3 Search on the Session ID number or the prefix *File\_Import* to locate EAI queue logging information for data deployed from a file.

The EAI queue item contains the actual message in the form of an XML attachment. Each data type has a separate queue item created.

## Troubleshooting ADM Migration

This section provides guidelines for resolving Application Deployment Manager (ADM) problems.

To resolve the problem, look for it in the list of Symptoms/Error messages in [Table 6](#).

Table 6. Resolving Application Deployment Manager Migration Problems

Symptom/Error Message	Diagnostic Steps/Cause	Solution
Log file error: No change update is in effect.	<ul style="list-style-type: none"> <li>■ Siebel Server components are not synchronized.</li> <li>■ Workflow Management (Workflow) component group disabled or off-line.</li> </ul>	<ul style="list-style-type: none"> <li>■ Synchronize Siebel Server components.</li> <li>■ Enable or online the Workflow Management (Workflow) component group.</li> </ul> <p>For a description of these tasks, see <i>Siebel System Administration Guide</i>.</p>
On some objects, errors are seen during deployment. Error depends on the object and the operation at that time (insert or update).	Users used in deployment must hold a position.	Add users to a position. For a description of this task, see <i>Security Guide for Siebel eBusiness Applications</i> .
The value for the field Last Updated By does not match the user who is used during deployment	If deploying in asynchronous mode (default), the system fields on the target system (Created By, Last Updated By) will point to the user running the Server Request Broker (SRBroker) component and NOT the User ID that was entered on the source system.	

Table 6. Resolving Application Deployment Manager Migration Problems

Symptom/Error Message	Diagnostic Steps/Cause	Solution
Cannot connect to target.	<ul style="list-style-type: none"> <li>■ Errors in the EAI configuration file.</li> <li>■ No UDADeploy subsystem.</li> </ul>	<ul style="list-style-type: none"> <li>■ Confirm entry in <code>eai.cfg</code>: UDADeploy = UDADeploy (under [HTTP Services])</li> <li>■ Confirm UDADeploy Subsystem under Enterprise Profile. For information on the Enterprise Profile, see <i>Siebel System Administration Guide</i>.</li> </ul>
Cannot deploy sessions using Server Manager command-line interface (srvrmgr program).	<ul style="list-style-type: none"> <li>■ Command-line syntax errors.</li> <li>■ Different User IDs used to create sessions and run srvrmgr program.</li> </ul>	<ul style="list-style-type: none"> <li>■ Make sure command-line syntax is correct. For information on using the srvrmgr program, See <i>Siebel System Administration Guide</i>. User creating session must be the same user running srvrmgr program session.</li> </ul>
GUI error message: The characters: '<?>' that are being inserted into column '<?>', are not compatible with the Server Database Charset. (SBL-DBC-00110).	Codepage different between the source system and target system.	Change the codepage on the source or target database. The source must be compatible with the target.



# 4

## Rolling Out Updates to Mobile and Dedicated Clients

Rolling out application configuration changes or updates to mobile and dedicated clients is the final step in going live to a new application environment. Use the Siebel Packager utility for this purpose.

This chapter includes the following topics:

- [“About Rolling Out Updates to Mobile and Dedicated Clients” on page 41](#)
- [“Process of Rolling Out Updates to Mobile and Dedicated Clients” on page 42](#)
- [“Preparing to Use the Siebel Packager Utility” on page 42](#)
- [“Running the Siebel Packager Utility” on page 43](#)
- [“Making Your Customized Installer Available to End Users” on page 48](#)

### About Rolling Out Updates to Mobile and Dedicated Clients

The Siebel Packager utility allows the Siebel administrator to rollout Siebel application configurations and customizations to mobile and dedicated clients. Siebel Packager assembles the Siebel client executable program and other installed files, including your custom configuration, into a customized installation package.

Siebel administrators can use these installation packages when installing Siebel eBusiness Applications for the first time or when upgrading from previous versions. Optionally, you can package the Siebel client installation as a single, self-extracting archive file.

**CAUTION:** Do not use Packager for Siebel maintenance releases. Packager is designed for use with full releases. It does not include the necessary functionality to install a Siebel release that depends on the existence of a previous release.

For details on the process of rolling out customizations using the Siebel Packager utility, see [“Process of Rolling Out Updates to Mobile and Dedicated Clients” on page 42](#).

### Distributing Siebel Client Packages

After the Siebel client installation has been packaged, the package can be distributed to your users in several ways. For details, see [“Making Your Customized Installer Available to End Users” on page 48](#).

- **Siebel Anywhere.** Distribute and execute the package automatically as a Siebel Anywhere kit. For further information on Siebel Anywhere, see *Siebel Anywhere Administration Guide*.
- **CD-ROM or DVD.** Distribute the package to end users on CD-ROMs or DVDs.
- **LAN, WAN, VPN, or modem.** Distribute the package across a LAN, WAN, VPN, or modem. Do this directly or using third-party software.

- **Other methods.** Distribute the package by email or FTP to end users.

## General Process of Creating a Package

The Packager utility creates a standard installation package in two steps:

- 1 Gathers the Siebel components and files you specify, copies the standard InstallShield components into the client installer directory, and creates a packing list used by InstallShield.
- 2 (Optional.) Packages the Siebel client installer (prepared in the previous step) into a self-extracting archive, which, when executed, automatically decompresses and starts the Siebel client installer.

# Process of Rolling Out Updates to Mobile and Dedicated Clients

This topic lists the ordered tasks of the process for rolling out customizations to mobile and dedicated clients using Siebel Packager. For background information on this process, see ["About Rolling Out Updates to Mobile and Dedicated Clients" on page 41](#).

To roll out customizations using Siebel Packager:

- 1 Make preparations before running the Siebel Packager utility. See ["Preparing to Use the Siebel Packager Utility" on page 42](#) for information on this task.
- 2 Run the Siebel Packager utility. See ["Running the Siebel Packager Utility" on page 43](#) for information on this task.
- 3 Distribute the update to mobile and dedicated clients. See ["Making Your Customized Installer Available to End Users" on page 48](#) for information on this task.

## Preparing to Use the Siebel Packager Utility

Before using the Siebel Packager utility, follow the steps in this topic. This task is a part of the ["Process of Rolling Out Updates to Mobile and Dedicated Clients" on page 42](#).

For background information on Siebel Packager and rolling out customizations to mobile and dedicated clients, see ["About Rolling Out Updates to Mobile and Dedicated Clients" on page 41](#).

For instructions on installing Siebel clients, see the *Siebel Installation Guide* for the operating system you are using.

**NOTE:** This chapter refers to the Siebel client root directory, such as `C:\program files\Siebel\7.7\webclient`, as `SIEBEL_CLIENT_ROOT`.

### **To prepare to use the Packager utility**

- 1 Perform a Siebel client installation on the computer on which you will run the Packager utility.

The Packager uses the files from this model client installation (or another client installation, as specified when running the Packager) in creating the installation package.

During Siebel client installation, select *Typical*, or select *Custom* and make sure to select the Packager Utility option.

**NOTE:** If two Siebel clients are installed on the same computer, where one is used as a Mobile Web Client and the other is a master installation for Packager, make sure to exit the SQL Anywhere engine before running Packager. An installation that has an initialized local database should never be used as a master installation for creating packages.

- 2 Customize the model Siebel client installation so that it is identical to how you intend to package it. When you create the custom installer, the Packager utility reproduces this model installation.

If you have custom Siebel repository file (SRF) or configuration files (CFG), report files, Web templates, or other changes or additions, copy them to the appropriate subdirectories under *SIEBEL\_CLIENT\_ROOT*, or under the root directory of another installation that you will use to create the custom installation package.

**NOTE:** The Packager utility can package only those files that reside in the *SIEBEL\_CLIENT\_ROOT* directory.

- 3 Make sure that you have sufficient free disk space on the computer on which you are installing the Packager utility and will create packages.

During the packaging process, the Packager utility temporarily requires at least:

- Three times the amount of disk space required by the Siebel Mobile and Dedicated Web Client software you are packaging, and
- Twice the disk space required by the third-party software (provided with the Siebel eBusiness Applications) that you are packaging.

## **Running the Siebel Packager Utility**

This topic describes how to run the Siebel Packager utility. The Siebel Packager utility wizard guides you in creating the custom Siebel client installer. This task is a part of the [“Process of Rolling Out Updates to Mobile and Dedicated Clients”](#) on page 42.

For background information on Siebel Packager and rolling out customizations to mobile and dedicated clients, see [“About Rolling Out Updates to Mobile and Dedicated Clients”](#) on page 41.

**NOTE:** You must run the Packager once for the base Siebel client modules (BASE option), and once for each language pack you want to include. To include elements in the same package, you must specify the same package name each time.

### **To run the Siebel Packager utility**

- 1** From the Windows Start menu, select Programs > Siebel Web Client 7.x > Siebel Packager.  
The Siebel Client Packager wizard launches and the Choose Setup Language window appears.
- 2** Choose the language in which to conduct the rest of the Siebel Packager procedure and click OK.  
The Directory Definition window appears.
- 3** Specify the following values:
  - **Package.** The name of the package. This is used as the name of the self-extracting archive file (if you create one) and as the name of the subdirectory under *SIEBEL\_CLIENT\_ROOT*\packager\temp in which the custom installer is created.
  - **Siebel Client.** The root-level directory of the Siebel client installation that is included in the custom installation. Accept the default, represented in this book as *SIEBEL\_CLIENT\_ROOT*.
  - **Language Packs.** Specify BASE or specify an installed language pack (for example, ENU for U.S. English). If you want to include language packs in the customized installer, select a language pack.

**NOTE:** Siebel Packager does not work with custom languages.
- 4** At the bottom-right of the window, choose Full Install or Patch Install, based on your desired goal:
  - **Full Install.** Intended for full installations of Siebel eBusiness Applications. This performs an entire installation, using the parameters in the *siebel.ini* file. For more information on the *siebel.ini* file, see Siebel SupportWeb.
  - **Patch Install.** Copies only the packaged files, preserving the same directory structure as the source. Typically, this is used with an existing installation not requiring further customizing. When you run a patch installer, it prompts only for the existing installation directory.
- 5** Click Next and the Module Definition window appears.
- 6** In the Module Definition window:
  - a** Choose the Siebel modules to be included in the custom installation package.  
A list of possible modules appears in the Modules list on the left. For explanations of some of these modules, see [Table 7 on page 46](#).
  - b** If you want to include or exclude a template, select an item in the Modules list. Notice that \*.\* appears in the Include Templates box on the right.  
The Include Templates and Exclude Templates boxes allow you to set the filters used to include or exclude files for each selected component. The default Include filter is \*.\* , which includes all files.  
Include Templates also has an Include Subdirectories check box to indicate whether files in subdirectories for these components are included.

**NOTE:** You do not need to modify Include Templates and Exclude Templates for a typical installer.

- ❑ If you want to prevent a directory from being created for a particular module, select the module and click Remove.
- ❑ If you want to add modules that are located in the *SIEBEL\_CLIENT\_ROOT* directory but do not appear in the Modules list, click Add and specify the path of the module.

To create a required directory without any files, select that module from the Modules list and, under Include Templates, click Remove.

**NOTE:** When preparing a full installation, do not remove any module or components unless you know they will not be needed. See module descriptions in [Table 7 on page 46](#).

**c** Click Next and the Packaging screen appears.

**7** To create the custom installer, click Start.

The Packager utility displays progress information while the Packager executes and creates the package.

**8** (Optional.) After this process is finished, you can further customize the behavior of the packaged installer by editing the siebel.ini file. To do so, click the button labeled Edit siebel.ini. For more information on this procedure, see Siebel SupportWeb.

**9** (Optional.) In order to bypass the installer screen labeled Choose Setup Language, edit the setup.ini file, and change the value of the parameter EnableLangDlg from Y to N.

**10** (Optional.) If you want to package the custom installer into a self-extracting archive, click Next.

**NOTE:** If you do not want to perform this step at this time, you can do it later by running the selfex.bat file in the directory *SIEBEL\_CLIENT\_ROOT\Packager\Temp\package\_name*.

**11** (Optional.) In the Self-extracting Archive window, if you are producing an installer for BASE, click Start to package the self-extracting archive.

The Packager creates the archive as a single executable file called setupex.exe in the directory *SIEBEL\_CLIENT\_ROOT\Packager\Temp\package\_name\selfex*. This step may take some time to complete, depending on the processing speed of the computer you are using. Verify the location of the executable file after the process has completed.

## About Siebel Modules for Packaging

The Siebel Mobile or Dedicated Web Client consists of the installable modules described in [Table 7](#). These modules correspond to the subdirectories under the *SIEBEL\_CLIENT\_ROOT* directory. Additional subdirectories, other than those shown here, may apply for your client installations.

**NOTE:** When you create a package, you can decide which modules or files to include or exclude in the package for distribution to end users. Do not remove any modules or component subdirectories or files unless you know they will not be needed. Verify that your Siebel directory structure contains the files you require, including any modified files or other configuration changes.

Table 7. Siebel eBusiness Applications Modules for Packaging

Component	Description
ACTUATE	Actuate-related files for Reports, located in the <i>SIEBEL_CLIENT_ROOT</i> \actuate directory.
BIN	<p>Siebel executable files (binaries) located in the <i>SIEBEL_CLIENT_ROOT</i>\bin directory, including the required DLL files, configuration files, and executable files such as siebel.exe.</p> <p>If you have customized the configuration files, replace the default configuration files in this directory with your own before you start the Packager utility.</p> <p><b>NOTE:</b> When you create a package, include this module and all components in the bin directory, except for the user preferences file, <i>user_ID&amp;SiebelAppname.spf</i>, and the session file, <i>siebel.ses</i>.</p>
CHARTS	Charts server components for generating charts, located in the <i>SIEBEL_CLIENT_ROOT</i> \charts directory.
FONTS	Barcode font files, located in the <i>SIEBEL_CLIENT_ROOT</i> \fonts directory.
ISSTEMPL	Template files for the SIS (Siebel Interactive Selling) CDA application, located in the <i>SIEBEL_CLIENT_ROOT</i> \isstempl directory.
LOCAL	<p>Location of the local database, local Siebel File System, and docking files for Siebel Remote, located in the <i>SIEBEL_CLIENT_ROOT</i>\local directory.</p> <p><b>NOTE:</b> Include this module in order to create the local directory when you create a package for a full installation. However, you should not initialize a local database before you create the package. Each local database is unique to an individual user and should not be packaged.</p>
LOCALE	<p>Language-specific files, located in the <i>SIEBEL_CLIENT_ROOT</i>\locale directory.</p> <p><b>NOTE:</b> Include this module and all components in the locale directory when you create a package for a full installation.</p>

Table 7. Siebel eBusiness Applications Modules for Packaging

Component	Description
LOG	<p>Log files from Siebel client operations (such as synchronization), located in the <i>SIEBEL_CLIENT_ROOT</i>\log directory.</p> <p><b>NOTE:</b> Include this module in order to create the log directory when you create a package for a full installation.</p>
MSGTEMPL	<p>Message template files used by the Siebel client, located in the <i>SIEBEL_CLIENT_ROOT</i>\msgtempl directory.</p> <p><b>NOTE:</b> Include this module and all components in the msgtempl directory when you create a package for a full installation.</p>
OBJECTS	<p>Object configuration template files (configured objects), located in the <i>SIEBEL_CLIENT_ROOT</i>\objects directory—the precompiled SRF file to distribute to end users.</p> <p>The objects directory must contain at least one SRF file before you start the Packager utility.</p> <p><b>NOTE:</b> Include this module and all components in the objects directory when you create a package for a full installation.</p>
PACKAGER	<p><b>NOTE:</b> Do <i>not</i> include the Packager utility itself when you create a package for distribution to end users.</p>
PATCH_BACK	<p>Removes modules that were applied as part of a patch.</p> <p><b>NOTE:</b> Do <i>not</i> include this module when you create a package for distribution to end users.</p>
PUBLIC	<p>HTML, help, JavaScript, image, and other files for the Siebel client, located in the <i>SIEBEL_CLIENT_ROOT</i>\public directory.</p> <p><b>NOTE:</b> Include this module and all components in the public directory when you create a package for a full installation.</p>
REPORTS	<p>Report template files located in the <i>SIEBEL_CLIENT_ROOT</i>\reports directory.</p> <p>If you have created your own reports, replace the standard report templates in this directory with your own, or add your own, before you start the Packager utility.</p> <p><b>NOTE:</b> Include this module and all components in the reports directory when you create a package for a full installation.</p>

Table 7. Siebel eBusiness Applications Modules for Packaging

Component	Description
SAMPLE	<p>Location of the Sample Database and sample Siebel File System, located in the <i>SIEBEL_CLIENT_ROOT</i>\sample directory—if you have installed the Sample Database.</p> <p><b>NOTE:</b> Generally, you would not distribute the Sample Database to your end users, who will access a local database (Mobile Web Client) or a server database (Dedicated Web Client).</p> <p>You may instead decide to distribute a separate client installer package that includes the Sample Database. If you do this, include the Sample Database, sample configuration files that refer to the Sample Database (located in <i>SIEBEL_CLIENT_ROOT</i>\bin\LANGUAGE), and sample SRF files (located in <i>SIEBEL_CLIENT_ROOT</i>\objects).</p>
SQLTEMPL	<p>SQL template files, located in the <i>SIEBEL_CLIENT_ROOT</i>\sqltempl directory.</p>
TEMP	<p>Working report files, located in the <i>SIEBEL_CLIENT_ROOT</i>\temp directory.</p> <p><b>NOTE:</b> Include this module in order to create the temp directory when you create a package for a full installation.</p>
UPGRADE	<p>Siebel Anywhere upgrade files retrieved by the user, located in the <i>SIEBEL_CLIENT_ROOT</i>\upgrade directory.</p> <p><b>NOTE:</b> This module is applicable only to upgrades, not to new installations.</p>
WEBTEMPL	<p>Siebel Web templates, located in the <i>SIEBEL_CLIENT_ROOT</i>\webtempl directory.</p> <p><b>NOTE:</b> Include this module and all components in the webtempl directory when you create a package for a full installation.</p>

## Making Your Customized Installer Available to End Users

After you have tested your customizations and are satisfied with the client installer you have created, make your customized installer available to end users. This task is a part of the [“Process of Rolling Out Updates to Mobile and Dedicated Clients”](#) on page 42.

For background information on Siebel Packager and rolling out customizations to mobile and dedicated clients, see [“About Rolling Out Updates to Mobile and Dedicated Clients”](#) on page 41.

You can distribute your customized installer to end users using one of the methods described in the following topics:

- [“Deploying the Installer Using Siebel Anywhere”](#) on page 49
- [“Deploying the Customized Siebel Client Installer”](#) on page 49

The suitability of each method will depend on many factors, including available network bandwidth.



## Deploying the Installer Using Siebel Anywhere

You can distribute and execute the customized Siebel client installer automatically as a Siebel Anywhere kit.

User access to a Siebel Anywhere kit requires an existing installation of the Siebel client on the user's machine. Therefore, you can use Siebel Anywhere for upgrades, but not for an initial deployment or new installations.

For more information on using Siebel Anywhere, see *Siebel Anywhere Administration Guide*.

## Deploying the Customized Siebel Client Installer

For new installations or for upgrades, you can distribute the customized Siebel client installer to end users on CD-ROM or local area network (LAN). You can also distribute the customized Siebel client installer across a WAN or VPN, using a modem, by email, or by FTP.

The customized Siebel client installer may optionally be in the form of a self-extracting archive file. Packaging the installer as a self-extracting archive is generally best for distribution methods such as using a modem, email, or FTP.

### ***To distribute a customized Siebel client installer on a CD-ROM or network***

- 1** Perform the following step, as applicable:
  - **CD-ROM:** Place the self-extracting archive file (setupex.exe) or installer package directory onto a CD-ROM, then distribute the CD-ROM to your users.
  - **Network:** Place the self-extracting archive file (setupex.exe) or installer package directory in a network-accessible directory, such as on a LAN. Make sure that all users have access to this directory.
- 2** Notify your users how to access the installer package and initiate the installation process. Optionally, users may need to copy files to their local machine, such as if you packaged a self-extracting archive file.

The procedure users will follow varies according to how you distributed the package, how you created the package, and whether the package is a self-extracting archive file. Users can install a self-extracting archive package by running the archive file.



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