SIEBEL 7
eBusiness

SIEBEL INTERACTIVE SELLING APPLICATIONS UPGRADE GUIDE

VERSION 7.0, REV. I

12-BCID5H

NOVEMBER 2002

Siebel Systems, Inc., 2207 Bridgepointe Parkway, San Mateo, CA 94404

Printed in the United States of America

The full text search capabilities of Siebel eBusiness Applications include technology used under license from Hummingbird Ltd. and are the copyright of Hummingbird Ltd. and/or its licensors.

Siebel, the Siebel logo, TrickleSync, TSQ, Universal Agent, and other Siebel product names referenced herein are trademarks of Siebel Systems, Inc., and may be registered in certain jurisdictions.

Supportsoft™ is a registered trademark of Supportsoft, Inc. Other product names, designations, logos, and symbols may be trademarks or registered trademarks of their respective owners.

U.S. GOVERNMENT RESTRICTED RIGHTS. Programs, Ancillary Programs and Documentation, delivered subject to the Department of Defense Federal Acquisition Regulation Supplement, are "commercial computer software" as set forth in DFARS 227.7202, Commercial Computer Software and Commercial Computer Software Documentation, and as such, any use, duplication and disclosure of the Programs, Ancillary Programs and Documentation shall be subject to the restrictions contained in the applicable Siebel license agreement. All other use, duplication and disclosure of the Programs, Ancillary Programs and Documentation by the U.S. Government shall be subject to the applicable Siebel license agreement and the restrictions contained in subsection (c) of FAR 52.227-19, Commercial Computer Software - Restricted Rights (June 1987), or FAR 52.227-14, Rights in Data—General, including Alternate III (June 1987), as applicable. Contractor/licensor is Siebel Systems, Inc., 2207 Bridgepointe Parkway, San Mateo, CA 94404.

Proprietary Information

Siebel Systems, Inc. considers information included in this documentation and in Siebel eBusiness Applications Online Help to be Confidential Information. Your access to and use of this Confidential Information are subject to the terms and conditions of: (1) the applicable Siebel Systems software license agreement, which has been executed and with which you agree to comply; and (2) the proprietary and restricted rights notices included in this documentation.

Contents

Chapter 3. Upgrading to eConfigurator Version 7

Chapter 4. Upgrading to eSales Version 7

Chapter 5. Upgrading OnLink Browser-Based Applications to Siebel 7

Chapter 6. Upgrading to eAuction Version 7

Appendix A. Preparation for OpenSite Data Migration - MSADC SDK Update

Index

Introduction

This guide is a compilation of upgrade information specific to the eConfigurator, ePricer, eSales, eAdvisor, and eAuction modules of the Siebel Interactive Selling applications. For more information, see the *Upgrade Guide* for the operating system you are using. Most likely, you will not find it necessary to read all the chapters.

NOTE: You must have a current maintenance and support contract in order to be eligible for upgrade. Siebel Professional Services provides an upgrade service package that includes a methodology for analyzing, planning, and executing an upgrade to Siebel 7. Assistance from Siebel Professional Services is available on a time-and-materials basis only.

---

eConfigurator. Product administrators should review Chapter 3, "Upgrading to eConfigurator Version 7" to make sure the previous configuration models and quotes are properly transferred to the Siebel 7 environment. They should also familiarize themselves with the overall new features of the Siebel Interactive Selling applications, particularly the new classification system, to understand this new foundation of product administration. Since Siebel 7 eConfigurator has a new design paradigm, it is important for product administrators to understand these new features and design trade-offs to determine the appropriate upgrade approach.

ePricer. Pricing administrators should review Chapter 2, "Upgrading to ePricer Version 7" and make note of the changes in some of the set-up features. Specifically, "Reviewing the Factor Target Value" on page 24 discusses the new pricing factor basis and results for price factors. Also, technical considerations are given to the use of the Pricing Factor Flow Designer.

eSales. Administrators that need to understand the new and enhanced features in Siebel 7 and their relationship to the upgrade process from Release 6.x eSales should review Chapter 4, "Upgrading to eSales Version 7." Some of the topics covered include user types and responsibilities, Web templates, catalog structure, parametric search, product comparison, credit card processing integration, tax calculation integration, workflow-driven user interface, and encryption.

eAdvisor. This guide outlines the process of migrating former OnLink version 4.0 projects as well as existing version 4.x Siebel eAdvisor and browser-based Siebel eConfigurator projects to Siebel 7. Administrative users for these applications should review Chapter 5, "Upgrading OnLink Browser-Based Applications to Siebel 7."

eAuction. Chapter 6, "Upgrading to eAuction Version 7" outlines the process of migrating existing OpenSite eAuction customers to Siebel 7 eAuction. This guide is intended for customers of both the OpenSite Auction (OSA) product as well as the Dynamic Pricing Toolkit (DPT) product.

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

Database Administrators	Persons who administer the database system, including data loading, system monitoring, backup and recovery, space allocation and sizing, and user account management.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.
Siebel Systems Certified Implementation Partners	Persons that have been trained and certified by Siebel Systems to conduct migrations of existing implementations to Siebel 7.
Pricing Administrators	Persons responsible for entering price list information and price model information.
Product Administrators or Product Managers	Persons responsible for determining product relationships and presentations, making use of Siebel Catalog and Siebel eConfigurator to administer the environment in which end-user product selection flow occurs.

This migration document assumes the reader is familiar with the following:

- Database applications including DB2, SQL Server and Oracle
- The Siebel architecture
- The Siebel Web Engine
- Siebel run-time configuration files (.CFG files)
- The Siebel eBusiness products being upgraded

How This Guide Is Organized

This guide provides information necessary to upgrade to Siebel 7 from eConfigurator, ePricer, eSales, eAdvisor, and eAuction, as well as from legacy OnLink and OpenSite applications. You should read this guide in conjunction with the upgrade guide for the operating system you are using, as it complements the more general Siebel upgrade documentation and highlights considerations specific to the Siebel Interactive Selling applications. You do not need to read every chapter—only the Introduction, Chapter 1, and the chapter or chapters that pertain to your upgrade.

The upgrade information provided varies among the applications, as the upgrade process involves different activities for each. In cases for which you must make choices about the scope of your Siebel 7 implementation, features new to Siebel 7 are highlighted and compared to earlier functionality to aid in your decision-making process. In cases where there are specific issues relating to certain segments of the upgrade process, information is divided into pre-upgrade, upgrade, and post-upgrade sections so that you can make sure to complete tasks in the correct order.

NOTE: For those readers upgrading to Siebel 7 eAuction, "Preparation for OpenSite Data Migration - MSADC SDK Update" includes supplemental information about the current version of MSADC SDK required.

Revision History

Siebel Interactive Selling Applications Upgrade Guide, Version 7.0, Rev. I

1 Upgrade Overview

This chapter provides a brief overview of the upgrade processes of the products addressed separately in this guide. In many cases, product names have changed in Siebel 7. Table 1 maps the earlier product names to the new Siebel 7 products.

Table 1. Product Mappings

Pre-Siebel 7 Product Name	Siebel 7 Product Name
OnLink Advisor OnLink Sales	Siebel eAdvisor
OpenSite Auction OpenSite Dynamic Pricing Toolkit Siebel eAuction Enterprise Edition Siebel eAuction MidMarket Edition	Siebel eAuction
OnLink Configurator OnLink Sales Siebel Configurator Siebel eConfigurator	Siebel eConfigurator (includes both server- and browser-based deployment options)
Siebel Pricer Siebel ePricer	Siebel ePricer
Siebel eSales	Siebel eSales

A successful upgrade requires:

- Familiarity with your current implementation as well as Siebel 7 products and deployment.
- Expertise in network connectivity, disk and file sharing, and software installation on your chosen application server and client operating systems.

- User accounts with appropriate access to install new software.
- Expertise in database installation, tuning, and administration in your chosen relational database management system (RDBMS).

Overview of the Upgrade Process

The general upgrade approach for each product follows:

Siebel eAuction. Using upgrade tools, former OpenSite customers and existing Siebel eAuction 4.3.x customers can upgrade to Siebel 7 eAuction in a three-step process of application, data, and user interface migration.

Siebel eAdvisor. Using upgrade tools embedded into Siebel Interactive Designer, former OnLink customers, Siebel eAdvisor customers, and browser-based Siebel eConfigurator customers can upgrade to Siebel 7 eAdvisor—modifying, publishing, or deploying with Siebel 7.

Siebel eConfigurator. Due to changes in design, customers can choose to:

- Enact scripts embedded in the general Siebel upgrade process, then manually review the results, or
- Modify the existing implementation in order to fully realize the benefits of certain new eConfigurator features.

Siebel ePricer. The general Siebel upgrade process will automatically upgrade ePricer-related information. However, you may want to consider certain data and rule restructuring in order to fully realize the benefits of new ePricer features.

Siebel eSales. The general Siebel upgrade process will automatically upgrade eSales-related information, with some modifications necessary. However, customers may want to consider certain data restructuring in order to fully realize the benefits of new eSales features.

Before You Start

The instructions in this guide are ordered in groups of preupgrade tasks, tasks to complete during the upgrade process, and postupgrade tasks. While you should follow the suggested steps in this order, you should also thoroughly review the chapter or chapters that apply to your upgrade situation before beginning. There are specific requirements or suggested actions to note before the upgrade process starts.

It is also worthwhile for you to consider the new features offered in Siebel 7, because in some cases you may have to decide whether to reimplement certain parts of your Siebel Interactive Selling applications in order to use the new functionality offered in Siebel 7. The new features that may influence your upgrading decisions are described at the beginning of each product's chapter.

NOTE: For eConfigurator, eSales, and ePricer upgrades, this guide complements the upgrade guide for the operating system you are using. You should be familiar with the information in the upgrade guide for the operating system you are using before beginning the tasks outlined in this guide.

Siebel Upgrade Tools

Siebel provides an array of utilities to assist you in the various aspects of upgrading to Siebel 7.

The following tools are available to customers upgrading to Siebel 7 eConfigurator, Siebel 7 ePricer, Siebel 7 eSales, and Siebel 7 eAuction:

- **Siebel Anywhere.** Provides software distribution capabilities for mobile clients and connected clients. Siebel Anywhere distributes the required components of the upgrade package and presents a point-and-click interface for the user.
- **Client and Server Software.** Delivers the new client and server executables that contain new Siebel 7 technology and functionality. Using Siebel Anywhere, users and administrators will install both client and server software, along with additional third-party software components.

The following tools are provided to customers upgrading to Siebel 7 eConfigurator, Siebel 7 eSales, and Siebel 7 ePricer. These tools upgrade all customer data, database schema elements, business objects, and user interface elements:

- **Siebel Application Upgrader.** Allows developers to automatically apply customizations from a prior release to the new release.
- **Automatic Database Schema Upgrader.** Allows administrators to migrate the physical database schema and the underlying data to future releases of Siebel software.
- **Data Model.** Defines the relational data schema and the underlying data for each application deployment. Using database upgrade scripts, administrators will be able to upgrade the server database schema to the new Siebel 7 schema.
- **Application Repository.** Provides the configurable, customized metadata that describes each application. Using the Siebel Application Upgrader, you can migrate your metadata and customizations to Siebel 7.

Upgrading to ePricer Version 7 2

Siebel ePricer upgrades require little or no manual intervention beyond the general Siebel upgrade. This chapter highlights the new features in ePricer version 7 and it explains the issues that are important specifically to ePricer: the preupgrade tasks and the postupgrade tasks that surround the general Siebel upgrade.

What's New in ePricer Version 7

Siebel ePricer version 7 provides many new features that you will want to take into consideration when planning your upgrade process. Table 2 lists key ePricer version 7 features.

Table 2. Siebel ePricer Version 7 Features

Feature	Where to Find Information
Attribute-Based Pricing Extends the price list capability by varying base prices according to product attributes.	See "Attribute-Based Pricing and Product Structure" on page 20. For more information, see *Pricing Administration Guide*.
Matrix-Based Pricing Enhances the price model through use of look-ups to external tables.	See "Matrix-Based Pricing" on page 20. For more information, see *Pricing Administration Guide*.
Bundle Pricing Applies discounts and giveaway rules based on the context of all the lines on an order.	See "Bundling" on page 19. For more information, see *Pricing Administration Guide*.
Configurable Bundle Pricing Establishes component prices that are unique to a given bill of materials (BOM).	For more information, see *Pricing Administration Guide*.

Table 2. Siebel ePricer Version 7 Features

Feature	Where to Find Information
Compound Rules Allows for highly specialized pricing treatment that takes place when multiple conditions are met.	See "Compound Rules" on page 19. For more information, see *Pricing Administration Guide*.
New Price List Types Line items on the price list can have up to three separate prices entered.	For more information, see *Pricing Administration Guide*.
Decision Flow Provides a graphic representation and control of the logic flow for a price model.	See "Controlling the Sequencing and Flow of Pricing Rules" on page 20. For more information, see *Pricing Administration Guide*.
Price List Transform Automates the method by which price lists are tailored for publication to specific customers.	For more information, see *Pricing Administration Guide*.
Contract Management Siebel ePricer supports the use of Agreements (sold separately) to establish negotiated product prices.	See "Contracts" on page 20. For more information, see *Pricing Administration Guide*.

Overview of Upgrading to ePricer Version 7

All of the product structures, price lists, pricing models, and price factors associated with ePricer will upgrade automatically as part of the standard Siebel upgrade process. However, because of the value of the new features offered in ePricer version 7, you may want to consider restructuring select parts of your implementation in order to make best use of ePricer version 7.

For instance, you may want to consider restructuring certain data and rules if you have the following requirements:

Bundling

In ePricer version 6.x, you may have used script-based factors to bundle products. Now that ePricer version 7 offers bundle type factors, you may want to replace these script-based factors with actual bundle type factors since the bundle type factors are easier to administer and will likely improve performance.

Customizable Product Pricing (BOMs)

In earlier versions of Siebel, you likely used a combination of Siebel ePricer script-based factors and Siebel eConfigurator to create sales BOMs. Now that sales BOMs can be constructed using Siebel eConfigurator's customizable product structure, and the associated pricing can be defined in ePricer, you may want to consider replacing the approach used in Release 6.x with the improved structure offered in Siebel 7. The customizable product pricing offered in Siebel 7 allows for easier administration and maintenance than script-based factors. It is also more dynamic, allowing the bundle's price to be determined in multiple ways.

Compound Rules

In ePricer version 6.x, you may have used script-based factors or mapping definitions to create something similar to compound rules. Because compound rules are constructed in ePricer version 7, you may want to use the new compound rule functionality.

Attribute-Based Pricing and Product Structure

In ePricer version 6.x, you may have maintained multiple product permutations on a price list in order to represent how the price of a product may differ with the selected attributes of that product. However, in Siebel 7, the product classification system allows you to maintain products more efficiently, associating attributes to product definition. Using ePricer version 7, these product attributes can then be associated with pricing adjustments, eliminating the need to instantiate each product-attribute combination as an item on the price list. You may find it beneficial to restructure your product definitions and price lists to make use of this new structure.

Matrix-Based Pricing

In ePricer version 6.x, you may have used mapping definitions to provide functionality similar to matrix-based pricing. These mapping definitions can be used in ePricer version 7 as well. However, if you have used mapping definitions extensively, you may want to consider using matrix-based pricing instead as this will improve performance and may be easier to administer.

Controlling the Sequencing and Flow of Pricing Rules

In ePricer version 6.x, only sequencing of pricing rules was available. However, in ePricer version 7, the rule flow can be laid out using Decision Flow, which allows rule skipping, exiting and sequencing. Decision Flow provides more control over pricing and it helps improve performance.

Contracts

You may want to consider translating your account-specific pricing rules (for example, “If account = AK Parker, give 10% off”) to Contracts in ePricer version 7, if contract-based pricing is part of your business process.

Preupgrade Tasks

The tasks you need to complete before upgrading to ePricer version 7 involve recording specifics about your existing implementation so that the information can be used to verify the data conversions later.

Reviewing the Release 6.x Configuration File

If your configuration files have been modified, you should record your pricing cache settings so they can be updated to the new versions of the Siebel 7 .CFG files.

Make note of the values for the following pricing cache settings:

- PricerPriceListCacheSize
- PricerPriceItemCacheSize
- PricerVolDisCacheSize
- PricerPriceModelCacheSize

Recording the Default Price List ID

You should review the default price list to record the ID for use in updating the default price list after upgrading to Siebel 7. This will make sure that Siebel eSales and other applications that use a default price list are pricing from the correct price list.

To review the default price list ID

1. Navigate to the Application Administration screen.
2. Select the List of Values applet.
3. Query on the LOV type for `PRICER_MASTER_PRICE_LIST_ID`.
4. Make note of the row ID in the Display Value field.

   This row ID is for your default price list. You will use it once you have completed the upgrade process. See "Checking the Default Price List ID" on page 24.

Recording the Factor Target Value

In Release 6.x, the basis for calculating adjustments was either the starting list price or the current net price (as determined by the value in the Target Price field). If your factor target value (target price) was based on list price in Release 6.x, you need to make note of that value and verify that it was converted to a value called "Base = List" in Siebel 7. If your target price was based on the current net price, then it should remain unchanged in Siebel 7.

To verify the target price

1. Navigate to the Price Administration screen.
2. Select the Price Model Manager screen.
3. Select a price model to review.
4. For each of the production pricing models, inspect all the price factors:
   a. Drill down into the price factor.
   b. In the Price Factor Designer applet, review the details of the price factor definition.
   c. In the Price Factor definition, find the value for Target Price.
   d. Make note of whether the Target Price value is List Price or Current.

Upgrade Task

After the general Siebel upgrade has taken place, you should perform the following ePricer-specific upgrade task.

Reviewing the Siebel 7 Configuration File

You should check the configuration file (.CFG) settings to make sure high interactivity is enabled and that the pricing cache settings are set in accordance with the previous release. See "Reviewing the Release 6.x Configuration File" on page 21.

To verify the Siebel 7 .CFG file settings

1. In the session configuration file, find the setting called `HighInteractivity`.
2. Verify that the line reads as follows: `HighInteractivity = TRUE`

   This will allow you to use the ePricer Decision Flow Designer.
3. Find the pricing cache settings.
4. Verify that the following pricing cache settings are the same as those you recorded in "Reviewing the Release 6.x Configuration File" on page 21:

   NOTE: The cache settings are rarely modified from their original default values. If this step was not a consideration when Release 6.x was originally implemented, you can skip this task.

   - PricerPriceListCacheSize
   - PricerPriceItemCacheSize
   - PricerVolDisCacheSize
   - PricerPriceModelCacheSize

Postupgrade Tasks

Recommended tasks include those activities that should *not* be overlooked. They are activities that have a direct impact on the completeness of the upgrade.

Checking the Default Price List ID

In "Recording the Default Price List ID" on page 21, you made note of the row ID for your default price list. Now that you have upgraded to Siebel 7, you should verify that the default price list is correct. The default price list ID is necessary in order to set the price list that is used for each of the user sessions in eSales.

To check the default price list ID

1. Navigate to the Application Administration screen.
2. Select the List of Values applet.
3. Query on the LOV type for `PRICER_MASTER_PRICE_LIST_ID`.
4. Set the row ID in the Display Value field to that of your default price list, as noted in "Recording the Default Price List ID" on page 21.

Reviewing the Factor Target Value

In "Recording the Factor Target Value" on page 22, you made note of your settings for calculating adjustments. If your factor target value (target price) was based on list price in Release 6.x, you now need to verify that it was converted to a value called "Base = List" in Siebel 7. If your target price was based on the current net price, then it should have remained unchanged in ePricer version 7.

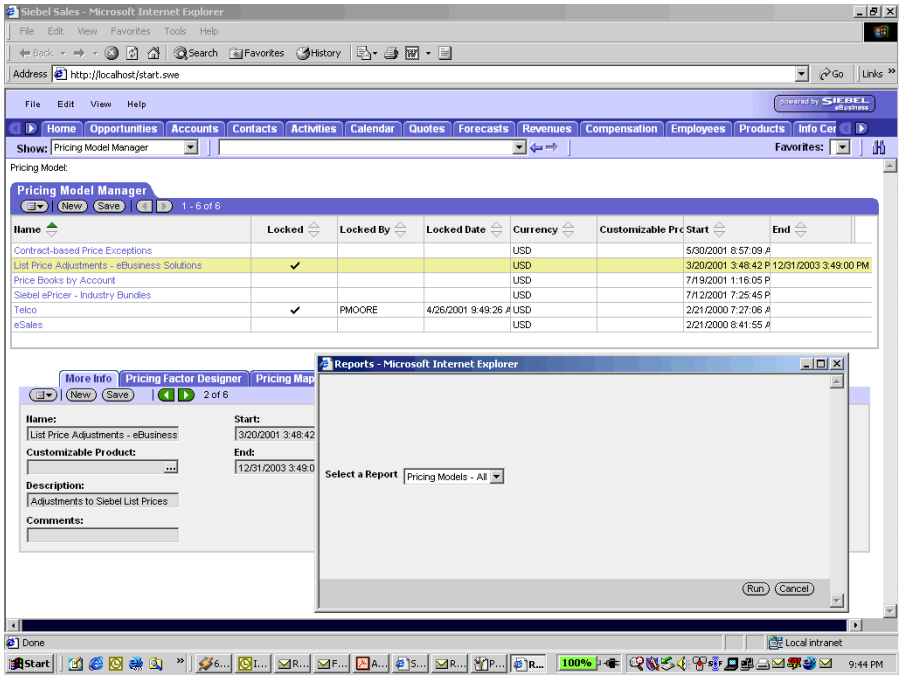
To verify the factor target value

1. Navigate to the Price Administration screen.
2. Click Price Model Manager.
3. In the Pricing Model Manager list applet, select one of the rows to review.
4. From the Siebel menu bar, click View.

5 From the View menu, select Reports.

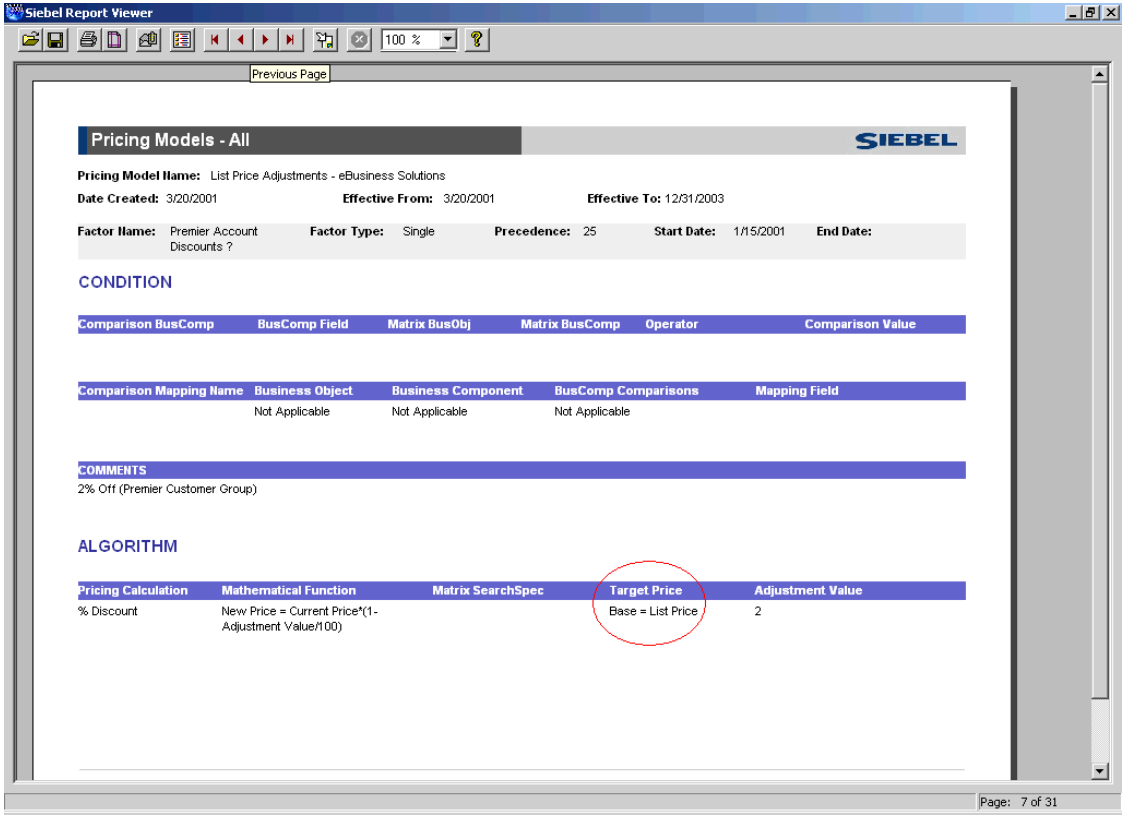
The Reports dialog box appears, as shown in the following figure.

6 From the Reports dialog box, select Pricing Models - All.



7 Click the Run button to run the report.

A pricing models report is generated, as shown in the following figure.



8 Review the report and note the Target Price column.

- If your price factors were previously set at "List" in ePricer version 6.0, then the price factor should now read "Base = List" in the Target Price field.
- If your price factors were previously set at "Current," then the price factor should still read "Current."

NOTE: If the value was converted to a value other than "Base = List" or "Current," change the value to the value that was recorded from the factor as it was in Release 6.x.

For more information on pricing factors, see *Pricing Administration Guide*.

Upgrading to eConfigurator Version 7 3

This chapter provides the information necessary for upgrading to server-based eConfigurator version 7, from either the Release 6.x Product Configurator or the Release 5.x Product Configurator.

To help you better understand the upgrade issues in deciding which upgrade approach to use, "What's New in eConfigurator Version 7" on page 30 highlights some of the major new features in eConfigurator version 7.

What's New in eConfigurator Version 7

Siebel 7 eConfigurator provides many new features that you will want to take into consideration when planning your upgrade process. Table 3 lists the key eConfigurator features that have been enhanced, added, or replaced in version 7. These new features are highlighted to assist you in your upgrade planning.

Table 3. Siebel eConfigurator Version 7 Features

Feature	Where to Find Information
Product Attributes and Classification System In earlier versions of Siebel, eConfigurator rules could be used in association with virtual products and properties to create the notion of product attributes. Now, with the new attributes and product classification system, the need for virtual products, properties, and certain associated configuration rules can in these instances be met more efficiently. Attributes now can be set and managed as part of product definition and can be set at run time. In these cases, you should consider restructuring your data and use the new attributes and product classification system.	For more information, see "Product Attributes and Classification System" on page 32 and "Customizable Products" on page 33. Also see *Product Administration Guide*. For information on restructuring data, see "Review and Adjust eConfigurator Version 6.x Models (Recommended)" on page 40.
Customizable Products Like product attributes, in earlier versions of Siebel a combination of Siebel eConfigurator rules, virtual products, and categories were often used to create product relationships. With eConfigurator version 7, customizable products and the Product Rule Manager allow the creation of bills of material (BOMs), hierarchical products, as well as nested- and subconfigurations. Data that was structured in eConfigurator version 6.x to mimic this type of functionality will not translate exactly into the eConfigurator version 7 framework. Also, since the customizable-product structure can present products and their associated prices in a hierarchical format, the customer's ability to review a quote is enhanced, eliminating the need for the quote solution provided in eConfigurator version 6.x.	For more information, see "Customizable Products" on page 33. Also see *Product Administration Guide*. For information on restructuring product configurations, see "Review and Adjust eConfigurator Version 6.x Models (Recommended)" on page 40.

Table 3. Siebel eConfigurator Version 7 Features

Feature	Where to Find Information
Natural Language Rule Design Siebel eConfigurator version 7's natural-language Product Rule Manager allows nontechnical users to administer simple and complicated configuration rules.	For more information, see "Product Rule Manager" on page 33. For information on reviewing rules of an upgraded configuration model, see "Checking Configuration Rules (Required)" on page 50. Also see *Product Administration Guide*.
UI Flexibility Siebel eConfigurator version 7 allows administrators to customize the application user interface without using Siebel Tools. During the upgrade process, default UI themes will be applied to any upgraded customizable products. To fully realize the benefit of this feature, you may want to modify or redesign certain UI elements.	For more information, see "Declarative User Interface Customization" on page 33. Also see *Product Administration Guide*.
Multiple Instantiation With eConfigurator version 7, you can now configure multiple instances of the same product simultaneously within a single configuration session. You may want to consider restructuring your upgraded configuration models in order to make use of this feature.	For more information, see "Multiple Instantiation" on page 34. Also see *Product Administration Guide*. For information on restructuring configuration models, see "Review and Adjust eConfigurator Version 6.x Models (Recommended)" on page 40.
Browser-Based Configuration Since you will receive both the server-based and browser-based deployment options of eConfigurator version 7 through the upgrade process, you may find that the browser-based deployment more appropriately matches your business needs. The browser-based deployment of eConfigurator represents an additional upgrade option available to you.	For more information, see "Browser-Based Configuration" on page 34. Browser-based deployment is described in *Siebel Interactive Designer Administration Guide*. Also see *Product Administration Guide*.

The development of Siebel's new features often required coming up with a new approach to solving a particular business problem. This has resulted in significant changes to the underlying structure and orientation of Siebel eConfigurator.

Because many of the new features in eConfigurator version 7 approach business problems in a manner that could not have been possible in Release 6.x, there are some limitations to the upgrade process, which are outlined in "Limitations" on page 54. Like any upgrade, the eConfigurator upgrade process cannot guarantee that the new features in the application are used as effectively as possible after the upgrade has taken place, since the legacy data may not be structured in a way to make use of these features. To fully realize the value of the new features offered in eConfigurator version 7, you may want to consider restructuring select parts of your implementation.

The sections that follow provide more detail about the major enhancements in eConfigurator version 7. This information is provided to assist you in planning your upgrade. For more comprehensive information about new Siebel 7 features, or eConfigurator version 7 features, see *Product Administration Guide*.

Product Attributes and Classification System

The product classification system new to eConfigurator version 7 simplifies product administration by shrinking the number of products that require maintenance.

You no longer have to create a single product record and configuration rule for each product combination. In eConfigurator version 7, you define products once in the product catalog, then append multiple attributes (and associated price adjustments, using Siebel ePricer). When you define product classes, you assign attributes to the classes or use the default attributes (see "Default Values" below), and then these attributes are inherited from parent class to subclasses.

Default Values

Siebel eConfigurator version 7 introduces the concept of default values to product administration. This simplifies the assigning of attributes to your products, and it also simplifies ordering for your customers. By setting default values when defining your products, you give your customers the option of configuring their product choices, or simply choosing the defaults you have set up for them.

Customizable Products

Using eConfigurator version 7, product administrators can create customizable products as part of the product definition process rather than having to define relationship rules. You define products and their components in multilevel hierarchies, along with related quantities. You define parent-child relationships among products, facilitating both fixed and substitutable product bundles, bills of materials, and multilevel subconfigurations, or nested configurations.

Product Rule Manager

The improved rules designer offered by eConfigurator version 7 provides a graphic designer for building eConfigurator rules—both simple and complex. Using rule templates—stored sets of rules—you can build other rules or templates for future reuse. The rule templates are created using a natural-language expression that includes predefined placeholders for items or attributes.

NOTE: A new rules-design paradigm was required to create this enhanced functionality. Certain rules designed within eConfigurator version 6.x, particularly those built using the Product Rule Manager, will not match the rule structure of eConfigurator version 7. After the upgrade, you should review these rules for accuracy, and you may need to restructure them. See "Checking Configuration Rules (Required)" on page 50.

Declarative User Interface Customization

Siebel eConfigurator version 7 provides flexibility to customize the application UI to meet your business needs, without using Siebel Tools. You can create your own selection pages in a configuration session for each configurable product and service by selecting from a palette of predefined controls and associating these controls to items that comprise the product definition. For example, an administrator setting up the display for a PC can choose to display CPU options using a drop-down list and show hard-drive options as a series of radio buttons, and then choose from an assortment of predefined templates to provide a logical grouping of the various options that comprise the PC. You can also define your own controls and themes. The UI customizations are not hard-coded; they are created using administrative tools in a data-driven (declarative) fashion. They can be modified using either the run-time administration screens or by changing HTML templates.

Multiple Instantiation

Siebel eConfigurator version 7 provides the ability to manage complex configuration requirements, including the ability to configure multiple instances of the same customizable product simultaneously within a single configuration run-time session. Multiple instantiation allows for more complete modeling of the relationships between the items in a complex configuration. Each customizable product instance can have different values for its selections, such as quantity or attribute values.

Browser-Based Configuration

Siebel eConfigurator operates both on a server-based technology (described throughout this chapter) and a browser-based technology, which performs the processing directly in the end user's Web browser. When an end user initiates a Siebel eConfigurator session, the system downloads user-interface elements, the Siebel eConfigurator browser-based engine, and specific browser-based Siebel eConfigurator data to the user's browser. Once downloaded, all processing can be done on the user's local device, thereby eliminating the need for round trips to the server after every user request. As these are downloaded, processing is done on the user's local device, eliminating the need for round trips to the server after every user selection or request. The result is an interactive session that allows the user to perform configurations and dynamically view the results of selections. This solution is particularly useful when deployed to large numbers of users without concern for bandwidth and latency.

You create new Siebel eConfigurator browser-based models using the Siebel Interactive Designer administration environment, which allows administrators to capture and describe both the data and logic of the browser-based Siebel eConfigurator deployment as well as define the run-time user interface. Once completed, the administrator can then selectively choose the Siebel eConfigurator models to be exposed to end users. For more information, see *Siebel Interactive Designer Administration Guide*.

Overview of Upgrading to eConfigurator Version 7

In upgrading to eConfigurator version 7, you have two major options to choose from when deciding on the approach you will take. You can choose to use the Siebel upgrade tool, or you can choose to manually reimplement your existing Siebel application natively within Siebel 7.

The first approach will migrate as much configuration data as you defined and created in the previous releases to the new application environment. At the same time, it will put fewer of the new Siebel 7 features to work for you. The second approach can give you the full benefits of the new Siebel 7 features, but with limitations on reusing (reconfiguring) existing data such as quotes.

Choosing the appropriate upgrade approach requires careful examination of your business practices as well as thorough consideration of your existing data and the model data you would like to have. In some circumstances, a combination of the two approaches may provide the optimal result. If you need assistance analyzing and planning your upgrade, please contact Siebel Professional Services or the Siebel ISS Competency Center group.

This chapter covers the two upgrade approaches in "Upgrading from eConfigurator Version 6.x to eConfigurator Version 7" on page 36. If you are upgrading from Release 5.x to Siebel 7 eConfigurator, you should also read "Upgrading from Release 5.x Product Configurator to eConfigurator Version 7" on page 73. The upgrade from Release 5.x is very similar to that of Release 6.x, so the two separate upgrade approaches are available in this case as well. If you are upgrading from Release 5.x, you will take the same steps as those upgrading from Release 6.x.

NOTE: For feature mappings between eConfigurator version 6.x and eConfigurator version 7, see the *Product Administration Guide*. The chapter on mapping features between eConfigurator version 6.x and eConfigurator version 7 provides mapping information for administration features, run-time features, quote integration, scripts, and methods. That chapter lists every eConfigurator version 6.x feature and its closest corresponding Siebel 7 feature. For those features not supported in Siebel 7, you will find alternate methods that implement the same or similar functionality. Once you understand the differences and similarities of these features, you will be able to migrate or design your model data and business logic more clearly and effectively.

Upgrading from eConfigurator Version 6.x to eConfigurator Version 7

In upgrading from eConfigurator version 6.x to eConfigurator version 7, you can choose between two major upgrade options: you can use the Siebel standard data upgrade tool and modify the upgraded configuration models, or you can redesign your models natively within the eConfigurator version 7 environment to make best use of the new features.

NOTE: For whichever upgrade option you choose, you must conduct the standard Siebel upgrade to migrate to the Siebel 7 application and database environment.

Approach 1: Using the Standard Upgrade Tool

Before you use the upgrade tool, you may want to review your configuration models and verify some product settings so that the upgrade process will perform optimally. Then you will run the standard upgrade tool, and your eConfigurator model and data will upgrade automatically. There are also some recommended preupgrade and postupgrade tasks to help you complete the process more effectively.

Overview

Siebel System's standard upgrade program migrates existing Release 6.x data into the Siebel 7 database and data repository. The Release 6.x data migrated includes configuration models and configuration data in quotes. As much as possible, the data upgrade script Siebel provides preserves the modeling information that you previously entered when designing your models. It does this by systematically mapping and translating similar data items.

However, since the design paradigms in eConfigurator version 6.x and eConfigurator version 7 are different, some of the functions of the version 6.x features may be implemented differently with Siebel 7 features and are therefore not directly applicable to the Siebel 7 upgraded models. See the *Product Administration Guide* for feature mapping information. Also, the customizable products generated during the standard upgrade cannot make full use of the new Siebel 7 features, such as classification systems and dynamic attributes, without substantial adjustments being made after the automatic upgrade process.

This section describes the details of what the upgrade program does. You will also find recommended procedures to follow before and after performing the upgrade.

Figure 1 shows the process flow of upgrading to eConfigurator version 7 following Approach 1, using the Siebel upgrade tool and reviewing the upgraded models. Solid boxes represent required steps and dotted boxes show recommended steps.

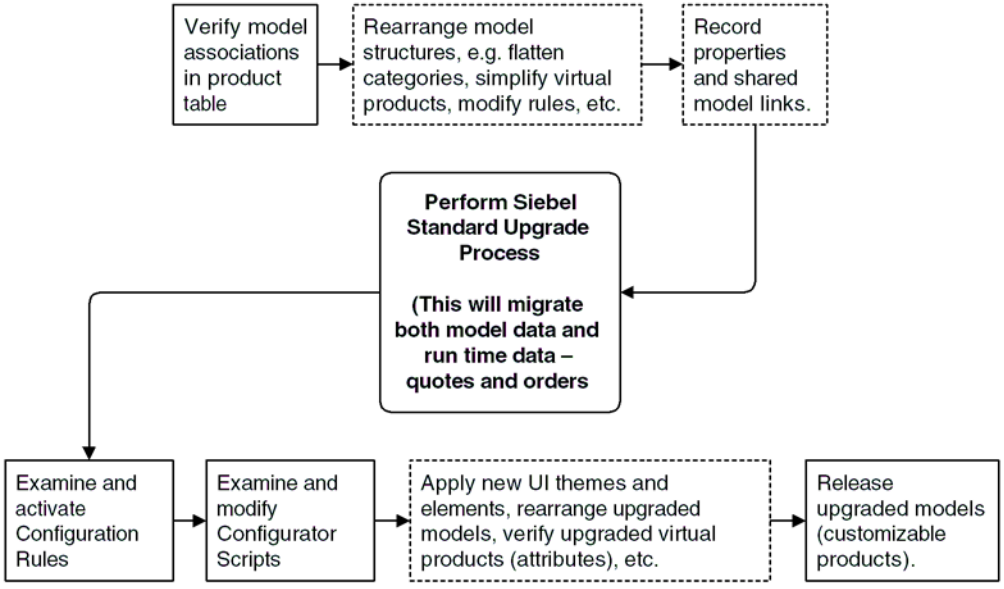


Figure 1. Overview of Upgrading to Siebel eConfigurator Version 7 (Approach 1)

Preupgrade Tasks

This section identifies a series of tasks to complete before launching the automatic Siebel upgrade script.

NOTE: Since the Configurator upgrade script is part of the Siebel standard upgrade script, you need to complete the tasks in this section prior to beginning the overall Siebel application upgrade.

Using these procedures, the Siebel upgrade script can preserve most of your modeling information during the upgrade process. The script will apply some new Siebel 7 features on top of the upgraded data. After running the upgrade script, you should review the upgraded data before it is released to use. See "Postupgrade Tasks" on page 50.

Verifying the Model Associations in the Product Table (Required)

In addition to migrating standard Siebel products definitions, the Siebel upgrade script will migrate configuration model data for related model products instead of migrating the models directly. The upgrade script does this by upgrading model products that have the Model Product field checked and the Configuration Model Name field populated with associated model names.

To make sure your configuration model definitions are properly preserved, before the entire upgrade process starts you should review your product table and verify that appropriate model products are created and associated with their corresponding configuration models.

To verify the model associations

1. Navigate to Screens > Configuration Designer > Model Manager.
2. Record all the models for which you want to preserve definitions.
3. Navigate to Screens > Marketing Administration > Products > Products view.

4 In the Products list applet, do the following:

   a Search for all products with the Model Product field checked and the Configuration Model Name field filled in.

   b Decide whether these model products will continue to be used as Siebel 7 customizable products. If so, make sure they have proper models associated with them.

   c For model products that are not going to be used:

      - Uncheck the Model Product field.
      - Remove the association of the configuration model name.

      NOTE: Removing the association of a configuration model name has implications on the quotes upgrade. For example, a Release 6.x model product could be used to create a quote with a solution. If the model association remains across the upgrade process, the solution in the quote will be upgraded as a customizable product quote line, which will be read-only and can be reconfigured by eConfigurator version 7. If the model product's association is removed, then the upgrade script will upgrade the quote solution into a package product, and each line item in the solution will be a component of this package product. In this case, this specific solution will remain directly editable but not reconfigurable by eConfigurator version 7. So you should only remove associations if you want to relinquish the configurability of the existing quotes that were created with a model product. This will likely be appropriate if you plan to use the second upgrade option (Approach 2) to natively create your configuration models.

5 Make sure every model for which you want to preserve data has at least one model product associated with it.

   a If a model does not have a model product associated with it, stay in Marketing Administration > Products > Products to create a product and make the association.

Review and Adjust eConfigurator Version 6.x Models (Recommended)

The Siebel upgrade script will migrate your Release 6.x configuration model products into Siebel 7 customizable products with similar structures. However, since the design paradigms for models and customizable products are different, it is recommended that you review each of your Release 6.x models, analyzing its use under the new eConfigurator features. The following steps will help you review and make necessary adjustments to your model data and to make best use of the upgrade script to migrate your data into the new Siebel 7 environment.

To review and adjust eConfigurator version 6.x model data

For each Release 6.x configuration model:

1. Flatten the structure so that there is, at most, one level of products or categories.

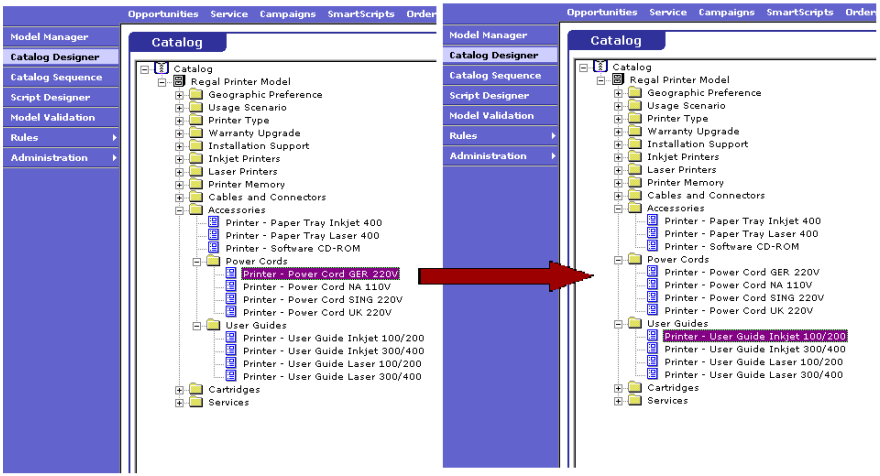
   The customizable product feature, new in Siebel 7, uses nested customizable products to achieve a bill-of-material structure. Use this functionality to create multiple-level products, rather than the eConfigurator version 6.x category structure. Also, you can use the new UI functionality to create groups and tabs to achieve a flexible user interface and to help the end user navigate to find the right product. Instead of letting the upgrade script flatten the structure for you, you may rearrange your product components now in order to keep maximum control of the outcome, and in order to plan for adopting the new features.

NOTE: Flattening your model structure brings the following considerations:

When you change your structures, some of the rules may become invalid. You may need to redefine those rules accordingly in the post-upgrade environment.

In any way that you decide to flatten your models, you should avoid having a product appear multiple times under the same top-level category. This could cause problems in the Siebel 7 environment when reconfiguring an upgraded customizable product quote.

Be cautious when removing products from your models because the corresponding quotes will not be read properly by eConfigurator after the upgrade. This is also the case for Release 6.x as these products will be missing when revalidating existing quotes with the latest version of the model.



2 Start planning your new class structure when reorganizing your model.

The upgrade script will not automatically create classes, as the same product may belong to different categories but not different classes. Since the concept of class is so important in the Siebel 7 customizable product structure, you should group products that may be of the same class into the categories you are going to keep (the top-level categories). This way you can assign classes to appropriate relationships after upgrading so as to make use of the new classification feature. See "Using the New eConfigurator Version 7 Features (Recommended)" on page 53.

3 Record all model properties.

In Release 6.x, properties were used locally in configuration models. Their main usage has been replaced by the Siebel 7 feature of dynamic attributes. The upgrade script will not migrate properties, so you may want to record these local properties and start planning their attribute replacements. For more details about how to implement dynamic attributes, see *Product Administration Guide*. Also see "Using the New eConfigurator Version 7 Features (Recommended)" on page 53.

NOTE: Some configuration rules that referenced these properties will become invalid too. You should revisit them in the postupgrade process. See "Checking Configuration Rules (Required)" on page 50.

---

4 Examine the virtual products in the models.

a If some virtual products were used to simulate product attributes, consider leaving them as they are or consolidating them.

An example of consolidating a set of virtual products might be that for a category "Color" with three virtual products—Blue, White, and Black—you remove the category "Color" and keep only one virtual product. Change the virtual product name to "Color." Now after the upgrade, the appropriate attribute will be created and the attribute-simulating function of the three virtual products will be preserved by extending the attribute domain (postupgrade).

NOTE: If you consolidate virtual products, some rules that reference them will become invalid. You may have to recreate these rules in the postupgrade environment. See "Checking Configuration Rules (Required)" on page 50 and "Verifying Attributes Upgraded from Virtual Products (Recommended)" on page 51.

---

b If virtual products were used for other purposes, consider removing them and using other new eConfigurator features to implement the functions.

For example, it is recommended that you use Siebel eAdvisor to conduct needs analysis previously done through the use of configuration models. See *Product Administration Guide* and *Siebel Interactive Designer Administration Guide* for more information.

What the Upgrade Script Does

In order to make use of the new Siebel 7 features and reduce future development and maintenance difficulty, the Siebel upgrade script will inevitably make trade-offs when migrating the existing configurator data. Understanding how the script performs the upgrade and the rationale behind it should help you to better manage your new configuration information in the Siebel 7 environment.

NOTE: See "Limitations" on page 54 for more information about possible upgrade mismatches.

The Siebel upgrade script takes the following steps to transform your existing Release 6.x model information to Siebel 7 corresponding data:

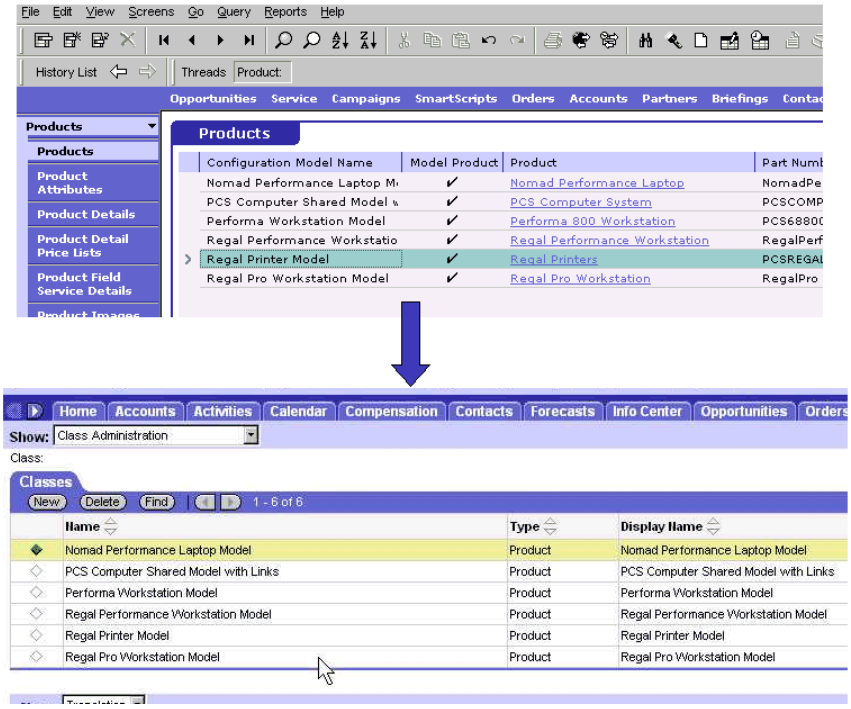
Release 6.x eConfigurator Model Data

For every Release 6.x model product that is associated with a configuration model, the Siebel upgrade script:

- Creates a new class with the same name. This will be a top-level class.
- Creates for every virtual product in the associated model a new attribute with the same name, assigning it to the class created above. It sets the attribute type as Integer and the default value as 0. No other attribute domain is defined.

  NOTE: All references to "associated model" in this section refer to the last released configuration model that is associated to the model product.

- Creates a customizable product with the same name and assigned to the class created above. With this, the customizable product inherits the newly created attributes (from virtual products).



A customizable product can preserve most of the structure and business logic of a Release 6.x model. In all the remaining bullet points below, you will find descriptions of model elements being migrated to their corresponding upgraded customizable product.

NOTE: Model product names are preserved during the upgrade process, but model names are not. If you rely on Release 6.x model names, you should rename their corresponding model products to preserve the proper information.

- Creates for every top-level category in the associated model a class relationship with the same name and attaches the relationship to the customizable product created. The cardinality of the relationship is set to a minimum of zero and a maximum of infinity, meaning there is no limitation of a certain quantity.

  The upgrade script does not create a new class for the relationship. This is to minimize the creation of redundant and possibly confusing classes. You should carefully plan your class system and apply your classes accordingly after the upgrade process.

- Creates for every top-level product in the model a product relationship with the same name and attaches to the customizable product. The cardinality of the relationship is set to a minimum of zero and a maximum of infinity. The upgrade script does not create and assign a class to the product.

  NOTE: The upgrade script does not create product relationships for virtual products.

- Creates for every product in a lower-level category a product relationship under its top-level class relationship (converted from a Release 6.x top-level category).

  This step and the previous steps transform the model structure into the new customizable product structure. The upgrade script creates only a single-level relationship in the new customizable product. This is because multi-level customizable products in Siebel 7 are created by nesting customizable products, one within another.

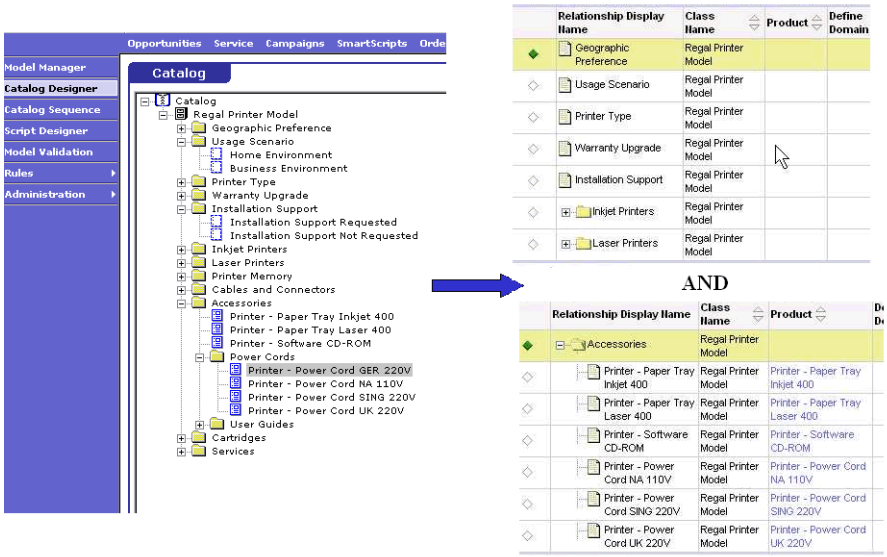
  NOTE: If you have completed Step 1 in "Review and Adjust eConfigurator Version 6.x Models (Recommended)" on page 40 you will have flattened your models so that they have only one level, and this step will not take place.

- For every shared model, do the following:

  a If the shared model is at the top level, create a relationship in the root model and put all the products in the shared model into this relationship.

  b If the shared model is in a category, all the products in the shared model are placed in the new relationship that is created for that category.

  c If there are nested shared models (Model A contains Model B, which contains model C), the upgrade script recursively adds the products from the shared models to the relationship. The script supports a maximum of 10 levels of nesting.



- Copies all configuration rules (basic and advanced) from the associated model as they are into the Siebel 7 customizable product. The upgrade script sets the rules to "Inactive."

  Siebel eConfigurator version 7 has a different design paradigm that may alter your strategy for rule creation. As described above, proper use of the new eConfigurator features will potentially reduce the number of rules in many instances. Also, the new eConfigurator uses "path" to identify a configuration item rather than "CfgId" (used in Release 6.x).

  NOTE: You will have to revisit every rule to make sure it functions correctly after the upgrade. You can do this by using the Advanced Rule and Assisted Advanced Rule templates in the Product Rule Manager. For more information, see "Checking Configuration Rules (Required)" on page 50.

- Upgrades the scripts in the associated Release 6.x model into the Siebel 7 customizable product as they are.

  NOTE: Since scripts are redesigned in Siebel 7, you will need to revisit these scripts and determine their proper usage after the upgrade. See "Verifying Scripts (Required)" on page 51. For more information, see the scripts mapping table in *Product Administration Guide*.

- Upgrades linked items in the associated Release 6.x model into the Siebel 7 customizable product as they are. In eConfigurator version 7, the linked items work the same way.

- Upgrades the resources in the associated model into the resources in the new customizable product. In eConfigurator version 7, the resources work the same way.

  The new customizable product will use the Siebel 7 default UI templates (base theme, product theme, and UI controls) to display the selection pages in a configuration session.

  NOTE: The new customizable product will not be released automatically. You should revisit the upgraded customizable product before you release it to production. See "Postupgrade Tasks" on page 50 and "Validating and Releasing Upgraded Customizable Products (Required)" on page 52.

Siebel eConfigurator Version 6.x Run-Time Quote and Solution Items

For every Release 6.x quote with solution items (which means the quote was created using model products), the standard Siebel upgrade script does the following:

- If a quote solution's corresponding model product still associates with a model, the script:
  - Upgrades the solution to a top-level customizable product quote line item. The customizable product is the one that is upgraded from a model product, as described above.
  - Upgrades all quote line items under the solution to the second-level quote line items under the customizable product. The prices of the quote lines will be preserved and rolled up to the customizable product.

    NOTE: This customizable product quote will be potentially reconfigurable by eConfigurator using the upgraded model, assuming the product set is maintained and the model structure is not changed after upgrade.

- If the association is removed, the script:
  - Upgrades the solution to a package product quote line item.
  - Upgrades all quote line items under the solution to the second-level quote line item under the package product. The prices of the quote lines will be preserved and rolled up to the top-level package product.

    NOTE: This package product is editable but not reconfigurable by eConfigurator version 7. The solution name will be preserved in the Package column, while the model product name will not be preserved. For more information, see the section on package products in *Product Administration Guide*.

The Quote Solution applet is dropped in Siebel 7, but the concept is mostly maintained through the use of hierarchical products and package names (which replace solution names). Every quote that previously had a solution will have either a customizable product or a package product as the top-level line item in the quote, and the solution name will be maintained in the package field of the quote line item.

Postupgrade Tasks

After you finish the automatic upgrade process, you should take the following steps to review your upgraded results before releasing to production. Some steps are recommended, and others are required. Taking these steps will make sure that your models function properly in the new environment. Due to the different model design paradigms, you may need to revise or recreate a certain amount of new configuration data to make use of the new Siebel 7 features. See "Limitations" on page 54 for information about preparing data and implementation changes.

Checking Configuration Rules (Required)

All the rules in eConfigurator version 6.x are upgraded as-is, but with "Inactive" status. Since eConfigurator version 7 uses a new model design paradigm, you should examine all your rules to verify that they still make sense. You can do this by modifying each rule and clearing the "Inactive" check box.

You also can create new rules that replace the upgraded rules. Creating new rules can have the following advantages:

- It is easier to write advanced rules in Siebel 7 using the new rules designer.
- Some rules can be consolidated or may not be needed because of new features in Siebel 7.
- Rules created in the Siebel 7 rules designer are easier to maintain.

Siebel eConfigurator version 7 provides an enhanced rules designer—Product Rule Manager—for you to create your rules. For modifying the upgraded rules, the Advanced Rule in the Product Rule Manager is particularly useful. For more information on Product Rule Manager, see *Product Administration Guide*.

There are a few considerations to keep in mind when you review and modify your rules:

- The items of the rules are specified as paths instead of Cfg IDs. Use the Advanced Rule in the Product Rule Manager and its picklist capability to replace them individually.
- Second- and lower-level categories are gone. You may need to change the references based on the new the relationship structure.

- Selection rules are no longer applicable. Assign proper relationship cardinalities and use the new UI designer features to simulate these rules.
- Some items in a Release 6.x model, such as virtual products and properties, are not supported in the Siebel 7 customizable product. You may want to use the new Siebel 7 features (such as product attributes) to reimplement the functions of these items. Following implementation of the new features, you may come back and create more rules.

The rules descriptions are preserved through the upgrade process and can serve as a good reference when you try to re-create a rule using the Product Rule Manager.

NOTE: All rules are upgraded with Inactive status. You should test the rules extensively before releasing your upgraded customizable products. For more information about Product Rule Manager, see *Product Administration Guide*.

Verifying Scripts (Required)

Some Release 6.x eConfigurator scripts may no longer make sense after they are upgraded to eConfigurator version 7. Also, some event types are not supported in Siebel 7. You may have to rewrite or remove these scripts. For more information, see the sections on scripting in *Product Administration Guide*.

Verifying Attributes Upgraded from Virtual Products (Recommended)

Every virtual product is upgraded into a new attribute and assigned to a class. The attributes can be exposed in the upgraded customizable product through Product UI Designer. You should visit these newly created attributes to see if they serve the functions that you intend.

To remove or modify attributes

1. Navigate to Application Administration > Class Administration view.
2. Find the class that corresponds to the virtual product you are verifying attributes for. The class should have the same name as the upgraded model product.
3. Modify or remove attributes as desired.

For more information about managing classes and attributes, see *Product Administration Guide*.

Exposing Resources in the Run-Time User Interface (Recommended)

The resources will be upgraded, but they will not show in the selection pages in a configuration session. You may choose to use Product UI Designer to place the resource items in the appropriate UI groups. For more information, see the section on customizable products in *Product Administration Guide*.

Rearranging Your Customizable Product Structure (Recommended)

Since the upgrade script flattens your previous model structure, you may want to rearrange your product components by creating relationships. You can do this freely within the Siebel 7 administration environment. In rearranging your customizable product structure, note the following:

- If you remove a product item from the upgraded customizable product or move it to another relationship, you may become unable to properly edit the upgraded quote using this customizable product with the configurator.
- In Release 6.x, a model can have a component product that is also associated with the model as a model product. In these instances, after upgrading, you will have a customizable product that has itself as a component product. Since this is not supported in Siebel 7, when you check the corresponding upgraded quotes eConfigurator and ePricer may not function properly. You may consider redesigning the customizable product to avoid this self-nested situation. For example, consider removing the component that is a customizable product and recreating the quote using the newer version of customizable products.

Validating and Releasing Upgraded Customizable Products (Required)

Before releasing your customizable products to production, you should thoroughly review and test them. Make sure to follow a careful process of transitioning from development to production to verify that all models function correctly before your end users start using them.

CAUTION: Do not touch the upgraded quote (for example, do not click the Reprice button) before the customizable product is examined and released.

Using the New eConfigurator Version 7 Features (Recommended)

If you have completed all the postupgrade tasks described above, you should be able to achieve a working eConfigurator environment. To implement the features new to Siebel 7, you should thoroughly understand them and you should have completed proper model planning. For more information, see *Product Administration Guide*.

This section highlights two important new features that you may want to take advantage of to help transition your models to Siebel 7. The first is the product class system and dynamic attributes. The second is the data-driven UI.

Using the New Product Class System and Dynamic Attributes

Do the following to take advantage of the new product class system and dynamic attributes.

- Create a class system and define appropriate attributes for the classes. Some of the previous properties can be recreated here. Set appropriate defaults.
- Assign products to the appropriate classes. These products inherit the dynamic attributes defined on the classes.
- Assign classes to the relationships created by the upgrade script. Do this as follows:

  a Remove all the products in the relationship.

  This makes the relationship's domain type selectable.

  b Change the relationship's domain type to Class or Dynamic Class.

  c Assign products from the desired class to the relationship.

  This procedure is required if you want to write configuration rules on the relationship that refers to the dynamic attributes of all the items. For a complete set of eConfigurator version 7 feature descriptions, see *Product Administration Guide*.

- Create new rules or modify existing rules as needed, to make use of the new features and customizable product structure.

Using the New Data-Driven UI

The upgrade script uses default UI themes and controls for all the customizable products upgraded. You may use the Siebel 7 Product UI Designer to choose or define more UI themes and elements so that your run-time product presentations are richer. For more information, see the section on customizable products in *Product Administration Guide*.

Limitations

Upgrading to eConfigurator version 7 happens with the following limitations:

Favorites. Favorites are not upgraded because while the Favorites function is preserved in Siebel 7, it is implemented differently. The Release 6.x Favorites data will not upgrade to Siebel 7 automatically. You may need to recreate the Favorites data.

Virtual products. Virtual products are upgraded as attributes. Some functionality may be lost. You may need to define attributes or expand the upgraded attributes' domains to replace the functions of Release 6.x virtual products. You can reimplement the functionality by modifying the customizable products that contain the associated attributes. An alternative is to use Siebel eAdvisor to replace your use of virtual products if a comprehensive needs-analysis function is required.

Configuration rules. Your rules need to be revisited individually. To make modifications, use the Advanced Rule and Assisted Advanced Rule templates in the Product Rule Manager. Some rules will become invalid with the upgrade.

Properties. Properties are not upgraded. You may need to define attributes to replace them.

Scripts. Upgraded scripts need to be rewritten. The event types are different.

Shared models. Shared-model structure is redeployed in every model in which the shared model is included. The definition of each shared model becomes part of the parent model, and so the structure of the parent model is flattened before upgrade. If you want to retain the shared model approach, you must upgrade the shared model as a customizable product. Then you add it to a relationship within the parent customizable product. Doing this may prevent recustomizing upgraded quotes that contain the parent customizable product.

Quotes. Upgraded quotes may be read improperly by Siebel eConfigurator if you choose to remove products from the upgraded customizable product or move them to a different relationship.

Tree-control UI. The tree-control user interface is not available in Siebel 7. It is replaced by the more flexible data-driven UI (templates and controls).

Case Study

This section provides a case study on how to plan and execute your upgrade. For additional detailed case studies, please contact the Siebel ISS Competency Center.

Background

ABC Computers is a computer retail company that uses eConfigurator version 6.x to maintain its product offerings. ABC defines three models:

- "Desktop Model"
- "Laptop Model"
- "Printer Model"

"Printer Model" is used as a shared model in "Desktop Model." Figure 2 shows the model structures of "Desktop Model."

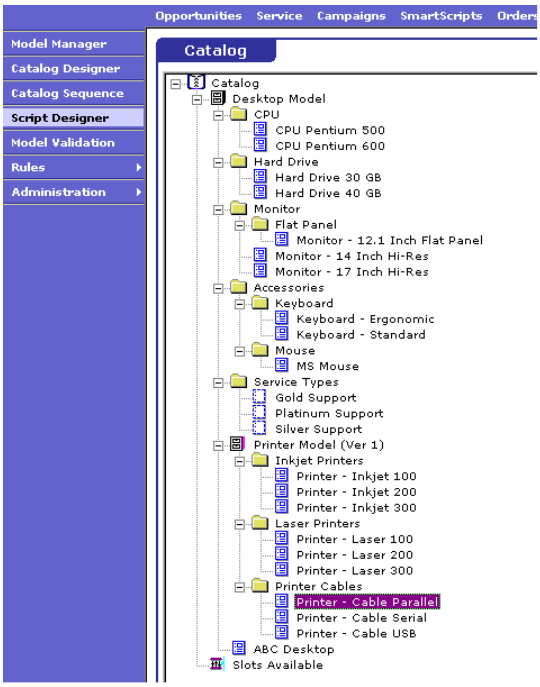


Figure 2. Release 6.x Desktop Model

Figure 3 shows the configuration rules, resources, and linked items defined for model "Desktop Model."

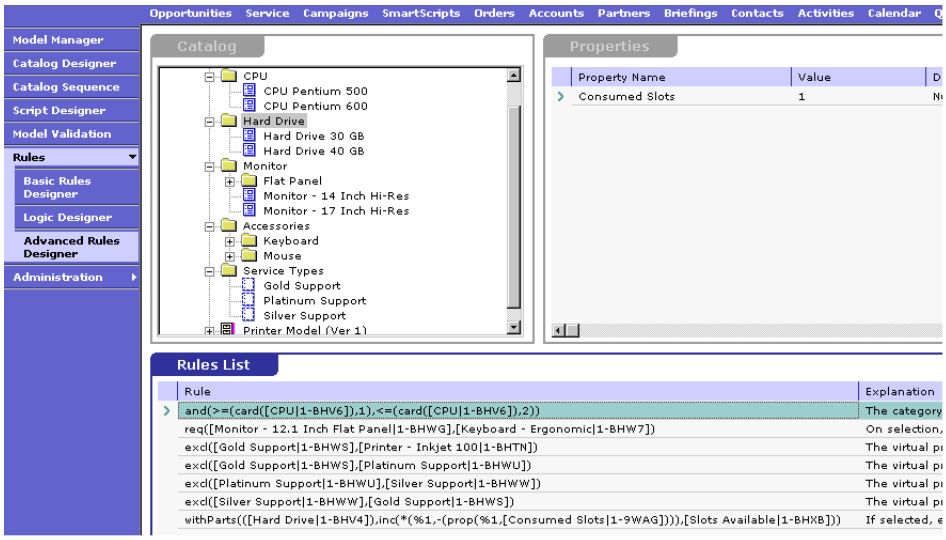


Figure 3. Release 6.x Desktop Model Rules

ABC also defines two model products:

- "ABC Desktop"
- "ABC Laptop"

These model products associate with “Desktop Model” and “Laptop Model” respectively. As shown in Figure 4, there is no model product associated with “Printer Model.”

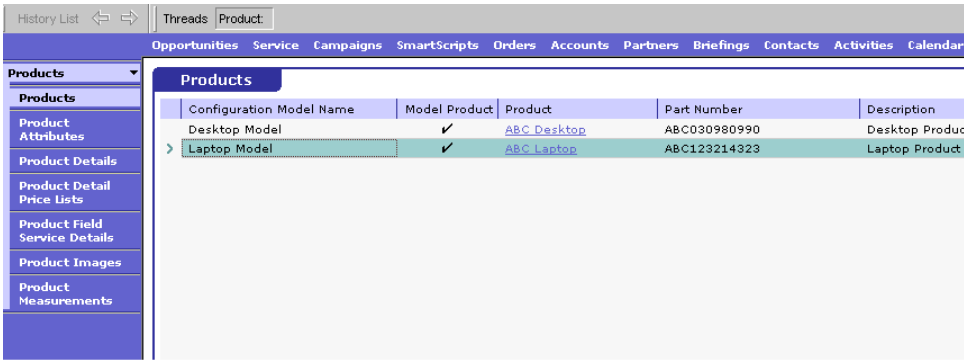


Figure 4. Release 6.x Model Products

ABC sales people use these models (and products) to create a quote ("XYZ Quote") that has two solutions ("XYZ Desktop" and "XYZ Laptop"), as shown in Figure 5. These two solutions use the two model products "ABC Desktop" and "ABC Laptop."

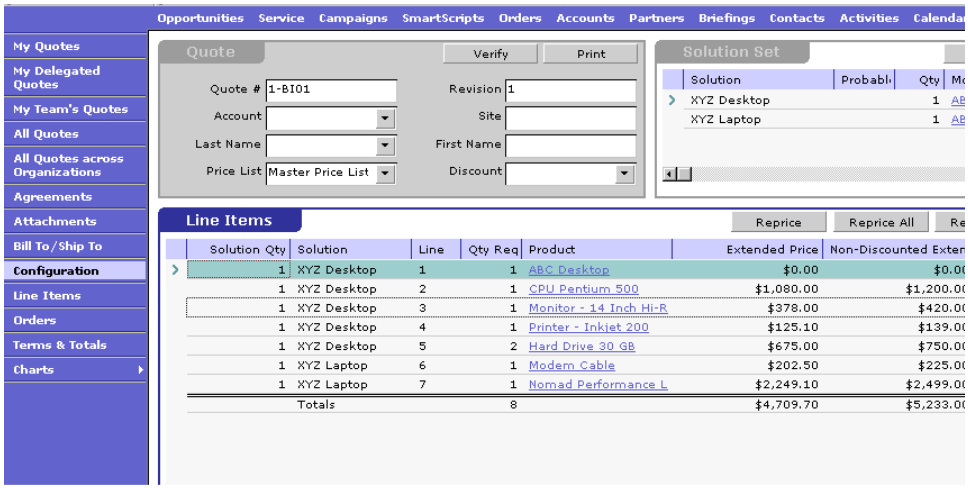


Figure 5. Release 6.x Quotes

Postupgrade: Verify Model Associations

This preupgrade preparation completes the task of "Verifying the Model Associations in the Product Table (Required)" on page 38.

1 Assume ABC Computers is going to design a new model in Siebel 7 for their laptop products. ABC can remove the model association (Laptop Model) of product "ABC Laptop." ABC has decided to forego the reconfiguration capability of solution "XYZ Laptop."

2 There is no model product associated with model “Printer Model.” The upgrade script will add the contents of Printer Model to XYZ Desktop but will not create a separate Printer Model customizable product. To make Printer Model a customizable product after the upgrade, ABC must create a model product and associate Printer Model with it, as shown in Figure 6.

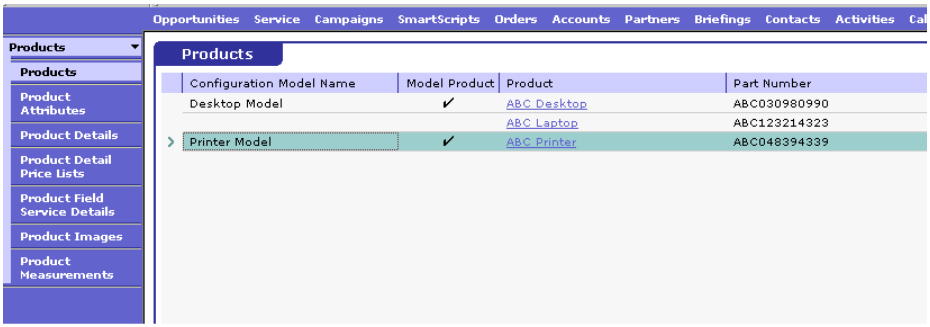
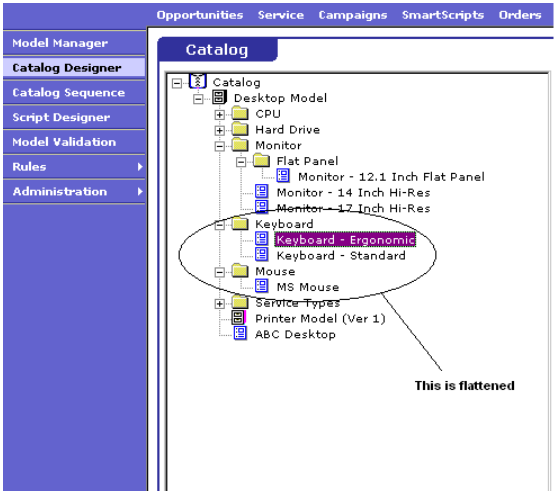


Figure 6. Release 6.x Model Product with Shared Model

This preupgrade preparation completes the task to “Review and Adjust eConfigurator Version 6.x Models (Recommended)” on page 40.

Postupgrade: Review and Adjust Models

1 ABC flattens its model structure. The figure below shows the flattening of the second-level categories. ABC leaves other structures intact for the upgrade script to do the flattening.



2 ABC records the properties.

3 ABC examines their virtual products. In this example, the model has three virtual products for specifying the service types. To avoid creating three attributes, ABC removes two virtual products and keeps only one. If there are rules related to these virtual products, they will become invalid. Figure 7 shows the Release 6.x virtual products used as service types.

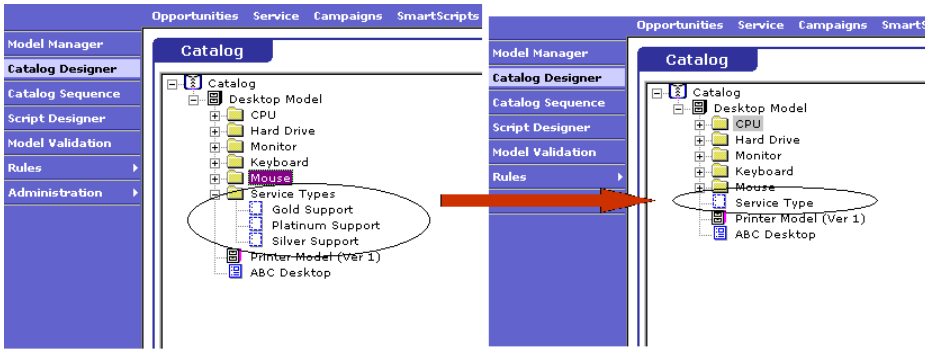


Figure 7. Release 6.x Virtual Products

Postupgrade Review

Following the upgrade process, ABC will have:

- Two new classes: “ABC Desktop” and “ABC Printer.” See Figure 9 on page 64.
- One new attribute: “Service Type,” defined for class “ABC Desktop.”
- Two new customizable products: “ABC Desktop” and “ABC Printer,” assigned to classes “ABC Desktop” and “ABC Printer” respectively.

- ABC Printer shared model node becomes a relationship in ABC Desktop. All the products in this shared model are redeployed. (See Figure 8.)

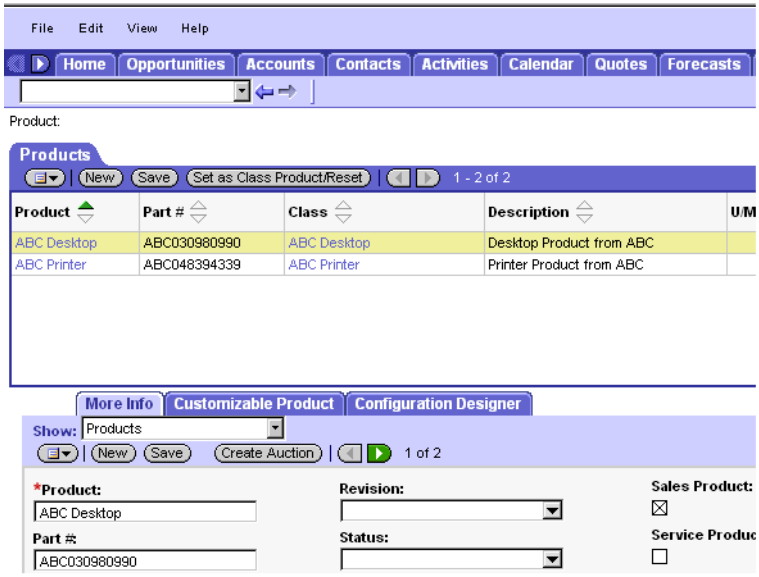


Figure 8. 7.0 Customizable Products

Figure 9 shows ABC's two new classes and the new Service Type attribute.

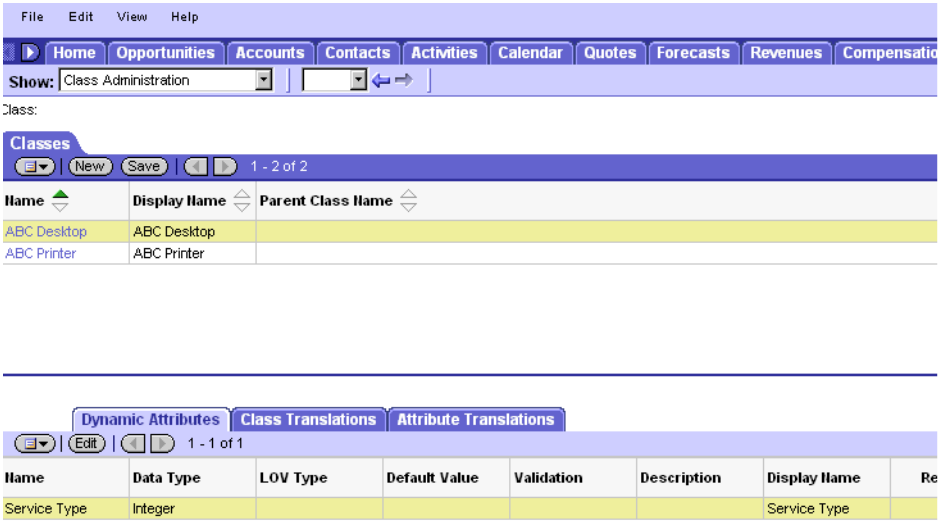


Figure 9. 7.0 Classes

The “ABC Desktop” structure is shown in Figure 10.

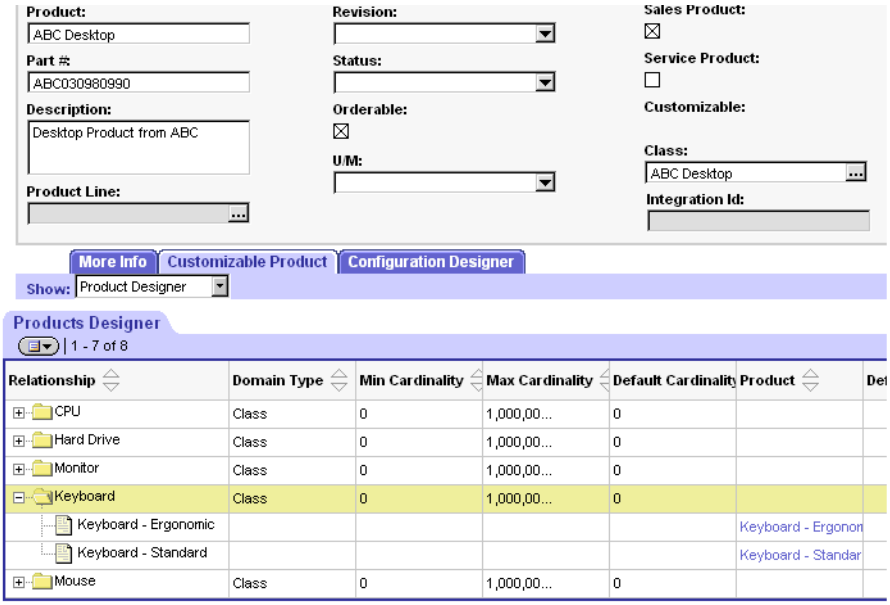


Figure 10. “ABC Desktop” Structure

Following the upgrade process, ABC will also have:

- One quote, “XYZ Quote” with two top-level quote line items: “ABC Desktop” and “Package,” with “XYZ Desktop” and “XYZ Laptop” in the Package column to preserve the solution names. These two quote line items have their corresponding second-level quote line items upgraded from the previous solutions.
  - Quote line “ABC Desktop” can be reconfigured once the corresponding customizable product “ABC Desktop” is examined and released.
  - Quote line “Package” is now a package product and its component products can be manually edited.

Postupgrade Review

1 This postupgrade review starts by walking through the task of "Checking Configuration Rules (Required)" on page 50.

All rules are marked "Inactive" during the upgrade process. ABC examines and activates every rule. Here are some examples of rule conversions.

Quantity rule prior to upgrade:

chkqty(and(>=([Monitor|1-BHV8], 1), <= ([Monitor|1-BHV8,2], 2)))

The category Monitor has a minimum count of 1 and a maximum count of 2.

Quantity rule converted:

On the upgrade relationship Monitor set the cardinality min = 1 and max = 1

Selection rule prior to upgrade:

and(>=(card([CPU|1-BHV6]), 1), <=(card([CPU|1-BHV6]), 1))

The category CPU has a minimum selection of 1 and a maximum selection of 1.

Selection rule converted:

Do not activate converted rule. Instead, go to the Product UI Designer and choose the Combo Box with Price and Quantity as the UI control for this relationship. This UI control limits the user to selecting only one item from the relationship but does not restrict the quantity the user can select.

Require rule prior to upgrade:

req([Monitor-12.1 Inch Flat Panel|1-BHWG], [Keyboard-Ergonomic|1-BHW7])

On selection, the Product Monitor-12.1 Inch Flat Panel will require the product Keyboard-Ergonomic.

Require rule converted:

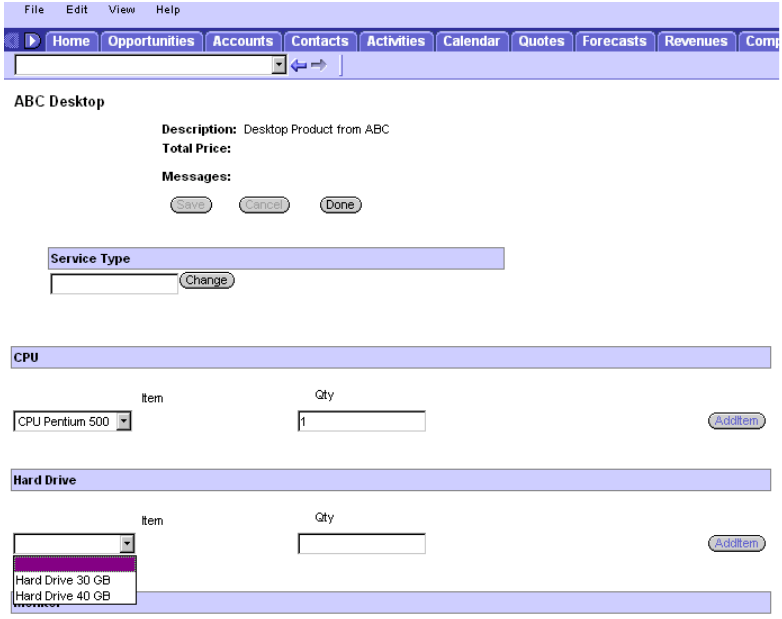
Use the Advanced Rule Template to modify this rule as follows:

req(@.[Monitor]([12.1 Inch Flat Panel]), @.[Keyboard]([Ergonomic]))

2 Next, ABC considers the task of "Verifying Scripts (Required)" on page 51. Since event types and the script set are different in Siebel 7, ABC makes sure all scripts remain effective and they redesign some, as necessary. All scripts are preserved in Configuration Designer > Script Designer view.

3 Next, ABC Computers moves on to the task of "Verifying Attributes Upgraded from Virtual Products (Recommended)" on page 51. ABC has only one virtual product "Service Type" being upgraded to an attribute in class "ABC Desktop." ABC can see and expose this attribute for product "ABC Desktop." But to make it useful, ABC redefines the attribute to have the original three service types in Application Administration > Class Administration view.

4 Now, ABC is ready to tackle the task of "Using the New Data-Driven UI" on page 54. ABC chooses to use the default UI theme and controls. To customize the UI, ABC can refer to *Product Administration Guide*.



5 Next, ABC Computers moves on to "Validating and Releasing Upgraded Customizable Products (Required)" on page 52. ABC uses the Validate button in Product Administration > Customizable Product > Product Versions view to validate the customizable product "ABC Desktop" before it can be used to configure more quotes or reconfigure the existing quote "XYZ Desktop."

Later, ABC may adopt more Siebel 7 new features to this customizable product for more complex functionality.

Approach 2: Modifying Your Existing Implementation

Since eConfigurator version 7 introduces a new model design paradigm and a set of new features, you may find that it is best to reimplement your existing configuration models and your product maintenance process.

This section details a series of processes that are commonly used for planning and implementing product definitions and configuration data. The implementation of eConfigurator version 7 differs greatly from its version 6.x predecessor in order to put the new Siebel 7 features to good use.

For more details about eConfigurator version 7 functionality, see *Product Administration Guide*.

NOTE: You may contact Siebel Professional Services or a certified Siebel partner to assist in your implementation of new models. All involvement on the part of Siebel Professional Services is available on a time-and-materials basis.

Overview

To manually reimplement your models, you need to first understand the new Siebel 7 features. Then you should analyze your Release 6.x models and determine what kind of data can be carried over and what can be reimplemented by using the new features. Because "Approach 1: Using the Standard Upgrade Tool" on page 36 describes the procedures that make use of most of your Release 6.x model data, it is reasonable to assume that if you choose to follow Approach 2, you will want to revamp most of your product definitions to make full use of the new features. The sections that follow outline a set of suggested processes for you to plan and implement your new Siebel 7 configuration environment.

NOTE: The new models you created in the Siebel 7 environment are generally not usable in reading your upgraded quotes.

Figure 11 shows the process flow of upgrading to eConfigurator version 7 following Approach 2, modifying your existing implementation natively in Siebel 7. Solid boxes represent required steps and dotted boxes show recommended steps.

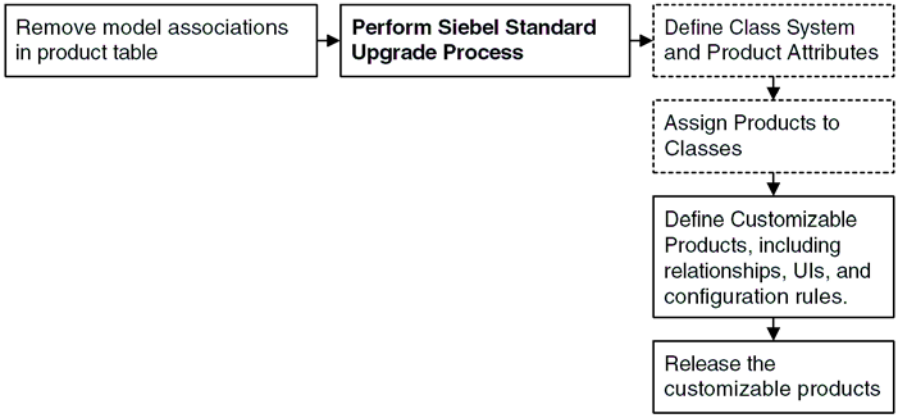


Figure 11. Overview of Upgrading to Siebel 7 eConfigurator (Approach 2)

Analyzing Your Release 6.x Models

It is useful to have your existing Release 6.x models handy, but it is not necessary. You may decide to create Siebel 7 customizable products to simulate your existing models, or you may create very different structures for different models. In general, a new customizable product can contain most functionality that used to be provided through a model.

Designing Your New Class System

You can use the new class system to logically classify your products. Another important function of the classification system is to hold and maintain product attributes. The Siebel application creates certain numbers of classes and attributes during the upgrade process (such as classes for model products, and attributes for virtual products). Still, since you are choosing to reimplement your models, it is recommended that you define a class system from the ground up.

The best way to define a class system is to think in terms of product attributes. Plan to group a set of products into a class if they share the same attributes. Then define subclasses which inherit the same attributes and which may have more specific attributes.

Designing Dynamic Attributes

You can define your attributes in the process of defining your class system. But after the class system is stabilized, it is recommended that you review your attribute definitions and consider adding new ones. If you create effective attributes and attach them appropriately (for instance, by putting the more common attributes at higher class levels), it is easier to maintain your product definitions.

Most of the eConfigurator version 6.x properties and virtual product functions can be implemented using Siebel 7 dynamic attributes. If you define attributes properly for use with new customizable products, you can make use of the attributes in your configuration sessions.

Assigning Products to Classes

You can assign products to classes so as to inherit the attributes defined for the classes. This is applicable both for simple products and for customizable products. For customizable products, you can define proper UI elements to present attribute selection in the run-time environment.

Defining Customizable Products

Your understanding of the customizable-product concept will allow you to replicate your existing model information by turning some upgraded products into customizable products, or by creating new ones. The Siebel 7 customizable product feature provides many Siebel 7 model capabilities such as rules, resources, and scripts. At the same time, the feature remains product-centric in definition.

When defining a new customizable product, first consider the customizable product structure, that is, the relationships involved. By using relationship definitions that are built in a bill-of-materials fashion, you can define simple or complicated bundles that have multiple layers of product components.

Defining the UI

After you define the structure of a customizable product, you can use the Siebel 7 Product UI Designer to determine the look and feel of your product in the run-time configuration session. Start with the standard UI templates and then design your own.

Defining Rules

You can use the new Product Rule Manager to define business rules for your customizable products. With the new features (such as attributes and product relationships) and the new design paradigm, it is possible that the number of rules you need to define is now much smaller. Examine the rules in your existing models and selectively apply them to their corresponding customizable products.

Defining Resources, Linked Items, and Scripts

Resources and linked items work the same way in Siebel 7 customizable products as they worked in Release 6.x models. The set of script events is revised and made simpler in Siebel 7. Your need for writing complicated scripts may decrease because of the new features.

Defining Pricing

The products and their prices are upgraded as they were in Release 6.x. However, with the new Siebel 7 pricing features, such as attribute-based pricing and bundle pricing, you can create more complex pricing conditions for your Siebel 7 customizable products. Integration with ePricer is necessary in some cases. For more information, see *Pricing Administration Guide*.

Upgrading from Release 5.x Product Configurator to eConfigurator Version 7

The process of upgrading from Release 5.x to Siebel 7 is identical to the process outlined in "Upgrading from eConfigurator Version 6.x to eConfigurator Version 7" on page 36, because the standard Siebel upgrade process includes the necessary Release 5.x to Release 6.x migrations. The preupgrade and postupgrade tasks are very similar to those outlined in "Upgrading from eConfigurator Version 6.x to eConfigurator Version 7."

The only difference in upgrading from Release 5.x is that to preserve or remove model product association, check the "Model Product" and "Configuration File" fields in the Product Administration view. There is no "Model Name" field in Release 5.X.

4 Upgrading to eSales Version 7

The Siebel eSales upgrade takes place as part of the standard Siebel upgrade process. This standard process is outlined in the upgrade guide for the operating system you are using. This chapter provides information about the new features offered in eSales version 7, and the considerations these new features present to the customer who is upgrading. In order to make use of these new features, you may want to consider restructuring select parts of your implementation. Preupgrade, upgrade, and postupgrade considerations are addressed.

NOTE: This chapter covers the issues involved in upgrading from Siebel eSales version 6 to Siebel eSales version 7. Upgrading from Siebel eSales version 5.x to Siebel eSales version 7 requires custom work.

What's New in eSales Version 7

Siebel eSales version 7 provides many new features that you will want to take into consideration when planning your upgrade process. Table 4 lists key eSales version 7 features, and it describes the upgrade considerations for each. For more information on these and other features new in Siebel eSales 7, see *Siebel eSales Administration Guide*.

Table 4. Siebel eSales Version 7 Features

Feature	Where to Find Information
Parametric Search This tool is used for product selection and comparisons. Implementing this feature requires the use of the product classification system as it is based on classes and attributes. Product structures used in eSales version 6 must be restructured to use the product classification system to allow for parametric searching.	See "Parametric Search" on page 81. For more information on setting up parametric search, see *Siebel eSales Administration Guide*.
Shared Catalog Categories In eSales version 6, a category could have more than one parent catalog or category. In eSales version 7, a category can have only one parent. This makes administration of access control easier because access rights are inherited down the catalog hierarchy.	For more information on server-based catalogs, see *Siebel eSales Administration Guide*.
Registration, Check-out, and Order-Approval Processes Built on Workflow Because eSales version 7 uses Workflow to design these processes, they are flexible and customizable.	See "Customizations Made with Siebel Tools" on page 83. Also see "Modifying Workflows" on page 91.
Quick Add Quick Add allows advanced users to type in the item name, code, or manufacturer's code in order to add the item directly to the shopping cart. If you want to use the new Quick Add functionality provided with eSales version 7, you may need to make minor modifications to your product definitions since each product to be used with Quick Add should have values for "Item Name," "Item Code," and "Manufacturer Code." You can also remove any fields from the Quick Add applet that are not applicable.	See "Implementing Quick Add" on page 89.

Table 4. Siebel eSales Version 7 Features

Feature	Where to Find Information
Credit Card Processing While the ability to authorize payment by credit card existed in eSales version 6, with Siebel eSales version 7, administrators can settle and refund payments as well. In Release 6.x, integration to CyberSource was available. The Siebel 7 integration uses Siebel EAI and was designed to be customizable. You will need to contract with CyberSource if you want to use their services.	See "Implementing the New Credit Card and Tax Business Services" on page 87. For more information on using third-party payment applications, see *Siebel eSales Administration Guide*.
Tax Calculation Tax calculations were supported in Release 6.x. While an integration to Taxware was available in eSales version 6, the Siebel 7 integration uses Siebel EAI and was designed to be customizable. You will need to purchase and install supported versions of software from Taxware to use their services.	See "Implementing the New Credit Card and Tax Business Services" on page 87. For more information on using third-party taxation applications, see *Siebel eSales Administration Guide*.
Shipping Calculation A flexible business service is provided to determine shipping costs during the check-out process. In eSales version 6, shipping calculation was not standard, and you might have written a script or business service to handle this requirement. However, in eSales version 7, a shipping business service is provided as a standard feature, and you might want to consider using this method instead.	See "Shipping Business Service" on page 81. For more information on setting up shipping charge calculations, see *Siebel eSales Administration Guide*.
User Interface Siebel 7 introduces new user interface templates. You most likely have made customizations to the UI templates in eSales version 6 in order to brand the application with your corporate identity. Siebel eSales version 7 provides further customization flexibility and you will need to use and customize the new templates provided in eSales version 7.	See "User-Interface Customizations" on page 83.

Table 4. Siebel eSales Version 7 Features

Feature	Where to Find Information
Multiple User Types In Siebel 7, additional user types are available to support business-to-business commerce. While eSales version 6 did provide multiple user types, those types have been expanded in eSales version 7. During the upgrade process, scripts will automatically convert the users associated with each responsibility in eSales version 6 to the correct combination of user types and responsibilities in eSales version 7.	See "User Types and Responsibilities" on page 80.
Encryption Prior versions of Siebel eSales used a proprietary encryption technology. In eSales version 7, you can use RSA, the industry standard for encryption. The standard Siebel upgrade brings all fields currently encrypted in eSales version 6 into eSales version 7 using the same proprietary encryption method. Siebel provides post-upgrade scripts that you can run to change the encryption method on currently encrypted fields to RSA. This is strongly encouraged, but not required.	For more information about RSA encryption, see "Using RSA Encryption" on page 85 and "Setting Up RSA Encryption" on page 87. For more information about encryption, see *Siebel Tools Reference* and *Siebel Server Administration Guide*. For information about running upgrade scripts to change the encryption method on currently encrypted fields to RSA, see *Siebel Tools Reference*.
Access Control Using Access Groups In Siebel 7, a new method of access control is being introduced using access groups. Access groups provide a mechanism for grouping positions, organizations, accounts, business units, and user lists (groupings of users). Access groups can be used to control visibility to catalogs and categories. In Release 6.x, organizations were used for determining catalog visibility. These Release 6.x organizations should be redefined as access groups in implementing Siebel 7.	See "Implementing Access Control Using Access Groups" on page 89.
User-specified Product Comparisons In Release 6.x, product comparisons were initiated from the product-detail page. The products being compared were predefined by the administrator. In Siebel 7, users can select specific products they want to compare, and then initiate an attribute-by-attribute comparison of those products. The product comparison is initiated from parametric searching. Implementing this feature requires the use of the product classification system, as it is based on attributes.	See "Implementing User-Specified Product Comparisons" on page 88.

Overview of Upgrading to eSales Version 7

You start by planning your Siebel 7 implementation to determine how to best make use of Siebel 7's new features. You review your current implementation's setup, and you also need to record certain specifics before beginning the upgrade. There are no specific actions required for you to take during the upgrade process, but you should take into account some considerations regarding user types and responsibilities, as well as RSA encryption. At the postupgrade stage, you complete some tasks to verify settings and implement the new Siebel 7 features.

Preupgrade Tasks

As the Siebel eSales upgrade will take place as part of the general Siebel upgrade, any preparations that apply for the Siebel upgrade may apply here as well. For general upgrade information, see the upgrade guide for the operating system you are using.

Planning Your Implementation

Before beginning your Siebel eSales upgrade, you should review your current implementation while considering the new Siebel 7 features available to determine the implementation structure that best meets your business requirements. This review process will help you understand how you may need to prepare for the upgrade.

New Web Templates

Siebel 7 introduces a new user interface style. Therefore, all Web templates from Release 6.x have been updated for Siebel 7. Review any customizations made to Release 6.x templates and determine if they should be replicated to the Siebel 7 templates.

To determine the template being used by the applet or view in order to modify it

1. Launch Siebel Tools.
2. In the Explorer view, navigate to Applet and click Applet Web Templates.
3. Query for the Applet Web Template.

4 Scroll over to the Web Template field and note the name in this field.

5 Navigate to Web Template in the Explorer view.

6 Query for the Web Template name.

7 In the Explorer view, click Web Template File and look at the File Name field for the name of the file to modify.

8 Repeat Step 1 on page 79 through Step 7 to find and modify the View Web Templates. This time at Step 2 on page 79, navigate to View and click on View Web Templates.

For more information, see "User-Interface Customizations" on page 83 and "Reapplying User Interface Template Customizations" on page 90.

User Types and Responsibilities

Siebel eSales version 6 used the proxy employee to associate responsibilities to .COM users. There were three standard responsibilities: Unregistered Visitor, Registered Customer, and Delegated Customer Administrator. Siebel eSales version 7 adds the concept of *user types* and separates user types from responsibilities. The new setup of user types and responsibilities allows you to provide different functionality to different types of users. In Siebel 7, responsibilities are now directly associated with user records.

The Siebel 7 user types and responsibilities are listed alongside the Release 6.x user responsibilities in Table 5.

Table 5. Siebel eSales Version 6 and Siebel eSales Version 7 User Types and Responsibilities

Release 6.x User Responsibilities	Siebel 7 User Responsibilities	Siebel 7 User Types
Unregistered Visitor	Web Anonymous User	N/A
Registered Customer	Web Registered User (if not associated with an account)	Web Registered User
	Web Corporate User (if associated with an account)	Web Corporate User
N/A	Web Purchasing Manager	Web Purchasing Manager
Delegated Customer Administrator	Web Delegated Customer Administrator	Web Delegated Customer Administrator

See "Upgrading Employee Login Names and Proxy Employees to Responsibilities and User Types" on page 84 for information about running the necessary upgrade scripts.

Parametric Search

If you decide to use the new parametric-search feature, then you must also use the product classification system and assign your products to classes. For more information, see *Siebel eSales Administration Guide* and *Product Administration Guide*.

Product Catalog Structure

If your categories have more than one parent catalog or category in eSales version 6, you need to restructure the hierarchy so that each category has only one parent.

For more information on server-based catalogs, see *Siebel eSales Administration Guide*.

Shipping Business Service

Make note of any scripts written in eSales version 6 to calculate shipping costs. You will likely be able to modify the Siebel 7 Shipping Cost Service (eScript) business service to meet your needs.

If you wrote Siebel eScript or Siebel VB in eSales version 6 to calculate shipping costs, you may want to use the same script in eSales version 7. In eSales version 6, when the Continue button in the Quote Account Shipping View (eSales) or Quote Personal Shipping View (eSales) is clicked, the `CalculateShippingCost` method is called. If a script was written for this method, it can be found in Siebel Tools.

For more information on setting up shipping charge calculations, see *Siebel eSales Administration Guide*.

To find the CalculateShippingCost method

1. In the Explorer view, click Business Component.
2. Search for the Quote business component.
3. Right-click and select Edit Scripts.

   This is where you would have defined the `CalculateShippingCost` method. You may want to use your existing custom script in Siebel 7, or you may want to modify the out-of-the-box Shipping Cost Service (eScript) business service. See "Modifying the Shipping Cost Service Business Service" on page 89.

New Credit Card and Tax Business Services

As the new business services provide the same functionality—with enhancements—as in eSales version 6, the Release 6.x business services will not be carried forward. If you modified these integrations, you should make note of the changes you made and apply them to the new integrations if necessary.

Displaying Quotes

In Release 6.x, only quotes created in the eSales application were displayed in eSales. For example, quotes created in Sales or Call Center by employee users were not displayed to customers in eSales.

In Siebel 7, all quotes created for a contact or user will be displayed in eSales. So quotes created in Sales and Call Center will be visible to customers in eSales. Auction quotes will also be visible in eSales.

You should determine if this will have an effect on your deployment. You may need to hide some quotes. If this new feature will have implications for your implementation, see "Hiding Quotes" on page 89.

Recording Specifics About Your Current Implementation

User-Interface Customizations

Make note of all customizations you made to UI templates in eSales version 6, if these changes are to be preserved after the upgrade. You will have to recustomize the new UI templates after upgrading.

NOTE: After upgrading to eSales version 7, your Release 6.x templates will still exist, but they will no longer be used in the new application.

Customizations Made with Siebel Tools

You should note customizations made with Siebel Tools for your eSales version 6 deployment. Examples of changes to note include new fields, new applets, new views, and scripting behind buttons.

Also, be sure to note any programmatic changes you may have made in the areas of registration and check-out processes.

Siebel eSales .cfg File Settings

Make note of the `esales.cfg` file settings. You will need to check the settings after upgrading, and reset them if they have changed. The `esales.cfg` settings to make note of include:

- `[CCA]`
- `[SalesTax]`
- `[SWE]`
- `[LDAP]`
- `EnableScripting;ScriptingDLL`

In Siebel 7, the `[SWE]` and `[LDAP]` settings are maintained in the `eSales.cfg` file. The other settings are administered through the Server Administration screen.

See the upgrade guide for the operating system you are using for more information about configuration file settings. See "Verifying esales.cfg File Settings" on page 86 for follow-up activities.

Upgrade Tasks

This section discusses considerations specific to eSales that you will want to take into account before running the standard Siebel upgrade.

Upgrading Employee Login Names and Proxy Employees to Responsibilities and User Types

As part of the standard Siebel upgrade, the upgrade scripts will run automatically to upgrade user types and responsibilities.

NOTE: The Web Purchasing Manager and Web Delegated Customer Administrator responsibilities are based on the Web Corporate User responsibility. Users with Web Purchasing Manager or Web Delegated Customer Administrator responsibility also need to have Web Corporate User responsibility to have access to views in eSales.

Contacts with a proxy employee that had a Delegated Customer Administrator responsibility in eSales version 6 take the Web Delegated Customer Administrator, Web Purchasing Manager, and Web Corporate User responsibilities, and the Web Delegated Customer Administrator user type in eSales version 7.

If a contact with Registered Customer responsibility in eSales version 6 is associated with an account, then it takes the Web Corporate User responsibility and user type in eSales version 7. If the contact is not associated with an account, then the contact takes the Web Registered User responsibility and user type in eSales version 7.

NOTE: If you want to change the user type display names, do so before deploying the Siebel 7 application. See "Communicating Siebel 7 Enhancements to Users" on page 91.

See "New User Types and Responsibilities" on page 91 for follow-up activities.

Using RSA Encryption

A new feature in Siebel 7 is the ability to use RSA for field-level encryption. During the standard Siebel upgrade process, the Release 6.x encrypted fields will migrate automatically to Siebel 7 without changing the encryption mechanism. You will need to run a separate script after the upgrade if you want to use RSA on these fields. See "Setting Up RSA Encryption" on page 87 for further information. Also see *Siebel Tools Reference* and *Siebel Server Administration Guide* for information on RSA encryption and enabling RSA encryption on fields encrypted using the Release 6.x proprietary encryption mechanism.

NOTE: You are strongly encouraged to use RSA if you need to encrypt data. If you are currently not using encryption, or do not want to use RSA encryption, you do not need to take any action.

For general information regarding encryption, see *Siebel Tools Reference* and *Siebel Server Administration Guide*.

Postupgrade Tasks

After the upgrade is complete, you will want to consider the tasks outlined in this section.

Verifying esales.cfg File Settings

Check the esales.cfg settings again to determine whether the post-upgrade settings are different from the settings you noted in "Siebel eSales .cfg File Settings" on page 83. If they are different, you may need to modify the settings to match the previous settings you recorded.

Verifying That Catalogs Display Properly

- In the administration environment, navigate to Site Map > Catalog Administration.
- For each Catalog you want displayed in eSales, make sure that the Catalog Type field in the More Info applet is set to "Buying."

Updating Record Counts on Categories

To update the record count for all upgraded categories, select the category in the Categories view and choose the Update Count action from the applet menu. Future modifications to this category will automatically readjust the count.

Setting Up RSA Encryption

During the standard Siebel upgrade process, Release 6.x encrypted fields will migrate automatically to Siebel 7 without changing the encryption mechanism. In order to make use of the new RSA-encryption feature after upgrading to Siebel 7, you must enable RSA as a separate step outside of the upgrade process.

To switch from using Siebel's proprietary mechanism to RSA, follow the instructions for configuring RSA in *Siebel Tools Reference*. There is a script available to convert fields from Siebel's proprietary encryption to RSA.

NOTE: If you use RSA, it is critical that the RSA key file be stored securely and backed up frequently. See *Siebel Server Administration Guide* for information about creating, managing, distributing, and backing up the keys.

For general information regarding encryption, see *Siebel Tools Reference* and *Siebel Server Administration Guide*.

Implementing the New Credit Card and Tax Business Services

The Siebel 7 integration to Taxware uses two business services: Tax Calculator and Taxware Adapter Service. It works with more recent versions of Taxware's software.

The Siebel 7 integration to CyberSource uses two business services: Credit Card Transaction Service and CyberSource Adapter Service. Settlement and refund transactions are supported in Siebel 7.

The new credit card and tax business services use Siebel EAI and eScript adapters for greater integration flexibility. The adapters written in eScript fit well, as VB and eScript coexist in Siebel 7. The Siebel 7 integrations provide additional functionality and are integrated to more recent versions of third-party software. You must install the supported versions of the third-party software. See the *Siebel System Requirements and Supported Platforms* documentation for your Siebel application for listings of supported versions.

You might want to modify the new business services to meet your specific needs.

NOTE: As the new business services provide the same functionality—with enhancements—as in eSales version 6, the Release 6.x business services will not be carried forward.

Figure 12 shows how the new integrations work.

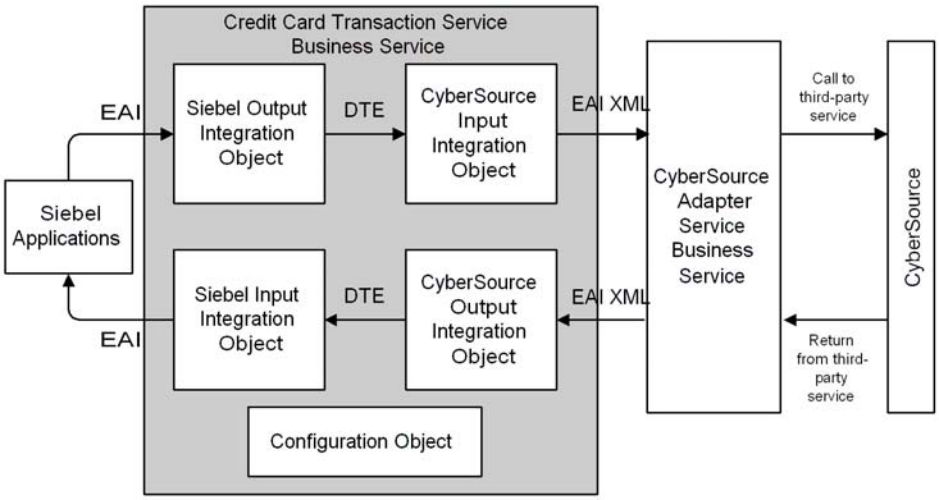


Figure 12. Credit Card and Tax Integration Schematic

Implementing User-Specified Product Comparisons

To implement user-specified product comparisons, you must restructure your products to make use of the product classification system. See *Product Administration Guide* for more information on the product classification system and on restructuring products. To continue using administrator-specified product comparisons, you will have to make some customizations.

Implementing Access Control Using Access Groups

If you used organizations to control visibility to the catalog in Release 6.x, you should redefine the organizations as access groups. See *Security Guide for Siebel eBusiness Applications* for more information.

Implementing Quick Add

If you want to use the new Quick Add functionality provided with eSales version 7, you may need to make minor modifications to your product definitions since each product to be used with Quick Add should have values for "Item Name," "Item Code," and "Manufacturer Code."

If you do not want to use a field in the Quick Add applet, it can be removed during the implementation phase. See *Siebel Tools Reference* for more information on customizing applets.

Modifying the Shipping Cost Service Business Service

You may want to modify the Siebel 7 standard business service called Shipping Cost Service (eScript) in order to make it reflect your shipping rates. You may be able to use the same script you used with eSales version 6.

For more information on setting up and modifying shipping charge calculations, see *Siebel eSales Administration Guide*.

Hiding Quotes

If you determined in "Displaying Quotes" on page 82 that the new quotes functionality will have implications for your implementation of Siebel, you will need to change the way quotes display.

To hide quotes in eSales that were created in Siebel Sales and Siebel Call Center

To prevent these quotes from appearing under My Quotes in eSales, modify the search specification on the Quote List Applet (eSales) so they are not displayed in the Saved Quotes View (eSales) view:

1. Open Siebel Tools.
2. Locate the Quote List Applet (eSales).

3 Set the Search Specification field to:

```
[Contact Id] =LoginId()

AND [Status] <> LookupValue ("QUOTE_STATUS", "Order Placed")

AND [Quote Type] <> LookupValue ("QUOTE_TYPE", "Persistent Cart")

AND [Quote Type] <> LookupValue ("QUOTE_TYPE", "Template")

AND ([Created By] <> LoginId() OR [Quote Type] == LookupValue
("QUOTE_TYPE", "Auction Quote"))
```

4 To prevent these quotes from appearing under My Company Quotes in eSales, remove the Saved Quotes View - My Company (eSales) from the Web Purchasing Manager responsibility:

   a Open Siebel Call Center or Siebel Sales.

   b Navigate to Site Map > Application Administration > Responsibilities.

   c Query for "Web Purchasing Manager" in the Responsibility field.

   d Query for "Saved Quotes View - My Company*" in the View Name field.

   e Remove this view from the responsibility by clicking Applet Menu > Delete Record.

Reapplying User Interface Template Customizations

Changes made to the logical UI level in eSales version 6, such as applets and views, are preserved in the upgraded version. For details on customizing Web templates in Siebel 7, see *Siebel Tools Reference*.

Modifying Workflows

If you made note of customizations in "Customizations Made with Siebel Tools" on page 83, you should now determine if the prior customizations are necessary in Siebel eSales version 7. If so, you may be able to modify an existing workflow. See the section on modifying order workflow processes in *Siebel eSales Administration Guide* for details on the workflows in eSales version 7 and to determine the best way to make these changes in Siebel 7.

Communicating Siebel 7 Enhancements to Users

The new eSales version 7 features you implement in your site translate into new features being used by your site's users. Inform your users about the new enhancements, and make them aware of changes they might not expect.

New User Types and Responsibilities

You should inform your site users, especially those who had Delegated Customer Administrator responsibility in Release 6.x, about the new user types and what each one is able to do.

To enhance business-to-business selling, the order-approval process and Web Purchasing Manager user type were created. The Web Purchasing Manager approves and rejects orders placed by Web Corporate Users when the payment method is a purchase order and the order total exceeds a threshold. Siebel administrators can decide which accounts can pay by purchase order and establish the thresholds.

For more information on the new user types and default responsibilities, see *Siebel eSales Administration Guide*.

Upgrading OnLink Browser-Based Applications to Siebel 7

5

This chapter describes the process for migrating OnLink version 4.0 projects as well as existing version 4.x Siebel eAdvisor projects to Siebel 7 eAdvisor projects. The process is divided into separate sections that cover preupgrade considerations, upgrade tasks, and postupgrade considerations. This chapter also highlights new features in Siebel 7 eAdvisor that should be considered during the upgrade planning stage.

Overview of Upgrading OnLink Browser-Based Applications to Siebel 7

The architecture of the Siebel Interactive Selling applications blend technology from prior versions of Siebel with technology from prior versions of OnLink.

NOTE: The process outlined in this guide begins once you have Siebel 7 installed. For information on setting up your implementation of Siebel 7, see the *Siebel Server Installation Guide* for the operating system you are using, and *Siebel Tools Reference*.

Once your Siebel 7 implementation is installed and operational, you will use the upgrade tools embedded in Interactive Designer to migrate your projects to Siebel 7 eAdvisor.

End-User Operation

The run-time (end-user) operation of Siebel eAdvisor and Siebel eConfigurator applications that use the OnLink architecture operate identically to prior versions of OnLink applications. Existing deployments of these applications do not require any changes in hardware, operating systems, or browser options for continued operation of the end-user applications.

Authoring Environment

The authoring environment within eAdvisor version 7 and eConfigurator version 7 has changed dramatically from the OnLink Composer tool provided in OnLink version 4.0. The Siebel 7 Interactive Designer authoring tool is built on the Siebel eBusiness architecture and therefore requires the installation and support of a third-party relational database and an appropriate server machine on which to operate the database and associated server application processes.

Figure 13 provides a graphical representation of these components.

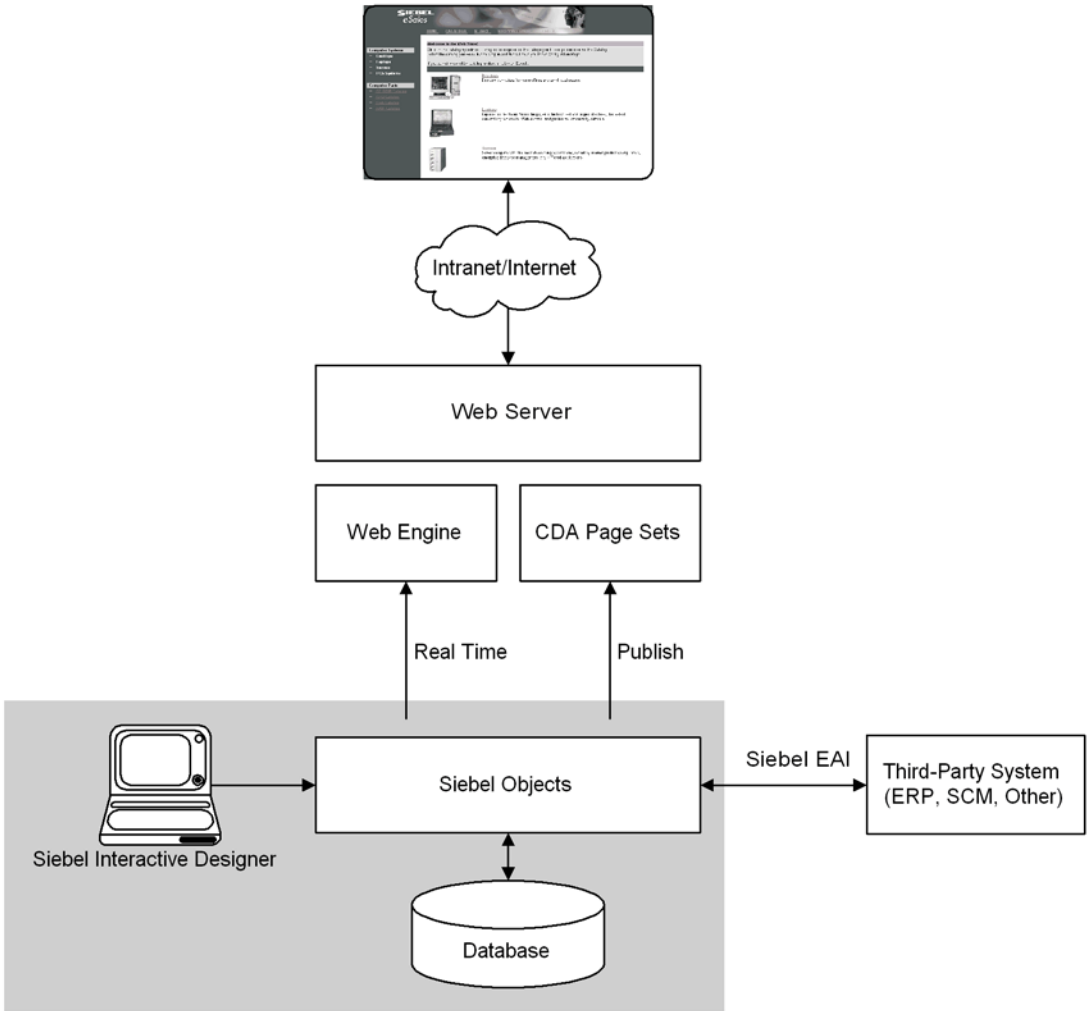


Figure 13. Siebel Interactive Designer Architecture

The Upgrade Process

You begin the process outlined in this guide once you have Siebel 7 installed. For information on setting up your implementation of Siebel 7, see the *Siebel Server Installation Guide* for the operating system you are using, and *Siebel Tools Reference*.

The upgrade tools you will use are embedded into the Siebel Interactive Designer authoring environment within the screens used to create new eAdvisor and eConfigurator applications. This approach allows the upgraded applications to be edited within the same environment.

You will complete the upgrade process by taking these steps:

- Preparing for the migration by verifying that you have a working project.
- Generating the HTML files and export each pageset.
- Migrating version 4.x projects to Siebel 7 projects.
- Publishing and validate the migration.
- Performing a quality review of your application.
- Deploying the migrated application to your site.

NOTE: This upgrade process was designed to migrate the files and data normally associated with a standard version 4.x application. This process is not capable of automatically upgrading customized code or other special files you may have associated or embedded into your application. Special consideration must be given to upgrade any customized aspects of the applications.

Figure 14 shows how a 4.x project is migrated.

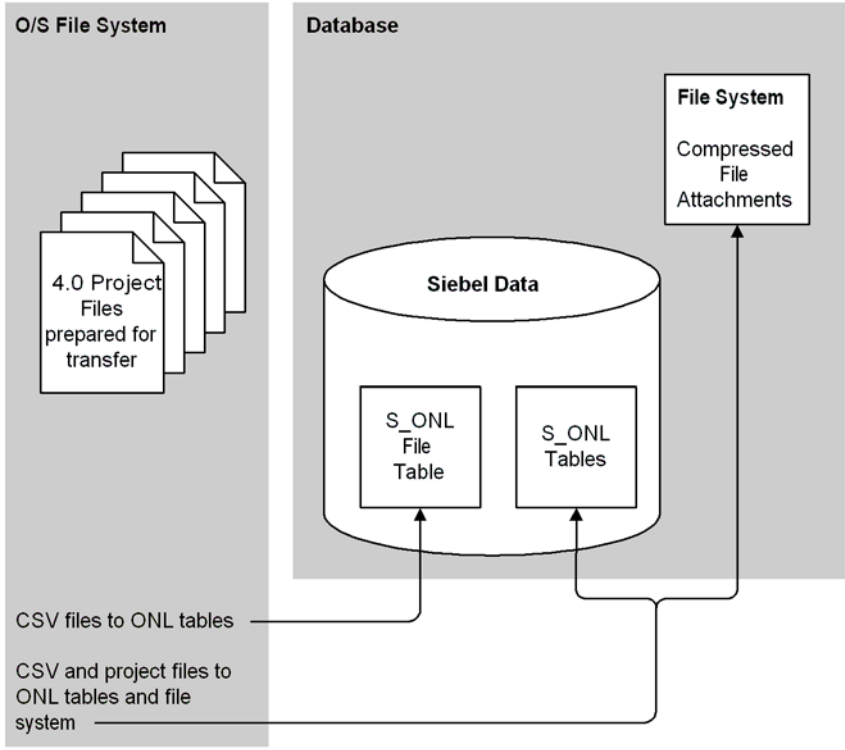


Figure 14. Migration of 4.x Project Files

The Migrate function copies the application data into the database and the project files into the file system. During this update, the CSV files are interpreted into pageset, feature, and configuration table data within the `S_ONL_*` database tables.

Limitations

Upgrading to eAdvisor version 7 has the following limitations:

- The Contents List display names (listed in the Contents List Table Manager) from the 4.x project will not be preserved. See "Backing Up Your 4.x Project" on page 101.
- The upgrade process does not validate the Composer 4.x data model. See "Backing Up Your 4.x Project" on page 101.
- You cannot overwrite an existing Siebel project. To remigrate, you must delete the existing Siebel project first, or create a new Siebel project with a different name.
- The version 4.x display pages or other application HTML will not be converted to SWE Web template format.
- Since the code set will be upgraded, any custom code changes made to the 4.x run-time code set files will not be preserved in the migration. Any custom code changes to files other than code set files are not guaranteed to be preserved. See "Backing Up Your 4.x Project" on page 101.

What's New in eAdvisor Version 7

Siebel eAdvisor version 7 provides new features that you will want to take into consideration when planning your upgrade process. Table 6 lists the key enhancements in version 7.

Table 6. Siebel eAdvisor Version 7 Features

Feature	Where to Find Information
Multichannel Integration Integration with other Siebel applications, including Siebel Sales, Siebel Call Center, Siebel eSales, and Siebel PRM, with standard mechanisms to launch a Siebel eAdvisor session from these applications.	For more information, see *Siebel Interactive Designer Administration Guide*.
Pricing Integration Integration with Siebel ePricer that allows users to get personalized pricing at runtime.	For more information, see *Siebel Interactive Designer Administration Guide*, *Siebel Interactive Selling Transact Server Interface Reference*, *Pricing Administration Guide*, and Chapter 2, "Upgrading to ePricer Version 7."
Configuration Integration Integration with customizable products to allow launch of a Siebel eConfigurator session from a Siebel eAdvisor session.	For more information, see *Siebel Interactive Designer Administration Guide*, *Siebel Interactive Selling Transact Server Interface Reference*, and *Product Administration Guide*.
Quote Integration Integration with quotes and shopping cart to allow users to add recommended products to their cart.	For more information, see *Siebel Interactive Designer Administration Guide*, *Siebel Interactive Selling Transact Server Interface Reference*, and *Product Administration Guide*.
Product Administration Product administration from Siebel views.	For more information, see *Siebel Interactive Designer Administration Guide*, *Siebel Interactive Selling Transact Server Interface Reference*, and *Product Administration Guide*.
Stand-Alone Availability Availability of the stand-alone version of the product.	For more information, see *Siebel Interactive Designer Administration Guide* and *Siebel Interactive Selling Transact Server Interface Reference*.

Preupgrade Considerations

Upgrading from OnLink or Siebel 4.x to Siebel 7 involves the following prerequisites:

- The Composer project must be at version 4.x. If the project is at a version of 3.x it must first be upgraded to version 4.0 before it can be migrated. For information on migrating from version 3.x to 4.0, contact Technical Support.
- The version 4.x data model must be a valid and working model. See "Verifying Your 4.x Project Is Valid" on page 101 for more information.
- The OnLink project directory must be valid and available for access. For the Siebel Web Client, this means that the OnLink project must reside in a directory (such as a network directory) that the program running on the Web server can see and access.
- All pagesets in the 4.x project must be exported to .csv files. These .csv files must reside in the `/ds` directory. See "Exporting Pagesets to .csv Format" on page 101 for more information.

NOTE: Any pagesets in a project that are not exported to .csv files will not be migrated.

Upgrade Tasks

You can update 4.x projects to eAdvisor version 7 using the Migrate button in the Projects screen of Siebel Interactive Designer. Before doing that, you should back up your 4.x project, verify the project's validity, and export your pagesets to .csv format. Following the migration, you will test the project and make minor adjustments as needed. This section explains those tasks in detail.

NOTE: If you are working with a 3.x Composer project, you must migrate it to 4.0 before migrating to Siebel 7. For specific documentation related to this process, contact Siebel Technical Support.

Backing Up Your 4.x Project

Begin the migration by making a copy of your 4.x project and associated files in a separate directory to serve as a backup. Keep this backup until you have successfully migrated your 4.x project to Siebel 7.

Verifying Your 4.x Project Is Valid

You check that you have a working model by validating the data models.

- Within Composer 4.x, choose File > Validate Data Models.

  The Validate Data Models function will perform a validation and any referential errors will be displayed in the Composer Output window.

Exporting Pagesets to .csv Format

Take the following steps for every pageset in the project.

To export pagesets to .csv format

1. Select a specific pageset.
2. Right-click the mouse and choose Export Model.
3. In the File Explorer, select the `/ds` folder and click Save.

Migrating a Project

Use the Migrate button to update 4.0 projects to 7.0. If you are working with a 3.x project, you must migrate it to 4.0 before migrating to 7.0.

NOTE: For more information on migrating from 3.x to 4.0, contact Siebel Technical Support.

Migrating a 4.x project requires two steps:

- Exporting your pagesets in Composer 4.0
- Migrating the project in Interactive Designer

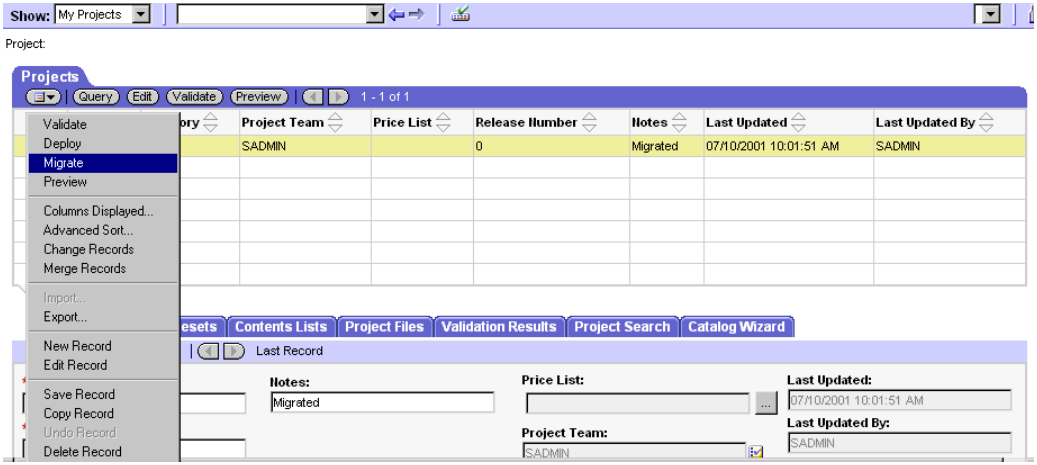
To export your pagesets in Composer 4.0

1. Verify that your 4.0 project is valid by generating the HTML files and checking for errors.
2. For every pageset in the project, select the pageset, right-click, and choose Export Model.

   The pageset files are exported to a .csv file.
3. In the File Explorer, choose the DS folder in the project structure of the 4.0 project and click Save.

To migrate your project in Interactive Designer

1 In the Projects screen, choose Migrate from the Projects View applet menu, as shown below.



The File picklist appears.

2 Select the project (.ocp file) you want to migrate to 7.0 and click Open.

NOTE: For a `siebel.exe` installation, browse to the project file on your local drive. If you are using a Siebel Web Client, the folder needs to reside on a shared drive that the Siebel server can access.

---

3 Click Migrate.

Depending on the size of the project, this step can take some time. The project updates to 7.0 and appears as a new project with the same name in the Projects list. The project files (excluding .csv, .ocd, .ocp, .bak, and .txt files) are copied into the Siebel File System. All of the data in the projects is created in the database.

4 Test your project and edit files as needed to make sure that all custom code works in your 7.0 project.

   The custom code in the custom and layout files is preserved. Because the migration process updates the code set, custom code in code set files (files in the CS directory) is not preserved.

5 In the Contents Lists tab, in the Name column, enter the display names for your contents lists. The migration process does not preserve the contents list display names from your 4.0 project.

Testing the Project

Custom code in custom and layout files will be preserved. However, because the migration process updates the code set, custom code in code set files (files in the `CS` directory) will not be preserved. Test your project and edit files as needed to make sure that all custom code works in your Siebel 7 project.

Resetting Display Names

The migration process does not preserve the contents list display names from your 4.x project. See "Backing Up Your 4.x Project" on page 101. In the Contents Lists tab, enter the display names for your contents lists in the Name column.

By default, the project is ready to run in stand-alone mode. To set up the project to run within the Siebel user interface, see the "Running in Stand Alone or Standard" section of the "Working with a Deployed Application" chapter of *Siebel Interactive Designer Administration Guide*.

Verifying the Siebel .cfg File

In the .cfg file for your Siebel application (for example, `uagent.cfg` for Call Center), verify that the `enableCDA` variable is set to `TRUE`.

Postupgrade Considerations

Stand-alone applications. You should test that existing third-party integration continues to work correctly after migration. You may need to make manual modifications to custom code.

Applications that are not stand-alone. You may need to make manual modifications to your application after migration. Modifications may include:

- Setting up the application to run in the Siebel UI. This may involve modifications to the page layout to guarantee proper fit and aesthetics.
- Integrating with other Siebel modules such as Shopping Cart or Quotes.
- Integrating with ePricer.
- Changing the Siebel project to access existing Siebel product table data.

Upgrading to eAuction Version 7 6

This chapter outlines the migration process for existing OpenSite technology customers upgrading to eAuction version 7, and for eAuction version 4.3.x customers upgrading to eAuction version 7. This chapter, where necessary, makes distinctions between the OpenSite Auction product (OSA) and the Dynamic Pricing Toolkit (DPT) product line. This guide is for customers that have current implementations of either OSA 4.3.x, DPT 1.3.x, or eAuction version 4.3.x.

What's New in eAuction Version 7

Siebel eAuction version 7 provides many new features that you will want to take into consideration when planning your upgrade process. Table 7 lists key Siebel 7 features that have been enhanced, added, or replaced in version 7.x. New auction capabilities are highlighted separately in Table 8 on page 112.

Table 7. Siebel eAuction Version 7 Features

Feature	Where to Find Information
Multichannel Integration With eAuction version 7, the auction application is integrated with Siebel eBusiness applications. This is different from the legacy OSA and DPT products that existed in their own framework separate from other systems that managed customer information. This integration allows you to manage all customer data, whether it be from an auction or some other transaction format, in one centralized manner. You can now offer both fixed and dynamic pricing, and you can consistently manage the customer relationship across all channels of interaction. The information learned about customers during the course of an auction can help you better understand such variables as product demand and price sensitivity. Using Siebel Marketing, you can make use of this and other customer data.	For more information, see *Siebel eAuction Guide*. For information on Siebel Marketing, see *Siebel Marketing Guide*.
Integrated Catalog Administration The integration of eAuction version 7 with Siebel eBusiness applications allows you to maintain and control product catalogs in a sole location, decreasing the burden associated with catalog management as well as minimizing the risk of inconsistencies across applications. The product catalog used to present products for eAuction version 7 can be shared with Siebel eSales and Siebel Call Center. This centralized source for catalog information not only streamlines administration and maintenance but also improves the customer's experience by making sure that the information received is consistent and accurate across any sales channel.	For more information, see *Siebel eAuction Guide*.

Table 7. Siebel eAuction Version 7 Features

Feature	Where to Find Information
Content Management Siebel eContent Management has been added to the core infrastructure of all Siebel applications, allowing you to publish product content consistently and accurately across all sales channels, decreasing time-to-market. By upgrading to eAuction version 7, you can use the new content management features, improving your administration and maintenance of Siebel eAuction. eContent Management 7 features include: ■ **Delegated catalog content creation.** Business users and product experts can act as content creators. ■ **Easy integration with third-party content.** You can import and manage external sources of content, such as information from partners. ■ **Project management.** Administrators can better manage changes. ■ **Staging.** Allows content to be posted to a preproduction environment for review prior to posting.	For more information, see *Siebel eAuction Guide*.
Distributed Catalog Administration Often, the need for catalog administration reaches beyond your internal experts, expanding to include resellers, channel partners or other third-party vendors. Using distributed catalog administration and a partner extranet, vendor organizations can administer portions of the product catalog, defining products, creating offers, categorizing products, or submitting their latest catalog content using Siebel EAI. Because of Siebel's access control system, vendors can access only those portions of the catalog for which they provide input, or over which they have authority. This feature is especially important for OSA or DPT customers that have created online marketplaces.	For more information, see *Siebel eAuction Guide*.
Integration with eSales Online Order Functionality Rather than having to connect to some external online ordering system as with OSA or DPT, with eAuction version 7 you can now carry out the actions related to closing a transaction within the Siebel eSales order framework. This integration provides you with all the benefits of the eSales order framework, including the ability to customize the order processing flow.	For more information, see *Siebel eAuction Guide*.

Table 7. Siebel eAuction Version 7 Features

Feature	Where to Find Information
Enhanced User Registration The enhanced user registration capabilities available in eSales version 7 are also available in eAuction version 7. These new registration features include forgotten-password support and personal key identification, which allows existing customers to self-register by submitting a unique key (such as a Social Security number). Also new in Siebel 7: all of Siebel's customer and partner applications use a single registration framework, enabling customers to access the functionality of each application in an integrated fashion. User registration has also been enhanced to support Siebel eAuction-specific requirements. These include: ■ **Requesting information from users as to whether they wish to bid on or post auctions.** "Yes" responses prompt the user to add valid credit card and shipping information. ■ **Approval process for registrant requesting privileges to bid on or post auctions.** This approval process can be automatic or manual as chosen by the global administrator.	For more information, see *Siebel eAuction Guide*. For information on user access, see *Siebel Security Guide*.

Table 7. Siebel eAuction Version 7 Features

Feature	Where to Find Information
Enterprise-Class Architecture and Infrastructure Siebel's Web infrastructure provides an upgradeable application framework for deploying HTML- and WML-based applications using a multitiered component-based architecture. The infrastructure is designed to support customer, partner, and employee applications, taking advantage of the latest browser capabilities to provide high interactivity, while reducing the amount of interaction between the browser and server. The infrastructure is designed to tightly integrate with your existing Web infrastructure to create a smooth experience for end users regardless of the source of the information being displayed. In addition, the Siebel architecture provides: ■ Support for distributed servers (multiprocessing). ■ Support for redundancy for both the data and business component. ■ Support for load balancing. ■ Support for fail-over (primary server and back-up server) These capabilities are exposed using the Resonate utilities embedded in Siebel. The Siebel architecture and infrastructure provide OSA and DPT customers with multiple new tools for managing, scaling, and making their auction applications fault-tolerant.	For more information, see *Siebel eAuction Guide*.
Enhanced User Interface for Auction Bidders For DPT customers, the standard UI features provided with eAuction version 7 represent new functionality. The bidder interface provides bidders with useful information to help them decide on their bid, including: ■ Product image and description, including features, location, condition, quantity, payment terms, and shipping method. ■ Auction details such as open and close times, format, starting price, bid increment, and reserve price status. ■ List of winning bids and runners up. ■ A secure bidding interface, which requires the bidder to input User ID and password before placing a bid.	For more information, see *Siebel eAuction Guide*.

Siebel eAuction version 7 carries forward the auction features of OSA and DPT while providing a useful list of new capabilities. Table 8 on page 112 shows the auction capabilities that are new to Siebel 7. For more information on each of the features listed, see *Siebel eAuction Guide*.

Table 8. Auction Features New to Siebel Applications

Feature
Auction Management Tools. Siebel eAuction version 7 provides comprehensive Web-based auction management and site administration tools that allow administrators to create users, auctions, catalogs, and categories to guarantee a secure auction experience with high integrity.
Administrative Reports. This feature allows listers and administrators to review auction and user activities providing useful data to better plan future auctions. A comprehensive list of standard reports is delivered with the application.
Offer-Creation Wizard. This feature provides listers a Web-based interface to create and manage auction events to maximize their return on inventory.
Reserve Price. This feature makes sure that a winning bid reaches a minimum price (in the case of forward auctions) or stays below a maximum bid (in the case of reverse auctions), thereby maximizing return for sellers and minimizing purchase price for buyers.
Featured Offer. This option highlights an auction category or offer at the top of the auction home page, creating interest and exposure for the category or offer.
AutoBid Agent. This feature allows bidders to establish an agent that will represent their interests.
My Auctions. This feature allows users to monitor any auction.
Contact Lister. This feature allows users to send an email to the seller or buyer to ask questions and clarify any issues.
AuctionAlert. This user-driven personalization tool notifies users based on their predefined interests, including wireless notification.
Dynamic Close. Auction owners can extend the bidding time allowed in an auction. This feature is enhanced in eAuction version 7, now allowing the auction owners to set the variables that decide when and how an auction will be extended.
Partial-Quantity Bidding. This option allows bidders to specify whether they are willing to accept a lesser quantity than what they bid for, giving them the flexibility to purchase multiple quantities of an item from one source, as could be the case in business-to-business transactions.
Auction Notification Events. Siebel eAuction supports many standard auction-related notifications, including the addition of wireless notification in eAuction version 7.

Overview of Upgrading to eAuction Version 7

This upgrade process is intended for existing customers of the OSA and DPT products, as well as Siebel eAuction version 4.3.x MidMarket or Enterprise Edition. Only OSA 4.3.x, DPT 1.3.x, and Siebel eAuction 4.3.x customers holding active maintenance and support contracts are eligible to upgrade to eAuction version 7.

The objective of this upgrade process is to make sure that you will have all the necessary license keys, utilities, and views enabled in order to replicate your existing auction.

Figure 15 provides a graphical overview of the process of upgrading OpenSite to Siebel 7.

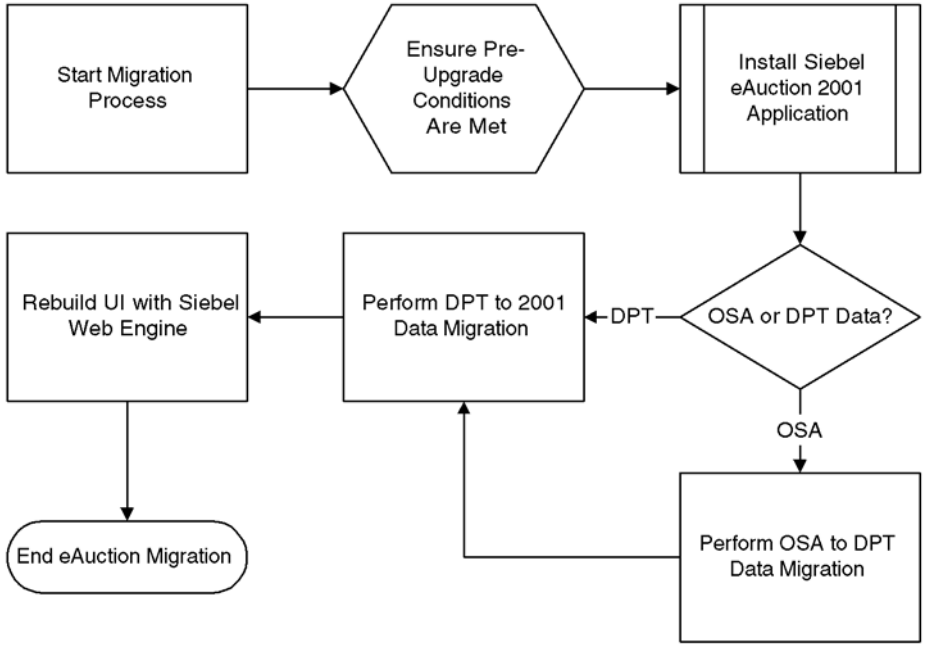


Figure 15. Upgrading OpenSite to Siebel eAuction Version 7

The upgrade process is divided into three parts:

- Application migration
- Data migration
- Migration of the user interface.

NOTE: Unless otherwise noted, the migration steps for Siebel eAuction version 4.3.x MidMarket customers are the same as the migration steps for OSA customers. In addition, the migration steps for Siebel eAuction version 4.3.x Enterprise Edition customers are the same as the migration steps for DPT.

If you have any questions regarding the version or release number of the product you are currently running, contact Siebel Technical Support.

Application Migration

The application migration process from OSA, DPT, and Siebel eAuction version 4.3.x to eAuction version 7 involves a new installation of the eAuction version 7 application software.

NOTE: The installation of the Siebel 7 application takes place during the application migration process. There is an assumption that a base Siebel application (such as Siebel Sales) is installed. This document does not document the steps required for its installation. See *Siebel Server Installation Guide* for information on installing your base Siebel application.

Data Migration

The data migration process uses a set of data migration utilities that prepare the Siebel Server database columns for the eAuction-specific data. Once prepared, the legacy data is copied onto the Siebel Server and the migration is completed automatically.

OSA and Siebel eAuction Version 4.3.x MidMarket Edition

The data migration process for OSA and Siebel eAuction version 4.3.x MidMarket Edition applications involves an intermediate step where the data will be migrated to the DPT data model, which will then be migrated to eAuction version 7.

DPT and Siebel eAuction Version 4.3.x Enterprise Edition

The data migration for DPT and Siebel eAuction version 4.3.x Enterprise Edition applications does not involve any intermediate steps and transfers directly to eAuction version 7.

Migration of the User Interface

The UI upgrade process requires you to completely rebuild your templates using the Siebel Web Engine. See *Siebel Tools Guide* for specific information.

Before You Start

Before beginning the upgrade process, verify that:

- You have a valid maintenance and support contract with Siebel Systems to qualify for the migration.
- You have installed at least a single seat of a Siebel base application, such as Siebel Sales or Siebel Call Center, and the implementation of this application is ready to use.
- You have received a CD from Siebel Systems with the following contents:

  Siebel eAuction version 7 licensed views

  - Siebel eCatalog (Product Catalog view)
  - Invoicing module (Quotes and Invoicing views)
  - Orders views
  - User Registration views
  - eSmartScript RunTime
  - .COM Server
  - Siebel Tools

  NOTE: If you have not received this CD, contact Siebel Technical Support.

- The CD mentioned above includes:
  - Search capabilities
  - Reporting capabilities

- You have received a separate CD from Siebel Systems with the following migration utilities:

  For OSA and Siebel eAuction version 4.3.x MidMarket Edition:

OSADPEMigration.exe	CreateSqlSvrCybrCashDB.SQL
Migration.ini	IniDataSqlSvrCybrCash.sql
CreateOracleCybrCashDB.SQL	CreateGallery.sql
IniDataOracleCybrCash.sql	

  For all applications:

Bsafe41.lib	Thr12d.lib
Dbt12d.lib	Thr15d.lib
Dbt15d.dll	Thread2015d.dll
Dbt15d.lib	Threxcept2015d.dll
Dptatoms.lib	Tls12d.lib
Dptatoms.dll	Tls15d.lib
DPTDynamicPropertyObjects.dll	Tls7012d.dll
DPTDynamicPropertyObjects.lib	Tls7015d.dll
DPTEncryptionMgr.lib	Trace2012d.dll
Osdptapi.lib	Trace2015d.dllMapping Database.mdb
Std12d.lib	DataMigration.exe
Std15d.lib	migproj.sif
Std315d.dll	migflows.xml
Sync2015d.dll	

Refer to Table 9 for more information related to the application from which you are upgrading.

Table 9. Upgrade Conditions

If you are a customer of...	These conditions must be met
OSA	Verify the version number of the application you are currently running is equal to or greater than 4.3. Note that if the OSA application you are running is not a version number equal to or greater than 4.3, please contact Siebel Technical Support immediately to migrate to the proper OSA version level.
DPT	Verify the version number of the application you are currently running is equal to or greater than 1.3. Note that if the DPT application you are running is not a version number equal to or greater than 1.3, please contact Siebel Technical Support immediately to migrate to the proper DPT version level.
Siebel eAuction version 4.3.x	If you have verified that you have a valid maintenance and support contract, and that you received the CD with the correct license keys activated, you are ready to begin. Note that Siebel eAuction version 4.3.x MidMarket Edition customers should follow the OSA instructions. Siebel eAuction version 4.3.x Enterprise Edition customers should follow the DPT instructions.

Preupgrade Tasks

Before starting the upgrade process, certain conditions must be met.

To verify that your system is ready for upgrading

- Check that the Siebel client (including Tools) is installed with appropriate administrative rights (access to workflow administration screens). The data migration process is designed to run on an NT workstation with the appropriate database drivers to access both the Siebel Server and the legacy database server.
- Make sure that all current legacy activity is halted (ongoing auctions, invoicing, and so on).
- Verify that there is valid ODBC, Oracle, or SQL Server access to the legacy database upon which the migration is to execute.
- Perform a backup of the legacy database before beginning the migration process.
- Make sure that the MSADC SDK is the current version. See "Preparation for OpenSite Data Migration - MSADC SDK Update" for the current version and instructions on the Microsoft Active Directory Connector Software Developers' Kit (MSADC SDK) update.
- Make sure you do not destroy your legacy user interface because you will need to use it as a guide when rebuilding the UI with the Siebel Web Engine.
- For those upgrading from OSA and Siebel eAuction version 6.0 MidMarket Edition:

  Before you are ready to complete the data migration, you must be running a relational database and you cannot be running a flat file data store.

NOTE: If you are currently running a flat file database, you must contact Siebel Technical Support and arrange for a Professional Services engagement to migrate to a relational database in order to perform the remaining migration steps.

Upgrade Tasks

Upgrading to eAuction version 7 involves a three-step process of first migrating the application, next migrating the data, and then migrating the user interface. You complete this process using the eAuction version 7 installation CD, the Data Migration Utilities CD, and the Siebel Web Engine.

NOTE: Any references to tools to assist with migration are intended for the specific purpose of data migration and not for application or user interface migration.

Application Migration

The first step is to install the Siebel eAuction application. This process involves using the CD you received with the proper license keys activated. See "Before You Start" on page 116 for the list of license keys.

To install the Siebel eAuction application

1. Insert the CD into the server CD-ROM drive.
2. Follow the instruction sequence as it appears on the screen.

   The automated installation process creates all the necessary directories and copies all the necessary files and executables required to run Siebel eAuction.
3. When the installation has completed, remove the CD from the CD-ROM drive and keep it in a safe place, in case you need to refer to it again or redo the application-installation step.

   No postinstallation cleanup is required. The Siebel eAuction application is now loaded onto your system.

Data Migration

Figure 16 summarizes the various steps involved in the data migration process.

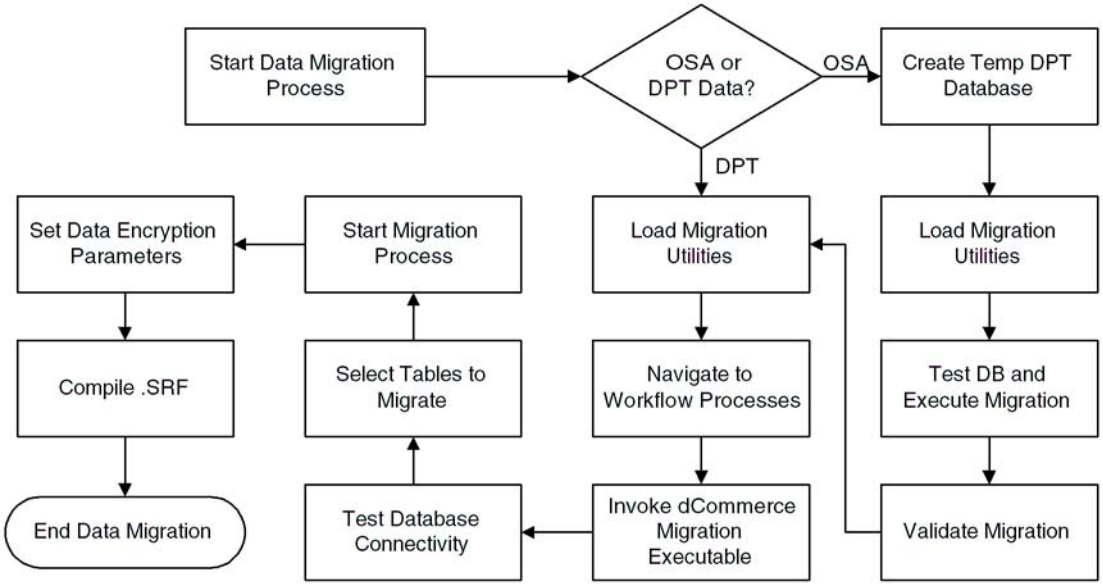


Figure 16. Data Migration Process

Data Migration Steps for OSA and Siebel eAuction Version 4.3.x MidMarket Edition Customers

OSA and Siebel eAuction version 4.3.x MidMarket Edition customers should read the information on data migration in this section.

NOTE: DPT and Siebel eAuction version 4.3.x Enterprise Edition customers should skip ahead to "Data Migration Steps for DPT and Siebel eAuction Version 4.3.x Enterprise Edition Customers" on page 124.

Preparing for Data Migration

To begin the process of data migration, first verify that the following conditions are met:

- Users, Bids, Offers, and Categories tables are migrated.
- All auctions are closed. Customers must not have access to the auction site during the migration.
- You have access to the Data Migration Utilities CD.
- All scripts run with either Oracle SQLPLUS or SQL Server Console Manager.

Creating a Temporary DPT Database

Load the Data Migration Utilities CD and verify that the following utilities are included:

```
OSADPEMigration.exe

Migration.ini

CreateOracleCybrCashDB.sql

IniDataOracleCybrCash.sql

CreateSqlSvrCybrCashDB.sql

IniDataSqlSvrCybrCash.sql

CreateGallery.sql

OSADPTValidation.sql
```

To create a clean instance of the temporary DPT database and populate it with seed data

Use the following seed data:

For Oracle Source Databases	For SQL Server Databases
Execute `CreateOracleCybrCashDB.sql`	Execute `CreateSqlSvrCybrCashDB.sql`
Execute `IniDataOracleCybrCash.sql`	Execute `IniDataSqlSvrCybrCash.sql`

To prepare and execute `CreateGallery.sql`

1 Using Notepad, open `CreateGallery.sql`.

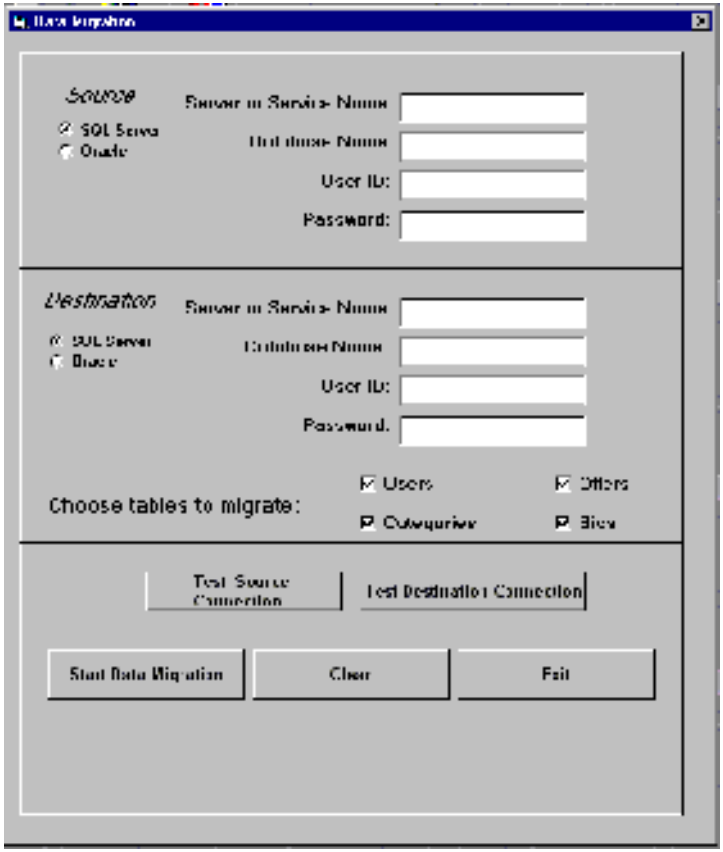
2 Set `Gallery ID=2`.

3 Execute `CreateGallery.sql`.

To invoke the data migration process

1 Double-click the `OSADPEMigration.exe` executable file.

The Data Migration dialog box appears, as shown in the following figure.



2 In the Data Migration dialog box, enter the following information:

- Source database type (SQL or Oracle)
- User ID (login) for source server or service
- Password for source server or service
- Destination database type (SQL or Oracle)
- User ID (login) for destination
- Password for destination

3 Click the Test Source Connection button to test the source database connection.

4 Click the Test Destination Connection button to test the destination database connection.

5 Click the Start Data Migration button to begin the migration process.

To verify migration success

1 Run `OSADPTValidation.sql`.

2 Check that counts in the Siebel eAuction version 4.3.x database match those in the intermediate database.

3 If the counts do not match, start the migration process over.

4 Proceed to"Data Migration Steps for DPT and Siebel eAuction Version 4.3.x Enterprise Edition Customers" on page 124.

Data Migration Steps for DPT and Siebel eAuction Version 4.3.x Enterprise Edition Customers

DPT and Siebel eAuction version 4.3.x Enterprise Edition customers should read the information on data migration in this section.

NOTE: OSA and Siebel eAuction version 4.3.x MidMarket Edition customers should skip this section in favor of "Data Migration Steps for OSA and Siebel eAuction Version 4.3.x MidMarket Edition Customers" on page 121.

Preparing for Data Migration

Before beginning the process of data migration, first verify that the following conditions are met:

- You have reviewed the list of table mappings (see Table 11 on page 135) and you now know which of your existing tables will map into Siebel 7 eAuction.
- You have access to a base Siebel application (Siebel Sales).
- All auctions are closed. Customers must not have access to the auction site during the migration.
- You have access to the Data Migration Utilities CD.
- You are familiar with Siebel Tools and Workflow.

Using the Data Migration Utilities CD

Use the data migration utilities CD to start the data migration.

To access the utilities

1. Insert the Data Migration Utilities CD.
2. Launch Windows NT Explorer and access the drive running the migration CD.

3 View the list of utilities on the CD and verify they are all there. Here is the list of utilities:

```
bsafe41.lib                    std12d.lib
DataMigration.exe              std15d.lib
dbt12d.lib                     std315d.lib
dbt15d.dll                     sync2015d.dll
dbt15d.lib                     thr12d.lib
DPTAtoms.dll                   thr15d.lib
DPTAtoms.lib                   thread2015d.dll
DPTDynamicPropertObjects.dll   threxcept2015d.dll
DPTDynamicPropertObjects.lib   tls12d.lib
DPTEncryptionMgr.lib           tls15d.lib
Mapping Database.mdb           tls7012d.dll
Mfc42d.dll                     tls7015d.dll
Mfc042d.dll                    trace2012d.dll
Msvcirtd.dll                   trace2015d.dll
Msvcp60.dll                    DataMigration.exe
Msvcp60d.dll                   Mapping Database.mdb
Msvcrtd.dll                    Migproj.sif
ODPTAPI.lib                    Migflows.xml
```

NOTE: If any of the utilities listed above are missing from your migration CD, contact Siebel Technical Support to request a new CD or to receive the missing files by FTP.

4 Copy all the utilities from the CD into the Siebel 7 `BIN` directory.

To import and compile the Migrate Project utility

1 Import the `migproj.sif`. This is the Migrate Project utility provided on the CD.

Once the import has completed, a new project will be available (`Migtable`).

2 Navigate to Menu > Tools > Compile.

3 Select the newly imported project (`Migtable`).

4 Compile the `.srf` file.

To make the new workflows available

1 Launch Siebel Sales.

2 Log in as Administrator.

3 From the application-level menu, choose View > Site Map > Workflow Administration > Workflow Processes.

4 Click the Import button to import the XML processes file (`migflows.xml`).

5 Run a query on the `dcommerce` data migration process to verify that the file exists.

   a From the Workflow Processes applet, find the picklist of actions you can perform.

   b From the picklist, choose New Query.

      A new applet appears.

   c Enter `*dcommerce*`.

   d Choose Run Query.

      The application will populate the workflow name with the appropriate workflow.

To invoke the data migration process

1 Within Siebel Sales, navigate to Screens > Workflow Administration > All Processes.

2 Click the Process Simulator tab.

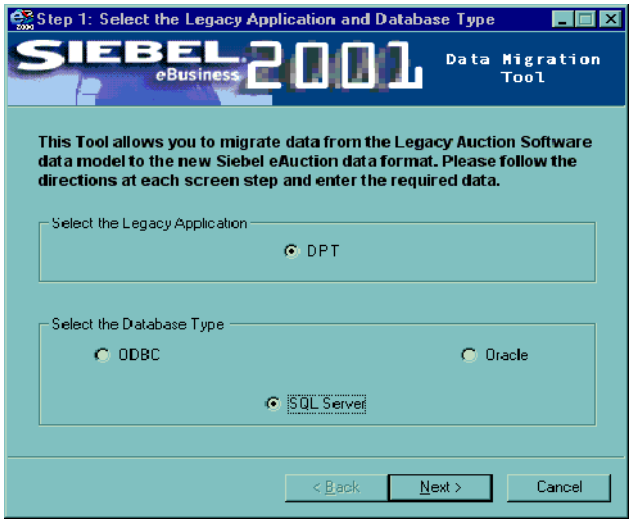
   A set of action buttons appears.

3 Click the Start button to invoke the migration process.

   A dialog box appears through which you can choose to continue.

4 Click the Continue button to invoke the migration utility.

The Step 1 dialog box of the Data Migration Tool appears, as shown in the following figure.



5 Click the radio buttons to specify the following selections:

- **Legacy application.** Select DPT.
- **Database type.** Select your source database type (ODBC, SQL Server, or Oracle).

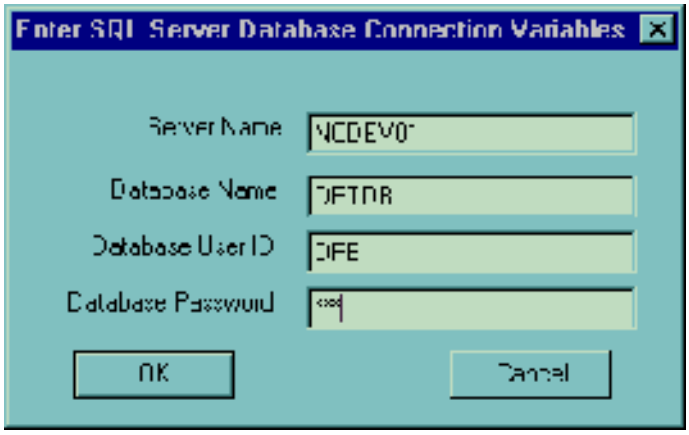
6 Click the Next button to continue.

The Step 2 dialog box of the Data Migration Tool appears as follows. You are now ready to test the database connectivity.

To run the database connection test

1 Click the Enter Values button.

A dialog box like this one appears, in which you can enter your database connection variables.



2 Complete the fields in the dialog box according to your specific connection variables, and then click OK.

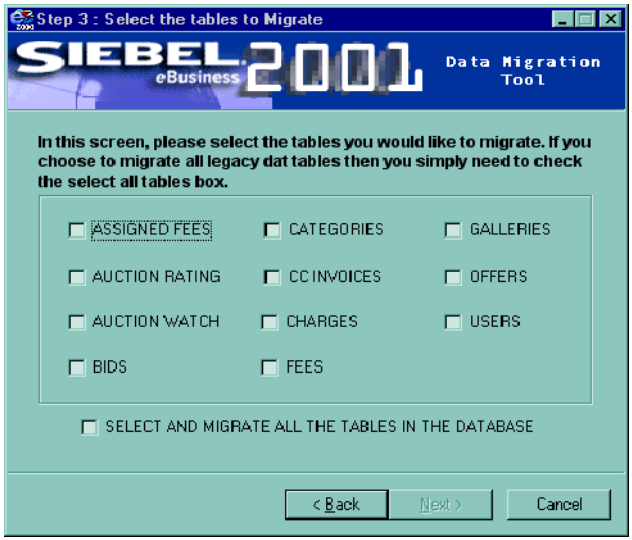
3 In the Step 2 dialog box, click the Test Database Connectivity button.

4 When a DataMigration message appears saying that the database connection test is successful, you have completed the test. Click OK.

In the event the connectivity test fails, an error message is generated. Verify that the database is up and running and that the database name, user ID, and password have all been input correctly. Then, rerun the database connectivity test. If the problem persists, contact your database administrator or Siebel Technical Support.

5 You are now ready to select the tables to migrate. In the Step 2 dialog box, click the Next button.

The Step 3 dialog box appears, as shown in the following figure.



To select the tables to migrate

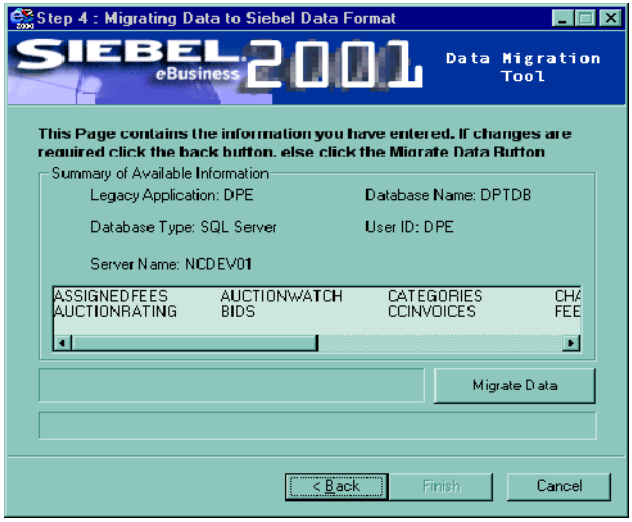
1 In the Step 3 dialog box, select the check boxes to specify which tables to migrate.

NOTE: It is strongly recommended that you select all the tables for migration. If you choose not to migrate all the tables, your postmigration auction site may not contain the same data as your premigration auction site.

---

2 Click the Next button to continue.

The Step 4 dialog box appears, as shown. You are now ready to migrate the data.



To migrate the data to the Siebel data format

1 In the Step 4 dialog box, verify that all tables you have selected for migration are displayed.

2 Click the Migrate Data button.

The migration process begins and can take several minutes depending on the amount of data to be migrated. In the dialog box, you can check the progress of the migration in the status bar underneath the Migrate Data button. When the status bar has reached the far right, the FINISH button is now available.

3 Click the Finish button.

The output from the data migration process is some or all of the XML files listed in the following table. Your specific output is determined by the files you selected for migration.

Base Data	Extended Data
ListOfUsers.xml	ListOfExtUsers.xml
ListOfGalleries.xml	ListOfExtGalleries.xml
ListOfCategories.xml	ListOfExtCategories.xml
ListOfItems.xml	ListOfExtItems.xml
ListOfBids.xml	ListOfExtBids.xml
ListOfFees.xml	ListOfExtFees.xml
ListOfAssignedFees.xml	ListOfExtCCInvoices.xml
ListOfCCInvoices.xml	ListOfExtCharges.xml
ListOfCharges.xml	ListOfExtAuctionRating.xml
ListOfAuctionRating.xml	ListOfExtAuctionWatch.xml
ListOfAuctionWatch.xml	

NOTE: No extension data migration of the Assigned Fees table will be available as this is an intersection table in the Siebel database.

4 Move the XML files into the Siebel `bin` directory.

NOTE: This process will have decrypted any data that was encrypted in the legacy database. The data now shows up decrypted within the XML files.

The next workflow subprocess steps that automatically execute use these XML files or update services to import the legacy data into the Siebel database through the EAI XML utility called "Siebel Read from File and Insert." Each subprocess operates on a particular Siebel data object. All subprocesses or the entire process can be rerun without incident. If you find data problems in the data to be imported, you may choose to adjust the data within the XML file and safely rerun the particular subprocess to which it corresponds.

The migration process will yield several output log files also located in the Siebel `bin` directory, as listed in Table 10.

Table 10. Output Log Files

File Name	Comment
`Migration Log.txt`	A complete log of the success or failure of the legacy data written to XML.
`Encrypted Fields.txt`	A complete log of the tables and fields within the legacy database that have been decrypted and placed in the XML (for reference by the operator after completing the migration process, for entering into Siebel Tools and setting the field user properties appropriately to force the encryption of this data in the Siebel database).
`Extension Tables Mapping.txt`	A complete log of the tables and fields within the legacy database that were extended and how they map to the Siebel extension tables (for reference during UI migration).

Table 11 shows the Siebel tables into which your legacy data is imported.

Table 11. Mapping of Legacy Tables to Siebel Tables

Legacy Table Name	Siebel Table Name
S_USER / S_CONTACT / S_PER_PAY_PRFL	USERS
S_CTLG / S_CONTACT / S_ORG_EXT / S_ADDR_ORG	GALLERIES
S_CTLG_CAT	CATEGORIES
S_AUC_ITEM / S_AUC_ITEM_X	ITEMS
S_AUC_ITEM / S_AUC_ITEM_X	OFFERS
S_AUC_BID / S_CONTACT / S_ADDR_ORG	BIDS
S_AUC_FEE	FEES
S_AUC_FEE_ASSIGN	ASSIGNEDFEES
S_INVOICE	INVOICES
S_INVOICE / S_ORDER / S_ORG_SYN / S_DOC_ORDER	CCINVOICES
S_INVOICE_ITEM	CHARGES
S_AUC_RATING	AUCTIONRATING
S_AUC_WATCH	AUCTIONWATCH

Table 12 shows the legacy data tables that *will not* be migrated to the Siebel database.

Table 12. Legacy Tables Not Migrated

File Name	Comment
INITIALIZATIONDATA	
TRANSACTIONLOG	
USERPRIVELEGES	
COLUMNSTOENCRYPT	Read by the migration process to determine data to be decrypted, but not directly migrated.
OPTIONS	Read by the migration process to add to ITEM information, but not directly migrated.
ITEMS	Read by the migration process to add to ITEM information, but not directly migrated. Exists in Siebel together with information from the OFFERS table to make up the new Siebel Item Table.
INVOICES	Read by the migration process to add to INVOICE information, but not directly migrated. Exists in Siebel together with information from CCINVOICES table to make up the new Siebel Item Table.

Table 13 shows the legacy data tables that *will be* migrated to the Siebel database. All fields within these legacy data tables will be migrated, with the exception of those listed. The fields listed are not migrated because they have been deemed irrelevant in the Siebel architecture.

Table 13. Legacy Tables Migrated

Table Name	Fields Within Table That Are Not Migrated
USERS	OSKEY_ID
	JOIN_DATE
	PAYMENT
	TERMS
	TOTAL_BIDS
	TOTAL_WINNING_BIDS
	DELETED
	DELETED_DATE_TIME
	TAX_REGISTRATION_ID
	STATE_TAX_EXEMPTION_ID
	COUNTY_TAX_EXEMPTION_ID
	LOCAL_TAX_EXEMPTION_ID
	BID_PLACED_NOTIFY
	SELLER_REQUEST
	SELLER_APPROVED
	DESIRED_LOCALE

Table 13. Legacy Tables Migrated

Table Name	Fields Within Table That Are Not Migrated
GALLERIES	ID
	OSKEY_ID
	DESCRIPTION
	ENFORCE_CONFIG_LIMITS
	MAX_OFFERS
	MAX_CATEGORIES
	PRIVATE_CATEGORIES_ALLOWED
	TEMPLATE_STYLE
	DELETED
	DELETED_DATE_TIME
	COMP_TAX_ID
	CUST_SUPPORT_EMAIL
	COMP_INFO_EMAIL
	AVS_OPTION
	PROCESS_MODEL
	CONFIGURATION_FILE
	STATE_TAX_EXEMPT
	STATE_TAX_EXEMPTION
	COUNTY_TAX_EXEMPT
	COUNTY_TAX_EXEMPTION
	LOCAL_TAX_EXEMPT
	LOCAL_TAX_EXEMPTION
	TW_COMPANY_ID
	TW_LOCATION_ID
	P2P

Table 13. Legacy Tables Migrated

Table Name	Fields Within Table That Are Not Migrated
CATEGORIES	ID
	DELETED
BIDS	All fields are migrated.
OFFERS	Some fields in the OFFERS table in addition to the ITEMS table map to the Siebel ITEMS table. The following fields, however, are the exceptions and will not be migrated from the current OFFERS Table.
	OSKEY_ID
	TITLE
	STATUS
	HOT_OFFER
	FEATURE_OFFER
	DURATION
	DAYS_OF_AUCTION
	DELETED
	DELETED_DATE_TIME
	BID_SORT_ORDER
	PAPER_INVOICING
	TAX_PRODUCT_CODE
	SHIPPING_INCLUDED
	PAYMENT_TYPES
	MODIFIED_CLOSE
	BID_COEFFICIENT3
	BID_COEFFICIENT4
FEES	DESCRIPTION
	CONTEXT

Table 13. Legacy Tables Migrated

Table Name	Fields Within Table That Are Not Migrated
ASSIGNEDFEES	All fields are migrated.
CCINVOICES	Some of the fields in this table along with some fields in the INVOICES table will migrate to comprise the Siebel Invoice table. The following fields are exceptions and will not migrate.
	MAIL_TRACKING_NUM
	TRACKING_ORDER_ID
CHARGES	ID
	CHARGE_DATE
AUCTIONRATING	ID
AUCTIONWATCH	All fields are migrated.

User Interface Migration

The UI migration process involves a complete rebuild of the user interface using the Siebel Web Engine (SWE). See *Siebel Tools Guide* for information about how to build end user templates using the SWE.

NOTE: None of the existing OSA or DPT user templates can be reused with eAuction version 7. All user interface templates must be rebuilt.

Postupgrade Tasks

No specific postupgrade cleanup is required for the application and user interface migrations.

The data migration process may require iterative runs in order to adjust data appropriately. When you have completed the upgrade successfully, you will need to set the correct user properties for the fields in the migrated tables in order for these fields to become encrypted within the Siebel database.

To set the correct user properties for the migrated fields

1. Launch Siebel Tools.
2. Navigate to the business components containing fields that need encryption.
3. Navigate to user properties for these fields.
4. Refer to the encrypted fields log generated during the migration. See Table 10 on page 134.
5. Establish and lock the projects where business components exist.
6. Set the user properties for these fields:

```
Encrypted Key Field     Value=Id
Encrypt Service Name    Value=RC2Encryptor
Encrypted               Value=Y
```

7. Unlock all locked projects.
8. Compile the `.srf` file.

To complete the postupgrade tasks

- You should examine the log files generated from the migration process to make sure the process completed successfully.
- While you may want to retain the XML files that were used for data import, you should remove these files from the client system as there will be data existing in these files that is not encrypted.

Preparation for OpenSite Data Migration - MSADC SDK Update

A

The current version of MSADC SDK is 2.6. If you do not have this version, you must obtain it before migrating to eAuction version 7.

Downloading MSADC SDK Version 2.6

You can download a current version of MSADC SDK from the Microsoft Web site. Go to http://www.microsoft.com/data/download_260SDK.htm, and then navigate to the link to download the 2.6 version. Follow the instructions to install it.

To enable the OLE DB provider for Oracle to work with your Oracle client software, you must modify the client's registry by running registry files from a command line.

CAUTION: Multiple instances of the client software should not run concurrently.

These registry files are listed in Table 14 and are located within the same directory structure that contains your MSDAC installation.

NOTE: You must restart the computer for the modifications to take effect.

Table 14. Client Registry Files to Be Modified

Oracle Client	Windows NT or Windows 9.x	Windows 2000
7.x	mtxoci7x_winnt.reg	mtxoci7x_win2k.reg
8.0	mtxoci80x_winnt.reg	mtxoci80x_win2k.reg
8.1	mtxoci81x_winnt.reg	mtxoci81x_win2k.reg

Table 15 shows the effects on the registry after the registry files are executed.

Table 15. Effects on Client Registry

Oracle Client	Windows NT or Windows 9.x	Windows 2000
7.x	[HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Transaction Server\Local Computer\My Computer] "OracleXaLib"="xa73.dll" "OracleSqlLib"="SQLLib18.dll" "OracleOciLib"="ociw32.dll"	[HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\MSDTC\MTxOCI] "OracleXaLib"="xa73.dll" "OracleSqlLib"="SQLLib18.dll" "OracleOciLib"="ociw32.dll"
8.0	[HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Transaction Server\Local Computer\My Computer] "OracleXaLib"="xa80.dll" "OracleSqlLib"="sqllib80.dll" "OracleOciLib"="oci.dll"	[HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\MSDTC\MTxOCI] "OracleXaLib"="xa80.dll" "OracleSqlLib"="sqllib80.dll" "OracleOciLib"="oci.dll"
8.1	[HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Transaction Server\Local Computer\My Computer] "OracleXaLib"="oraclient8.dll" "OracleSqlLib"="orasql8.dll" "OracleOciLib"="oci.dll"	[HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\MSDTC\MTxOCI] "OracleXaLib"="oraclient8.dll" "OracleSqlLib"="orasql8.dll" "OracleOciLib"="oci.dll"

Index