

**Oracle® Business Intelligence Applications**

Upgrade Guide

Version 7.9.4

**E10757-01**

December 2007

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# Preface

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

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

- On the Oracle Business Intelligence Applications CD-ROM.
- On the Oracle Technology Network at [http://www.oracle.com/technology/documentation/bi\\_apps.html](http://www.oracle.com/technology/documentation/bi_apps.html)

To register for a free account on the Oracle Technology Network, go to <http://www.oracle.com/technology/about/index.html>.

## Audience

This document is intended for BI managers and implementers of Oracle Business Intelligence Applications.

## Documentation Accessibility

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## Related Documents

For more information, see the following documents in the Oracle Business Intelligence Applications Release 7.9.4 documentation set (available at [http://www.oracle.com/technology/documentation/bi\\_apps.html](http://www.oracle.com/technology/documentation/bi_apps.html)):

- *Oracle Business Intelligence Applications Release Notes*
- *System Requirements and Supported Platforms for Oracle Business Intelligence Applications*
- *Oracle Business Intelligence Applications Installation and Configuration Guide*
- *Oracle Business Intelligence Infrastructure Installation and Configuration Guide*

## Conventions

The following text conventions are used in this document:

| Convention             | Meaning  |
|------------------------|--|
| <b>boldface</b>        | Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.         |
| <i>italic</i>          | Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.                          |
| <code>monospace</code> | Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter. |

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# What's New in This Release

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

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

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

- On the Oracle Business Intelligence Applications CD-ROM.
- On the Oracle Technology Network at [http://www.oracle.com/technology/documentation/bi\\_apps.html](http://www.oracle.com/technology/documentation/bi_apps.html)

To register for a free account on the Oracle Technology Network, go to <http://www.oracle.com/technology/about/index.html>.

## 1.1 What's New in Oracle BI Applications Upgrade Guide, Release 7.9.4

This section lists changes described in this version of the documentation to support release 7.9.4 of the software.

- [Chapter 3, "Upgrading Oracle's Siebel Analytics Release 7.5.3"](#) was updated .
- [Chapter 4, "Upgrading Other Siebel Analytics Releases"](#) was updated.
- [Chapter 5, "Upgrading for Siebel CRM Applications"](#) was added.
- [Chapter 6, "Upgrading Older Releases for Oracle EBS"](#) was added.
- [Chapter 7, "Upgrading for Oracle EBS and PeopleSoft Enterprise Applications"](#) was added.
- [Chapter A, "Upgrading the Oracle BI Repository for Pharma Analytics"](#) was added.



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# Overview of Oracle BI Applications Upgrade

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

- [Section 2.1, "Supported Upgrade Paths"](#)
- [Section 2.2, "Preupgrade Considerations"](#)
- [Section 2.3, "Best Practices for Preparing to Upgrade"](#)
- [Section 2.4, "Major Stages of Oracle BI Applications Upgrade"](#)

## 2.1 Supported Upgrade Paths

The *Oracle Business Intelligence Applications Upgrade Guide* provides instructions for upgrading to Oracle BI Applications 7.9.4 from the previous releases listed below:

- Siebel Analytics 7.5.3  
For instructions, see [Section 3, "Upgrading Oracle's Siebel Analytics Release 7.5.3"](#).
- Siebel Business Analytics 7.7, 7.7.x and 7.8.x  
For instructions, see [Section 4, "Upgrading Other Siebel Analytics Releases"](#).

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**Note:** Upgrade paths to Oracle BI Applications 7.9.4 from Siebel Business Analytics Applications 6.x, 7.x, and Oracle Business Intelligence 7.9.x (7.9.0, 7.9.1, 7.9.7.9.2 and 7.9.3) with Siebel Relationship Management Warehouse or Oracle Business Analytics Warehouse on NCR Teradata database are currently NOT available.

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- Siebel Business Analytics for Life Sciences 7.8.0, 7.8.1 and 7.8.2  
For instructions, see [Section 4, "Upgrading Other Siebel Analytics Releases"](#).
- Oracle Business Intelligence Applications 7.9.0, 7.9.1, 7.9.2 and 7.9.3  
For instructions, see one of the following, depending on your source system adapter, [Section 5, "Upgrading for Siebel CRM Applications"](#), [Section 6, "Upgrading Older Releases for Oracle EBS"](#), or [Section 7, "Upgrading for Oracle EBS and PeopleSoft Enterprise Applications"](#).

## 2.2 Preupgrade Considerations

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

- Review the *System Requirements and Supported Platforms for Oracle Business Intelligence Applications* to make sure your database platform versions are supported.
- The upgrade process is not only a technical process. You will also need to analyze the impact of the schema changes on your current custom implementation. The extent of your customizations will have an impact on the length of time required for the upgrade.

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

- It is highly recommended that you use side-by-side environments when performing each stage of the upgrade process. Enabling side-by-side instances of the entire Oracle Business Intelligence Applications environment is a critical success factor for upgrade.

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

- You should determine what customizations were made to your existing DAC repository before you begin the upgrade process. Depending on the release from which you are upgrading, moving the customizations in your existing DAC repository into the new DAC repository may be a manual process.
- For each stage of the upgrade process, you need to allocate a reasonable amount of time to validate the results of that stage and address any problems. In addition, final user acceptance testing must confirm that the entire upgrade process was successful.
- When you move from a development environment to test or production environments, you must perform the following stages of the upgrade process for each environment:
  - Upgrade the platform
  - Upgrade the applications
  - Migrate the data

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

For a description of the major stages of the upgrade process, see [Section 2.4, "Major Stages of Oracle BI Applications Upgrade"](#).

## 2.3 Best Practices for Preparing to Upgrade

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

- Review this guide, *Oracle Business Intelligence Applications Upgrade Guide*, in its entirety.
- Rename and copy into a different location your current repositories, Presentation Catalog (formerly known as the Web Catalog), and DAC installation folder from your existing environment. The file names and locations listed below represent the

standard names and locations of files that shipped with previous versions of Siebel Business Analytics Applications and Oracle BI Applications.

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

| Type  | Name                      | Location                              |
|---|---------------------------|---------------------------------------|
| DAC metadata repository                                     | *.xml                     | OracleBI\DAC\export                   |
| Oracle BI repository (formerly called Analytics repository) | OracleBIAnalyticsApps.rpd | OracleBI\Repository                   |
| Informatica repository                                      | Oracle_BI_DW_Base.rep     | OracleBI\dwrep\Informatica\Repository |
| Presentation Catalog (formerly called Web Catalog)          | <file_name>.webcat        | OracleBIData\web\catalog              |
| DAC installation folder                                     | DAC                       | OracleBI\DAC                          |

- Gather information that describes the current implementation, including the following:
  - Version of the transactional database to which you upgraded.
  - Version of the Oracle BI Infrastructure (platform) or Siebel Business Analytics platform from which you are upgrading.
 

To determine the platform version from which you are upgrading, launch the Administration Tool, and click Help, and then click Administration Tool in the toolbar. A message box provides the platform version.
  - Version of Siebel Business Analytics Applications or Oracle BI Applications from which you are upgrading.
 

To determine the version of Siebel Business Analytics Applications or Oracle BI Applications from which you are upgrading, launch the Data Warehouse Administration Console (DAC), and click Help, and then click About DAC.

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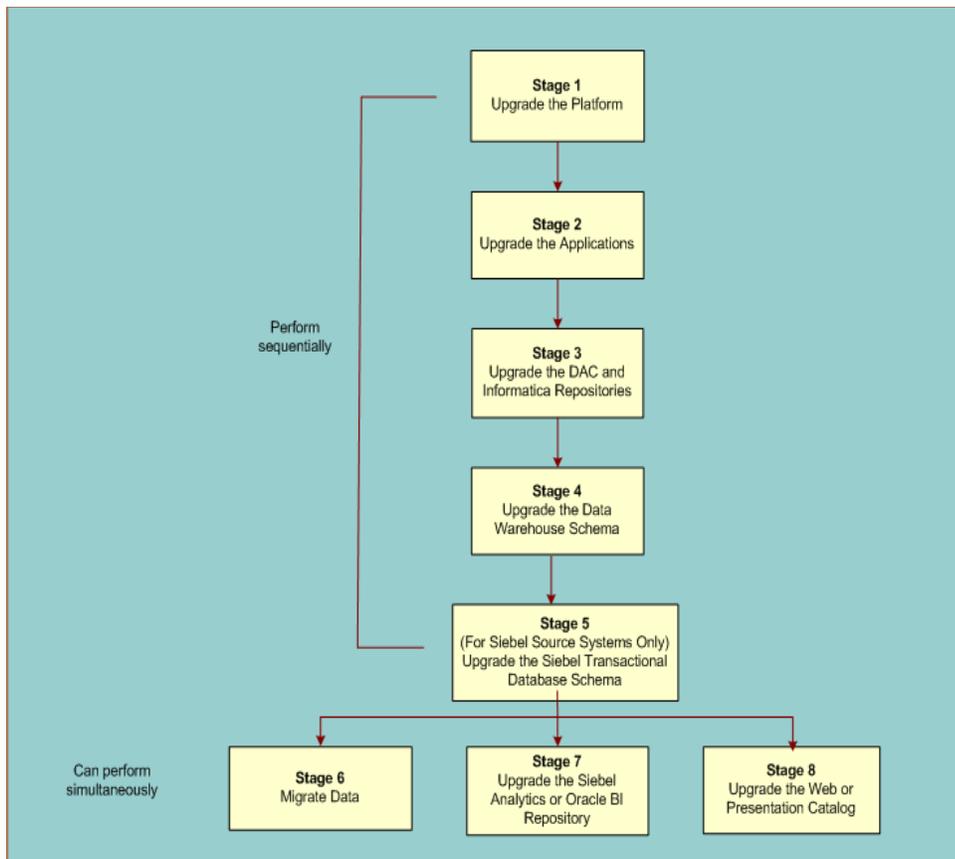
**Note:** If the DAC is not a component of your Analytics installation, you are running Siebel Analytics 7.5.x.

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## 2.4 Major Stages of Oracle BI Applications Upgrade

Figure 2–1 shows the upgrade flow for the major stages of the Siebel Business Analytics and Oracle BI Applications upgrade process. Depending on the prior release from which you are upgrading, you may find minor changes in the process shown in Figure 2–1.

Table 2–1 provides the documentation you should refer to for each stage of the upgrade.

**Figure 2–1 Oracle BI Applications Upgrade Flow**

### 2.4.1 Sequence of Upgrade Stages

In general, you must complete stages one through five sequentially, in the following order: 1) upgrade the Siebel Business Analytics platform or Oracle BI Infrastructure to the current release of Oracle BI Infrastructure; 2) upgrade the Siebel Business Analytics Applications or Oracle BI Applications to the current release of Oracle BI Applications; 3) upgrade the metadata in the DAC and Informatica repositories; 4) upgrade the data warehouse schema; 5) (For Siebel source systems) upgrade the Siebel transactional database schema.

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

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**Note:** Depending on the prior release from which you are upgrading, you may find minor changes in the process described in this section.

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**Table 2–1 Major Stages of the Oracle BI Applications Upgrade and Related Documentation**

| Stage  | Related Documentation  |
|--|--|
| 1. Upgrade the Siebel Business Analytics Platform or Oracle BI Infrastructure to the current release of the Oracle BI Infrastructure.                    | ■ <i>Oracle Business Intelligence Infrastructure Upgrade Guide</i>   |
| <b>Note:</b> The Oracle Business Intelligence Infrastructure is code-independent from the Oracle BI Applications.  |  |
| 2. Upgrade the Siebel Business Analytics Applications or Oracle BI Applications to the current release of the Oracle Business Intelligence Applications. | ■ <i>Oracle Business Intelligence Applications Upgrade Guide</i>   |
| 3. Upgrade the DAC and Informatica repositories.   | ■ <i>Oracle Business Intelligence Applications Upgrade Guide</i><br>■ <i>Oracle Business Intelligence Data Warehouse Administration Console Guide</i>  |
| 4. Upgrade the data warehouse schema.  | ■ <i>Oracle Business Intelligence Applications Upgrade Guide</i>   |
| 5. Upgrade the Siebel transactional database schema.   | ■ <i>Oracle Business Intelligence Applications Upgrade Guide</i>   |
| 6. Migrate data into the upgraded data warehouse.  | ■ <i>Oracle Business Intelligence Applications Upgrade Guide</i>   |
| 7. Upgrade the Siebel Analytics repository or Oracle BI repository to the current release of the Oracle BI repository.                                   | ■ <i>Oracle Business Intelligence Applications Upgrade Guide</i><br>■ <i>Oracle Business Intelligence Server Administration Guide</i>  |
| 8. Upgrade the Siebel Business Analytics Web Catalog or Oracle BI Presentation Catalog to the current release of the Oracle BI Presentation Catalog.     | ■ <i>Oracle Business Intelligence Applications Upgrade Guide</i><br>■ <i>Oracle Business Intelligence Infrastructure Upgrade Guide</i><br>■ <i>Oracle Business Intelligence Presentation Services Administration Guide</i> |

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

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

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# Upgrading Oracle's Siebel Analytics Release 7.5.3

This section includes the following topics:

- Section 3.1, "Upgrading Oracle BI Infrastructure"
- Section 3.2, "Upgrading Oracle BI Applications"
- Section 3.3, "Upgrading the DAC Repository"
- Section 3.4, "Upgrading to Informatica Version 7.1.4"
- Section 3.5, "Upgrading the Informatica Repository"
- Section 3.6, "Upgrading the Data Warehouse Schema from Release 7.5.x to 7.7 and Migrating Data"
- Section 3.7, "Upgrading the Data Warehouse Schema from Release 7.7 to 7.9.4"
- Section 3.8, "Importing New Schema Definitions into the Siebel Transactional Database"
- Section 3.9, "Migrating Data into the Data Warehouse Upgraded to Release 7.9.4"
- Section 3.10, "Upgrading the Siebel Analytics Repository"
- Section 3.11, "Upgrading the Oracle BI Presentation Catalog"

## 3.1 Upgrading Oracle BI Infrastructure

Upgrade the Oracle BI Infrastructure to the current version. For information on installing the current version, see the *Oracle Business Intelligence Infrastructure Upgrade Guide*.

## 3.2 Upgrading Oracle BI Applications

Run the Oracle BI Applications installer to upgrade your Oracle BI Applications environment to the current version. For instructions on running the installer, see *Oracle Business Intelligence Applications Installation and Configuration Guide*.

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**Note:** Perform only the step that addresses the running of the installer. Do not perform the configuration instructions that follow the running of the installer.

---

---

## 3.3 Upgrading the DAC Repository

Before you begin this procedure, do the following:

- Create and configure a new DAC repository according to the instructions in *Oracle Business Intelligence Applications Installation and Configuration Guide*.
- Make sure you have set up the DAC system properties, Informatica Server, Informatica Repository Server, and database connections according to the instructions in the *Oracle Business Intelligence Applications Installation and Configuration Guide*.
- Make a copy of your preconfigured source system container. (You cannot change the metadata in the preconfigured container. You must make a copy of it in order to be able to modify the objects it contains.) For instructions, see the *Oracle Business Intelligence Data Warehouse Administration Console Guide*

### To manually move your customizations to the DAC repository

1. Open the copy of the source system container into which you want to move your customizations.
2. Import the custom data warehouse tables:
  - a. Navigate to the Tables tab in the Design view.
  - b. Right-click and select Import from Database, and then click Import Database Tables.
  - c. In the Data Sources drop-down list, select DataWarehouse.
  - d. Click Read Tables.
  - e. Select the tables you want to import, and then click Import Tables.
3. Import the custom columns for the tables you imported in Step 2:
  - a. In the Tables tab, query for the tables you imported in Step 2.
  - b. Right-click and select Import from Database, and then click Import Database Columns.
  - c. In the Importing Columns... dialog box, select "All records in the list," and click OK.
  - d. In the Data Sources drop-down list, select DataWarehouse.
  - e. Click Read Columns.
  - f. Select the columns you want to import, and then click Import Columns.
  - g. Navigate to the Tables tab, and then click the Columns child tab, and add the Foreign Key to Table and Foreign Key to Column attributes for the newly imported columns.
4. Import the indices for the custom data warehouse tables.
  - a. In the Tables tab, query for the tables you imported in Step 2.
  - b. Right-click and select Import Indices.
  - c. In the Importing Indices... dialog box, select "All records in the list," and click OK.
  - d. In the Data Sources drop-down list, select DataWarehouse.
  - e. Click Read Indices.



This step adds source and target tables to the task.

- e. Click Yes in the Synchronizing Task(s)... dialog box to proceed.  
An informational message will indicate the results of the process.
  - f. Click OK.
10. Add tasks that were created as new tasks in the current implementation.
- a. In the Design view, select the Tasks tab, and then select the Edit child tab.
  - b. For each new task, copy the names of the Informatica workflows into the fields Command for Incremental Load and Command for Full Load.
  - c. Assign the appropriate values for the remaining fields in the Edit child tab.
  - d. In the Tasks tab, query for the tasks you entered in Step b.
  - e. Right-click the list of query results, and in the Task Synchronization dialog box, select "All records in the list," and click OK.

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

- f. Click Yes in the Synchronizing Task(s)... dialog box to proceed.  
An informational message will indicate the results of the process.
- g. Click OK.

---

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

---

## 3.4 Upgrading to Informatica Version 7.1.4

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

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

### 3.4.1 Applying Informatica Emergency Bug Fix to Informatica PowerCenter 7.1.4

After you upgrade to Informatica version 7.1.4, you need to apply the Informatica Emergency Bug Fix (EBF) 108240. The EBF product files are located in the \Third\_Party\_Software\Informatica\Patch2 directory on the Oracle BI Applications 7.9.4 Installation CD. For instructions on installing the EBF, refer to the file titled EBF108240.html provided in the same location as the EBF product files.

The instructions provided in the EBF108240.html file reference the regedit path for Informatica PowerCenter 7.1.4 on Windows machines as:

```
\hkey_local_
machine\system\currentcontrolset\services\powermart\configuratio
n
```

Depending on your machine and Informatica 7.1.4 installation, the path may be:

```
\hkey_local_
machine\system\currentcontrolset\services\powermart\parameters\c
onfiguration
```

### 3.5 Upgrading the Informatica Repository

Follow this procedure to upgrade the Informatica repository.

#### To upgrade the Informatica repository

1. Make sure you have backed up and renamed your current Informatica repository.  
For instructions, see the Informatica documentation, which is provided in the Third\_Party\_Software\Informatica\Informatica 7.1.4 PowerCenter Doc folder of the Oracle Business Intelligence Applications CD-ROM.
2. Copy the Oracle\_BI\_DW\_Base.rep file from the folder OracleBI\dwrep\Informatica\Repository into the folder Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup.
3. Launch the Informatica Repository Console and restore Oracle\_BI\_DW\_Base.rep (located in Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup).
4. Copy the custom folder from your previous Informatica repository to the newly created Informatica repository:
  - a. Launch the Informatica Repository Manager, and connect to both your previous and newly created Informatica repositories.
  - b. Copy the Custom folder in your previous repository into the newly created Informatica repository.
  - c. Make sure there is an individual workflow for each of the mappings in the Custom folder.
  - d. New columns were added to the Oracle Business Analytics Warehouse for Oracle BI Applications version 7.9.4. Review your custom mappings to determine whether the new columns need to be added to the mapping.
  - e. Register the mappings in the DAC.

### 3.6 Upgrading the Data Warehouse Schema from Release 7.5.x to 7.7 and Migrating Data

Upgrading from release 7.5.x requires two stages. In the first stage, you upgrade the data warehouse schema and migrate the data from release 7.5.x to 7.7. In the second stage, you upgrade the data warehouse schema and migrate the data from release 7.7 to 7.9.4.

#### To upgrade the data warehouse schema from release 7.5.x to 7.7

1. Run the schema upgrade script.
  - a. Navigate to the folder OracleBI\dwrep\Upgrade\CTLFiles.
  - b. Use the DDLimp utility to run one of the following scripts:

For Siebel Applications (Horizontal), run `ddlsmc_HOR_77.ctl`.

For Siebel Industry Applications (Vertical), run `ddlsmc_SIA_77.ctl`.

Use the following command, substituting the correct script name where appropriate.

```
..\OracleBI\dwrep\bin\DDLIMP /U <USER> /P <PASSWORD> /C <ODBC connect string>
/G SSE_ROLE /I N /R Y /F <..\OracleBI\dwrep\ddlsmc_HOR_77.ctl>
/L <..\OracleBI\dwrep\ddlsmc_HOR_77.log>
```

For example:

```
DDLIMP /U SADMIN /P SADMIN /C SIEBEL_OLTP /G SSE_ROLE
/I N /R Y /F C:\OracleBI\dwrep\ddlsmc_HOR_77.ctl /L
C:\OracleBI\dwrep\ddlsmc_HOR_77.log
```

**Notes:**

- \* /P <PASSWORD> - The password for the data warehouse.
- \* /C <ODBC connect string> - The name of the ODBC connect string.
- \* /I N - Tells DDLimp to ignore the indexes DDL defined in the CTL file if any exist. It does not change existing indexes. (The default is /I Y, which tells DDLimp to create and merge indexes from the CTL file with the indexes in the database.
- \* For Oracle databases, use the Data Direct drivers.
- \* In addition, you can use the following commands:
- \* /W Y - If the OLAP database is Oracle and Unicode.
- \* /Z Y - If the OLAP database is DB2 or SQL Server and Unicode.
- \* /B <TABLE\_SPACE\_NAME> - If you want to create these tables in a separate table space. For DB2, This must be specified as 32K tablespace.
- \* /X <INDEX\_TABLE\_SPACE\_NAME> - If you want to create the indexes in a separate tablespace. For DB2, This must be specified as 32K tablespace.
- \* /Y - Storage File for DB2/390.
- \* /R - Regrant tables.

2. Copy the file `Upgrade.rep` file from the folder `OracleBI\dwrep\Upgrade\Informatica\Repository` into the folder `Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup`.
3. Launch the Informatica Repository Console and restore `Upgrade.rep` (located in `Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup`) into a database other than the database in which you restored `Oracle_BI_DW_Base.rep`.
4. Navigate to the folder `OracleBI\dwrep\Upgrade\Informatica\ParameterFiles` and copy the file `753_TENERIFE_UPG_PARAMS.txt` into the `SrcFiles` folder on the Informatica Server machine, for example, `C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles`.
5. Rename `753_TENERIFE_UPG_PARAMS.txt` to `TENERIFE_UPG_PARAMS.txt`.
6. In the Informatica Workflow Manager, open the Relational Connection Browser by selecting `Connections` from the toolbar, and then selecting `Relational`. Do the following.

---

---

**Note:** If you are connected to an Oracle database, use Oracle Native driver instead of ODBC.

If you are connected to a SQL Server database, use the ODBC driver rather than the native SQL Server driver.

---

---

- a. Create a relational connection with the name PARAM\_OLTP\_SIEBEL to point to the Siebel transactional database.
  - b. Create a relational connection with the name DataWarehouse to point to the newly upgraded data warehouse database.
  - c. Create a relational connection with the name PARAM\_DAC\_NEW to point to the DAC repository database.
7. For Siebel Applications (Horizontal), in Informatica Workflow Manager, navigate to the folder UPGRADE\_753\_to\_770\_HOR, and execute the following workflows in the order indicated:
- a. Upgrade\_R\_Image
  - b. Upgrade\_Unspecifieds
  - c. Upgrade\_Agree
  - d. Upgrade\_Asset
  - e. Upgrade\_Opty
  - f. Upgrade\_Order
  - g. Upgrade\_Quote
  - h. Upgrade\_Response
  - i. Upgrade\_ServiceRequest
  - j. Upgrade\_Others
  - k. Upgrade\_Visibility
  - l. UpgradeSlowlyChangingDimensionStartDates
  - m. DAC\_Metadata\_Upgrade\_Workflow
8. For Siebel Industry Applications (Vertical), in Informatica Workflow Manager, navigate to the folder UPGRADE\_753\_to\_770\_SIA, and execute the following workflows in the order indicated:
- a. Upgrade\_R\_Image
  - b. Upgrade\_Unspecifieds
  - c. Upgrade\_Agree
  - d. Upgrade\_Asset
  - e. Upgrade\_Opty
  - f. Upgrade\_Order
  - g. Upgrade\_Quote
  - h. Upgrade\_Response
  - i. Upgrade\_ServiceRequest
  - j. Upgrade\_Others

- k. Upgrade\_Visibility
- l. UpgradeSlowlyChangingDimensionStartDates
- m. Upgrade\_Industry\_R\_Image
- n. Upgrade\_Industry\_Unspecified
- o. Upgrade\_LS\_ActivityProduct
- p. Upgrade\_LS\_Others
- q. Upgrade\_Industry\_Household
- r. Upgrade\_FINS\_Visibility
- s. UpgradeSlowlyChangingDimensionStartDates\_Industry
- t. DAC\_Metadata\_Upgrade\_Workflow

### 3.7 Upgrading the Data Warehouse Schema from Release 7.7 to 7.9.4

This procedure adds new tables, columns, and indexes to the existing data warehouse schema. It does not alter or disrupt your existing data. The scripts that you will run during this procedure are described below.

- **UPGRADE.ctl.** This script standardizes schemas to the Siebel Industry Applications 7.8.4 release. It adds new tables and columns and modifies existing columns. It also adds lookup tables.
- **790\_UPGRADE\_PRE\_CTL\_SCRIPT.sql.** For all database types except for DB2, this script renames columns to support Teradata databases. It also adds default values in columns in case a column changes from nullable to not null, and truncates all fact and dimension staging tables.

For DB2 databases, this script does not rename columns. Instead, the new columns are updated with the old values in the script 790\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql.

- **DW.ctl.** This script upgrades the schema to the Oracle BI Applications 7.9.4 release.
- **790\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql.** This script creates backup tables for the dimension and fact tables that are being updated during the 7.8.4 to 7.9 upgrade. The backup tables are called <table\_name>\_784.

This script also sets the SRC\_EFF\_FROM\_DT and EFFECTIVE\_FROM\_DT to 1/1/1899 in the tables where these columns were defaulted to SYSDATE in DW.ct.

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

#### To upgrade the data warehouse schema to release 7.9.4

1. Run the UPGRADE.ctl script.
  - a. Navigate to the folder OracleBI\dwrep\Upgrade\CTLFiles.
  - b. Use the DDLimp utility to run the UPGRADE.ctl script. Use the following command:

```

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

For example:

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

**Notes:**

- \* /P <PASSWORD> - The password for the data warehouse.
- \* /C <ODBC connect string> - The name of the ODBC connect string.
- \* /I N - Tells DDLimp to ignore the indexes DDL defined in the CTL file if any exist. It does not change existing indexes. (The default is /I Y, which tells DDLimp to create and merge indexes from the CTL file with the indexes in the database.

- \* For Oracle databases, use the Data Direct drivers.

In addition, you can use the following commands:

- \* /W Y - If the OLAP database is Oracle and Unicode.
- \* /Z Y - If the OLAP database is DB2 or SQL Server and Unicode.
- \* /B <TABLE\_SPACE\_NAME> - If you want to create these tables in a separate table space. For DB2, This must be specified as 32K tablespace.
- \* /X <INDEX\_TABLE\_SPACE\_NAME> - If you want to create the indexes in a separate tablespace. For DB2, This must be specified as 32K tablespace.
- \* /Y - Storage File for DB2/390.
- \* /R - Regrant tables.

2. Run the 790\_UPGRADE\_PRE\_CTL\_SCRIPT.sql script.
  - a. Open the SQL client for your database type, for example, SQLPLUS for Oracle, Query Analyzer for SQL Server, or a command window for DB2.
  - b. Navigate to the folder OracleBI\dwrep\Upgrade\DbScripts\<database type>.
  - c. Open the 790\_UPGRADE\_PRE\_CTL\_SCRIPT.sql file, and copy the contents into the SQL client.
  - d. Execute the script.
3. Run the DW.ctl script.
  - a. Navigate to the folder OracleBI\dwrep\Upgrade\CTLFiles.
  - b. Use the DDLimp utility to run the DW.ctl script.

Use the command provided in Step 1, but substitute the correct script name.
4. Run the 790\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql script.
  - a. Open the SQL client for your database type.
  - b. Navigate to the folder OracleBI\dwrep\Upgrade\DbScripts\<database type>.
  - c. Open the 790\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql file, and copy the contents into the SQL client.
  - d. Execute the script.

## 3.8 Importing New Schema Definitions into the Siebel Transactional Database

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

---

**Note:** You must perform this procedure before you migrate data into the data warehouse upgraded to release 7.9.4.

---

### To import new schema definitions into the Siebel transactional database

- Use the DDLim utility to run the DDL\_OLTP.ctf script that is located in the OracleBI\dwrep\Upgrade\CTLFiles folder.

### 3.8.1 Verifying the Siebel Transactional Database Upgrade

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

#### To verify the transactional database upgrade

- For all upgrade paths, verify the following tables were created in the Siebel transactional database:
  - S\_ETL\_R\_IMG\_1 through S\_ETL\_R\_IMG\_166
  - S\_ETL\_I\_IMG\_1 through S\_ETL\_I\_IMG\_166
  - S\_ETL\_D\_IMG\_1 through S\_ETL\_D\_IMG\_166
  - S\_ETL\_PARAM
  - S\_ETL\_PRD\_ATTR
  - S\_ETL\_PRD\_REL

## 3.9 Migrating Data into the Data Warehouse Upgraded to Release 7.9.4

Follow this procedure to migrate data into the data warehouse upgraded to Release 7.9.4.

### To migrate data into the data warehouse upgraded to release 7.9.4

1. Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\SrcFiles and copy the \*.csv files into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.
2. Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\ParameterFiles and copy the file 770\_TENERIFE\_UPG\_PARAMS.txt into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.
3. Rename 770\_TENERIFE\_UPG\_PARAMS.txt to TENERIFE\_UPG\_PARAMS.txt.
4. In the file TENERIFE\_UPG\_PARAMS.txt:
  - a. Search for the parameter \$\$SourceConnection.
  - b. Set the value to one of the following options, based on your Siebel applications (OLTP) version:

- \* SEBL\_63
- \* SEBL\_753
- \* SEBL\_771
- \* SEBL\_78
- \* SEBL\_80
- \* SEBL\_VERT\_753
- \* SEBL\_VERT\_771
- \* SEBL\_VERT\_78
- \* SEBL\_VERT\_80

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

```
$$SourceConnection=SEBL_VERT_753
```

5. In the file TENERIFE\_UPG\_PARAMS.txt:
  - a. Search for the parameter \$\$Source\_Container.
  - b. Set the value to one of the following options, based on your Siebel applications (OLTP) version:
    - \* Siebel 6.3
    - \* Siebel 7.5.3
    - \* Siebel 7.5.3 Vertical
    - \* Siebel 7.7.1
    - \* Siebel 7.7.1 Vertical
    - \* Siebel 7.8
    - \* Siebel 7.8 Vertical
    - \* Siebel 8.0
    - \* Siebel 8.0 Vertical

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

```
$$Source_Container=Siebel 7.5.3 Vertical
```

6. In the file TENERIFE\_UPG\_PARAMS.txt, edit the ETL\_PROC\_WID parameter as follows:

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

You can get this value from W\_PARAM\_G.ETL\_PROC\_WID.

7. If you are running Siebel Industry Applications (Vertical), in the file TENERIFE\_UPG\_PARAMS.txt, set the VERTICAL\_UPGRADE parameter to 1. For example:
 

```
$$VERTICAL_UPGRADE=1
```
8. For Siebel Industry Applications (Vertical), define the alignment rule to be used for ETL loads.

- a. Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\SrcFiles and copy the file AlignmentType\_LS\_782.csv into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.
- b. Rename the file AlignmentType\_LS\_782.csv to AlignmentType.csv.
- c. Open the file AlignmentType.csv, and enter one of the following alignment item types under the ALIGN\_TYPE field:
  - \* Zipcode
  - \* Account/Contact
  - \* Brick
- d. Save the file.

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

9. In Informatica Workflow Manager, navigate to the folder UPGRADE\_770\_to\_79, and execute the following workflows in the order indicated:
  - a. MARKETING\_LOAD
  - b. Upgrade\_Dimensions\_Industry
  - c. Update\_Dimensions
  - d. Update\_Dimension\_Unspecified
  - e. Update\_Facts
  - f. Upgrade\_LS\_Dimensions
  - g. Upgrade\_LS\_Facts
  - h. SIL\_PositionDimensionHierarchy\_Full
  - i. Load\_INT\_ORG\_DH
  - j. DIMENSION\_LOAD

---

---

**Note:** If you are using the SCD version of the dimension, replace the corresponding TENN\_UPG\_W\_XXX\_D\_784\_To\_W\_XXX\_D session with TENN\_UPG\_W\_XXX\_D\_784\_SCD\_To\_W\_XXX\_D. This will upgrade the data from the W\_XXX\_SCD version of the dimension to the new SCD-enabled W\_XXX\_D dimension.

---

---

- k. DIMENSION\_UNSPECIFIED\_UPDATE
  - l. FACT\_UPDATE
  - m. DAC\_Metadata\_Upgrade\_Workflow
10. If you upgraded your transactional database to Siebel Applications 8.0, navigate to the folder UPGRADE\_790\_to\_791\_SBL80UPG and run the following workflows in the order indicated:
    - a. UPGRADE\_DIMENSIONS
    - b. UPGRADE\_FACTS

11. Use the `reset_infa_seq_gen.bat` script to initialize the Informatica sequence generator for incremental runs on the main Informatica repository (Oracle\_BI\_DW\_Base.rep).
  - a. Navigate to `OracleBI\dwrep\Upgrade\DbScripts\<database type>`.
  - b. Open the `reset_infa_seq_gen.bat` file.  
The file opens a command prompt, which will prompt you for the parameters listed below.
  - c. Enter the appropriate parameter values to reflect your environment (the parameters are database specific).  
For Oracle databases:

| Parameter                             | Setting   |
|---------------------------------------|---|
| OLAP_USERNAME                         | Enter the data warehouse database user ID   |
| OLAP_PASSWORD                         | Enter the user ID/password@connection string of the data warehouse database       |
| INFORMATICA_DB_USERNAME               | Enter the user ID of the main Informatica Repository database                     |
| INFORMATICA_DB_PASSWORD               | Enter the password@connection string of the main Informatica Repository database  |
| INFORMATICA_REPOSITORY                | Enter the name of the main Informatica Repository                                 |
| INFORMATICA_REPOSITORY_USERNAME       | Enter the user ID of the main Informatica Repository                              |
| INFORMATICA_REPOSITORY_PASSWORD       | Enter the password for the main Informatica Repository                            |
| INFORMATICA_REPOSITORY_SERVER_ADDRESS | Enter the main Informatica Repository Server host name                            |
| INFA_FOLDER                           | Enter the value HOR for Horizontal Applications or VERT for Vertical Applications |

For Microsoft SQL Server databases:

| Parameter                  | Setting  |
|----------------------------|--|
| OLAP_SERVER                | Enter the name of the SQL Server for the OLAP database                                   |
| OLAP_DATABASE              | Enter the name of the database on which OLAP data is available                           |
| OLAP_USERNAME              | Enter the user ID of the data warehouse database   |
| OLAP_PASSWORD              | Enter the user ID/password@connection string of the data warehouse database              |
| INFORMATICA_SERVER_ADDRESS | Enter the name of the SQL Server for the Informatica Repository database.                |
| INFORMATICA_DATABASE       | Enter the name of the database on which the Informatica Repository metadata is available |

| Parameter                             | Setting   |
|---------------------------------------|---|
| INFORMATICA_DB_USERNAME               | Enter the user ID of the main Informatica Repository database                     |
| INFORMATICA_DB_PASSWORD               | Enter the password@connection string of the main Informatica Repository database  |
| INFORMATICA_REPOSITORY                | Enter the name of the main Informatica Repository                                 |
| INFORMATICA_REPOSITORY_USERNAME       | Enter the user ID of the main Informatica Repository                              |
| INFORMATICA_REPOSITORY_PASSWORD       | Enter the password of the main Informatica Repository                             |
| INFORMATICA_REPOSITORY_SERVER_ADDRESS | Enter the main Informatica Repository Server host name                            |
| INFA_FOLDER                           | Enter the value HOR for Horizontal Applications or VERT for Vertical Applications |

For IBM DB2 databases:

| Parameter                             | Setting  |
|---------------------------------------|--|
| OLAP_USERNAME                         | Enter the user ID of the data warehouse database                                     |
| OLAP_PASSWORD                         | Enter the user ID/password@connection string of the data warehouse database          |
| INFORMATICA_DB_USERNAME               | Enter the user ID of the Upgrade Informatica Repository database                     |
| INFORMATICA_DB_PASSWORD               | Enter the password @connection string of the main Informatica Repository database    |
| INFA_DATABASE_ALIAS                   | Enter the name of the database in which Informatica Repository metadata is available |
| INFORMATICA_REPOSITORY                | Enter the name of the main Informatica Repository                                    |
| INFORMATICA_REPOSITORY_USERNAME       | Enter the user ID of the main Informatica Repository                                 |
| INFORMATICA_REPOSITORY_PASSWORD       | Enter the password for the Informatica Repository                                    |
| INFORMATICA_REPOSITORY_SERVER_ADDRESS | Enter the Upgrade Informatica Repository Server host name                            |
| INFA_FOLDER                           | Enter the value HOR for Horizontal Applications or VERT for Vertical Applications    |

**12.** To verify the data migrated successfully:

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

- b. Check whether the SQL scripts (790\_UPGRADE\_PRE\_CTL\_SCRIPT.sql and 790\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql) that you ran in the SQL client of the database failed or errored out while executing.
  - c. Check the log files for the CTL files (Upgrade.ctl and DW.ctl) that you ran using the DDLimp command to determine whether any of the runs failed.
- If you did not detect any errors or failures in the steps above, then the data migration was successful.
13. (Optional) If the data migration was successful, drop the tables that were created during the upgrade process, such as, W\_xxxx\_x\_784 tables, LKP\_xxxx\_x, and W\_ASSET\_D\_TMP.

This step frees the space occupied by these backup tables.

### 3.10 Upgrading the Siebel Analytics Repository

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

To upgrade the repository, perform the following tasks:

- [Section 3.10.1, "Preparing for the Oracle BI Repository Upgrade"](#)
- [Section 3.10.2, "Equalizing the Oracle BI Repositories"](#)
- [Section 3.10.3, "Comparing the Siebel Analytics and Oracle BI Repositories"](#)
- [Section 3.10.4, "Merging the Siebel Analytics and Oracle BI Repositories"](#)
- [Section 3.10.5, "Regression Testing the Oracle BI Repository Merge"](#)

The tasks in this section refer to multiple versions of the Siebel Analytics and Oracle BI repositories. [Table 3–1](#) provides the names and descriptions of the repositories used in the examples in this section.

**Table 3–1 Names of Analytics Repositories used in Examples**

| Name of Repository             | Description   |
|--------------------------------|---|
| SiebelAnalytics_7x.rpd         | The standard Siebel Analytics repository for the version you are upgrading from. This repository is referred to as the "original" repository in the examples in this section.<br><br><b>Note:</b> Standard repositories from previous releases are available in the folder \OracleBI\Upgrade. |
| OracleBIAnalyticsApps.rpd      | The standard Oracle BI repository for the version you are upgrading to.   |
| Customer_SiebelAnalytics.rpd   | The Siebel Analytics repository that contains your customizations for the version you are upgrading from.   |
| Merged_Repository_OracleBI.rpd | The Oracle BI repository that contains your customizations for the version you are upgrading to.  |

#### 3.10.1 Preparing for the Oracle BI Repository Upgrade

Follow this procedure to prepare for the repository upgrade.

**To prepare for the Analytics repository upgrade**

1. Set up a directory for the merge process, such as `\OracleBIUpgrade`, and create the following subfolders:
  - Original
  - AfterEqualize
  - AfterMerge
  - AfterManualWork
  - AfterRegressions
2. Copy the original repository (for example, `SiebelAnalytics_7x.rpd`), the production repository (for example, `Customer_SiebelAnalytics.rpd`), and the repository from the latest installation (for example, `OracleBIAnalyticsApps.rpd`) into the folder `\OracleBIUpgrade\Original`.

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

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

### 3.10.2 Equalizing the Oracle BI Repositories

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

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

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

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

- **Fully Qualified Name.** If an object in one repository has the same fully qualified name as another object of the same class in another repository, then the two objects are declared equal.
- **Simple String Substitution.** Equivalence can be declared between two objects of the same class in two repositories whose only difference is that some key characters in their names differ. The `equalizerpds` executable file ignores those characters while checking fully qualified names. For example, `"Core"."W_DAY_D"` might be considered equivalent to `"Core"."W DAY D"` if the characters `"_"` and `" "` have been declared as equivalent.

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

The syntax of the equalizerpds command is as follows:

```
equalizerpds.exe -A userid1 [-B [password1]] -C base_repository_name -D userid2
[-E [password2]] -F repository2_name [-J udml_utf8_file_name_equalization] [-O
ouput_repository_name] [-X] [-Y equalStringSet]
-X          Treat 'Factxxxx' as 'Fact' in Business Model.
-Y          Treat the characters as equals.
/?          Display this usage information and exit.
```

### To equalize a repository

- Copy the appropriate MAP file from the OracleBI\Upgrade folder into the folder where you will execute equalizerpds.exe, for example, \OracleBIUpgrade\Original.
- Run equalizerpds.exe to equalize the repository from the latest installation (for example, OracleBIAnalyticsApps.rpd) with the original repository (for example, SiebelAnalytics\_7x.rpd). An example of the equalizerpds command is as follows:

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

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

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

- Run equalizerpds.exe to equalize your customized repository (for example, Customer\_SiebelAnalytics.rpd) with the original repository (for example, SiebelAnalytics\_7x.rpd). An example of the equalizerpds command is as follows:

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

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

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

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

### 3.10.3 Comparing the Siebel Analytics and Oracle BI Repositories

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

**To compare the repositories**

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

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

### 3.10.4 Merging the Siebel Analytics and Oracle BI Repositories

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

**To merge versions of the repositories**

1. Copy the three repositories (for example, SiebelAnalytics\_7x.rpd, OracleBIAnalyticsApps.rpd, and Customer\_SiebelAnalytics.rpd) to the AfterMerge folder.
2. Open the repository from the latest installation (for example, OracleBIAnalyticsApps.rpd) in the \OracleBIUpgrade\AfterMerge folder.
3. Save the repository with a new name, for example, Merged\_Repository\_OracleBIAnalyticsApps.rpd.

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

4. From the Administration Tool menu bar, select File, then select Merge.
5. In the Select Original Repository dialog box, select the original repository (for example, SiebelAnalytics\_7x.rpd).
6. Enter the password, and click OK.
7. Click Select for the Modified Repository field.
8. In the Select Modified Repository dialog box, select the repository that contains the customizations you made to the previous version of the Analytics repository.
9. Click Open, type the password, and then click OK.
10. In the Decision drop-down list, select the action you want to take regarding the repository change, or accept the default action.
11. To locate subsequent rows with empty Decision fields, click the Decision header cell.

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

12. Click Merge.

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

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

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

renamed many of the objects and the upgrade engine failed to relate them to the original objects.

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

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

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

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

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

### 3.10.5 Regression Testing the Oracle BI Repository Merge

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

#### To perform regression testing

1. Run the reports that are necessary to include in the regression suite. These reports might be a subset of the reports in the Presentation Catalog.
2. Collect the logical SQL generated in the previous step. You can do this using Usage Tracking or by parsing the query log file.

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

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

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

4. Edit the logical SQL test scripts to account for the name changes or modifications resulting from the upgrade.
5. Execute the edited logical SQL against the merged repository, and save the results.
6. Compare the results from the steps above and try to explain the differences. If it is determined that these differences are due to the upgrade process, then you have to correct them manually.

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

## 3.11 Upgrading the Oracle BI Presentation Catalog

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

- Has prebuilt applications already installed, and
- Has customized the current Oracle BI Presentation Catalog

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

This process includes the following tasks:

- [Section 3.11.1, "Trimming the Input Presentation Catalog"](#)
- [Section 3.11.2, "Upgrading the Oracle BI Presentation Catalog to a Newer Version"](#)
- [Section 3.11.3, "Testing the Results of the Presentation Catalog Upgrade"](#)

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**Caution:** In releases of Oracle BI Applications previous to 7.9, the Presentation Catalog (formerly known as the Siebel Analytics Web Catalog) was stored in a single file rather than in a directory structure of individual files. If you have a previous version of the Presentation Catalog, you will need to convert it to the new format. For more information about how to convert the Presentation Catalog to the new format, see the *Oracle Business Intelligence Infrastructure Upgrade Guide*.

---

---

### 3.11.1 Trimming the Input Presentation Catalog

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

### 3.11.2 Upgrading the Oracle BI Presentation Catalog to a Newer Version

The Presentation Catalog upgrade process makes use of three catalogs:

- The *original* Presentation Catalog. This is the unmodified Presentation Catalog that you received with the Oracle BI Applications release that you are upgrading from.
- The *new* Presentation Catalog. This is the Presentation Catalog that is installed in the OracleBIData\web\catalog folder with the installation of Oracle BI Applications.
- The *current* Presentation Catalog. This is the Presentation Catalog currently in use at your organization.

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

**To upgrade your Presentation Catalog to a newer version**

1. Make a backup copy of the current Presentation Catalog, rename the folder <catalogname>\_old, and move it to a temporary location.
2. Copy the original Presentation Catalog into the folder that holds your current Presentation Catalog and rename it <catalogname>\_Original.
3. Start Catalog Manager and open the new Presentation Catalog in offline mode.
4. Select Tools, then select Upgrade Catalog.
5. In the original Presentation Catalog field, browse to locate the original Presentation Catalog.
6. In the Current Presentation Catalog field, browse to locate your current Web Catalog, <catalogname>\_old.
7. Click OK.
8. Resolve any upgrade differences as follows:
  - a. Review each unresolved difference in the Unresolved differences list.
  - b. For each unresolved difference, select the version that you want to keep.
  - c. Click OK.

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

9. Review the upgraded Presentation Catalog, and, if necessary, set permissions for objects.
10. Save the new Presentation Catalog.

### 3.11.3 Testing the Results of the Presentation Catalog Upgrade

---

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

---

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

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

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

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

---

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## Upgrading Other Siebel Analytics Releases

This section contains instructions for upgrading Oracle's Siebel Business Analytics releases 7.7, 7.7.x, and 7.8.x.

This section includes the following topics:

- [Section 4.1, "Upgrading Oracle BI Infrastructure"](#)
- [Section 4.2, "Upgrading Oracle BI Applications"](#)
- [Section 4.3, "Upgrading the DAC Repository"](#)
- [Section 4.4, "Upgrading to Informatica Version 7.1.4"](#)
- [Section 4.5, "Upgrading the Informatica Repository"](#)
- [Section 4.6, "Upgrading the Data Warehouse Schema"](#)
- [Section 4.7, "Importing New Schema Definitions into the Siebel Transactional Database"](#)
- [Section 4.8, "Migrating Data into the Upgraded Data Warehouse"](#)
- [Section 4.10, "Upgrading the Oracle BI Presentation Catalog"](#)
- [Section 4.10, "Upgrading the Oracle BI Presentation Catalog"](#)

### 4.1 Upgrading Oracle BI Infrastructure

Upgrade the Oracle BI Infrastructure to the current version. For information on installing the current version, see the *Oracle Business Intelligence Infrastructure Upgrade Guide*.

### 4.2 Upgrading Oracle BI Applications

Run the Oracle BI Applications installer to upgrade your Oracle BI Applications environment to the current version. For instructions on running the installer, see *Oracle Business Intelligence Applications Installation and Configuration Guide*.

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**Note:** Perform only the step that addresses the running of the installer. Do not perform the configuration instructions that follow the running of the installer.

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### 4.3 Upgrading the DAC Repository

Before you begin this procedure, do the following:

- Determine what customizations were made to your existing DAC repository. Moving the customizations in your existing DAC repository into the new DAC repository is a manual process.
- Make sure you have renamed and backed up your existing DAC repository into a different database. When you backup the DAC repository, you export the DAC metadata, in XML format (using the DAC's Export tool), into a folder other than the standard DAC export folder where backups are stored (DAC\export). For instructions on exporting DAC metadata, see the *Oracle Business Intelligence Data Warehouse Administration Console Guide*.
- Create and configure a new DAC repository according to the instructions in *Oracle Business Intelligence Applications Installation and Configuration Guide*.
- Make sure you have set up the DAC system properties, Informatica Server, Informatica Repository Server, and database connections according to the instructions in the *Oracle Business Intelligence Applications Installation and Configuration Guide*.
- Make a copy of your preconfigured source system container. (You cannot change the metadata in the preconfigured container. You must make a copy of it in order to be able to modify the objects it contains.) For instructions, see the *Oracle Business Intelligence Data Warehouse Administration Console Guide*

In the procedure below you will manually move your customizations from your previous DAC repository into the new DAC repository.

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

1. Open the copy of the source system container into which you want to move your customizations.
2. Import the custom data warehouse tables:
  - a. Navigate to the Tables tab in the Design view.
  - b. Right-click and select Import from Database, and then click Import Database Tables.
  - c. In the Data Sources drop-down list, select DataWarehouse.
  - d. Click Read Tables.
  - e. Select the tables you want to import, and then click Import Tables.
3. Import the custom columns for the tables you imported in Step 3:
  - a. In the Tables tab, query for the tables you imported in Step 3.
  - b. Right-click and select Import from Database, and then click Import Database Columns.
  - c. In the Importing Columns... dialog box, select "All records in the list," and click OK.
  - d. In the Data Sources drop-down list, select DataWarehouse.
  - e. Click Read Columns.
  - f. Select the columns you want to import, and then click Import Columns.
  - g. Navigate to the Tables tab, and then click the Columns child tab, and add the Foreign Key to Table and Foreign Key to Column attributes for the newly imported columns.

4. Import the indices for the custom data warehouse tables.
  - a. In the Tables tab, query for the tables you imported in Step 3.
  - b. Right-click and select Import Indices.
  - c. In the Importing Indices... dialog box, select "All records in the list," and click OK.
  - d. In the Data Sources drop-down list, select DataWarehouse.
  - e. Click Read Indices.
  - f. Select the indices you want to import, and then click Import Indices.
5. Import the custom source tables:
  - a. Navigate to the Tables tab in the Design view.
  - b. Right-click and select Import from Database, and then click Import Database Tables.
  - c. In the Data Sources drop-down list, select the appropriate source.
  - d. Click Read Tables.
  - e. Select the tables you want to import, and then click Import Tables.

You do not have to import columns for the custom source tables. Columns for source tables are not required.
6. Import columns for any standard data warehouse tables that were extended, and add the appropriate attributes in the DAC.
7. Create new custom logical and physical task folders.
  - a. In the DAC, from the Tools menu, select Seed Data, then select Task Folders.
  - b. To create a custom logical folder, click New.
  - c. In the Name field, enter a name for the custom logical folder, for example, Custom Logical.
  - d. In the Type field, select Logical.
  - e. To create a custom physical folder, click New.
  - f. In the Name field, enter a name for the custom physical folder, for example, Custom Physical.
  - g. In the Type field, select Physical.
8. Register the folders you created in Step 8 in the Source System Folders tab.
  - a. In the Design view, select the Source System Folders tab.
  - b. Click New.
  - c. Enter the name of the Custom Logical folder in the Logical Folder field.
  - d. Enter the name of the Custom Physical folder in the Physical Folder field, and save the record.
9. Modify the task attributes for workflows in the custom folder that are modified standard mappings, that is, standard (out-of-the-box) mappings from the previous release that you copied into the Informatica custom folder.
  - a. Navigate to the Tasks tab and query for the Informatica workflow names that are in the Informatica custom folder under Command for Incremental Load or Command for Full Load.

You must review the workflows in the custom folder in Informatica Workflow Manager.

- b. For each task, change the Folder Name (in the Edit child tab) to the Custom Logical folder name.
  - c. For each task, right-click and select Synchronize Tasks.
  - d. In the Task Synchronization dialog box, select Selected Record Only, and click OK.  
This step adds source and target tables to the task.
  - e. Click Yes in the Synchronizing Task(s)... dialog box to proceed.  
An informational message will indicate the results of the process.
  - f. Click OK.
10. Add tasks that were created as new tasks in the current implementation.
- a. In the Design view, select the Tasks tab, and then select the Edit child tab.
  - b. For each new task, copy the names of the Informatica workflows into the fields Command for Incremental Load and Command for Full Load.
  - c. Assign the appropriate values for the remaining fields in the Edit child tab.
  - d. In the Tasks tab, query for the tasks you entered in Step b.
  - e. Right-click the list of query results, and in the Task Synchronization dialog box, select "All records in the list," and click OK.  
This step adds source tables and target tables to the task.
  - f. Click Yes in the Synchronizing Task(s)... dialog box to proceed.  
An informational message will indicate the results of the process.
  - g. Click OK.

---



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

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## 4.4 Upgrading to Informatica Version 7.1.4

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

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

### 4.4.1 Applying Informatica Emergency Bug Fix to Informatica PowerCenter 7.1.4

After you upgrade to Informatica version 7.1.4, you need to apply the Informatica Emergency Bug Fix (EBF) 108240. The EBF product files are located in the \Third\_Party\_Software\Informatica\Patch2 directory on the Oracle BI Applications 7.9.4 Installation CD. For instructions on installing the EBF, refer to the file titled EBF108240.html provided in the same location as the EBF product files.

The instructions provided in the EBF108240.html file reference the regedit path for Informatica PowerCenter 7.1.4 on Windows machines as:

```
\hkey_local_
machine\system\currentcontrolset\services\powermart\configuratio
n
```

Depending on your machine and Informatica 7.1.4 installation, the path may be:

```
\hkey_local_
machine\system\currentcontrolset\services\powermart\parameters\c
onfiguration
```

## 4.5 Upgrading the Informatica Repository

Follow this procedure to upgrade the Informatica repository.

### To upgrade the Informatica repository

1. Make sure you have backed up and renamed your current Informatica repository.  
For instructions, see the Informatica documentation, which is provided in the Third\_Party\_Software\Informatica\Informatica 7.1.4 PowerCenter Doc folder of the Oracle Business Intelligence Applications CD-ROM.
2. Copy the Oracle\_BI\_DW\_Base.rep file from the folder OracleBI\dwrep\Informatica\Repository into the folder Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup.
3. Launch the Informatica Repository Console and restore Oracle\_BI\_DW\_Base.rep (located in Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup).
4. Copy the custom folder from your previous Informatica repository to the newly created Informatica repository:
  - a. Launch the Informatica Repository Manager, and connect to both your previous and newly created Informatica repositories.
  - b. Copy the Custom folder in your previous repository into the newly created Informatica repository.
  - c. Make sure there is an individual workflow for each of the mappings in the Custom folder.
  - d. New columns were added to the Oracle Business Analytics Warehouse for Oracle BI Applications version 7.9.4. Review your custom mappings to determine whether the new columns need to be added to the mapping.
  - e. Register the mappings in the DAC.

## 4.6 Upgrading the Data Warehouse Schema

This procedure adds new tables, columns, and indexes to the existing data warehouse schema. It does not alter or disrupt your existing data. The scripts that you will run during this procedure are described below.

- **UPGRADE.ctl.** This script standardizes schemas to the Siebel Industry Applications release 7.8.4. It adds new tables and columns and modifies existing columns. It also adds lookup tables and temp tables.

---

**Note:** If you are already running Siebel Business Analytics 7.8.4, you still need to run the UPGRADE.ctl scripts.

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

For DB2 databases, this script does not rename columns. Instead, the new columns are updated with the old values in the script 790\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql.

- **DW.ctl.** This script upgrades the schema to the Oracle BI Applications 7.9.4 release.
- **790\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql.** This script creates backup tables for the dimension and fact tables that are being updated during the 7.8.4 to 7.9 upgrade. The backup tables are called <table\_name>\_784.

This script also sets the SRC\_EFF\_FROM\_DT and EFFECTIVE\_FROM\_DT to 1/1/1899 in the tables where these columns were defaulted to SYSDATE in DW.ct.

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

### To upgrade the data warehouse schema

1. Run the UPGRADE.ctl script.
  - a. Navigate to the folder OracleBI\dwrep\Upgrade\CTLFiles.
  - b. Use the DDLimp utility to run the UPGRADE.ctl script. Use the following command:

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

For example:

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

#### Notes:

- \* /P <PASSWORD> - The password for the data warehouse.
- \* /C <ODBC connect string> - The name of the ODBC connect string.
- \* /I N - Tells DDLimp to ignore the indexes DDL defined in the CTL file if any exist. It does not change existing indexes. (The default is /I Y, which

tells DDLimp to create and merge indexes from the CTL file with the indexes in the database.

- \* For Oracle databases, use the Data Direct drivers.

In addition, you can use the following commands:

- \* /W Y - If the OLAP database is Oracle and Unicode.
- \* /Z Y - If the OLAP database is DB2 or SQL Server and Unicode.
- \* /B <TABLE\_SPACE\_NAME> - If you want to create these tables in a separate table space. For DB2, This must be specified as 32K tablespace.
- \* /X <INDEX\_TABLE\_SPACE\_NAME> - If you want to create the indexes in a separate tablespace. For DB2, This must be specified as 32K tablespace.
- \* /Y - Storage File for DB2/390.
- \* /R - Regrant tables.

2. Run the 790\_UPGRADE\_PRE\_CTL\_SCRIPT.sql script.
  - a. Open the SQL client for your database type, for example, SQLPLUS for Oracle, Query Analyzer for SQL Server, or a command window for DB2.
  - b. Navigate to the folder OracleBI\dwrep\Upgrade\DbScripts\<database type>.
  - c. Open the 790\_UPGRADE\_PRE\_CTL\_SCRIPT.sql file, and copy the contents into the SQL client.
  - d. Execute the script.
3. Run the DW.ctl script.
  - a. Navigate to the folder OracleBI\dwrep\Upgrade\CTLFiles.
  - b. Use the DDLimp utility to run the DW.ctl script.

Use the command provided in Step 1, but substitute the correct script name.
4. Run the 790\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql script.
  - a. Open the SQL client for your database type.
  - b. Navigate to the folder OracleBI\dwrep\Upgrade\DbScripts\<database type>.
  - c. Open the 790\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql file, and copy the contents into the SQL client.
  - d. Execute the script.

## 4.7 Importing New Schema Definitions into the Siebel Transactional Database

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

### To import new schema definitions into the Siebel transactional database

- Use the DDLimp utility to run the DDL\_OLTP.ctl script that is located in the OracleBI\dwrep\Upgrade\CTLFiles folder.

## 4.7.1 Verifying the Siebel Transactional Database Upgrade

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

### To verify the transactional database upgrade

- For all upgrade paths, verify the following tables were created in the Siebel transactional database:
  - S\_ETL\_R\_IMG\_1 through S\_ETL\_R\_IMG\_166
  - S\_ETL\_I\_IMG\_1 through S\_ETL\_I\_IMG\_166
  - S\_ETL\_D\_IMG\_1 through S\_ETL\_D\_IMG\_166
  - S\_ETL\_PARAM
  - S\_ETL\_PRD\_ATTR
  - S\_ETL\_PRD\_REL

## 4.8 Migrating Data into the Upgraded Data Warehouse

Follow this procedure to migrate data into the upgraded data warehouse

### To migrate data into the upgraded data warehouse

1. Copy the file Upgrade.rep file from the folder OracleBI\dwrep\Upgrade\Informatica\Repository into the folder Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup.
2. Launch the Informatica Repository Console and restore Upgrade.rep (located in Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup) into a database other than the database in which you restored Oracle\_BI\_DW\_Base.rep.
3. Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\SrcFiles and copy the \*.csv files into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.
4. Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\ParameterFiles and copy the file <previous version of Siebel Analytics>\_TENERIFE\_UPG\_PARAMS.txt into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.
5. Rename the file <previous version of Siebel Analytics>\_TENERIFE\_UPG\_PARAMS.txt to TENERIFE\_UPG\_PARAMS.txt.
6. In the file TENERIFE\_UPG\_PARAMS.txt:
  - a. Search for the parameter \$\$SourceConnection.
  - b. Set the value to match your Siebel applications (OLTP) version:
    - \* SEBL\_63
    - \* SEBL\_753
    - \* SEBL\_771
    - \* SEBL\_78
    - \* SEBL\_80
    - \* SEBL\_VERT\_753
    - \* SEBL\_VERT\_771

\* SEBL\_VERT\_78

\* SEBL\_VERT\_80

For example, if your Siebel applications (OLTP) version is Siebel Industry Applications 7.8, the parameter should appear as:

```
$$SourceConnection=SEBL_VERT_78
```

7. In the file TENERIFE\_UPG\_PARAMS.txt:

a. Search for the parameter \$\$Source\_Container.

b. Set the value to match your Siebel applications (OLTP) version:

\* Siebel 6.3

\* Siebel 7.5.3

\* Siebel 7.7.1

\* Siebel 7.8

\* Siebel 8.0

\* Siebel 7.5.3 Vertical

\* Siebel 7.7.1 Vertical

\* Siebel 7.8 Vertical

\* Siebel 8.0 Vertical

For example, if your Siebel applications (OLTP) version is Siebel Industry Applications 7.8, the parameter should appear as:

```
$$Source_Container=Siebel 7.8 Vertical
```

8. In the file TENERIFE\_UPG\_PARAMS.txt, edit the ETL\_PROC\_WID parameter as follows:

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

You can get this value from W\_PARAM\_G.ETL\_PROC\_WID.

9. If you are running Siebel Industry Applications (Vertical), in the file TENERIFE\_UPG\_PARAMS.txt, set the VERTICAL\_UPGRADE parameter to 1. For example:

```
$$VERTICAL_UPGRADE=1
```

10. In the Informatica Workflow Manager, open the Relational Connection Browser by selecting Connections from the toolbar, and then selecting Relational. Do the following.

---



---

**Note:** If you are connected to an Oracle database, use Oracle Native driver instead of ODBC.

If you are connected to a SQL Server database, use the ODBC driver rather than the native SQL Server driver.

---



---

a. Create a relational connection with the name PARAM\_OLTP\_SIEBEL to point to the Siebel transactional database.

b. Create a relational connection with the name DataWarehouse to point to the newly upgraded data warehouse database.

- c. Create a relational connection with the name PARAM\_DAC\_OLD to point to the previous DAC repository database (the version from which you are upgrading).
  - d. Create a relational connection with the name PARAM\_DAC\_NEW to point to the new DAC repository database (the version to which you are upgrading).
11. If you are upgrading from Siebel Industry Applications (Vertical), define the alignment rule to be used for ETL loads.
- a. Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\SrcFiles and copy the file AlignmentType\_LS\_782.csv into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.
  - b. Rename the file AlignmentType\_LS\_782.csv to AlignmentType.csv.
  - c. Open the file AlignmentType.csv, and enter one of the following alignment item types under the ALIGN\_TYPE field:
    - \* Zipcode
    - \* Account/Contact
    - \* Brick
  - d. Save the file.

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

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

| Application Version | Folder Name       | Workflow  |
|---------------------|-------------------|---|
| 7.7 to 7.9          | UPGRADE_770_to_79 | <ul style="list-style-type: none"> <li>■ MARKETING_LOAD</li> <li>■ Upgrade_Dimensions_Industry</li> <li>■ Update_Dimensions</li> <li>■ Update_Dimension_Unspecified</li> <li>■ Update_Facts</li> <li>■ Upgrade_LS_Dimensions</li> <li>■ Upgrade_LS_Facts</li> <li>■ SIL_PositionDimensionHierarchy_Full</li> <li>■ Load_INT_ORG_DH</li> <li>■ DIMENSION_LOAD</li> </ul> <p>Note: If you are using the SCD version of the dimension, replace the corresponding TENN_UPG_W_XXX_D_784_To_W_XXX_D session with TENN_UPG_W_XXX_D_784_SCD_To_W_XXX_D. This will upgrade the data from the W_XXX_SCD version of the dimension to the new SCD-enabled W_XXX_D dimension.</p> <ul style="list-style-type: none"> <li>■ DIMENSION_UNSPECIFIED_UPDATE</li> <li>■ FACT_UPDATE</li> <li>■ DAC_Metadata_Upgrade_Workflow</li> </ul> |

| Application Version | Folder Name       | Workflow   |
|---------------------|-------------------|--|
| 7.7.1.x to 7.9      | UPGRADE_771_to_79 | <ul style="list-style-type: none"> <li>■ Update_Dimensions</li> <li>■ Update_Dimension_Unspecified</li> <li>■ Update_Facts</li> <li>■ Upgrade_LS_Dimensions</li> <li>■ Upgrade_LS_Facts</li> <li>■ SIL_PositionDimensionHierarchy_Full</li> <li>■ Load_INT_ORG_DH</li> <li>■ DIMENSION_LOAD</li> </ul> <p>Note: If you are using the SCD version of the dimension, replace the corresponding TENN_UPG_W_XXX_D_784_To_W_XXX_D session with TENN_UPG_W_XXX_D_784_SCD_To_W_XXX_D. This will upgrade the data from the W_XXX_SCD version of the dimension to the new SCD-enabled W_XXX_D dimension.</p> <ul style="list-style-type: none"> <li>■ DIMENSION_UNSPECIFIED_UPDATE</li> <li>■ FACT_UPDATE</li> <li>■ DAC_Metadata_Upgrade_Workflow</li> </ul> |
| 7.8 to 7.9          | UPGRADE_78_to_79  | <ul style="list-style-type: none"> <li>■ SIL_PositionDimensionHierarchy_Full</li> <li>■ Load_INT_ORG_DH</li> <li>■ DIMENSION_LOAD</li> </ul> <p>Note: If you are using the SCD version of the dimension, replace the corresponding TENN_UPG_W_XXX_D_784_To_W_XXX_D session with TENN_UPG_W_XXX_D_784_SCD_To_W_XXX_D. This will upgrade the data from W_XXX_SCD version of the dimension to the new SCD enabled W_XXX_D dimension.</p> <ul style="list-style-type: none"> <li>■ DIMENSION_UNSPECIFIED_UPDATE</li> <li>■ FACT_UPDATE</li> <li>■ DAC_Metadata_Upgrade_Workflow</li> </ul>   |

**13.** If you upgraded your transactional database to Siebel Applications 8.0, navigate to the folder UPGRADE\_790\_to\_791\_SBL80UPG and run the following workflows in the order indicated:

- a. UPGRADE\_DIMENSIONS
- b. UPGRADE\_FACTS

**14.** Use the reset\_infa\_seq\_gen.bat script to initialize the Informatica sequence generator for incremental runs on the main Informatica repository (Oracle\_BI\_DW\_Base.rep).

- a. Navigate to OracleBI\dwrep\Upgrade\DbScripts\<<database type>.
- b. Open the reset\_infa\_seq\_gen.bat file.

The file opens a command prompt, which will prompt you for the parameters listed below.

- c. Enter the appropriate parameter values to reflect your environment (the parameters are database specific).

For Oracle databases:

| Parameter                             | Setting   |
|---------------------------------------|---|
| OLAP_USERNAME                         | Enter the data warehouse database user ID   |
| OLAP_PASSWORD                         | Enter the user ID/password@connection string of the data warehouse database       |
| INFORMATICA_DB_USERNAME               | Enter the user ID of the main Informatica Repository database                     |
| INFORMATICA_DB_PASSWORD               | Enter the password@connection string of the main Informatica Repository database  |
| INFORMATICA_REPOSITORY                | Enter the name of the main Informatica Repository                                 |
| INFORMATICA_REPOSITORY_USERNAME       | Enter the user ID of the main Informatica Repository                              |
| INFORMATICA_REPOSITORY_PASSWORD       | Enter the password for the main Informatica Repository                            |
| INFORMATICA_REPOSITORY_SERVER_ADDRESS | Enter the main Informatica Repository Server host name                            |
| INFA_FOLDER                           | Enter the value HOR for Horizontal Applications or VERT for Vertical Applications |

For Microsoft SQL Server databases:

| Parameter                       | Setting  |
|---------------------------------|--|
| OLAP_SERVER                     | Enter the name of the SQL Server for the OLAP database                                   |
| OLAP_DATABASE                   | Enter the name of the database on which OLAP data is available                           |
| OLAP_USERNAME                   | Enter the user ID of the data warehouse database   |
| OLAP_PASSWORD                   | Enter the user ID/password@connection string of the data warehouse database              |
| INFORMATICA_SERVER_ADDRESS      | Enter the name of the SQL Server for the Informatica Repository database.                |
| INFORMATICA_DATABASE            | Enter the name of the database on which the Informatica Repository metadata is available |
| INFORMATICA_DB_USERNAME         | Enter the user ID of the main Informatica Repository database                            |
| INFORMATICA_DB_PASSWORD         | Enter the password@connection string of the main Informatica Repository database         |
| INFORMATICA_REPOSITORY          | Enter the name of the main Informatica Repository  |
| INFORMATICA_REPOSITORY_USERNAME | Enter the user ID of the main Informatica Repository                                     |

| Parameter                             | Setting   |
|---------------------------------------|---|
| INFORMATICA REPOSITORY PASSWORD       | Enter the password of the main Informatica Repository                             |
| INFORMATICA REPOSITORY SERVER ADDRESS | Enter the main Informatica Repository Server host name                            |
| INFA_FOLDER                           | Enter the value HOR for Horizontal Applications or VERT for Vertical Applications |

For IBM DB2 databases:

| Parameter                             | Setting  |
|---------------------------------------|--|
| OLAP USERNAME                         | Enter the user ID of the data warehouse database                                     |
| OLAP PASSWORD                         | Enter the user ID/password@connection string of the data warehouse database          |
| INFORMATICA DB USERNAME               | Enter the user ID of the Upgrade Informatica Repository database                     |
| INFORMATICA DB PASSWORD               | Enter the password @connection string of the main Informatica Repository database    |
| INFA DATABASE ALIAS                   | Enter the name of the database in which Informatica Repository metadata is available |
| INFORMATICA REPOSITORY                | Enter the name of the main Informatica Repository                                    |
| INFORMATICA REPOSITORY USERNAME       | Enter the user ID of the main Informatica Repository                                 |
| INFORMATICA REPOSITORY PASSWORD       | Enter the password for the Informatica Repository                                    |
| INFORMATICA REPOSITORY SERVER ADDRESS | Enter the Upgrade Informatica Repository Server host name                            |
| INFA_FOLDER                           | Enter the value HOR for Horizontal Applications or VERT for Vertical Applications    |

**15.** To verify the data migrated successfully:

- a. Check whether any of the Informatica mapping log files stored in the directory \Informatica PowerCenter 7.1.4\Server\SessLogs indicates errors or failures.
- b. Check whether the SQL scripts (790\_UPGRADE\_PRE\_CTL\_SCRIPT.sql and 790\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql) that you ran in the SQL client of the database failed or errored out while executing.
- c. Check the log files for the CTL files (Upgrade.ctl and DW.ctl) that you ran using the DDLimp command to determine whether any of the runs failed.

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

16. (Optional) If the data migration was successful, drop the tables that were created during the upgrade process, such as, W\_xxxx\_x\_784 tables, LKP\_xxxx\_x, and W\_ASSET\_D\_TMP.

This step frees the space occupied by these backup tables.

## 4.9 Upgrading the Siebel Analytics Repository

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

To upgrade the repository, perform the following tasks:

- [Section 4.9.1, "Preparing for the Oracle BI Repository Upgrade"](#)
- [Section 4.9.2, "Equalizing the Oracle BI Repositories"](#)
- [Section 4.9.3, "Comparing the Siebel Analytics and Oracle BI Repositories"](#)
- [Section 4.9.4, "Merging the Siebel Analytics and Oracle BI Repositories"](#)
- [Section 4.9.5, "Regression Testing the Oracle BI Repository Merge"](#)

The tasks in this section refer to multiple versions of the Siebel Analytics and Oracle BI repositories. [Table 4-1](#) provides the names and descriptions of the repositories used in the examples in this section.

**Table 4-1 Names of Analytics Repositories used in Examples**

| Name of Repository             | Description   |
|--------------------------------|---|
| SiebelAnalytics_7x.rpd         | The standard Siebel Analytics repository for the version you are upgrading from. This repository is referred to as the "original" repository in the examples in this section.<br><br><b>Note:</b> Standard repositories from previous releases are available in the folder \OracleBI\Upgrade. |
| OracleBIAnalyticsApps.rpd      | The standard Oracle BI repository for the version you are upgrading to.   |
| Customer_SiebelAnalytics.rpd   | The Siebel Analytics repository that contains your customizations for the version you are upgrading from.   |
| Merged_Repository_OracleBI.rpd | The Oracle BI repository that contains your customizations for the version you are upgrading to.  |

### 4.9.1 Preparing for the Oracle BI Repository Upgrade

Follow this procedure to prepare for the repository upgrade.

#### To prepare for the Analytics repository upgrade

1. Set up a directory for the merge process, such as \OracleBIUpgrade, and create the following subfolders:
  - Original
  - AfterEqualize
  - AfterMerge
  - AfterManualWork
  - AfterRegressions

2. Copy the original repository (for example, SiebelAnalytics\_7x.rpd), the production repository (for example, Customer\_SiebelAnalytics.rpd, and the repository from the latest installation (for example, OracleBIAnalyticsApps.rpd) into the folder \OracleBIUpgrade\Original.

If, in your current environment, you are running Siebel Analytics for one or more modules using a Siebel Analytics repository in which you extracted the corresponding projects for the modules from the standard Siebel Analytics repository file you received from the previous release, you need to extract the same projects from the SiebelAnalytics\_7x.rpd file and use this as your original repository. (If you have the original repository that you extracted during the last upgrade, you can use it as the original repository file.) This will prevent you from losing any new metadata you would like to add in this upgrade.

Also, if you customized the Siebel Analytics repository by trimming a large number of objects and you would like to get those objects back during the current upgrade, you need to trim the SiebelAnalytics\_7x.rpd file in the same way and use the modified version as the original repository file. This will prevent you from losing any new metadata you would like to add in this upgrade.

## 4.9.2 Equalizing the Oracle BI Repositories

The Merge feature in the Administration Tool relies on a change detection algorithm to determine the changes that need to be made to upgrade repositories correctly. For the algorithm to work correctly, it has to determine which objects in the three repositories (for example, SiebelAnalytics\_7x.rpd, OracleBIAnalyticsApps.rpd, and Customer\_SiebelAnalytics.rpd) are equivalent.

The point of this step is to determine for every object in the OracleBIAnalyticsApps.rpd and the Customer\_SiebelAnalytics.rpd whether it is coming from the SiebelAnalytics\_7x.rpd.

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

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

- **Fully Qualified Name.** If an object in one repository has the same fully qualified name as another object of the same class in another repository, then the two objects are declared equal.
- **Simple String Substitution.** Equivalence can be declared between two objects of the same class in two repositories whose only difference is that some key characters in their names differ. The equalizerpds executable file ignores those characters while checking fully qualified names. For example, "Core"."W\_DAY\_D" might be considered equivalent to "Core"."W DAY D" if the characters "\_" and " " have been declared as equivalent.
- **Rename File.** When none of the preceding rules are applicable, equivalence can be manually declared using a script as input to the equalizerpds executable file. Oracle ships the rename files (MAP) for the major releases. The files are located in the OracleBI\Upgrade folder. You can also create your own rename files for customizations not covered in the files that Oracle ships. You can open and edit the rename files in Microsoft Excel.

The syntax of the equalizerpds command is as follows:

```
equalizerpds.exe -A userid1 [-B [password1]] -C base_repository_name -D userid2
```

```

[-E [password2]] -F repository2_name [-J udml_utf8_file_name_equalization] [-O
ouput_repository_name] [-X] [-Y equalStringSet]
-X          Treat 'Factxxxx' as 'Fact' in Business Model.
-Y          Treat the characters as equals.
/?          Display this usage information and exit.

```

### To equalize a repository

1. Copy the appropriate MAP file from the OracleBI\Upgrade folder into the folder where you will execute equalizerpds.exe, for example, \OracleBIUpgrade\Original.
2. Run equalizerpds.exe to equalize the repository from the latest installation (for example, OracleBIAnalyticsApps.rpd) with the original repository (for example, SiebelAnalytics\_7x.rpd). An example of the equalizerpds command is as follows:

```

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

```

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

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

3. Run equalizerpds.exe to equalize your customized repository (for example, Customer\_SiebelAnalytics.rpd) with the original repository (for example, SiebelAnalytics\_7x.rpd). An example of the equalizerpds command is as follows:

```

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

```

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

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

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

## 4.9.3 Comparing the Siebel Analytics and Oracle BI Repositories

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

### To compare the repositories

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

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

#### 4.9.4 Merging the Siebel Analytics and Oracle BI Repositories

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

##### To merge versions of the repositories

1. Copy the three repositories (for example, SiebelAnalytics\_7x.rpd, OracleBIAnalyticsApps.rpd, and Customer\_SiebelAnalytics.rpd) to the AfterMerge folder.
2. Open the repository from the latest installation (for example, OracleBIAnalyticsApps.rpd) in the \OracleBIUpgrade\AfterMerge folder.
3. Save the repository with a new name, for example, Merged\_Repository\_OracleBIAnalyticsApps.rpd.

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

4. From the Administration Tool menu bar, select File, then select Merge.
5. In the Select Original Repository dialog box, select the original repository (for example, SiebelAnalytics\_7x.rpd).
6. Enter the password, and click OK.
7. Click Select for the Modified Repository field.
8. In the Select Modified Repository dialog box, select the repository that contains the customizations you made to the previous version of the Analytics repository.
9. Click Open, type the password, and then click OK.
10. In the Decision drop-down list, select the action you want to take regarding the repository change, or accept the default action.
11. To locate subsequent rows with empty Decision fields, click the Decision header cell.

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

12. Click Merge.

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

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

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

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

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

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

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

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

## 4.9.5 Regression Testing the Oracle BI Repository Merge

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

### To perform regression testing

1. Run the reports that are necessary to include in the regression suite. These reports might be a subset of the reports in the Presentation Catalog.
2. Collect the logical SQL generated in the previous step. You can do this using Usage Tracking or by parsing the query log file.

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

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

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

4. Edit the logical SQL test scripts to account for the name changes or modifications resulting from the upgrade.
5. Execute the edited logical SQL against the merged repository, and save the results.
6. Compare the results from the steps above and try to explain the differences. If it is determined that these differences are due to the upgrade process, then you have to correct them manually.

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

## 4.10 Upgrading the Oracle BI Presentation Catalog

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

- Has prebuilt applications already installed, and
- Has customized the current Oracle BI Presentation Catalog

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

This process includes the following tasks:

- [Section 4.10.2, "Upgrading the Oracle BI Presentation Catalog to a Newer Version"](#)

- [Section 4.10.3, "Testing the Results of the Presentation Catalog Upgrade"](#)

---

**Caution:** In releases of Oracle BI Applications previous to 7.9, the Presentation Catalog (formerly known as the Siebel Analytics Web Catalog) was stored in a single file rather than in a directory structure of individual files. If you have a previous version of the Presentation Catalog, you will need to convert it to the new format. For more information about how to convert the Presentation Catalog to the new format, see the *Oracle Business Intelligence Infrastructure Upgrade Guide*.

---

### 4.10.1 Trimming the Input Presentation Catalog

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

### 4.10.2 Upgrading the Oracle BI Presentation Catalog to a Newer Version

The Presentation Catalog upgrade process makes use of three catalogs:

- The *original* Presentation Catalog. This is the unmodified Presentation Catalog that you received with the Oracle BI Applications release that you are upgrading from.
- The *new* Presentation Catalog. This is the Presentation Catalog that is installed in the OracleBIData\web\catalog folder with the installation of Oracle BI Applications.
- The *current* Presentation Catalog. This is the Presentation Catalog currently in use at your organization.

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

#### To upgrade your Presentation Catalog to a newer version

1. Make a backup copy of the current Presentation Catalog, rename the folder <catalogname>\_old, and move it to a temporary location.
2. Copy the original Presentation Catalog into the folder that holds your current Presentation Catalog and rename it <catalogname>\_Original.
3. Start Catalog Manager and open the new Presentation Catalog in offline mode.
4. Select Tools, then select Upgrade Catalog.

5. In the original Presentation Catalog field, browse to locate the original Presentation Catalog.
6. In the Current Presentation Catalog field, browse to locate your current Web Catalog, <catalogname>\_old.
7. Click OK.
8. Resolve any upgrade differences as follows:
  - a. Review each unresolved difference in the Unresolved differences list.
  - b. For each unresolved difference, select the version that you want to keep.
  - c. Click OK.

The log file SiebelAnalyticsMigrationLog.txt holds information about the merge process. This log file is written to \OracleBI\web\catalogmanager. If you get an error logged in the file, this means that the path in question had a problem that did not allow the merge mechanism to resolve the merge. No action was taken. To merge that particular item, go into your original Presentation Catalog and merge it manually.
9. Review the upgraded Presentation Catalog, and, if necessary, set permissions for objects.
10. Save the new Presentation Catalog.

### 4.10.3 Testing the Results of the Presentation Catalog Upgrade

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

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

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

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

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

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# Upgrading for Siebel CRM Applications

This section contains instructions for upgrading Oracle BI Applications releases 7.9.0, 7.9.1, and 7.9.2 for Siebel CRM Applications.

This section includes the following topics:

- [Section 5.1, "Upgrading Oracle BI Infrastructure"](#)
- [Section 5.2, "Upgrading Oracle BI Applications"](#)
- [Section 5.3, "Applying the Informatica Emergency Bug Fix to Informatica PowerCenter 7.1.4"](#)
- [Section 5.4, "Upgrading the DAC Repository"](#)
- [Section 5.5, "Upgrading the Informatica Repository"](#)
- [Section 5.6, "Upgrading the Data Warehouse Schema and Migrating Data"](#)

## 5.1 Upgrading Oracle BI Infrastructure

Upgrade the Oracle BI Infrastructure to the current version. For information on installing the current version, see the *Oracle Business Intelligence Infrastructure Upgrade Guide*.

## 5.2 Upgrading Oracle BI Applications

Run the Oracle BI Applications installer to upgrade your Oracle BI Applications environment to the current version. For instructions on running the installer, see the *Oracle Business Intelligence Applications Installation and Configuration Guide*.

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**Note:** Perform only the step that addresses the running of the installer. Do not perform the configuration instructions that follow the running of the installer.

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## 5.3 Applying the Informatica Emergency Bug Fix to Informatica PowerCenter 7.1.4

You need to apply the Informatica Emergency Bug Fix (EBF) 108240 to the Informatica PowerCenter 7.1.4 installation. The EBF product files are located in the \Third\_Party\_Software\Informatica\Patch2 directory on the Oracle BI Applications 7.9.4 Installation CD. For instructions on installing the EBF, refer to the file titled EBF108240.html provided in the same location as the EBF product files.

The instructions provided in the EBF108240.html file reference the regedit path for Informatica PowerCenter 7.1.4 on Windows machines as:

```
\hkey_local_
machine\system\currentcontrolset\services\powermart\configuratio
n
```

Depending on your machine and Informatica 7.1.4 installation, the path may be:

```
\hkey_local_
machine\system\currentcontrolset\services\powermart\parameters\c
onfiguration
```

## 5.4 Upgrading the DAC Repository

Before you begin this procedure, do the following:

- Determine what customizations were made to your existing DAC repository.
- Make sure you have renamed and backed up your existing DAC repository into a different database. When you backup the DAC repository, you export the DAC metadata, in XML format (using the DAC's Export tool), into a folder other than the standard DAC export folder where backups are stored (DAC\export). For instructions on exporting DAC metadata, see the *Oracle Business Intelligence Data Warehouse Administration Console Guide*.

### To upgrade the DAC metadata repository

1. Upgrade your current DAC repository tables to be compatible with the new DAC repository release.
  - a. Configure the new DAC client version to read the DAC metadata from your existing DAC repository.
  - b. Log in to the DAC and select Yes if prompted to upgrade the repository tables.
2. Export all the applications from your custom repository (including the custom applications) to a folder other than the standard DAC export folder (DAC\export) or the folder into which you backed up metadata in the previous format.
3. Import the new DAC metadata for your application from the standard DAC export folder (DAC\export). Select the Truncate Repository Tables check box.

For instructions on importing DAC metadata, see the *Oracle Business Intelligence Data Warehouse Administration Console Guide*.

4. Refresh the source system container to locate any missing objects in your customized application.
  - a. In the DAC menu bar, select File, then select Refresh Source System Containers.

A list of available source system containers appears in the container list to the right of the View buttons.
  - b. Select the appropriate source system container from the list, and click OK.
  - c. Confirm that you want to refresh the source system container.
5. Rebuild all the subject areas and execution plans in your customized application to include any new changes in the object dependency. For information about building subject areas and execution plans, see the *Oracle Business Intelligence Data Warehouse Administration Console Guide*.

## 5.5 Upgrading the Informatica Repository

Follow this procedure to upgrade the Informatica repository.

### To upgrade the Informatica repository

1. Make sure you have backed up and renamed your current Informatica repository.  
For instructions, see the Informatica documentation, which is provided in the Third\_Party\_Software\Informatica\Informatica 7.1.4 PowerCenter Doc folder of the Oracle Business Intelligence Applications CD-ROM.
2. Copy the Oracle\_BI\_DW\_Base.rep file from the folder OracleBI\dwrep\Informatica\Repository into the folder Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup.
3. Launch the Informatica Repository Console and restore Oracle\_BI\_DW\_Base.rep (located in Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup).
4. Copy the custom folder from your previous Informatica repository to the newly created Informatica repository:
  - a. Launch the Informatica Repository Manager, and connect to both your previous and newly created Informatica repositories.
  - b. Copy the Custom folder in your previous repository into the newly created Informatica repository.
  - c. Make sure there is an individual workflow for each of the mappings in the Custom folder.
  - d. New columns were added to the Oracle Business Analytics Warehouse for Oracle BI Applications version 7.9.4. Review your custom mappings to determine whether the new columns need to be added to the mapping.
  - e. Register the mappings in the DAC.

## 5.6 Upgrading the Data Warehouse Schema and Migrating Data

This procedure adds new tables, columns, and indexes to the existing data warehouse schema. It does not alter or disrupt your existing data.

### To upgrade the data warehouse schema and migrate data into the upgraded data warehouse

1. Run the 792\_UPGRADE\_PRE\_CTL\_SCRIPT.sql script.
  - a. Open the SQL client for your database type, for example, SQLPLUS for Oracle, Query Analyzer for SQL Server, or a command window for DB2.
  - b. Navigate to the folder OracleBI\dwrep\Upgrade\DbScripts\<database type>.
  - c. Open the 792\_UPGRADE\_PRE\_CTL\_SCRIPT.sql file, and copy the contents into the SQL client.
  - d. Execute the script.
2. Using the DAC, create data warehouse tables for the new schema version.

---

**Note:** Do not drop your existing schema before performing these steps.

---

- a. From the menu bar, select Tools, then select ETL Management, then select Configure.
  - b. Select the appropriate database type for your source and target databases.
  - c. Select Create Data Warehouse Tables, and then click Next.
  - d. Enter the appropriate database information, and then click Start.
3. Run the 792\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql script.
    - a. Open the SQL client for your database type.
    - b. Navigate to the folder OracleBI\dwrep\Upgrade\DbScripts\<<database type>.
    - c. Open the 792\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql file, and copy the contents into the SQL client.
    - d. Execute the script.
  4. If you upgraded your transactional database to Siebel Applications 8.0, run the workflows to migrate your data into the upgraded data warehouse.
    - a. In Informatica Workflow Manager, navigate to the folder UPGRADE\_790\_TO\_791\_SBL80UPG.
    - b. Run the following workflows in the order indicated:  
 UPGRADE\_DIMENSIONS  
 UPGRADE\_FACTS
  5. Verify the data migrated successfully by checking whether any of the Informatica mapping log files stored in the \Informatica PowerCenter 7.1.4\Server\SessLogs directory indicate errors or failures.
  6. Use the reset\_infa\_seq\_gen.bat script to initialize the Informatica sequence generator for incremental runs on the main Informatica repository (Oracle\_BI\_DW\_Base.rep).
    - a. Navigate to OracleBI\dwrep\Upgrade\DbScripts\<<database type>.
    - b. Open the reset\_infa\_seq\_gen.bat file.  
 The file opens a command prompt, which will prompt you for the parameters listed below.
    - c. Enter the appropriate parameter values to reflect your environment (the parameters are database specific).  
 For Oracle databases:

| Parameter               | Setting  |
|-------------------------|--|
| OLAP USERNAME           | Enter the data warehouse database user ID  |
| OLAP PASSWORD           | Enter the user ID/password@connection string of the data warehouse database      |
| INFORMATICA DB USERNAME | Enter the user ID of the main Informatica Repository database                    |
| INFORMATICA DB PASSWORD | Enter the password@connection string of the main Informatica Repository database |
| INFORMATICA REPOSITORY  | Enter the name of the main Informatica Repository                                |

| Parameter                             | Setting   |
|---------------------------------------|---|
| INFORMATICA REPOSITORY USERNAME       | Enter the user ID of the main Informatica Repository                              |
| INFORMATICA REPOSITORY PASSWORD       | Enter the password for the main Informatica Repository                            |
| INFORMATICA REPOSITORY SERVER ADDRESS | Enter the main Informatica Repository Server host name                            |
| INFA_FOLDER                           | Enter the value HOR for Horizontal Applications or VERT for Vertical Applications |

For Microsoft SQL Server databases:

| Parameter                             | Setting  |
|---------------------------------------|--|
| OLAP_SERVER                           | Enter the name of the SQL Server for the OLAP database                                   |
| OLAP_DATABASE                         | Enter the name of the database on which OLAP data is available                           |
| OLAP_USERNAME                         | Enter the user ID of the data warehouse database   |
| OLAP_PASSWORD                         | Enter the user ID/password@connection string of the data warehouse database              |
| INFORMATICA SERVER ADDRESS            | Enter the name of the SQL Server for the Informatica Repository database.                |
| INFORMATICA DATABASE                  | Enter the name of the database on which the Informatica Repository metadata is available |
| INFORMATICA_DB_USERNAME               | Enter the user ID of the main Informatica Repository database                            |
| INFORMATICA_DB_PASSWORD               | Enter the password@connection string of the main Informatica Repository database         |
| INFORMATICA REPOSITORY                | Enter the name of the main Informatica Repository  |
| INFORMATICA REPOSITORY USERNAME       | Enter the user ID of the main Informatica Repository                                     |
| INFORMATICA REPOSITORY PASSWORD       | Enter the password of the main Informatica Repository                                    |
| INFORMATICA REPOSITORY SERVER ADDRESS | Enter the main Informatica Repository Server host name                                   |
| INFA_FOLDER                           | Enter the value HOR for Horizontal Applications or VERT for Vertical Applications        |

For IBM DB2 databases:

| Parameter     | Setting  |
|---------------|--|
| OLAP_USERNAME | Enter the user ID of the data warehouse database |

| Parameter                             | Setting  |
|---------------------------------------|--|
| OLAP_PASSWORD                         | Enter the user ID/password@connection string of the data warehouse database          |
| INFORMATICA_DB_USERNAME               | Enter the user ID of the Upgrade Informatica Repository database                     |
| INFORMATICA_DB_PASSWORD               | Enter the password @connection string of the main Informatica Repository database    |
| INFA_DATABASE_ALIAS                   | Enter the name of the database in which Informatica Repository metadata is available |
| INFORMATICA_REPOSITORY                | Enter the name of the main Informatica Repository                                    |
| INFORMATICA_REPOSITORY_USERNAME       | Enter the user ID of the main Informatica Repository                                 |
| INFORMATICA_REPOSITORY_PASSWORD       | Enter the password for the Informatica Repository                                    |
| INFORMATICA_REPOSITORY_SERVER_ADDRESS | Enter the Upgrade Informatica Repository Server host name                            |
| INFA_FOLDER                           | Enter the value HOR for Horizontal Applications or VERT for Vertical Applications    |

## 5.7 Upgrading the Oracle BI Repository

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

To upgrade the repository, perform the following tasks:

- [Section 5.7.1, "Preparing for the Oracle BI Repository Upgrade"](#)
- [Section 5.7.2, "Equalizing the Oracle BI Repositories"](#)
- [Section 5.7.3, "Comparing the Oracle BI Repositories"](#)
- [Section 5.7.4, "Merging the Oracle BI Repositories"](#)
- [Section 5.7.5, "Regression Testing the Oracle BI Repository Merge"](#)

The tasks in this section refer to multiple versions of the Oracle BI repository. [Table 5–1](#) provides the names and descriptions of the repositories used in the examples in this section.

**Table 5–1 Names of Analytics Repositories used in Examples**

| Name of Repository            | Description   |
|-------------------------------|---|
| OracleBIAnalyticsApps_79x.rpd | The standard Oracle BI repository for the version you are upgrading from.<br><br><b>Note:</b> Standard repositories from previous releases are available in the folder \OracleBI\Upgrade. |
| OracleBIAnalyticsApps.rpd     | The standard Oracle BI repository for the version you are upgrading to.   |

**Table 5–1 (Cont.) Names of Analytics Repositories used in Examples**

| Name of Repository                 | Description  |
|------------------------------------|--|
| Customer_OracleBIAnalyticsApps.rpd | The Oracle BI repository that contains your customizations for the version you are upgrading from. |
| Merged_Repository_OracleBI.rpd     | The Oracle BI repository that contains your customizations for the version you are upgrading to.   |

### 5.7.1 Preparing for the Oracle BI Repository Upgrade

Follow this procedure to prepare for the repository upgrade.

#### To prepare for the Analytics repository upgrade

1. Set up a directory for the merge process, such as `\OracleBIUpgrade`, and create the following subfolders:
  - Original
  - AfterEqualize
  - AfterMerge
  - AfterManualWork
  - AfterRegressions
2. Copy the original repository (for example, `OracleBIAnalyticsApps_79x.rpd`), the production repository (for example, `Customer_OracleBIAnalyticsApps.rpd`), and the repository from the latest installation (for example, `OracleBIAnalyticsApps.rpd`) into the folder `\OracleBIUpgrade\Original`.

If, in your current environment, you are running Oracle BI Applications for one or more modules using a Oracle BI repository in which you extracted the corresponding projects for the modules from the standard Oracle BI repository file you received from the previous release, you need to extract the same projects from the `OracleBIAnalyticsApps_79x.rpd` file and use this as your original repository. (If you have the original repository that you extracted during the last upgrade, you can use it as the original repository file.) This will prevent you from losing any new metadata you would like to add in this upgrade.

Also, if you customized the Oracle BI repository by trimming a large number of objects and you would like to get those objects back during the current upgrade, you need to trim the `OracleBIAnalyticsApps_79x.rpd` file in the same way and use the modified version as the original repository file. This will prevent you from losing any new metadata you would like to add in this upgrade.

### 5.7.2 Equalizing the Oracle BI Repositories

The Merge feature in the Administration Tool relies on a change detection algorithm to determine the changes that need to be made to upgrade repositories correctly. For the algorithm to work correctly, it has to determine which objects in the three repositories (for example, `OracleBIAnalyticsApps_79x.rpd`, `OracleBIAnalyticsApps.rpd`, and `Customer_OracleBIAnalyticsApps.rpd`) are equivalent.

The point of this step is to determine for every object in the `OracleBIAnalyticsApps.rpd` and the `Customer_OracleBIAnalyticsApps.rpd` whether it is coming from the `OracleBIAnalyticsApps_79x.rpd`.

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

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

- **Fully Qualified Name.** If an object in one repository has the same fully qualified name as another object of the same class in another repository, then the two objects are declared equal.
- **Simple String Substitution.** Equivalence can be declared between two objects of the same class in two repositories whose only difference is that some key characters in their names differ. The equalizerpds executable file ignores those characters while checking fully qualified names. For example, "Core"."W\_DAY\_D" might be considered equivalent to "Core"."W DAY D" if the characters "\_" and " " have been declared as equivalent.
- **Rename File.** When none of the preceding rules are applicable, equivalence can be manually declared using a script as input to the equalizerpds executable file. Oracle ships the rename files (MAP) for the major releases. The files are located in the OracleBI\Upgrade folder. You can also create your own rename files for customizations not covered in the files that Oracle ships. You can open and edit the rename files in Microsoft Excel.

The syntax of the equalizerpds command is as follows:

```
equalizerpds.exe -A userid1 [-B [password1]] -C base_repository_name -D userid2
[-E [password2]] -F repository2_name [-J udml_utf8_file_name_equalization] [-O
ouput_repository_name] [-X] [-Y equalStringSet]
-X          Treat 'Factxxxx' as 'Fact' in Business Model.
-Y          Treat the characters as equals.
/?          Display this usage information and exit.
```

### To equalize a repository

1. Copy the appropriate MAP file from the OracleBI\Upgrade folder into the folder where you will execute equalizerpds.exe, for example, \OracleBIUpgrade\Original.
2. Run equalizerpds.exe to equalize the repository from the latest installation (for example, OracleBIAnalyticsApps.rpd) with the original repository (for example, OracleBIAnalyticsAppss\_79x.rpd). An example of the equalizerpds command is as follows:

```
equalizerpds -A Administrator -B SADMIN
-C \\OracleBIUpgrade\Original\OracleBIAnalyticsApps_791.rpd
-D Administrator -E SADMIN
-F \\OracleBIUpgrade\Original\OracleBIAnalyticsApps.rpd
-O \\OracleBIAnalyticsUpgrade\AfterEqualize\OracleBIAnalyticsApps.rpd
-X -J rename7x-79.map
```

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

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

3. Run equalizerpds.exe to equalize your customized repository (for example, Customer\_OracleBIAnalyticsApps.rpd) with the original repository (for example, OracleBIAnalyticsApps\_79x.rpd). An example of the equalizerpds command is as follows:

```
equalizerpds -A Administrator -B SADMIN
-C \\OracleBIUpgrade\Original\OracleBIAnalyticsApps_791.rpd
```

```
-D Administrator -E SADMIN
-F \\OracleBIUpgrade\Original\Customer_OracleBIAnalyticsApps.rpd
-O \\OracleBIUpgrade\AfterEqualize\Customer_OracleBIAnalyticsApps.rpd
```

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

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

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

### 5.7.3 Comparing the Oracle BI Repositories

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

#### To compare the Analytics repositories

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

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

### 5.7.4 Merging the Oracle BI Repositories

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

#### To merge versions of the Oracle BI repositories

1. Copy the three repositories (for example, OracleBIAnalyticsApps\_79x.rpd, OracleBIAnalyticsApps.rpd, and Customer\_OracleBIAnalyticsApps.rpd) to the AfterMerge folder.
2. Open the repository from the latest installation (for example, OracleBIAnalyticsApps.rpd) in the \OracleBIUpgrade\AfterMerge folder.
3. Save the repository with a new name, for example, Merged\_Repository\_OracleBIAnalyticsApps.rpd.

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

4. From the Administration Tool menu bar, select File, then select Merge.
5. In the Select Original Repository dialog box, select the original repository (for example, OracleBIAnalyticsApps\_79x.rpd).
6. Enter the password, and click OK.
7. Click Select for the Modified Repository field.
8. In the Select Modified Repository dialog box, select the repository that contains the customizations you made to the previous version of the Analytics repository.
9. Click Open, type the password, and then click OK.

10. In the Decision drop-down list, select the action you want to take regarding the repository change, or accept the default action.
11. To locate subsequent rows with empty Decision fields, click the Decision header cell.

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

12. Click Merge.

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

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

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

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

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

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

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

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

### 5.7.5 Regression Testing the Oracle BI Repository Merge

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

#### To perform regression testing

1. Run the reports that are necessary to include in the regression suite. These reports might be a subset of the reports in the Presentation Catalog.
2. Collect the logical SQL generated in the previous step. You can do this using Usage Tracking or by parsing the query log file.

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

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

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

4. Edit the logical SQL test scripts to account for the name changes or modifications resulting from the upgrade.
5. Execute the edited logical SQL against the merged repository, and save the results.
6. Compare the results from the steps above and try to explain the differences. If it is determined that these differences are due to the upgrade process, then you have to correct them manually.

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

## 5.8 Upgrading the Oracle BI Presentation Catalog

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

- Has prebuilt applications already installed, and
- Has customized the current Oracle BI Presentation Catalog

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

This process includes the following tasks:

- [Section 5.8.1, "Trimming the Input Presentation Catalog"](#)
- [Section 5.8.2, "Upgrading the Oracle BI Presentation Catalog to a Newer Version"](#)
- [Section 5.8.3, "Testing the Results of the Presentation Catalog Upgrade"](#)

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**Caution:** In releases of Oracle BI Applications previous to 7.9, the Presentation Catalog (formerly known as the Siebel Analytics Web Catalog) was stored in a single file rather than in a directory structure of individual files. If you have a previous version of the Presentation Catalog, you will need to convert it to the new format. For more information about how to convert the Presentation Catalog to the new format, see the *Oracle Business Intelligence Infrastructure Upgrade Guide*

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### 5.8.1 Trimming the Input Presentation Catalog

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

### 5.8.2 Upgrading the Oracle BI Presentation Catalog to a Newer Version

The Presentation Catalog upgrade process makes use of three catalogs:

- The *original* Presentation Catalog. This is the unmodified Presentation Catalog that you received with the Oracle BI Applications release that you are upgrading from.

- The *new* Presentation Catalog. This is the Presentation Catalog that is installed in the OracleBIData\web\catalog folder with the installation of Oracle BI Applications.
- The *current* Presentation Catalog. This is the Presentation Catalog currently in use at your organization.

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

#### To upgrade your Presentation Catalog to a newer version

1. Make a backup copy of the current Presentation Catalog, rename the folder <catalogname>\_old, and move it to a temporary location.
2. Copy the original Presentation Catalog into the folder that holds your current Presentation Catalog and rename it <catalogname>\_Original.
3. Start Catalog Manager and open the new Presentation Catalog in offline mode.
4. Select Tools, then select Upgrade Catalog.
5. In the original Presentation Catalog field, browse to locate the original Presentation Catalog.
6. In the Current Presentation Catalog field, browse to locate your current Web Catalog, <catalogname>\_old.
7. Click OK.
8. Resolve any upgrade differences as follows:
  - a. Review each unresolved difference in the Unresolved differences list.
  - b. For each unresolved difference, select the version that you want to keep.
  - c. Click OK.

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

9. Review the upgraded Presentation Catalog, and, if necessary, set permissions for objects.
10. Save the new Presentation Catalog.

### 5.8.3 Testing the Results of the Presentation Catalog Upgrade

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

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

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

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

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



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## Upgrading Older Releases for Oracle EBS

This section contains instructions for upgrading Oracle BI Applications releases 7.9.0, 7.9.1, and 7.9.2 for Oracle EBS.

This section includes the following topics:

- [Section 6.1, "Upgrading Oracle BI Infrastructure"](#)
- [Section 6.2, "Upgrading Oracle BI Applications"](#)
- [Section 6.3, "Upgrading the DAC Repository"](#)
- [Section 6.4, "Applying the Informatica Emergency Bug Fix to Informatica PowerCenter 7.1.4"](#)
- [Section 6.5, "Upgrading the Informatica Repository"](#)
- [Section 6.6, "Upgrading the Data Warehouse Schema from Release 7.9.0 to 7.9.3 and Migrating Data"](#)
- [Section 6.7, "Upgrading the Data Warehouse Schema from Release 7.9.3 to 7.9.4 and Migrating Data"](#)
- [Section 6.8, "Upgrading the Oracle BI Repository"](#)
- [Section 6.9, "Upgrading the Oracle BI Presentation Catalog"](#)

### 6.1 Upgrading Oracle BI Infrastructure

Upgrade the Oracle BI Infrastructure to the current version. For information on installing the current version, see the *Oracle Business Intelligence Infrastructure Upgrade Guide*.

### 6.2 Upgrading Oracle BI Applications

Run the Oracle BI Applications installer to upgrade your Oracle BI Applications environment to the current version. For instructions on running the installer, see the *Oracle Business Intelligence Applications Installation and Configuration Guide*.

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**Note:** Perform only the step that addresses the running of the installer. Do not perform the configuration instructions that follow the running of the installer.

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### 6.3 Upgrading the DAC Repository

Before you begin this procedure, do the following:

- Determine what customizations were made to your existing DAC repository.
- Make sure you have renamed and backed up your existing DAC repository into a different database. When you backup the DAC repository, you export the DAC metadata, in XML format (using the DAC's Export tool), into a folder other than the standard DAC export folder where backups are stored (DAC\export). For instructions on exporting DAC metadata, see the *Oracle Business Intelligence Data Warehouse Administration Console Guide*.

#### To upgrade the DAC metadata repository

1. Upgrade your current DAC repository tables to be compatible with the new DAC repository release.
  - a. Configure the new DAC client version to read the DAC metadata from your existing DAC repository.
  - b. Log in to the DAC and select Yes if prompted to upgrade the repository tables.
2. Export all the applications from your custom repository (including the custom applications) to a folder other than the standard DAC export folder (DAC\export) or the folder into which you backed up metadata in the previous format.
3. Import the new DAC metadata for your application from the standard DAC export folder (DAC\export). Select the Truncate Repository Tables check box.

For instructions on importing DAC metadata, see the *Oracle Business Intelligence Data Warehouse Administration Console Guide*.

4. Refresh the source system container to locate any missing objects in your customized application.
  - a. In the DAC menu bar, select File, then select Refresh Source System Containers.

A list of available source system containers appears in the container list to the right of the View buttons.
  - b. Select the appropriate source system container from the list, and click OK.
  - c. Confirm that you want to refresh the source system container.
5. Rebuild all the subject areas and execution plans in your customized application to include any new changes in the object dependency. For information about building subject areas and execution plans, see the *Oracle Business Intelligence Data Warehouse Administration Console Guide*.

## 6.4 Applying the Informatica Emergency Bug Fix to Informatica PowerCenter 7.1.4

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**Note:** If you previously applied the Informatica Emergency Bug Fix to PowerCenter 7.1.4, you do not need to reapply it.

---

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You need to apply the Informatica Emergency Bug Fix (EBF) 108240 to the Informatica PowerCenter 7.1.4 installation. The EBF product files are located in the \Third\_Party\_Software\Informatica\Patch2 directory on the Oracle BI Applications 7.9.4 Installation CD. For instructions on installing the EBF, refer to the file titled EBF108240.html provided in the same location as the EBF product files.

The instructions provided in the EBF108240.html file reference the regedit path for Informatica PowerCenter 7.1.4 on Windows machines as:

```
\hkey_local_
machine\system\currentcontrolset\services\powermart\configuratio
n
```

Depending on your machine and Informatica 7.1.4 installation, the path may be:

```
\hkey_local_
machine\system\currentcontrolset\services\powermart\parameters\c
onfiguration
```

## 6.5 Upgrading the Informatica Repository

Follow this procedure to upgrade the Informatica repository.

### To upgrade the Informatica repository

1. Make sure you have backed up and renamed your current Informatica repository.  
For instructions, see the Informatica documentation, which is provided in the Third\_Party\_Software\Informatica\Informatica 7.1.4 PowerCenter Doc folder of the Oracle Business Intelligence Applications CD-ROM.
2. Copy the Oracle\_BI\_DW\_Base.rep file from the folder OracleBI\dwrep\Informatica\Repository into the folder Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup.
3. Launch the Informatica Repository Console and restore Oracle\_BI\_DW\_Base.rep (located in Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup).
4. Copy the custom folder from your previous Informatica repository to the newly created Informatica repository:
  - a. Launch the Informatica Repository Manager, and connect to both your previous and newly created Informatica repositories.
  - b. Copy the Custom folder in your previous repository into the newly created Informatica repository.
  - c. Make sure there is an individual workflow for each of the mappings in the Custom folder.
  - d. New columns were added to the Oracle Business Analytics Warehouse for Oracle BI Applications version 7.9.4. Review your custom mappings to determine whether the new columns need to be added to the mapping.
  - e. Register the mappings in the DAC.

## 6.6 Upgrading the Data Warehouse Schema from Release 7.9.0 to 7.9.3 and Migrating Data

This procedure adds new tables, columns, and indexes to the Release 7.9.0 data warehouse schema. It does not alter or disrupt your existing data.

### To upgrade the data warehouse schema and migrating data into the upgraded data warehouse

1. Run the UPGRADE\_793.ctf script.

This script adds temp tables for the upgrade process.

- a. Navigate to the folder OracleBI\dwrep\Upgrade\CTLFiles.
- b. Use the DDLimp utility to run the UPGRADE\_793.ctl script. Use the following command:

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

For example:

```
DDLIMP /U SADMIN /P SADMIN /C OBIA /G SSE_ROLE
/I N /R Y /F C:\OracleBI\dwrep\UPGRADE_793.CTL /L
C:\OracleBI\dwrep\UPGRADE.log
```

**Notes:**

- \* /P <PASSWORD> - The password for the data warehouse.
- \* /C <ODBC connect string> - The name of the ODBC connect string.
- \* /I N - Tells DDLimp to ignore the indexes DDL defined in the CTL file if any exist. It does not change existing indexes. (The default is /I Y, which tells DDLimp to create and merge indexes from the CTL file with the indexes in the database.
- \* For Oracle databases, use the Data Direct drivers.

In addition, you can use the following commands:

- \* /W Y - If the OLAP database is Oracle and Unicode.
- \* /Z Y - If the OLAP database is DB2 or SQL Server and Unicode.
- \* /B <TABLE\_SPACE\_NAME> - If you want to create these tables in a separate table space. For DB2, This must be specified as 32K tablespace.
- \* /X <INDEX\_TABLE\_SPACE\_NAME> - If you want to create the indexes in a separate tablespace. For DB2, This must be specified as 32K tablespace.
- \* /Y - Storage File for DB2/390.
- \* /R - Regrant tables.

2. Using the DAC, create data warehouse tables for the schema version 7.9.4.

---



---

**Note:** Do not drop your existing schema before performing these steps.

---



---

- a. From the menu bar, select Tools, then select ETL Management, then select Configure.
  - b. Select the appropriate database type for your source and target databases.
  - c. Select Create Data Warehouse Tables, and then click Next.
  - d. Enter the appropriate database information, and then click Start.
3. Run the 793\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql script.
    - a. Open the SQL client for your database type.

- b. Navigate to the folder OracleBI\dwrep\Upgrade\DbScripts\<database type>.
  - c. Open the 793\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql file, and copy the contents into the SQL client.
  - d. Execute the script.
4. Migrate data into the upgraded data warehouse.
    - a. Copy the file Upgrade.rep file from the folder OracleBI\dwrep\Upgrade\Informatica\Repository into the folder Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup.
    - b. Launch the Informatica Repository Console and restore Upgrade.rep (located in Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup).
    - c. Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\ParameterFiles and copy the file 793\_UPG\_PARAMS.txt into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.
    - d. Set the parameter \$\$ETL\_PROC\_WID to the latest ETL\_PROC\_WID value from the database. You can get this value from W\_PARAM\_G.ETL\_PROC\_WID.
    - e. Set the parameter \$\$DATASOURCE\_NUM\_ID to the relevant value from the adapter setup.
    - f. In Informatica Workflow Manager, open the Relational Connection Browser (in the menu bar, select Connections, and then select Relational), and create a relational connection with the name ODBC\_PARAM\_OLTP\_ORA11i to point to the transactional database.

---

**Note:** If you are connected to an Oracle database, use Oracle Native driver instead of ODBC.

If you are connected to a SQL Server database, use the ODBC driver rather than the native SQL Server driver.

---

- g. Create a relational connection with the name PARAM\_OLAP to point to the newly upgraded data warehouse database.
  - h. In Informatica Workflow Manager, navigate to the folder UPGRADE\_790\_to\_793 and run the Update\_Dimensions workflow, and then run the Update\_Facts workflow.
  - i. If you are using the Oracle 11.5.10 adapter, navigate to the folder UPGRADE\_790\_to\_793\_ORA11510, and run the SIL\_PurchaseAmount\_Patch workflow.
5. Verify the data migrated successfully.
    - a. Check whether any of the Informatica mapping log files stored in the \Informatica PowerCenter 7.1.4\Server\SessLogs directory indicate errors or failures.
    - b. Check whether the script 793\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql that you ran in the SQL client of the database failed or errored out while executing.
    - c. Check the log file for the script Upgrade\_793.ctl that you ran using the DDLimp command to determine whether any of the runs failed.

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

## 6.7 Upgrading the Data Warehouse Schema from Release 7.9.3 to 7.9.4 and Migrating Data

This procedure adds new tables, columns, and indexes to the Release 7.9.3 data warehouse schema. It does not alter or disrupt your existing data.

### To upgrade the data warehouse schema and migrate data into the upgraded data warehouse

1. Use the `reset_infa_seq_gen.bat` script to initialize the Informatica sequence generator for incremental runs on the Upgrade repository.
  - a. Navigate to `OracleBI\dwrep\Upgrade\DbScripts\<database type>`.
  - b. Open the `reset_infa_seq_gen.bat` file.  
The file opens a command prompt, which will prompt you for the parameters listed below.
  - c. Enter the appropriate parameter values to reflect your environment (the parameters are database specific).

For Oracle databases:

| Parameter                             | Setting   |
|---------------------------------------|---|
| OLAP_USERNAME                         | Enter the data warehouse database user ID   |
| OLAP_PASSWORD                         | Enter the user ID/password@connection string of the data warehouse database         |
| INFORMATICA_DB_USERNAME               | Enter the user ID of the Upgrade Informatica Repository database                    |
| INFORMATICA_DB_PASSWORD               | Enter the password@connection string of the Upgrade Informatica Repository database |
| INFORMATICA_REPOSITORY                | Enter the name of the Upgrade Informatica Repository                                |
| INFORMATICA_REPOSITORY_USERNAME       | Enter the user ID of the Upgrade Informatica Repository                             |
| INFORMATICA_REPOSITORY_PASSWORD       | Enter the password for the Upgrade Informatica Repository                           |
| INFORMATICA_REPOSITORY_SERVER_ADDRESS | Enter the Upgrade Informatica Repository Server host name                           |
| INFA_FOLDER                           | Enter the value UPGRADE   |

For Microsoft SQL Server databases:

| Parameter     | Setting  |
|---------------|--|
| OLAP_SERVER   | Enter the name of the SQL Server for the OLAP database         |
| OLAP_DATABASE | Enter the name of the database on which OLAP data is available |

| Parameter                             | Setting  |
|---------------------------------------|--|
| OLAP_USERNAME                         | Enter the user ID of the data warehouse database   |
| OLAP_PASSWORD                         | Enter the user ID/password@connection string of the data warehouse database              |
| INFORMATICA_SERVER_ADDRESS            | Enter the name of the SQL Server for the Informatica Repository database.                |
| INFORMATICA_DATABASE                  | Enter the name of the database in which the Informatica Repository metadata is available |
| INFORMATICA_DB_USERNAME               | Enter the user ID of the Upgrade Informatica Repository database                         |
| INFORMATICA_DB_PASSWORD               | Enter the password @connection string of the Upgrade Informatica Repository database     |
| INFORMATICA_REPOSITORY                | Enter the name of the Upgrade Informatica Repository                                     |
| INFORMATICA_REPOSITORY_USERNAME       | Enter the user ID of the Upgrade Informatica Repository                                  |
| INFORMATICA_REPOSITORY_PASSWORD       | Enter the password of the Upgrade Informatica Repository                                 |
| INFORMATICA_REPOSITORY_SERVER_ADDRESS | Enter the Upgrade Informatica Repository Server host name                                |
| INFA_FOLDER                           | Enter the value UPGRADE  |

For IBM DB2 databases:

| Parameter                       | Setting  |
|---------------------------------|--|
| OLAP_USERNAME                   | Enter the user ID of the data warehouse database                                     |
| OLAP_PASSWORD                   | Enter the user ID/password@connection string of the data warehouse database          |
| INFORMATICA_DB_USERNAME         | Enter the user ID of the Upgrade Informatica Repository database                     |
| INFORMATICA_DB_PASSWORD         | Enter the password @connection string of the Upgrade Informatica Repository database |
| INFA_DATABASE_ALIAS             | Enter the name of the database in which Informatica Repository metadata is available |
| INFORMATICA_REPOSITORY          | Enter the name of the Upgrade Informatica Repository                                 |
| INFORMATICA_REPOSITORY_USERNAME | Enter the user ID of the Upgrade Informatica Repository                              |
| INFORMATICA_REPOSITORY_PASSWORD | Enter the password for the Informatica Repository                                    |

| Parameter                                   | Setting   |
|---|---|
| INFORMATICA<br>REPOSITORY_SERVER<br>ADDRESS | Enter the Upgrade Informatica Repository Server host name |
| INFA_FOLDER                                 | Enter the value UPGRADE                                   |

2. Run the 794\_UPGRADE\_PRE\_CTL\_SCRIPT.sql.
  - a. Open the SQL client for your database type.
  - b. Navigate to the folder OracleBI\dwrep\Upgrade\DbScripts\<<database type>.
  - c. Open the 794\_UPGRADE\_PRE\_CTL\_SCRIPT.sql file, and copy the contents into the SQL client.
  - d. Execute the script.
3. Run the UPGRADE\_794.ctl script.

This script adds temp tables for the upgrade process.

- a. Navigate to the folder OracleBI\dwrep\Upgrade\CTLFiles.
- b. Use the DDLimp utility to run the UPGRADE\_794.ctl script. Use the following command:

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

For example:

```
DDLIMP /U SADMIN /P SADMIN /C OBIA /G SSE_ROLE
/I N /R Y /F C:\OracleBI\dwrep\UPGRADE_794.CTL /L
C:\OracleBI\dwrep\UPGRADE.log
```

**Notes:**

- \* /P <PASSWORD> - The password for the data warehouse.
- \* /C <ODBC connect string> - The name of the ODBC connect string.
- \* /I N - Tells DDLimp to ignore the indexes DDL defined in the CTL file if any exist. It does not change existing indexes. (The default is /I Y, which tells DDLimp to create and merge indexes from the CTL file with the indexes in the database.
- \* For Oracle databases, use the Data Direct drivers.

In addition, you can use the following commands:

- \* /W Y - If the OLAP database is Oracle and Unicode.
- \* /Z Y - If the OLAP database is DB2 or SQL Server and Unicode.
- \* /B <TABLE\_SPACE\_NAME> - If you want to create these tables in a separate table space. For DB2, This must be specified as 32K tablespace.
- \* /X <INDEX\_TABLE\_SPACE\_NAME> - If you want to create the indexes in a separate tablespace. For DB2, This must be specified as 32K tablespace.

\* /Y - Storage File for DB2/390.

\* /R - Regrant tables.

4. Using the DAC, create data warehouse tables for the new schema version.

---

**Note:** Do not drop your existing schema before performing these steps.

---

- a. From the menu bar, select Tools, then select ETL Management, then select Configure.
  - b. Select the appropriate database type for your source and target databases.
  - c. Select Create Data Warehouse Tables, and then click Next.
  - d. Enter the appropriate database information, and then click Start.
5. Run the 794\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql script.
    - a. Open the SQL client for your database type.
    - b. Navigate to the folder OracleBI\dwrep\Upgrade\DbScripts\    - c. Open the 794\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql file, and copy the contents into the SQL client.
    - d. Execute the script.
  6. Copy all of the domain value files in the folder \OracleBI\dwrep\Informatica\LkpFiles into the folder \Informatica PowerCenter 7.1.4\Server\LkpFiles.
  7. Migrate data into the upgraded data warehouse.
    - a. Copy the file Upgrade.rep file from the folder OracleBI\dwrep\Upgrade\Informatica\Repository into the folder Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup.
    - b. Launch the Informatica Repository Console and restore Upgrade.rep (located in Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup) into a database other than the database in which you restored Oracle\_BI\_DW\_Base.rep.
    - c. Navigate to the folder OracleBI\dwrep\Upgrade\Informatica\ParameterFiles and copy the file 794\_UPG\_PARAMS.txt into the SrcFiles folder on the Informatica Server machine, for example, C:\Program Files\Informatica PowerCenter 7.1.4\Server\SrcFiles.
    - d. Set the parameter \$\$ETL\_PROC\_WID to the latest ETL\_PROC\_WID value from the database. You can get this value from W\_PARAM\_G.ETL\_PROC\_WID.
    - e. Set the parameter \$\$DATASOURCE\_NUM\_ID to the relevant value from the adapter setup.
    - f. In Informatica Workflow Manager, open the Relational Connection Browser (in the menu bar, select Connections, and then select Relational), and create one relational connection based on the appropriate database platform for your OLTP database. Create the connection with the name PARAM\_OLTP\_ORA11i.

---

---

**Note:** If you are connected to an Oracle database, use Oracle Native driver instead of ODBC.

If you are connected to a SQL Server database, use the ODBC driver rather than the native SQL Server driver.

---

---

- g.** In Informatica Workflow Manager, open the Relational Connection Browser (in the menu bar, select Connections, and then select Relational), and create one relational connection based on the appropriate database platform for your OLAP database. Create the connection with the name PARAM\_OLAP.
- 
- 

**Note:** If you are connected to an Oracle database, use Oracle Native driver instead of ODBC.

If you are connected to a SQL Server database, use the ODBC driver rather than the native SQL Server driver.

---

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- h.** In Informatica Workflow Manager, navigate to the folder UPGRADE\_793\_to\_794\_ORA11i and execute first the UPGRADE\_DIMENSIONS workflow and then the UPGRADE\_FACTS workflow.

- 8.** Verify the data migrated successfully.

- a.** Check whether any of the Informatica mapping log files stored in the \Informatica PowerCenter 7.1.4\Server\SessLogs directory indicate errors or failures.
- b.** Check whether the script 794\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql that you ran in the SQL client of the database failed or errored out while executing.
- c.** Check the log file for the script Upgrade\_794.ctf that you ran using the DDLimp command to determine whether any of the runs failed.

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

- 9.** (Optional) If the data migration was successful, drop the tables that were created during the upgrade process, such as, W\_XXXX\_x\_79x tables, LKP\_XXXX\_x and 79x\_XXXX\_TMP.

This step frees the space occupied by these backup tables.

- 10.** (Optional) Once the data migration steps above are complete, you can delete the Upgrade repository to avoid any accidental use or confusion.

- a.** In the Informatica Repository Server Administration Console, connect to the Informatica Server.
- b.** Open the Repositories folder.
- c.** Right-click the Upgrade repository, and then click Delete.
- d.** Select the option "Delete the repository. All Data will be lost."

- 11.** Use the reset\_infa\_seq\_gen.bat script to initialize the Informatica sequence generator for incremental runs on the main Informatica repository (Oracle\_BI\_DW\_Base.rep).

- a.** Navigate to OracleBI\dwrep\Upgrade\DbScripts\<<database type>.
- b.** Open the reset\_infa\_seq\_gen.bat file.

The file opens a command prompt, which will prompt you for the parameters listed below.

- c. Enter the appropriate parameter values to reflect your environment (the parameters are database specific).

For Oracle databases:

| Parameter                             | Setting  |
|---------------------------------------|--|
| OLAP_USERNAME                         | Enter the data warehouse database user ID  |
| OLAP_PASSWORD                         | Enter the user ID/password@connection string of the data warehouse database      |
| INFORMATICA_DB_USERNAME               | Enter the user ID of the main Informatica Repository database                    |
| INFORMATICA_DB_PASSWORD               | Enter the password@connection string of the main Informatica Repository database |
| INFORMATICA_REPOSITORY                | Enter the name of the main Informatica Repository                                |
| INFORMATICA_REPOSITORY_USERNAME       | Enter the user ID of the main Informatica Repository                             |
| INFORMATICA_REPOSITORY_PASSWORD       | Enter the password for the main Informatica Repository                           |
| INFORMATICA_REPOSITORY_SERVER_ADDRESS | Enter the main Informatica Repository Server host name                           |
| INFA_FOLDER                           | Enter the value HOR  |

For Microsoft SQL Server databases:

| Parameter                  | Setting  |
|----------------------------|--|
| OLAP_SERVER                | Enter the name of the SQL Server for the OLAP database                                   |
| OLAP_DATABASE              | Enter the name of the database on which OLAP data is available                           |
| OLAP_USERNAME              | Enter the user ID of the data warehouse database   |
| OLAP_PASSWORD              | Enter the user ID/password@connection string of the data warehouse database              |
| INFORMATICA_SERVER_ADDRESS | Enter the name of the SQL Server for the Informatica Repository database.                |
| INFORMATICA_DATABASE       | Enter the name of the database on which the Informatica Repository metadata is available |
| INFORMATICA_DB_USERNAME    | Enter the user ID of the main Informatica Repository database                            |
| INFORMATICA_DB_PASSWORD    | Enter the password@connection string of the main Informatica Repository database         |
| INFORMATICA_REPOSITORY     | Enter the name of the main Informatica Repository  |

| Parameter                             | Setting  |
|---------------------------------------|--|
| INFORMATICA REPOSITORY USERNAME       | Enter the user ID of the main Informatica Repository   |
| INFORMATICA REPOSITORY PASSWORD       | Enter the password of the main Informatica Repository  |
| INFORMATICA REPOSITORY SERVER ADDRESS | Enter the main Informatica Repository Server host name |
| INFA_FOLDER                           | Enter the value HOR                                    |

For IBM DB2 databases:

| Parameter                             | Setting  |
|---------------------------------------|--|
| OLAP USERNAME                         | Enter the user ID of the data warehouse database                                     |
| OLAP PASSWORD                         | Enter the user ID/password@connection string of the data warehouse database          |
| INFORMATICA DB USERNAME               | Enter the user ID of the Upgrade Informatica Repository database                     |
| INFORMATICA DB PASSWORD               | Enter the password @connection string of the main Informatica Repository database    |
| INFA DATABASE ALIAS                   | Enter the name of the database in which Informatica Repository metadata is available |
| INFORMATICA REPOSITORY                | Enter the name of the main Informatica Repository                                    |
| INFORMATICA REPOSITORY USERNAME       | Enter the user ID of the main Informatica Repository                                 |
| INFORMATICA REPOSITORY PASSWORD       | Enter the password for the Informatica Repository                                    |
| INFORMATICA REPOSITORY SERVER ADDRESS | Enter the Upgrade Informatica Repository Server host name                            |
| INFA_FOLDER                           | Enter the value HOR  |

## 6.8 Upgrading the Oracle BI Repository

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

To upgrade the repository, perform the following tasks:

- [Section 6.8.1, "Preparing for the Oracle BI Repository Upgrade"](#)
- [Section 6.8.2, "Equalizing the Oracle BI Repositories"](#)
- [Section 6.8.3, "Comparing the Oracle BI Repositories"](#)
- [Section 6.8.4, "Merging the Oracle BI Repositories"](#)

- [Section 6.8.5, "Regression Testing the Oracle BI Repository Merge"](#)

The tasks in this section refer to multiple versions of the Oracle BI repository. [Table 6–1](#) provides the names and descriptions of the repositories used in the examples in this section.

**Table 6–1 Names of Analytics Repositories used in Examples**

| Name of Repository                     | Description   |
|--|---|
| OracleBIAnalyticsApps_79x.rpd          | The standard Oracle BI repository for the version you are upgrading from.<br><b>Note:</b> Standard repositories from previous releases are available in the folder \OracleBI\Upgrade. |
| OracleBIAnalyticsApps.rpd              | The standard Oracle BI repository for the version you are upgrading to.   |
| Customer_<br>OracleBIAnalyticsApps.rpd | The Oracle BI repository that contains your customizations for the version you are upgrading from.  |
| Merged_Repository_OracleBI.rpd         | The Oracle BI repository that contains your customizations for the version you are upgrading to.  |

## 6.8.1 Preparing for the Oracle BI Repository Upgrade

Follow this procedure to prepare for the repository upgrade.

### To prepare for the Analytics repository upgrade

1. Set up a directory for the merge process, such as \OracleBIUpgrade, and create the following subfolders:
  - Original
  - AfterEqualize
  - AfterMerge
  - AfterManualWork
  - AfterRegressions
2. Copy the original repository (for example, OracleBIAnalyticsApps\_79x.rpd), the production repository (for example, Customer\_OracleBIAnalyticsApps.rpd, and the repository from the latest installation (for example, OracleBIAnalyticsApps.rpd) into the folder \OracleBIUpgrade\Original.

If, in your current environment, you are running Oracle BI Applications for one or more modules using a Oracle BI repository in which you extracted the corresponding projects for the modules from the standard Oracle BI repository file you received from the previous release, you need to extract the same projects from the OracleBIAnalyticsApps\_79x.rpd file and use this as your original repository. (If you have the original repository that you extracted during the last upgrade, you can use it as the original repository file.) This will prevent you from losing any new metadata you would like to add in this upgrade.

Also, if you customized the Oracle BI repository by trimming a large number of objects and you would like to get those objects back during the current upgrade, you need to trim the OracleBIAnalyticsApps\_79x.rpd file in the same way and use the modified version as the original repository file. This will prevent you from losing any new metadata you would like to add in this upgrade.

## 6.8.2 Equalizing the Oracle BI Repositories

The Merge feature in the Administration Tool relies on a change detection algorithm to determine the changes that need to be made to upgrade repositories correctly. For the algorithm to work correctly, it has to determine which objects in the three repositories (for example, OracleBIAnalyticsApps\_79x.rpd, OracleBIAnalyticsApps.rpd, and Customer\_OracleBIAnalyticsApps.rpd) are equivalent.

The point of this step is to determine for every object in the OracleBIAnalyticsApps.rpd and the Customer\_OracleBIAnalyticsApps.rpd whether it is coming from the OracleBIAnalyticsApps\_79x.rpd.

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

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

- **Fully Qualified Name.** If an object in one repository has the same fully qualified name as another object of the same class in another repository, then the two objects are declared equal.
- **Simple String Substitution.** Equivalence can be declared between two objects of the same class in two repositories whose only difference is that some key characters in their names differ. The equalizerpds executable file ignores those characters while checking fully qualified names. For example, "Core"."W\_DAY\_D" might be considered equivalent to "Core"."W DAY D" if the characters "\_" and " " have been declared as equivalent.
- **Rename File.** When none of the preceding rules are applicable, equivalence can be manually declared using a script as input to the equalizerpds executable file. Oracle ships the rename files (MAP) for the major releases. The files are located in the OracleBI\Upgrade folder. You can also create your own rename files for customizations not covered in the files that Oracle ships. You can open and edit the rename files in Microsoft Excel.

The syntax of the equalizerpds command is as follows:

```
equalizerpds.exe -A userid1 [-B [password1]] -C base_repository_name -D userid2
[-E [password2]] -F repository2_name [-J udml_utf8_file_name_equalization] [-O
ouput_repository_name] [-X] [-Y equalStringSet]
-X          Treat 'Factxxxx' as 'Fact' in Business Model.
-Y          Treat the characters as equals.
/?          Display this usage information and exit.
```

### To equalize a repository

1. Copy the appropriate MAP file from the OracleBI\Upgrade folder into the folder where you will execute equalizerpds.exe, for example, \OracleBIUpgrade\Original.
2. Run equalizerpds.exe to equalize the repository from the latest installation (for example, OracleBIAnalyticsApps.rpd) with the original repository (for example, OracleBIAnalyticsAppss\_793.rpd). An example of the equalizerpds command is as follows:

```
equalizerpds -A Administrator -B SADMIN
-C \\OracleBIUpgrade\Original\OracleBIAnalyticsApps_791.rpd
-D Administrator -E SADMIN
-F \\OracleBIUpgrade\Original\OracleBIAnalyticsApps.rpd
-O \\OracleBIAnalyticsUpgrade\AfterEqualize\OracleBIAnalyticsApps.rpd
```

```
-X -J rename7x-79.map
```

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

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

3. Run equalizerpds.exe to equalize your customized repository (for example, Customer\_OracleBIAnalyticsApps.rpd) with the original repository (for example, OracleBIAnalyticsApps\_79x.rpd). An example of the equalizerpds command is as follows:

```
equalizerpds -A Administrator -B SADMIN
-C \\OracleBIUpgrade\Original\OracleBIAnalyticsApps_791.rpd
-D Administrator -E SADMIN
-F \\OracleBIUpgrade\Original\Customer_OracleBIAnalyticsApps.rpd
-O \\OracleBIUpgrade\AfterEqualize\Customer_OracleBIAnalyticsApps.rpd
```

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

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

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

### 6.8.3 Comparing the Oracle BI Repositories

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

#### To compare the Analytics repositories

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

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

### 6.8.4 Merging the Oracle BI Repositories

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

#### To merge versions of the Oracle BI repositories

1. Copy the three repositories (for example, OracleBIAnalyticsApps\_79x.rpd, OracleBIAnalyticsApps.rpd, and Customer\_OracleBIAnalyticsApps.rpd) to the AfterMerge folder.
2. Open the repository from the latest installation (for example, OracleBIAnalyticsApps.rpd) in the \OracleBIUpgrade\AfterMerge folder.
3. Save the repository with a new name, for example, Merged\_Repository\_OracleBIAnalyticsApps.rpd.

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

4. From the Administration Tool menu bar, select File, then select Merge.
5. In the Select Original Repository dialog box, select the original repository (for example, OracleBIAnalyticsApps\_79x.rpd).
6. Enter the password, and click OK.
7. Click Select for the Modified Repository field.
8. In the Select Modified Repository dialog box, select the repository that contains the customizations you made to the previous version of the Analytics repository.
9. Click Open, type the password, and then click OK.
10. In the Decision drop-down list, select the action you want to take regarding the repository change, or accept the default action.
11. To locate subsequent rows with empty Decision fields, click the Decision header cell.

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

12. Click Merge.

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

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

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

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

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

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

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

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

### 6.8.5 Regression Testing the Oracle BI Repository Merge

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

**To perform regression testing**

1. Run the reports that are necessary to include in the regression suite. These reports might be a subset of the reports in the Presentation Catalog.
2. Collect the logical SQL generated in the previous step. You can do this using Usage Tracking or by parsing the query log file.  
*For information about Usage Tracking, see Oracle Business Intelligence Server Administration Guide.*
3. Execute the logical SQL against the old repository using the command line utility nQCmd.exe located in \OracleBI\server\bin, and save the results to a file.  
*For information about the nQCmd.exe utility, see Oracle Business Intelligence Server Administration Guide.*
4. Edit the logical SQL test scripts to account for the name changes or modifications resulting from the upgrade.
5. Execute the edited logical SQL against the merged repository, and save the results.
6. Compare the results from the steps above and try to explain the differences. If it is determined that these differences are due to the upgrade process, then you have to correct them manually.

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

## 6.9 Upgrading the Oracle BI Presentation Catalog

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

- Has prebuilt applications already installed, and
- Has customized the current Oracle BI Presentation Catalog

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

This process includes the following tasks:

- [Section 6.9.1, "Trimming the Input Presentation Catalog"](#)
- [Section 6.9.2, "Upgrading the Oracle BI Presentation Catalog to a Newer Version"](#)
- [Section 6.9.3, "Testing the Results of the Presentation Catalog Upgrade"](#)

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**Caution:** In releases of Oracle BI Applications previous to 7.9, the Presentation Catalog (formerly known as the Siebel Analytics Web Catalog) was stored in a single file rather than in a directory structure of individual files. If you have a previous version of the Presentation Catalog, you will need to convert it to the new format. For more information about how to convert the Presentation Catalog to the new format, see the *Oracle Business Intelligence Infrastructure Upgrade Guide*

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### 6.9.1 Trimming the Input Presentation Catalog

Before you upgrade and merge your current Presentation Catalog with the new Presentation Catalog, determine which of the existing content you want to keep and which new content you want to incorporate. Review your existing Presentation Catalog and determine the usage patterns of reports and dashboards. Note that some

of the preconfigured content in the existing catalog may appear in the new version in a redesigned format. In addition, the new version includes completely new content. After you have decided the content that is to make up your enterprise Presentation Catalog, trim the input catalogs using the Catalog Manager. For information on trimming catalogs, see *Oracle Business Intelligence Presentation Services Administration Guide*.

## 6.9.2 Upgrading the Oracle BI Presentation Catalog to a Newer Version

The Presentation Catalog upgrade process makes use of three catalogs:

- The *original* Presentation Catalog. This is the unmodified Presentation Catalog that you received with the Oracle BI Applications release that you are upgrading from.
- The *new* Presentation Catalog. This is the Presentation Catalog that is installed in the OracleBIData\web\catalog folder with the installation of Oracle BI Applications.
- The *current* Presentation Catalog. This is the Presentation Catalog currently in use at your organization.

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

### To upgrade your Presentation Catalog to a newer version

1. Make a backup copy of the current Presentation Catalog, rename the folder <catalogname>\_old, and move it to a temporary location.
2. Copy the original Presentation Catalog into the folder that holds your current Presentation Catalog and rename it <catalogname>\_Original.
3. Start Catalog Manager and open the new Presentation Catalog in offline mode.
4. Select Tools, then select Upgrade Catalog.
5. In the original Presentation Catalog field, browse to locate the original Presentation Catalog.
6. In the Current Presentation Catalog field, browse to locate your current Web Catalog, <catalogname>\_old.
7. Click OK.
8. Resolve any upgrade differences as follows:
  - a. Review each unresolved difference in the Unresolved differences list.
  - b. For each unresolved difference, select the version that you want to keep.
  - c. Click OK.

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

9. Review the upgraded Presentation Catalog, and, if necessary, set permissions for objects.
10. Save the new Presentation Catalog.

### 6.9.3 Testing the Results of the Presentation Catalog Upgrade

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

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

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

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

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



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# Upgrading for Oracle EBS and PeopleSoft Enterprise Applications

This section contains instructions for upgrading Oracle BI Applications release 7.9.3 for Oracle EBS and PeopleSoft Enterprise Applications.

This section includes the following topics:

- [Section 7.1, "Upgrading Oracle BI Infrastructure"](#)
- [Section 7.2, "Upgrading Oracle BI Applications"](#)
- [Section 7.3, "Applying the Informatica Emergency Bug Fix to Informatica PowerCenter 7.1.4"](#)
- [Section 7.4, "Upgrading the DAC Repository"](#)
- [Section 7.5, "Upgrading the Informatica Repository"](#)
- [Section 7.6, "Upgrading the Data Warehouse Schema and Migrating Data"](#)
- [Section 7.7, "Upgrading the Oracle BI Repository"](#)
- [Section 7.8, "Upgrading the Oracle BI Presentation Catalog"](#)

## 7.1 Upgrading Oracle BI Infrastructure

Upgrade the Oracle BI Infrastructure to the current version. For information on installing the current version, see the *Oracle Business Intelligence Infrastructure Upgrade Guide*.

## 7.2 Upgrading Oracle BI Applications

Run the Oracle BI Applications installer to upgrade your Oracle BI Applications environment to the current version. For instructions on running the installer, see *Oracle Business Intelligence Applications Installation and Configuration Guide*.

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**Note:** Perform only the step that addresses the running of the installer. Do not perform the configuration instructions that follow the running of the installer.

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## 7.3 Applying the Informatica Emergency Bug Fix to Informatica PowerCenter 7.1.4

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**Note:** If you previously applied the Informatica Emergency Bug Fix to PowerCenter 7.1.4, you do not need to reapply it.

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You need to apply the Informatica Emergency Bug Fix (EBF) 108240 to the Informatica PowerCenter 7.1.4 installation. The EBF product files are located in the \Third\_Party\_Software\Informatica\Patch2 directory on the Oracle BI Applications 7.9.4 Installation CD. For instructions on installing the EBF, refer to the file titled EBF108240.html provided in the same location as the EBF product files.

The instructions provided in the EBF108240.html file reference the regedit path for Informatica PowerCenter 7.1.4 on Windows machines as:

```
\hkey_local_
machine\system\currentcontrolset\services\powermart\configuratio
n
```

Depending on your machine and Informatica 7.1.4 installation, the path may be:

```
\hkey_local_
machine\system\currentcontrolset\services\powermart\parameters\c
onfiguration
```

## 7.4 Upgrading the DAC Repository

Before you begin this procedure, do the following:

- Determine what customizations were made to your existing DAC repository.
- Make sure you have renamed and backed up your existing DAC repository into a different database. When you backup the DAC repository, you export the DAC metadata, in XML format (using the DAC's Export tool), into a folder other than the standard DAC export folder where backups are stored (DAC\export). For instructions on exporting DAC metadata, see the *Oracle Business Intelligence Data Warehouse Administration Console Guide*.

### To upgrade the DAC metadata repository

1. Upgrade your current DAC repository tables to be compatible with the new DAC repository release.
  - a. Configure the new DAC client version to read the DAC metadata from your existing DAC repository.
  - b. Log in to the DAC and select Yes if prompted to upgrade the repository tables.
2. Export all the applications from your custom repository (including the custom applications) to a folder other than the standard DAC export folder (DAC\export) or the folder into which you backed up metadata in the previous format.
3. Import the new DAC metadata for your application from the standard DAC export folder (DAC\export). Select the Truncate Repository Tables check box.

For instructions on importing DAC metadata, see the *Oracle Business Intelligence Data Warehouse Administration Console Guide*.

4. Refresh the source system container to locate any missing objects in your customized application.

- a. In the DAC menu bar, select File, then select Refresh Source System Containers.  
A list of available source system containers appears in the container list to the right of the View buttons.
  - b. Select the appropriate source system container from the list, and click OK.
  - c. Confirm that you want to refresh the source system container.
5. Rebuild all the subject areas and execution plans in your customized application to include any new changes in the object dependency. For information about building subject areas and execution plans, see the *Oracle Business Intelligence Data Warehouse Administration Console Guide*.

## 7.5 Upgrading the Informatica Repository

Follow this procedure to upgrade the Informatica repository.

### To upgrade the Informatica repository

1. Make sure you have backed up and renamed your current Informatica repository.  
For instructions, see the Informatica documentation, which is provided in the Third\_Party\_Software\Informatica\Informatica 7.1.4 PowerCenter Doc folder of the Oracle Business Intelligence Applications CD-ROM.
2. Copy the Oracle\_BI\_DW\_Base.rep file from the folder OracleBI\dwrep\Informatica\Repository into the folder Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup.
3. Launch the Informatica Repository Console and restore Oracle\_BI\_DW\_Base.rep (located in Informatica PowerCenter 7.1.4\RepositoryServer\bin\Backup).
4. Copy the custom folder from your previous Informatica repository to the newly created Informatica repository:
  - a. Launch the Informatica Repository Manager, and connect to both your previous and newly created Informatica repositories.
  - b. Copy the Custom folder in your previous repository into the newly created Informatica repository.
  - c. Make sure there is an individual workflow for each of the mappings in the Custom folder.
  - d. New columns were added to the Oracle Business Analytics Warehouse for Oracle BI Applications version 7.9.4. Review your custom mappings to determine whether the new columns need to be added to the mapping.
  - e. Register the mappings in the DAC.

## 7.6 Upgrading the Data Warehouse Schema and Migrating Data

This procedure adds new tables, columns, and indexes to the existing data warehouse schema. It does not alter or disrupt your existing data.

### To upgrade the data warehouse schema and migrate data into the upgraded data warehouse

1. Use the reset\_infa\_seq\_gen.bat script to initialize the Informatica sequence generator for incremental runs on the Upgrade repository.
  - a. Navigate to OracleBI\dwrep\Upgrade\DbScripts\<database type>.

- b. Open the reset\_infa\_seq\_gen.bat file.  
The file opens a command prompt, which will prompt you for the parameters listed below.
- c. Enter the appropriate parameter values to reflect your environment (the parameters are database specific).

For Oracle databases:

| Parameter                             | Setting   |
|---------------------------------------|---|
| OLAP_USERNAME                         | Enter the data warehouse database user ID   |
| OLAP_PASSWORD                         | Enter the user ID/password@connection string of the data warehouse database         |
| INFORMATICA_DB_USERNAME               | Enter the user ID of the Upgrade Informatica Repository database                    |
| INFORMATICA_DB_PASSWORD               | Enter the password@connection string of the Upgrade Informatica Repository database |
| INFORMATICA_REPOSITORY                | Enter the name of the Upgrade Informatica Repository                                |
| INFORMATICA_REPOSITORY_USERNAME       | Enter the user ID of the Upgrade Informatica Repository                             |
| INFORMATICA_REPOSITORY_PASSWORD       | Enter the password for the Upgrade Informatica Repository                           |
| INFORMATICA_REPOSITORY_SERVER_ADDRESS | Enter the Upgrade Informatica Repository Server host name                           |
| INFA_FOLDER                           | Enter the value UPGRADE   |

For Microsoft SQL Server databases:

| Parameter                  | Setting  |
|----------------------------|--|
| OLAP_SERVER                | Enter the name of the SQL Server for the OLAP database                                   |
| OLAP_DATABASE              | Enter the name of the database on which OLAP data is available                           |
| OLAP_USERNAME              | Enter the user ID of the data warehouse database   |
| OLAP_PASSWORD              | Enter the user ID/password@connection string of the data warehouse database              |
| INFORMATICA_SERVER_ADDRESS | Enter the name of the SQL Server for the Informatica Repository database.                |
| INFORMATICA_DATABASE       | Enter the name of the database in which the Informatica Repository metadata is available |
| INFORMATICA_DB_USERNAME    | Enter the user ID of the Upgrade Informatica Repository database                         |
| INFORMATICA_DB_PASSWORD    | Enter the password @connection string of the Upgrade Informatica Repository database     |
| INFORMATICA_REPOSITORY     | Enter the name of the Upgrade Informatica Repository                                     |

| Parameter                             | Setting   |
|---------------------------------------|---|
| INFORMATICA REPOSITORY USERNAME       | Enter the user ID of the Upgrade Informatica Repository   |
| INFORMATICA REPOSITORY PASSWORD       | Enter the password of the Upgrade Informatica Repository  |
| INFORMATICA REPOSITORY SERVER ADDRESS | Enter the Upgrade Informatica Repository Server host name |
| INFA_FOLDER                           | Enter the value UPGRADE                                   |

For IBM DB2 databases:

| Parameter                             | Setting  |
|---------------------------------------|--|
| OLAP USERNAME                         | Enter the user ID of the data warehouse database                                     |
| OLAP PASSWORD                         | Enter the user ID/password@connection string of the data warehouse database          |
| INFORMATICA DB USERNAME               | Enter the user ID of the Upgrade Informatica Repository database                     |
| INFORMATICA DB PASSWORD               | Enter the password @connection string of the Upgrade Informatica Repository database |
| INFA DATABASE ALIAS                   | Enter the name of the database in which Informatica Repository metadata is available |
| INFORMATICA REPOSITORY                | Enter the name of the Upgrade Informatica Repository                                 |
| INFORMATICA REPOSITORY USERNAME       | Enter the user ID of the Upgrade Informatica Repository                              |
| INFORMATICA REPOSITORY PASSWORD       | Enter the password for the Informatica Repository                                    |
| INFORMATICA REPOSITORY SERVER ADDRESS | Enter the Upgrade Informatica Repository Server host name                            |
| INFA_FOLDER                           | Enter the value UPGRADE  |

2. (For Oracle Applications only.) Run the 794\_UPGRADE\_PRE\_CTL\_SCRIPT.sql.
  - a. Open the SQL client for your database type.
  - b. Navigate to the folder OracleBI\dwrep\Upgrade\DbScripts\<database type>.
  - c. Open the 794\_UPGRADE\_PRE\_CTL\_SCRIPT.sql file, and copy the contents into the SQL client.
  - d. Execute the script.
3. Run the UPGRADE\_794.ctl script.  
This script adds temp tables for the upgrade process.

- a. Navigate to the folder OracleBI\dwrep\Upgrade\CTLFiles.
- b. Use the DDLimp utility to run the UPGRADE\_794.ctl script. Use the following command:

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

For example:

```
DDLIMP /U SADMIN /P SADMIN /C OBIA /G SSE_ROLE
/I N /R Y /F C:\OracleBI\dwrep\UPGRADE_794.CTL /L
C:\OracleBI\dwrep\UPGRADE.log
```

**Notes:**

- \* /P <PASSWORD> - The password for the data warehouse.
- \* /C <ODBC connect string> - The name of the ODBC connect string.
- \* /I N - Tells DDLimp to ignore the indexes DDL defined in the CTL file if any exist. It does not change existing indexes. (The default is /I Y, which tells DDLimp to create and merge indexes from the CTL file with the indexes in the database.
- \* For Oracle databases, use the Data Direct drivers.

In addition, you can use the following commands:

- \* /W Y - If the OLAP database is Oracle and Unicode.
- \* /Z Y - If the OLAP database is DB2 or SQL Server and Unicode.
- \* /B <TABLE\_SPACE\_NAME> - If you want to create these tables in a separate table space. For DB2, This must be specified as 32K tablespace.
- \* /X <INDEX\_TABLE\_SPACE\_NAME> - If you want to create the indexes in a separate tablespace. For DB2, This must be specified as 32K tablespace.
- \* /Y - Storage File for DB2/390.
- \* /R - Regrant tables.

4. Using the DAC, create data warehouse tables for the new schema version.

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**Note:** Do not drop your existing schema before performing these steps.

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- a. From the menu bar, select Tools, then select ETL Management, then select Configure.
  - b. Select the appropriate database type for your source and target databases.
  - c. Select Create Data Warehouse Tables, and then click Next.
  - d. Enter the appropriate database information, and then click Start.
5. Run the 794\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql script.
    - a. Open the SQL client for your database type.



- h. In Informatica Workflow Manager:
  - If you are using the PeopleSoft adapter, navigate to the folder UPGRADE\_793\_to\_794\_PSFT88, and execute first the UPGRADE\_DIMENSIONS workflow and then the UPGRADE\_FACTS workflow.
  - If you are using the Oracle EBS adapter, navigate to the folder UPGRADE\_793\_to\_794\_ORA11i, and execute first the UPGRADE\_DIMENSIONS workflow and then the UPGRADE\_FACTS workflow.
- 8. Verify the data migrated successfully.
  - a. Check whether any of the Informatica mapping log files stored in the \Informatica PowerCenter 7.1.4\Server\SessLogs directory indicate errors or failures.
  - b. Check whether the script 794\_UPGRADE\_PRE\_DIMENSION\_SCRIPT.sql that you ran in the SQL client of the database failed or errored out while executing.
  - c. Check the log file for the script Upgrade\_794.ctl that you ran using the DDLimp command to determine whether any of the runs failed.
 

If you did not detect any errors or failures in the steps above, then the data migration was successful.
- 9. (Optional) If the data migration was successful, drop the tables that were created during the upgrade process, such as, W\_xxxx\_x\_79x tables, LKP\_xxxx\_x and 79x\_XXXX\_TMP.
 

This step frees the space occupied by these backup tables.
- 10. (Optional) Once the data migration steps above are complete, you can delete the Upgrade repository to avoid any accidental use or confusion.
  - a. In the Informatica Repository Server Administration Console, connect to the Informatica Server.
  - b. Open the Repositories folder.
  - c. Right-click the Upgrade repository, and then click Delete.
  - d. Select the option "Delete the repository. All Data will be lost."
- 11. Use the reset\_infa\_seq\_gen.bat script to initialize the Informatica sequence generator for incremental runs on the main Informatica repository (Oracle\_BI\_DW\_Base.rep).
  - a. Navigate to OracleBI\dwrep\Upgrade\DbScripts\<<database type>.
  - b. Open the reset\_infa\_seq\_gen.bat file.
 

The file opens a command prompt, which will prompt you for the parameters listed below.
  - c. Enter the appropriate parameter values to reflect your environment (the parameters are database specific).
 

For Oracle databases:

| Parameter     | Setting   |
|---------------|---|
| OLAP USERNAME | Enter the data warehouse database user ID                                   |
| OLAP PASSWORD | Enter the user ID/password@connection string of the data warehouse database |

| Parameter                             | Setting  |
|---------------------------------------|--|
| INFORMATICA_DB_USERNAME               | Enter the user ID of the main Informatica Repository database                    |
| INFORMATICA_DB_PASSWORD               | Enter the password@connection string of the main Informatica Repository database |
| INFORMATICA_REPOSITORY                | Enter the name of the main Informatica Repository                                |
| INFORMATICA_REPOSITORY_USERNAME       | Enter the user ID of the main Informatica Repository                             |
| INFORMATICA_REPOSITORY_PASSWORD       | Enter the password for the main Informatica Repository                           |
| INFORMATICA_REPOSITORY_SERVER_ADDRESS | Enter the main Informatica Repository Server host name                           |
| INFA_FOLDER                           | Enter the value HOR  |

For Microsoft SQL Server databases:

| Parameter                             | Setting  |
|---------------------------------------|--|
| OLAP_SERVER                           | Enter the name of the SQL Server for the OLAP database                                   |
| OLAP_DATABASE                         | Enter the name of the database on which OLAP data is available                           |
| OLAP_USERNAME                         | Enter the user ID of the data warehouse database   |
| OLAP_PASSWORD                         | Enter the user ID/password@connection string of the data warehouse database              |
| INFORMATICA_SERVER_ADDRESS            | Enter the name of the SQL Server for the Informatica Repository database.                |
| INFORMATICA_DATABASE                  | Enter the name of the database on which the Informatica Repository metadata is available |
| INFORMATICA_DB_USERNAME               | Enter the user ID of the main Informatica Repository database                            |
| INFORMATICA_DB_PASSWORD               | Enter the password@connection string of the main Informatica Repository database         |
| INFORMATICA_REPOSITORY                | Enter the name of the main Informatica Repository  |
| INFORMATICA_REPOSITORY_USERNAME       | Enter the user ID of the main Informatica Repository                                     |
| INFORMATICA_REPOSITORY_PASSWORD       | Enter the password of the main Informatica Repository                                    |
| INFORMATICA_REPOSITORY_SERVER_ADDRESS | Enter the main Informatica Repository Server host name                                   |
| INFA_FOLDER                           | Enter the value HOR  |

For IBM DB2 databases:

| Parameter                             | Setting  |
|---------------------------------------|--|
| OLAP_USERNAME                         | Enter the user ID of the data warehouse database                                     |
| OLAP_PASSWORD                         | Enter the user ID/password@connection string of the data warehouse database          |
| INFORMATICA_DB_USERNAME               | Enter the user ID of the Upgrade Informatica Repository database                     |
| INFORMATICA_DB_PASSWORD               | Enter the password @connection string of the main Informatica Repository database    |
| INFA_DATABASE_ALIAS                   | Enter the name of the database in which Informatica Repository metadata is available |
| INFORMATICA_REPOSITORY                | Enter the name of the main Informatica Repository                                    |
| INFORMATICA_REPOSITORY_USERNAME       | Enter the user ID of the main Informatica Repository                                 |
| INFORMATICA_REPOSITORY_PASSWORD       | Enter the password for the Informatica Repository                                    |
| INFORMATICA_REPOSITORY_SERVER_ADDRESS | Enter the Upgrade Informatica Repository Server host name                            |
| INFA_FOLDER                           | Enter the value HOR  |

## 7.7 Upgrading the Oracle BI Repository

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

To upgrade the repository, perform the following tasks:

- [Section 7.7.1, "Preparing for the Oracle BI Repository Upgrade"](#)
- [Section 7.7.2, "Equalizing the Oracle BI Repositories"](#)
- [Section 7.7.3, "Comparing the Oracle BI Repositories"](#)
- [Section 7.7.4, "Merging the Oracle BI Repositories"](#)
- [Section 7.7.5, "Regression Testing the Oracle BI Repository Merge"](#)

The tasks in this section refer to multiple versions of the Oracle BI repository. [Table 7–1](#) provides the names and descriptions of the repositories used in the examples in this section.

**Table 7–1 Names of Analytics Repositories used in Examples**

| Name of Repository            | Description   |
|-------------------------------|---|
| OracleBIAnalyticsApps_793.rpd | The standard Oracle BI repository for the version you are upgrading from.<br><br><b>Note:</b> Standard repositories from previous releases are available in the folder \OracleBI\Upgrade. |

**Table 7–1 (Cont.) Names of Analytics Repositories used in Examples**

| <b>Name of Repository</b>              | <b>Description</b>   |
|--|--|
| OracleBIAnalyticsApps.rpd              | The standard Oracle BI repository for the version you are upgrading to.                            |
| Customer_<br>OracleBIAnalyticsApps.rpd | The Oracle BI repository that contains your customizations for the version you are upgrading from. |
| Merged_Repository_OracleBI.rpd         | The Oracle BI repository that contains your customizations for the version you are upgrading to.   |

## 7.7.1 Preparing for the Oracle BI Repository Upgrade

Follow this procedure to prepare for the repository upgrade.

### To prepare for the Analytics repository upgrade

1. Set up a directory for the merge process, such as `\OracleBIUpgrade`, and create the following subfolders:
  - Original
  - AfterEqualize
  - AfterMerge
  - AfterManualWork
  - AfterRegressions
2. Copy the original repository (for example, `OracleBIAnalyticsApps_793.rpd`), the production repository (for example, `Customer_OracleBIAnalyticsApps.rpd`, and the repository from the latest installation (for example, `OracleBIAnalyticsApps.rpd`) into the folder `\OracleBIUpgrade\Original`.

If, in your current environment, you are running Oracle BI Applications for one or more modules using a Oracle BI repository in which you extracted the corresponding projects for the modules from the standard Oracle BI repository file you received from the previous release, you need to extract the same projects from the `OracleBIAnalyticsApps_793.rpd` file and use this as your original repository. (If you have the original repository that you extracted during the last upgrade, you can use it as the original repository file.) This will prevent you from losing any new metadata you would like to add in this upgrade.

Also, if you customized the Oracle BI repository by trimming a large number of objects and you would like to get those objects back during the current upgrade, you need to trim the `OracleBIAnalyticsApps_793.rpd` file in the same way and use the modified version as the original repository file. This will prevent you from losing any new metadata you would like to add in this upgrade.

## 7.7.2 Equalizing the Oracle BI Repositories

The Merge feature in the Administration Tool relies on a change detection algorithm to determine the changes that need to be made to upgrade repositories correctly. For the algorithm to work correctly, it has to determine which objects in the three repositories (for example, `OracleBIAnalyticsApps_793.rpd`, `OracleBIAnalyticsApps.rpd`, and `Customer_OracleBIAnalyticsApps.rpd`) are equivalent.

The point of this step is to determine for every object in the `OracleBIAnalyticsApps.rpd` and the `Customer_OracleBIAnalyticsApps.rpd` whether it is coming from the `OracleBIAnalyticsApps_793.rpd`.

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

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

- **Fully Qualified Name.** If an object in one repository has the same fully qualified name as another object of the same class in another repository, then the two objects are declared equal.
- **Simple String Substitution.** Equivalence can be declared between two objects of the same class in two repositories whose only difference is that some key characters in their names differ. The equalizerpds executable file ignores those characters while checking fully qualified names. For example, "Core"."W\_DAY\_D" might be considered equivalent to "Core"."W DAY D" if the characters "\_" and " " have been declared as equivalent.
- **Rename File.** When none of the preceding rules are applicable, equivalence can be manually declared using a script as input to the equalizerpds executable file. Oracle ships the rename files (MAP) for the major releases. The files are located in the OracleBI\Upgrade folder. You can also create your own rename files for customizations not covered in the files that Oracle ships. You can open and edit the rename files in Microsoft Excel.

The syntax of the equalizerpds command is as follows:

```
equalizerpds.exe -A userid1 [-B [password1]] -C base_repository_name -D userid2
[-E [password2]] -F repository2_name [-J udml_utf8_file_name_equalization] [-O
ouput_repository_name] [-X] [-Y equalStringSet]
-X          Treat 'Factxxxx' as 'Fact' in Business Model.
-Y          Treat the characters as equals.
/?          Display this usage information and exit.
```

### To equalize a repository

1. Copy the appropriate MAP file from the OracleBI\Upgrade folder into the folder where you will execute equalizerpds.exe, for example, \OracleBIUpgrade\Original.
2. Run equalizerpds.exe to equalize the repository from the latest installation (for example, OracleBIAnalyticsApps.rpd) with the original repository (for example, OracleBIAnalyticsAppss\_793.rpd). An example of the equalizerpds command is as follows:

```
equalizerpds -A Administrator -B SADMIN
-C \\OracleBIUpgrade\Original\OracleBIAnalyticsApps_793.rpd
-D Administrator -E SADMIN
-F \\OracleBIUpgrade\Original\OracleBIAnalyticsApps.rpd
-O \\OracleBIAnalyticsUpgrade\AfterEqualize\OracleBIAnalyticsApps.rpd
-X -J rename7x-79.map
```

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

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

3. Run equalizerpds.exe to equalize your customized repository (for example, Customer\_OracleBIAnalyticsApps.rpd) with the original repository (for example, OracleBIAnalyticsApps\_7x.rpd). An example of the equalizerpds command is as follows:

```
equalizerpds -A Administrator -B SADMIN
-C \\OracleBIUpgrade\Original\OracleBIAnalyticsApps_7x.rpd
```

```
-D Administrator -E SADMIN
-F \\OracleBIUpgrade\Original\Customer_OracleBIAnalyticsApps.rpd
-O \\OracleBIUpgrade\AfterEqualize\Customer_OracleBIAnalyticsApps.rpd
```

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

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

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

### 7.7.3 Comparing the Oracle BI Repositories

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

#### To compare the Analytics repositories

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

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

### 7.7.4 Merging the Oracle BI Repositories

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

#### To merge versions of the Oracle BI repositories

1. Copy the three repositories (for example, OracleBIAnalyticsApps\_793.rpd, OracleBIAnalyticsApps.rpd, and Customer\_OracleBIAnalyticsApps.rpd) to the AfterMerge folder.
2. Open the repository from the latest installation (for example, OracleBIAnalyticsApps.rpd) in the \OracleBIUpgrade\AfterMerge folder.
3. Save the repository with a new name, for example, Merged\_Repository\_OracleBIAnalyticsApps.rpd.

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

4. From the Administration Tool menu bar, select File, then select Merge.
5. In the Select Original Repository dialog box, select the original repository (for example, OracleBIAnalyticsApps\_793.rpd).
6. Enter the password, and click OK.
7. Click Select for the Modified Repository field.
8. In the Select Modified Repository dialog box, select the repository that contains the customizations you made to the previous version of the Analytics repository.
9. Click Open, type the password, and then click OK.

10. In the Decision drop-down list, select the action you want to take regarding the repository change, or accept the default action.
11. To locate subsequent rows with empty Decision fields, click the Decision header cell.

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

12. Click Merge.

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

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

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

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

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

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

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

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

### 7.7.5 Regression Testing the Oracle BI Repository Merge

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

#### To perform regression testing

1. Run the reports that are necessary to include in the regression suite. These reports might be a subset of the reports in the Presentation Catalog.
2. Collect the logical SQL generated in the previous step. You can do this using Usage Tracking or by parsing the query log file.

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

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

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

4. Edit the logical SQL test scripts to account for the name changes or modifications resulting from the upgrade.
5. Execute the edited logical SQL against the merged repository, and save the results.
6. Compare the results from the steps above and try to explain the differences. If it is determined that these differences are due to the upgrade process, then you have to correct them manually.

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

## 7.8 Upgrading the Oracle BI Presentation Catalog

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

- Has prebuilt applications already installed, and
- Has customized the current Oracle BI Presentation Catalog

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

This process includes the following tasks:

- [Section 7.8.1, "Trimming the Input Presentation Catalog"](#)
- [Section 7.8.2, "Upgrading the Oracle BI Presentation Catalog to a Newer Version"](#)
- [Section 7.8.3, "Testing the Results of the Presentation Catalog Upgrade"](#)

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**Caution:** In releases of Oracle BI Applications previous to 7.9, the Presentation Catalog (formerly known as the Siebel Analytics Web Catalog) was stored in a single file rather than in a directory structure of individual files. If you have a previous version of the Presentation Catalog, you will need to convert it to the new format. For more information about how to convert the Presentation Catalog to the new format, see the *Oracle Business Intelligence Infrastructure Upgrade Guide*

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### 7.8.1 Trimming the Input Presentation Catalog

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

### 7.8.2 Upgrading the Oracle BI Presentation Catalog to a Newer Version

The Presentation Catalog upgrade process makes use of three catalogs:

- The *original* Presentation Catalog. This is the unmodified Presentation Catalog that you received with the Oracle BI Applications release that you are upgrading from.

- The *new* Presentation Catalog. This is the Presentation Catalog that is installed in the OracleBIData\web\catalog folder with the installation of Oracle BI Applications.
- The *current* Presentation Catalog. This is the Presentation Catalog currently in use at your organization.

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

#### To upgrade your Presentation Catalog to a newer version

1. Make a backup copy of the current Presentation Catalog, rename the folder <catalogname>\_old, and move it to a temporary location.
2. Copy the original Presentation Catalog into the folder that holds your current Presentation Catalog and rename it <catalogname>\_Original.
3. Start Catalog Manager and open the new Presentation Catalog in offline mode.
4. Select Tools, then select Upgrade Catalog.
5. In the original Presentation Catalog field, browse to locate the original Presentation Catalog.
6. In the Current Presentation Catalog field, browse to locate your current Web Catalog, <catalogname>\_old.
7. Click OK.
8. Resolve any upgrade differences as follows:
  - a. Review each unresolved difference in the Unresolved differences list.
  - b. For each unresolved difference, select the version that you want to keep.
  - c. Click OK.

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

9. Review the upgraded Presentation Catalog, and, if necessary, set permissions for objects.
10. Save the new Presentation Catalog.

### 7.8.3 Testing the Results of the Presentation Catalog Upgrade

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

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

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

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

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



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# Upgrading the Oracle BI Repository for Pharma Analytics

This appendix contains instructions for upgrading the Oracle BI repository for Pharma Analytics.

In Oracle Business Intelligence Applications release 7.9.4, the Pharma Analytics business model and Core business model are merged. Because of this merge, the process of upgrading the Oracle BI repository has some steps that differ from the standard Oracle BI repository upgrade process.

This section includes the following topics:

- [Section A.1, "What's New or Changed in Pharma Analytics Release 7.9.4"](#)
- [Section A.2, "Pharma Analytics Dimensions in Release 7.9.4"](#)
- [Section A.3, "Merging Siebel Analytics and Oracle BI Repositories for Pharma Analytics"](#)
- [Section A.4, "Replacing Common Dimensions After the Repository Merge"](#)

## A.1 What's New or Changed in Pharma Analytics Release 7.9.4

The following changes in Pharma Analytics are included in release 7.9.4:

- Pharma Analytics physical tables are now included in the Oracle Business Analytics Warehouse.
- Pharma Analytics logical tables (fact and dimension tables) are now included in the Core business model.
- As a Core module, Pharma Analytics shares certain common dimensions, such as date, customer, contact, and security, with other Core modules.

## A.2 Pharma Analytics Dimensions in Release 7.9.4

[Table A-1](#) lists the common Pharma Analytics dimensions and the dimension status. Some of the Pharma dimensions are not shared with other Core modules because of specific Pharma requirements.

**Table A-1 Common Pharma Analytics Dimensions**

| Dimensions in Pre-7.9.4 Releases | Dimensions in Release 7.9.4 | Status | Comments |
|----------------------------------|-----------------------------|--------|----------|
| Dim - Accounts                   | Dim - Customer              | Shared | No value |

**Table A-1 (Cont.) Common Pharma Analytics Dimensions**

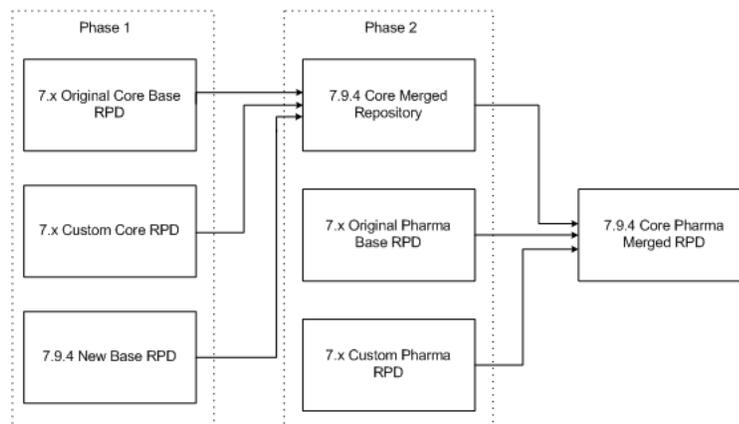
| Dimensions in Pre-7.9.4 Releases | Dimensions in Release 7.9.4    | Status     | Comments                              |
|----------------------------------|--------------------------------|------------|---------------------------------------|
| Dim - Contacts                   | Dim - Contact                  | Shared     | New name is singular                  |
| Dim - Security Dimension         | Dim - Security Dimension       | Shared     | No value                              |
| Dim - Time Period                | Dim - Date                     | Shared     | No value                              |
| Dim - Geography                  | Dim - Pharma Geography         | Not shared | Use Pharma-specific dimension in Core |
| Dim - Geography_Account          | Dim - Geography_Account        | Not shared | Use Pharma-specific dimension in Core |
| Dim - Geography_Contact          | Dim - Pharma Geography_Contact | Not shared | Use Pharma-specific dimension in Core |
| Dim - Products                   | Dim - Pharma Products          | Not shared | Use Pharma-specific dimension in Core |

### A.3 Merging Siebel Analytics and Oracle BI Repositories for Pharma Analytics

The Pharma Analytics upgrade process involves merging customizations of prior releases of the Siebel Analytics or Oracle BI repositories into the current version of the Oracle BI repository. This process follows the same principle as the Core upgrade process but includes some unique steps.

As shown in [Figure A-1](#), there are two phases to the Pharma Analytics upgrade process.

**Figure A-1 Phases of Repository Merge for Pharma Analytics**



#### Phase 1

As shown in [Figure A-1](#), there are two phases in the Pharma Analytics upgrade process. Phase 1 involves merging the 7.x original Core base repository (the repository that shipped with the release of Siebel Analytics or Oracle BI you are currently running), the 7.x custom Core repository, and the 7.9.4 new base repository into one output repository.

## Phase 2

Phase 2 involves merging the output repository of Phase 1 with the 7.x original Pharma Analytics base repository and the 7.x custom Pharma Analytics repository. The output repository of Phase 2 is a merged Pharma and Core repository that includes your customizations from prior releases and the new 7.9.4 data model.

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**Note:** You need to perform both phases of the upgrade process if your current, customized repository has both Core and Pharma models and the Core model is customized.

If your current, customized repository does not include the Core model or includes the Core model but the Core model is not customized, you only need to perform Phase 2.

If you only perform Phase 2, then you will not have a 7.9.4 Core merged RPD (as shown in [Figure A-1](#)). Instead, you will use the 7.9.4 new base RPD in place of the 7.9.4 Core merged RPD.

See [Table A-2](#) and [Table A-3](#) for a description of the different RPD file names.

---

The tasks in this section refer to multiple versions of the Siebel Analytics or Oracle BI repository. [Table A-2](#) provides the names and descriptions of the repositories used in Phase 1. [Table A-3](#) provides the names and descriptions of the repositories used in Phase 2.

**Table A-2 Phase 1 Repository Files**

| Repository File           | Description   |
|---------------------------|---|
| 7x_original_Core_base.rpd | The trimmed, original (standard) repository for the version you are upgrading from.                             |
| 7x_custom_Core.rpd        | The trimmed, custom 7.x repository that includes the Core model customizations.                                 |
| 794_new_base.rpd          | The trimmed, 7.9.4 repository that includes related Core and Pharma modules in one Core model (logical folder). |

**Table A-3 Phase 2 Repository Files**

| Repository File             | Description  |
|-----------------------------|--|
| 794_Core_merged.rpd         | The output repository from Phase 1.<br>If you do not perform Phase 1, then use the 7.9.4 new base RPD in place of the 7.9.4 Core merged RPD. |
| 7x_original_Pharma_base.rpd | The trimmed, original 7.x repository that includes the Pharma model, which was not customized.   |
| 7x_custom_Pharma.rpd        | The trimmed, customized repository that includes a customized Pharma model.  |
| 794_Core_Pharma_merged.rpd  | The final, merged 7.9.4 repository that includes a single Core model (logical folder), including all the customized content.                 |

### A.3.1 Creating Working Folders

You will use the working folders to hold the repository files after the different stages of the merge process.

Create a folder for the merge process, such as \OracleBIPharmaUpgrade, and then create the following subfolders:

- Original
- AfterTrimDown
- AfterEqualize
- AfterMerge
- AfterManualWork
- AfterRegressions

### A.3.2 Trimming Repository Files

Trimming the repositories so that you upgrade only the content that is in use can narrow the upgrade scope and eliminate unnecessary complexities during the merge process.

#### A.3.2.1 Trimming the Original Base Repository Files

You can trim the original base repository files (Core and Pharma) by extracting projects or manually trimming down repository objects.

**To trim the original base repository files**

1. If you are performing Phase 1 of the upgrade process, trim the original Core base repository file.
2. Save the file as 7x\_original\_Core\_base.rpd (where 7x represents the release of Siebel Analytics or Oracle BI) in the AfterTrimDown subfolder.
3. Trim the original Pharma base repository file.
4. Save the file as 7x\_original\_Pharma\_base.rpd in the AfterTrimDown subfolder.

#### A.3.2.2 Trimming the New Base Repository File

The new base repository file that you received with the current Oracle BI Applications release, contains one Core model (logical folder), which holds Pharma and Core repository objects.

**To trim the new base repository file**

1. Trim the new base repository file.
2. Save the file as 794\_new\_base.rpd in the AfterTrimDown subfolder.

#### A.3.2.3 Trimming the Custom Repository Files

If you are performing Phase 1 of the upgrade process, you will have a 7x custom Core repository file (7x\_custom\_core.rpd) that contains the 7x original Core base contents and your customizations.

You will also have a 7x custom Pharma repository file (7x\_custom\_Pharma.rpd) that contains the 7x original Pharma base contents and your customizations.

Save these files in the AfterTrimDown subfolder.

### A.3.3 Renaming Objects in the Original Pharma Base Repository File

In the 7x original Pharma base repository file and the 7x custom Pharma repository file, you need to rename some repository objects to be compatible with the new data model.

#### To rename objects in the Pharma repository files

1. In the Server Administration Tool, open the 7x \_original\_Pharma\_base.rpd file.
2. In the Business Model and Mapping layer, rename all instances of Pharma to Core.
3. In the Physical layer, do the following:
  - a. Rename all instances of Pharma to Core.
  - b. Rename all instances of Pharma Data Warehouse to Oracle Data Warehouse.
  - c. Make sure the connection pool is named as Data Warehouse Connection Pool.
  - d. Make sure Catalog and dbo appear below the connection pool entry.
4. Repeat Steps 1 through 3 using the 7x\_custom\_Pharma.rpd file.

### A.3.4 Equalizing the Oracle BI Repositories

The equalization process in the standard Oracle BI repository upgrade uses the original base repository from a previous release as a starting point. This type of equalization is referred to as "backward" equalization. The Pharma upgrade uses what is called "forward" equalization, in which you use the repository file from the current release as a starting point and equalize the 7x base repository file and the 7x custom repository file to it.

You will first need to prepare the MAP file for "forward" equalization before you execute the equalization.

#### To prepare the MAP file for "forward" equalization

1. Copy the appropriate MAP file from the \OracleBI\Upgrade folder into the folder where you will execute equalizerpds.exe.

---

**Note:** The naming convention of the MAP files is rename<release from which you are upgrading>-<release to which you are upgrading>.map. To upgrade to the current release, select 79 as the release to which you are upgrading.

For example if you are upgrading from release 7.8.4 to release 7.9.4, you should use the file rename784\_79.map.

---

2. Open the MAP file in Excel.
3. In the Text Import Wizard, accept the default in the Step 1 dialog by clicking Next.
4. In the Step 2 dialog of the Text Import Wizard, do the following:
  - a. Make sure the Tab check box is selected in the Delimiters region.
  - b. In the Text qualifier list, select None.
  - c. Click Next.
5. In the Step 3 dialog, click Finish.

The file opens in an Excel spreadsheet window and contains three columns.

6. Switch the order of the second and third columns by cutting the third column and inserting it as the second column.
7. Save the file.
8. Check to make sure the string format is correct.

#### To equalize the repository files

1. Run equalizerpds.exe.

An example of the equalizerpds command is as follows:

```
equalizerpds -A Administrator -B SADMIN  
-C \OracleBIPharmaUpgrade\AfterTrimDown\794_new_base.rpd  
-D Administrator -E SADMIN  
-F \OracleBIPharmaUpgrade\AfterTrimDown\7x_custom_Pharma.rpd  
-O \OracleBIPharmaUpgrade\AfterEqualize\7x_custom_Pharma.rpd  
-X -J rename784-79.map
```

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

2. Repeat Step 1 to equalize each of the files in AfterTrimDown to 794\_new\_base.rpd.
3. To verify the process completed successfully, compare the size of the repositories. The output repository (-O) should be close to the same size as the repository you equalized (-F).

### A.3.5 Merging the Core Repository Files

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**Note:** You need to perform this procedure if your customized repository has both Core and Pharma models and the Core model is customized. If the customized repository does not include the Core model or includes the Core model but the Core model is not customized, you do not need to perform this step.

---

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This step involves a three-way merge on the Core repository. For a description of the files that will be merged in this procedure, see [Section A.3, "Merging Siebel Analytics and Oracle BI Repositories for Pharma Analytics."](#)

#### To merge the core repository files

1. Copy 7x\_original\_Core\_base.rpd, 7x\_custom\_Core.rpd, and 794\_new\_base.rpd to the AfterMerge folder.
2. In the Server Administration Tool, open the 794\_new\_base.rpd file.
3. From the Administration Tool menu bar, select File, then select Merge.
4. In the Select Original Repository dialog, select 7x\_original\_Core\_base.
5. Enter the password, and click OK.
6. Click Select for the Modified Repository field.
7. In the Select Modified Repository dialog, select 7x\_custom\_Core.rpd.
8. Click Open, type the password, and then click OK.
9. In the Decision list, select the action you want to take regarding the repository change, or accept the default action.

For information about making decisions, see [Section A.3.7, "Making Merge Decisions in the Server Admin Tool."](#)

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

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

11. Click Merge.

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

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

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

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

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

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

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

13. Save the merged repository as 794\_Core\_merged.rpd.

### A.3.6 Merging the Pharma Repository Files

This step involves a three-way merge on the Pharma repository. For a description of the files that will be merged in this procedure, see [Section A.3, "Merging Siebel Analytics and Oracle BI Repositories for Pharma Analytics."](#)

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**Note:** If you did not perform Phase 1 of the upgrade process you will not have a 794\_Core\_merged.rpd file. In place of the 794\_Core\_merged.rpd file, you should use the 794\_new\_base.rpd file.

---



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#### To merge the Pharma repository files

1. Copy 794\_Core\_merged.rpd, 7x\_original\_Pharma\_base.rpd, and 7x\_custom\_Pharma.rpd to the AfterMerge folder.
2. In the Server Administration Tool, open the 794\_Core\_merged.rpd file.
3. From the Administration Tool menu bar, select File, then select Merge.
4. In the Select Original Repository dialog, select 7x\_original\_Pharma\_base.
5. Enter the password, and click OK.
6. Click Select for the Modified Repository field.

7. In the Select Modified Repository dialog, select 7x\_custom\_Pharma.rpd.
8. Click Open, type the password, and then click OK.
9. In the Decision list, select the action you want to take regarding the repository change, or accept the default action.

For information about making decisions, see [Section A.3.7, "Making Merge Decisions in the Server Admin Tool."](#)

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

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

11. Click Merge.

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

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

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

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

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

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

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

13. Save the merged repository as 794\_Core\_Pharma\_merged.rpd .

### A.3.7 Making Merge Decisions in the Server Admin Tool

When making decisions about merging repository objects in the Server Admin Tool, you should consider the following points:

- For objects that do not appear in the new base repository, you should normally choose "current," which will incorporate the changes into the new base repository.
- For objects added to the new base repository, you should normally choose "current," which will keep the changes.
- For objects in the original repository that were replaced with new objects, you may see decisions for removing the old objects from the current repository and adding the new objects. Choosing "current" will replace the old objects.
- For new customizations that you added to a repository, choose "modified" to keep the changes.

- If an object is changed in both the customized repository and the new base repository, the description "changed in both," may appear. In such cases, choose "current" to keep the object as it is in the new base repository, or choose "modified," to keep the object as it is in the customized repository.

## A.4 Replacing Common Dimensions After the Repository Merge

After the repository file merge, all preconfigured presentation dimension tables and columns should be merged properly and sourcing from the new logical dimensions in the Core model. For example, Account Name in the Account presentation table should source from "Core"."Dim - Customer"."Account Name," and Gross Margin in the Product presentation table should source from "Core"."Dim - Pharma Products"."Gross Margin."

However, customized presentation tables and columns may still source from old dimensions. [Table A-4](#) lists the common dimensions that have new names in release 7.9.4. If you customized the dimensions listed in [Table A-4](#), you need to replace the old dimension name with the new dimension name.

**Table A-4** *New Names for Common Pharma Analytics Dimensions*

| Name of Dimension in Pre-7.9.4 Releases | Name of Dimension in Release 7.9.4 | Status | Comments             |
|---|------------------------------------|--------|----------------------|
| Dim - Accounts                          | Dim - Customer                     | Shared | No value             |
| Dim - Contacts                          | Dim - Contact                      | Shared | New name is singular |
| Dim - Time Period                       | Dim - Date                         | Shared | No value             |

### To replace old common dimension names with the new release 7.9.4 names

1. In the Core logical folder in the Server Admin Tool, find the old dimension name as listed in [Table A-4](#), for example, "Dim - Accounts".
2. Right-click the old dimension name, then click Display Related, and then click Presentation Column.
3. Replace the presentation columns with the same columns from the new logical dimension, for example, "Dim - Customer".
4. To verify you replaced the presentation columns correctly, search for presentation columns on the Core logical dimension, such as "Core - Accounts". If the return is empty, then it is safe to delete the old dimension, for example, "Dim - Accounts".



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