



ORACLE

Siebel Migration Application

Walk-Through for Siebel CRM Administrators

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Safe harbor statement



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Outline



- Overview of the Migration Application
- Types of Migration
 - Full vs. Incremental
 - Synchronous vs. Asynchronous
- Resources that Migrate
- Relationship between Workspaces and Migration
- Migration Scenarios
- What's Next



Overview of Migration Application

GOALS

- Understand basic setup
- Define Migration object types

Overview of the Migration Application

- Manages moving configuration and data between environments
 - Repository data (applets, BusComps, schema, workflow, etc.)
 - Administrative data (List Of Values)
 - Any other data (via ADM)
 - Manifest data (*future*)
- Replaces “Dev2Prod” and similar utilities
- Options
 - User Interface from any configured Application Interface (AI) node
 - REST API for automation

Migration Application User Interface

SMC Profile

- Defined in Siebel Management Console (SMC)
- Specify where to store persistent data
 - Connections
 - Migration Plans
 - Execution Status
 - Execution Log
- Specific setup depend on version
 - Original Version specified DB information
 - Newer Version (20.10+) uses REST
 - No direct database connectivity needed
 - Combines authentication and storage
- Storage location can be any Siebel database

Migration Profiles

Search

Migration Profiles

Name Access Permission Last Updated

No records to view

Migration Profiles

Search

Migration Profiles

Name Access Permission Last Updated

OldProfile_01 Read-Write 2020/08/05 11:51:57

OldProfile_02 Read-Write 2020/08/05 07:17:30

MigProfile Read-Write 2020/08/03 07:18:20

slc07foa_20200726110419 Read-Write 2020/08/02 23:09:01

OldProfile_05 Read-Write 2020/07/26 12:33:23

View 1 - 5 of 8

Review Profile OldProfile_01

Connectivity and Authentication

Migration REST Endpoint for Authentication and Data Store*

https://slc15bmu.us.oracle.com:16690/siebel/v1.0

Authentication Type*

Basic Authentication

Single Sign-On

Logging Information

Other Information

siebdb

Migration Application User Interface

SMC Deployment

- Specify Application Interface Node and Port
- Give it a name (typically “migration”)
 - <https://myAlnode.company.com/siebel/migration>

NOTES

- Deploy on as many AI nodes as desired
- No Tomcat or other restarts necessary

The screenshot displays the Siebel Migration Application User Interface. On the left is a dark sidebar with a navigation menu containing: Siebel Deployment, Enterprise - siebelr, siebelr, Application Interfa..., siebelr, Migration, migration (highlighted in blue), Profiles, Configuration, Management, Enterprise Cache, and Settings.

The main content area is titled 'Hierarchy - Migration' and features a tree diagram showing the deployment structure:

```
graph TD; SD[Siebel Deployment] --> M[Migration]; M --> migration[migration siebelr.demo.tst:443];
```

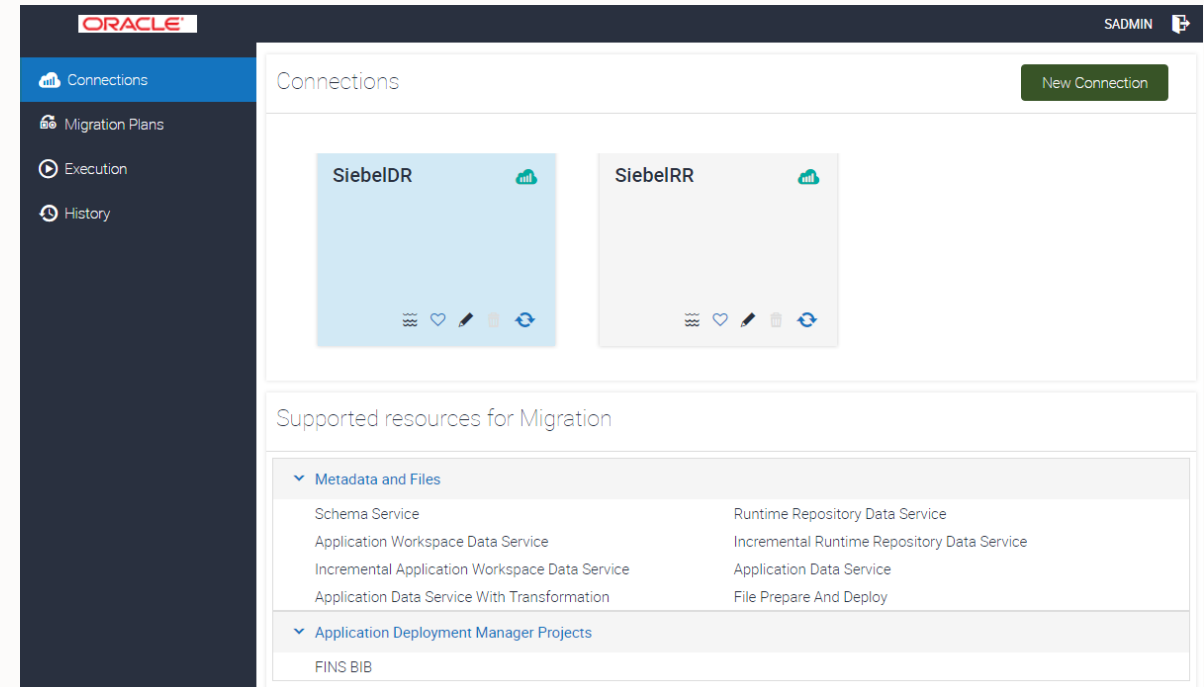
Below the hierarchy is a 'Review Deployment' section with two expandable panels:

- Deployment Information:**
 - Host Name:HTTPS Port*: siebelr.demo.tst:443
 - Profile*: MigrationProfile
- Migration Deployment Parameters:**
 - Siebel Migration Name*: migration
 - Siebel Migration Description: migration

Migration Application User Interface

Connections

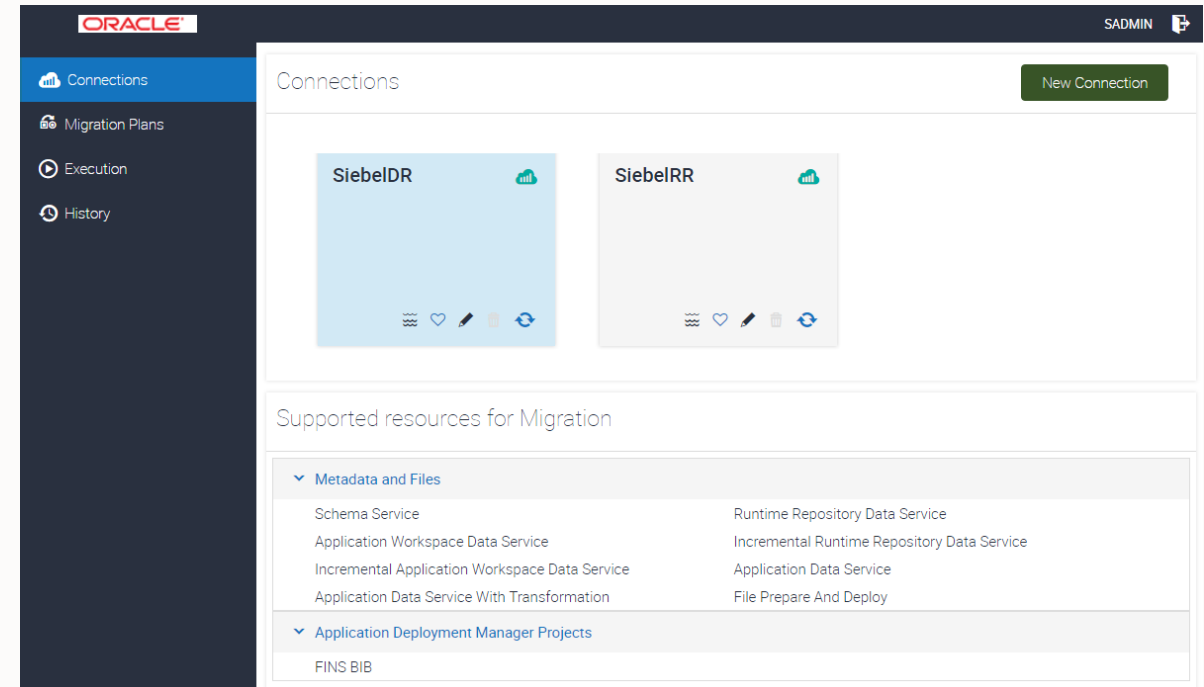
- Define REST connection points
 - Source—Design Repository (DR) environment
 - Target—Runtime Repository (RR) environment
- Single Migration App/Multiple Sources/Targets
 - Usually one Source (development environment)
 - Many Targets (Test, UAT, Pre-Prod, Prod)



Migration Application User Interface

Connections (continued)

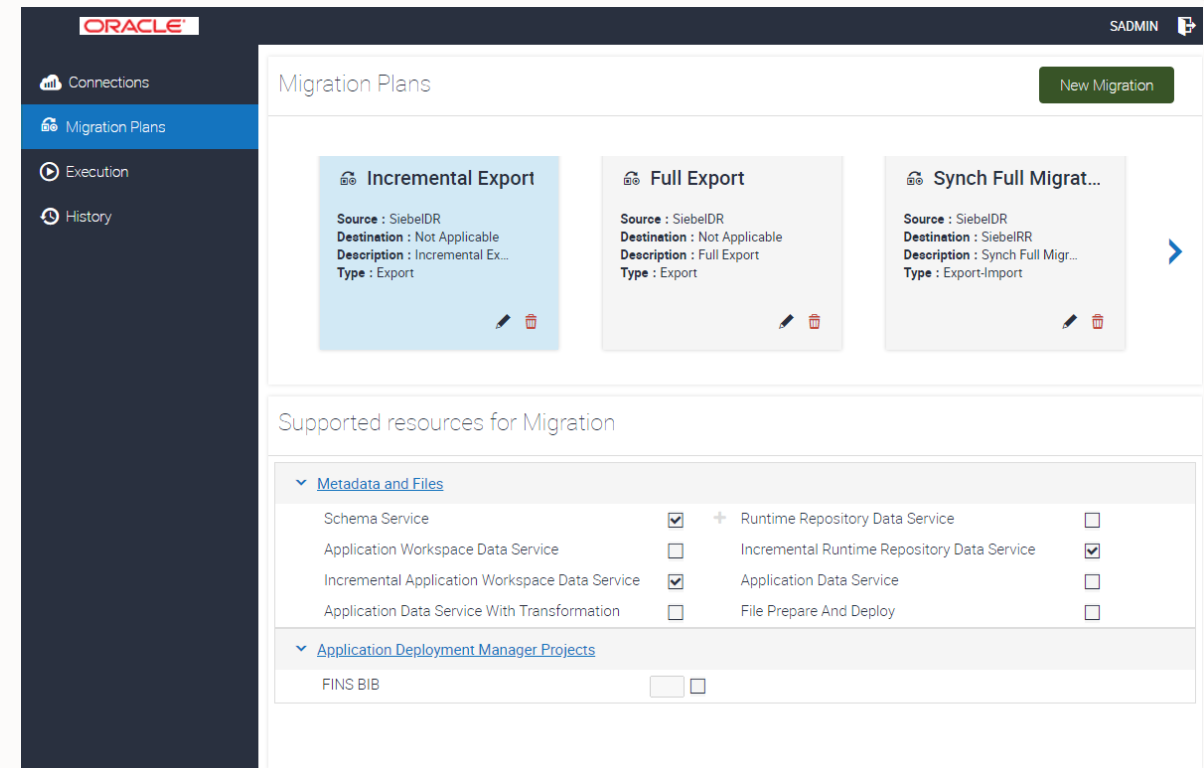
- Show resources available for migration
 - Standard resources
 - ADM Projects
- Resources are types of data to migrate
 - Schema
 - Repository
 - Application data (e.g., List Of Values)



Migration Application User Interface

Migration Plans

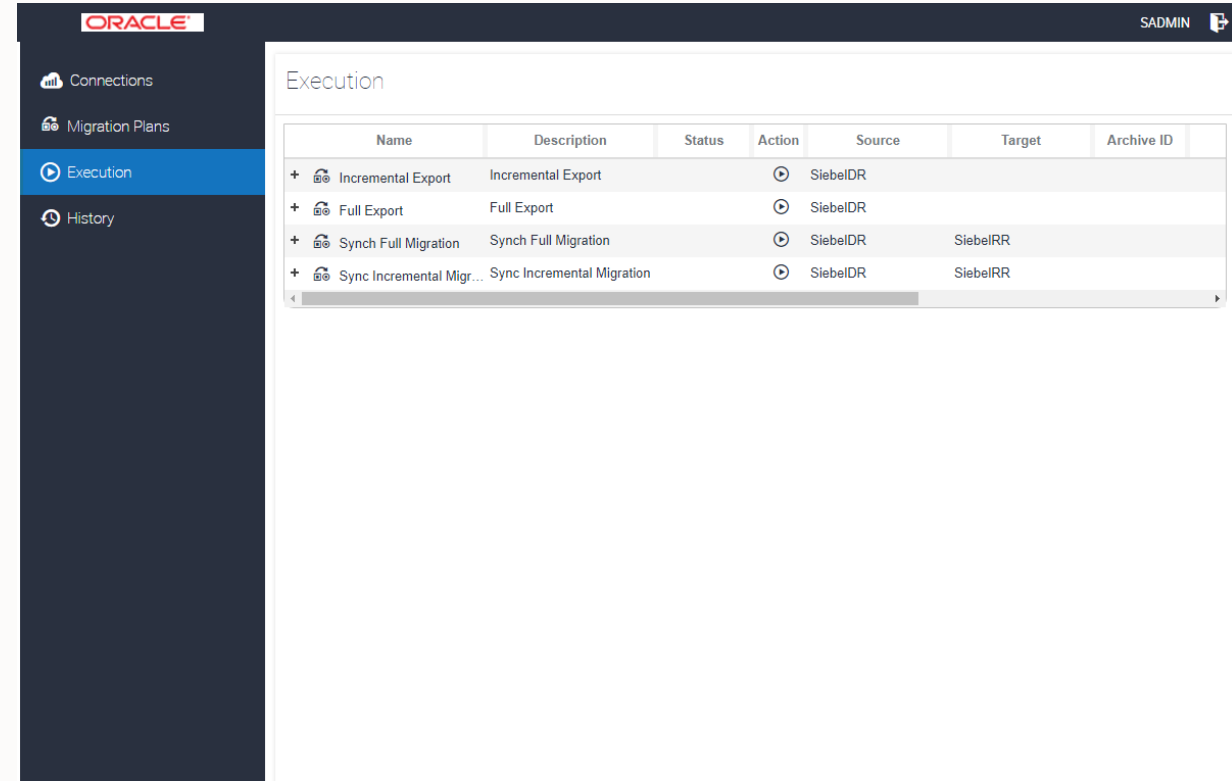
- Define two things
 - Source and Target
 - Resources
- Many migration plans allowed
 - Full Migration Dev to Test
 - Incremental Migration Dev to Test
 - Full Migration Dev to Prod
 - Incremental Migration Dev to Prod
 - Etc.



Migration Application User Interface

Execution

- Performs the Migration Plan
- In-process logs are available



The screenshot displays the Oracle Migration Application User Interface. The top navigation bar includes the Oracle logo and the user name 'SADMIN'. The left sidebar contains a menu with the following items: 'Connections', 'Migration Plans', 'Execution' (highlighted in blue), and 'History'. The main content area is titled 'Execution' and features a table with the following columns: Name, Description, Status, Action, Source, Target, and Archive ID. The table contains four rows of migration tasks, each with a plus icon in the Name column and a play icon in the Action column.

Name	Description	Status	Action	Source	Target	Archive ID
+ Incremental Export	Incremental Export		▶	SiebelDR		
+ Full Export	Full Export		▶	SiebelDR		
+ Synch Full Migration	Synch Full Migration		▶	SiebelDR	SiebelRR	
+ Sync Incremental Migr...	Sync Incremental Migration		▶	SiebelDR	SiebelRR	

Migration Application User Interface

History

- Shows results of previous migrations
- Expanding history item gives details
- Quick links to log files

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SADMIN

Connections

Migration Plans

Execution

History

History

Name	Description	Status	Source	Target	Archive ID	
+ Synch Full Migration	Synch Full Migration	Success	SiebelDR	SiebelIRR	9SIA-EVABA	202
+ Synch Full Migration	Synch Full Migration	Error	SiebelDR	SiebelIRR	9SIA-EV77A	202
+ Synch Full Migration	Synch Full Migration	Error	SiebelDR	SiebelIRR	9SIA-EV76S	202
+ Full Export	Full Export	Success	SiebelDR		9SIA-DO1T5	202
- Full Export	Full Export	Error	SiebelDR		9SIA-DO1SX	202

Resource Name	Operation	Seq Num	Status	Log	Start Date	
Schema Service	Export	1	Success	Log	2020-08-19 18:09:07	2020-08
Runtime Repository Data Ser...	GetWatermark	2	Success	Log	2020-08-19 18:09:06	2020-08
Runtime Repository Data Ser...	Export	3	Error	Log	2020-08-19 18:09:07	2020-08
Application Workspace Data ...	GetFullSeedWatermark	4	Success	Log	2020-08-19 18:09:06	2020-08
Application Workspace Data ...	FullSeedExport	5	Success	Log	2020-08-19 18:09:07	2020-08
PostProcessing_Export	CreateManifest	6	Not Started	Log		
PostProcessing_Export	preparePackage	7	Not Started	Log		

+ Incremental Export	Incremental Export	Success	SiebelDR		9SIA-CRB5I	202
+ Incremental Export	Incremental Export	Success	SiebelDR		9SIA-CRB5B	202
+ Full Export	Full Export	Success	SiebelDR		9SIA-CR3SQ	202



Types of Migration

GOALS

- Differentiate Full vs. Incremental Migration
- Understand Synchronous vs. Asynchronous Migration

Full vs. Incremental Migration

- Full Migration seeds Target
 - Required if Source branch changes
 - Complete replacement of destination workspace data
 - Always requires server restart
- Incremental Migration
 - Delta changes from source
 - *May* require restart of destination server
 - Schema changes (possible table locks)
 - Components needing dictionary cache reset
 - These are being worked on!

Synchronous vs. Asynchronous

- Synchronous
 - Source and Target both accessible from Migration (AI) node
 - Migration automatically detects what Target needs
- Asynchronous
 - Source and Target not accessible from same Migration node
 - Target must provide context “what did I last receive?” (watermark)
 - Source exports content based on watermark (“what does Target need?”) to ZIP package
 - ZIP package manually transferred to Target
 - Target imports content from ZIP package



Resources that Migrate

GOALS

- Identify Possible Resources

Resource Types

- Schema Service
- Repository Services
 - Runtime Repository Data Service
 - Incremental Runtime Repository Data Service
- Workspace Data Services (e.g., LOVs)
 - Application Workspace Data Service
 - Incremental Application Workspace Data Service
- Non-Workspace Data Services (*datamig.inp*)
 - Application Data Service
 - Application Data Service With Transformation (*datamig.rul*)
- File Prepare And Deploy
- ADM Projects



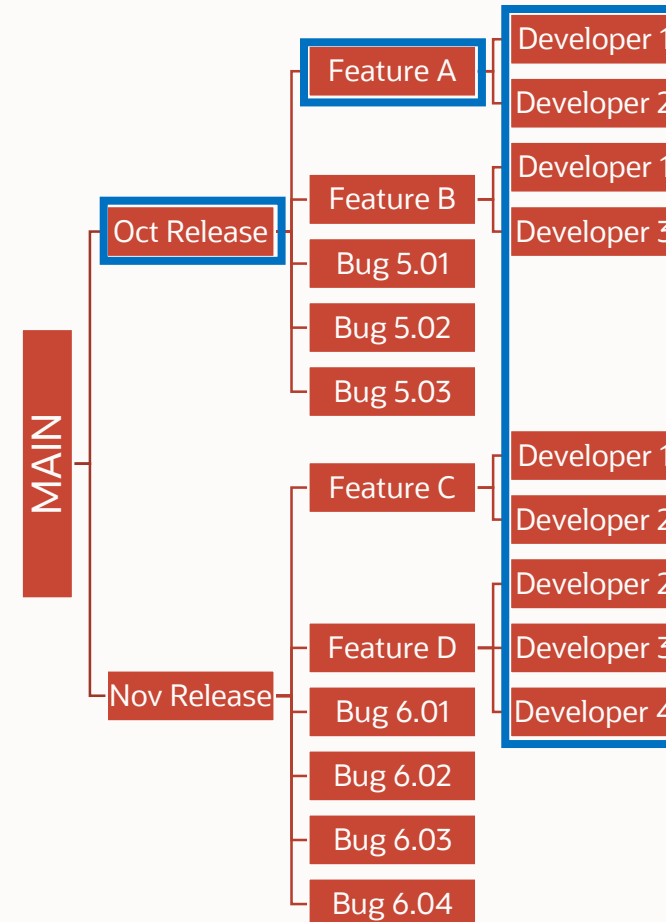
Relationship between Workspaces & Migration

GOALS

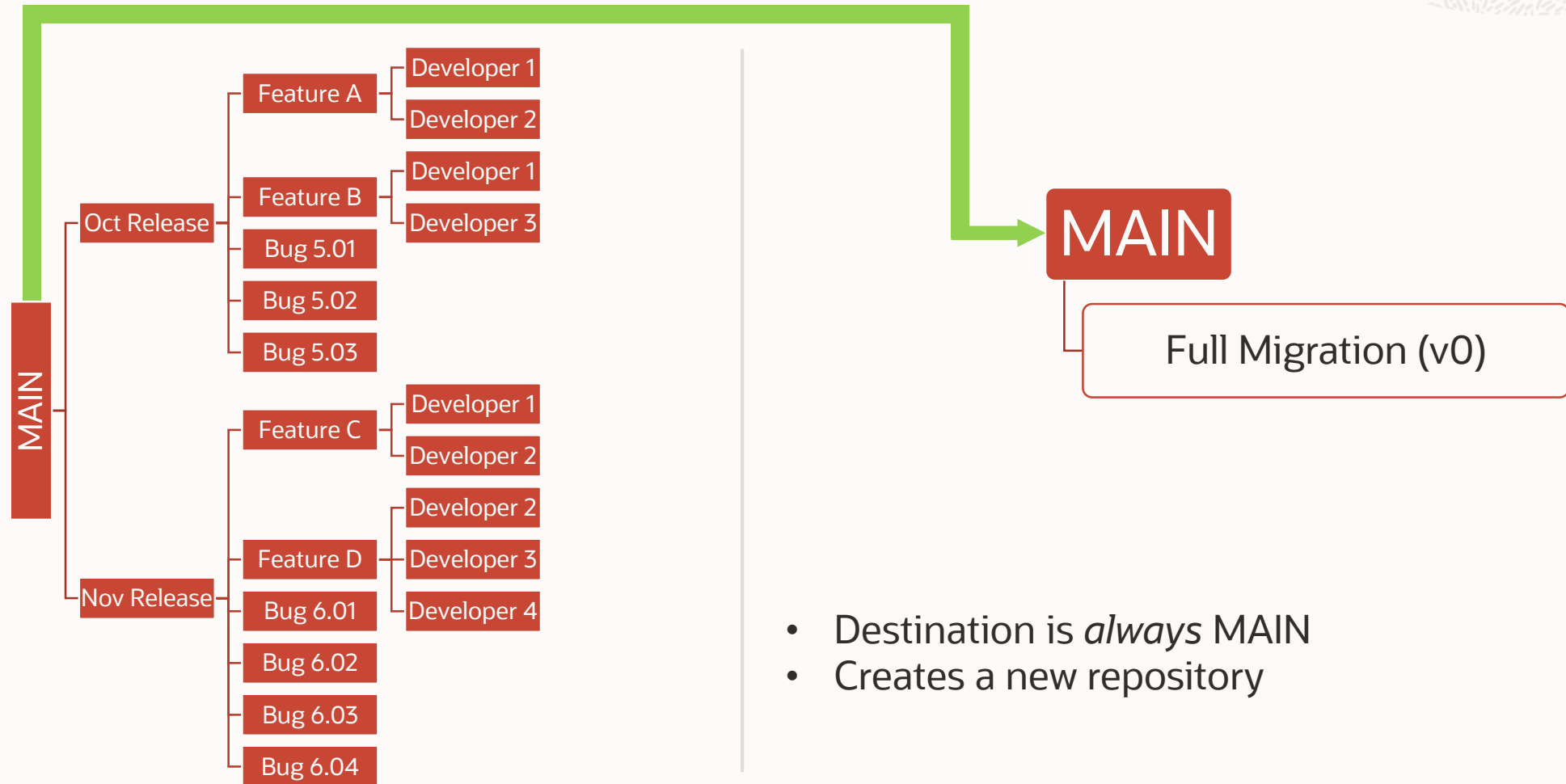
- Maximize Parallel Development Opportunities
- Optimize Testing

Basic Workspace Framework

- Developer Workspaces reserved for Design Repository (DR)
 - Cannot be migrated
 - Used for...
 - Developer Unit Testing
 - QA Unit Testing before delivery
- Integration Workspaces
 - First level branches (and MAIN) typically migrated to downstream environments
 - Lower level branches for team-level QA testing

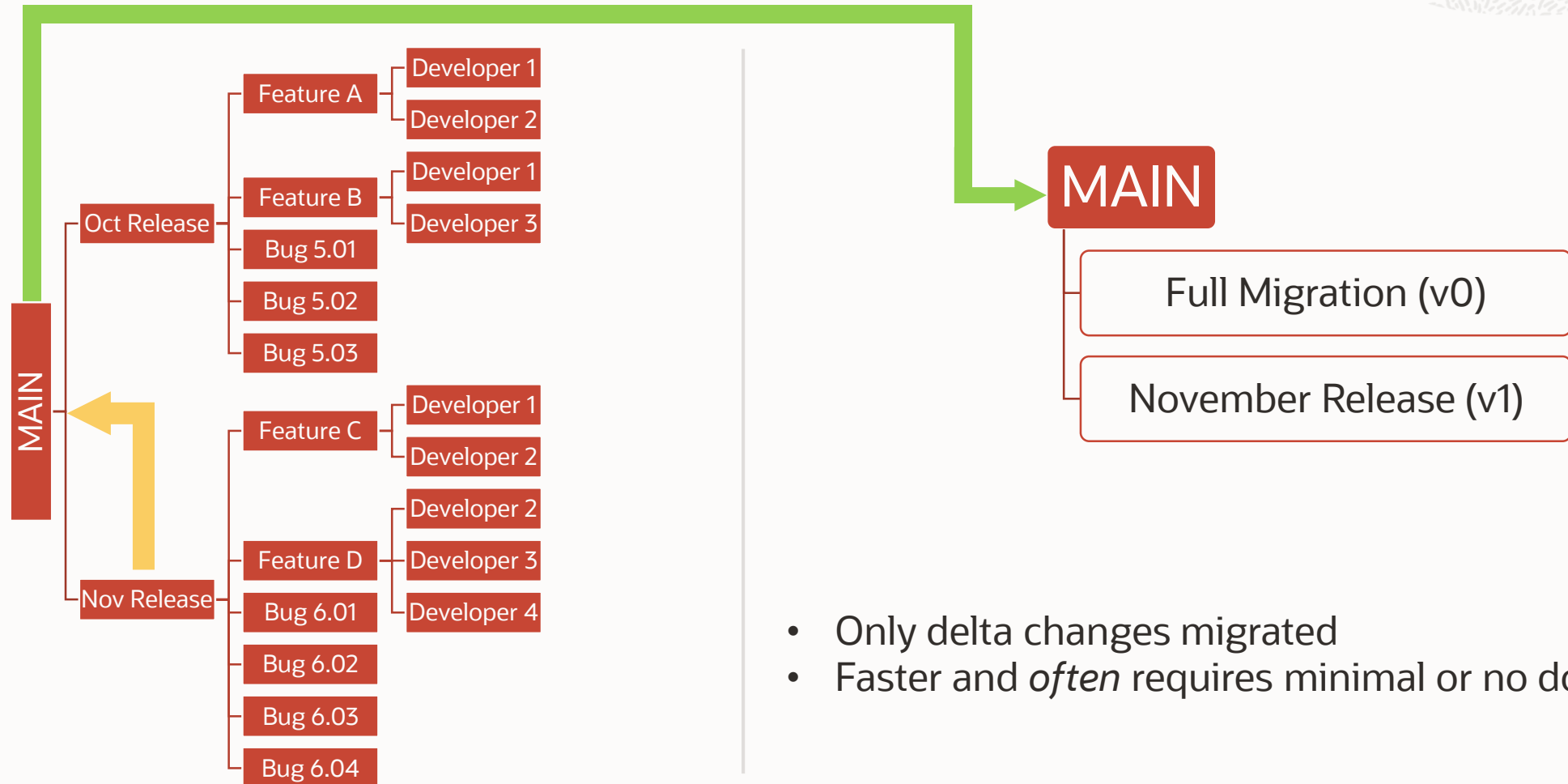


Full Migration



- Destination is *always* MAIN
- Creates a new repository

Incremental Migration



- Only delta changes migrated
- Faster and *often* requires minimal or no downtime

Full vs. Incremental Migration

When Do I Do what?

Full Migration

- First time pre-IP2017 upgrade/IRM (automatic)
- Full Publish
 - New language
- Change in Source Integration Branch
 - Reset Test environment to new release branch
 - Seldom—if ever—in Production

Incremental Migration

- Every other time than Full Migration requirements
- Hard limit of 10,000
 - 27.4 years at one per day



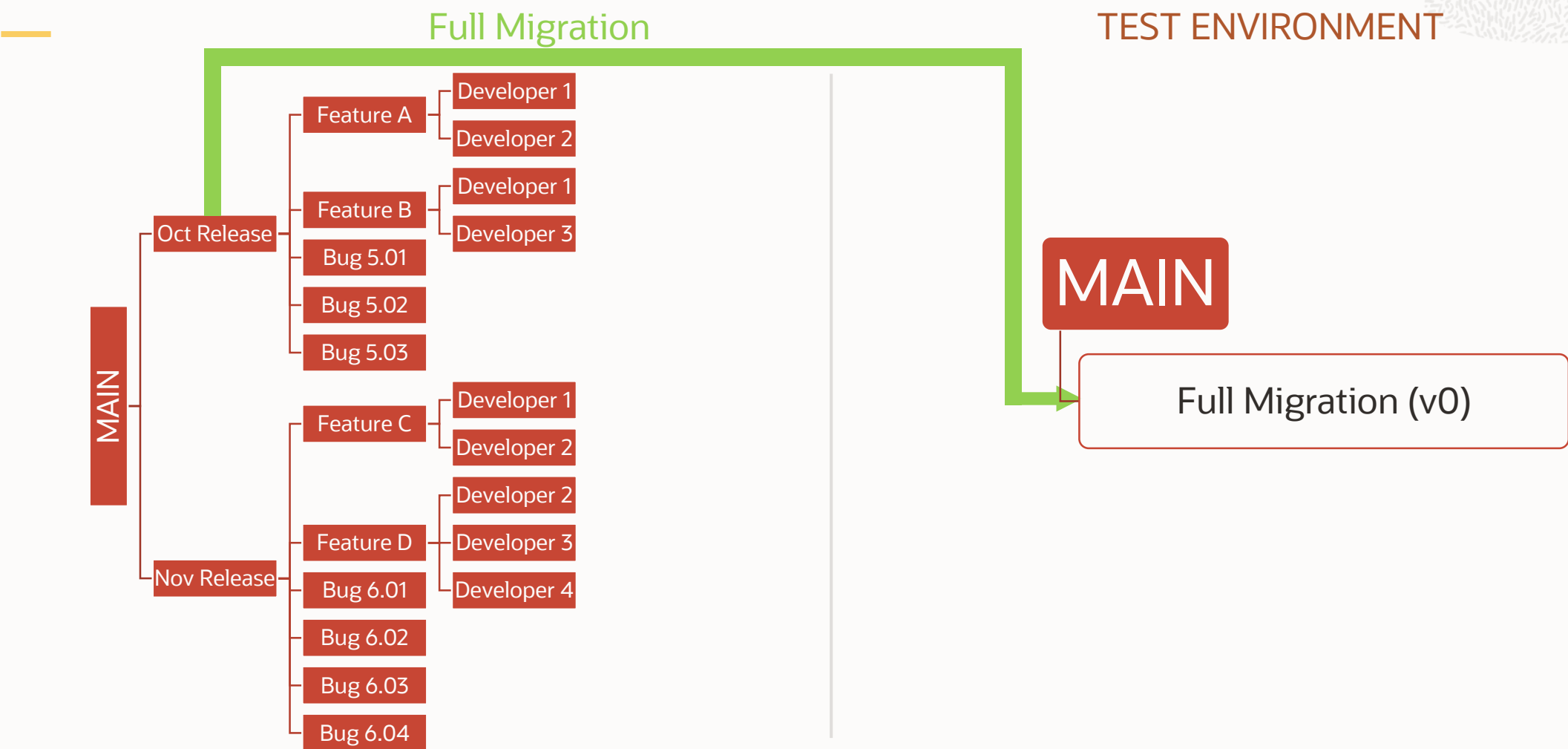
Migration Scenarios

GOALS

- Understand Development to Test
- Understand Development to Production
- Differentiate between the Two

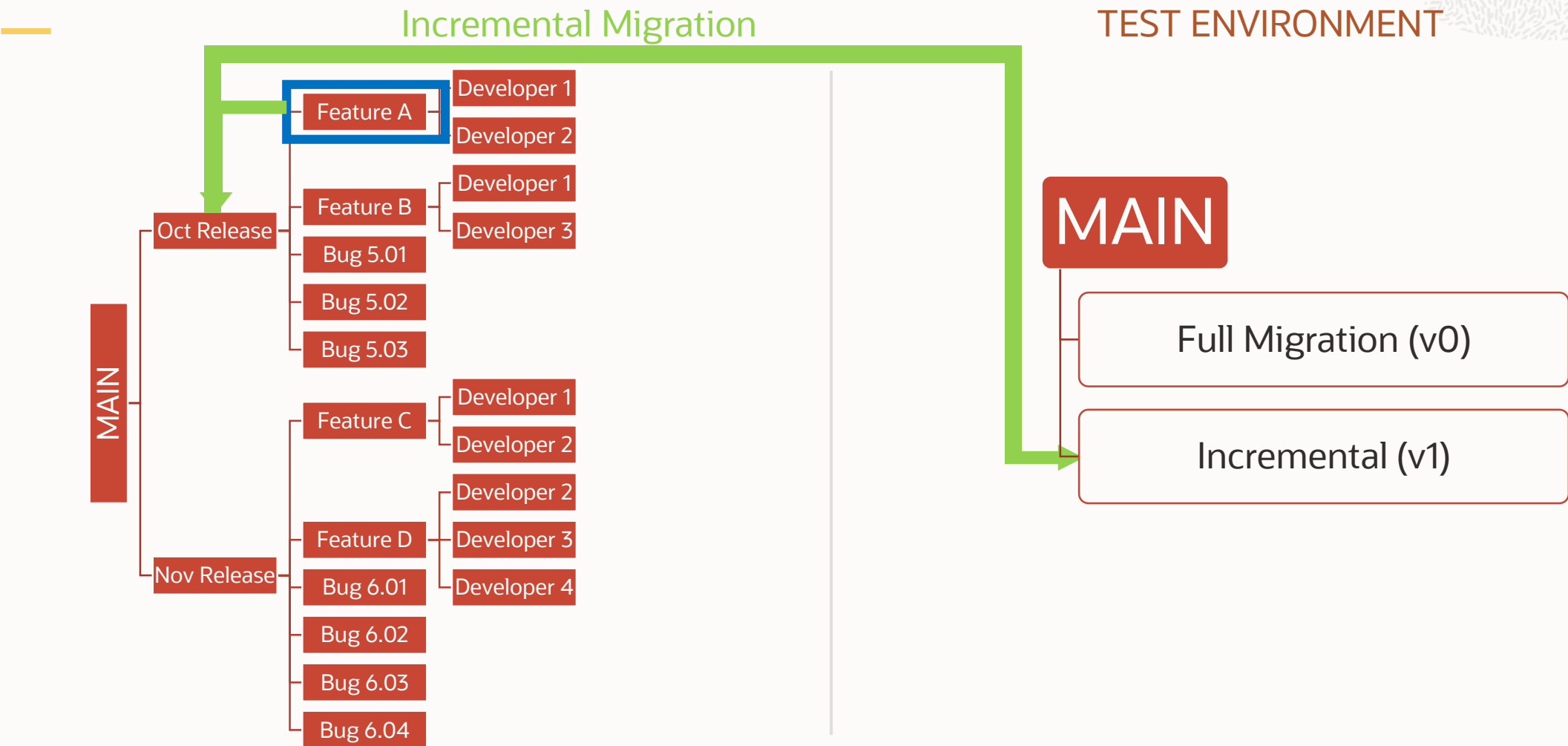
Migration Process

October Release—First IP2017 Release



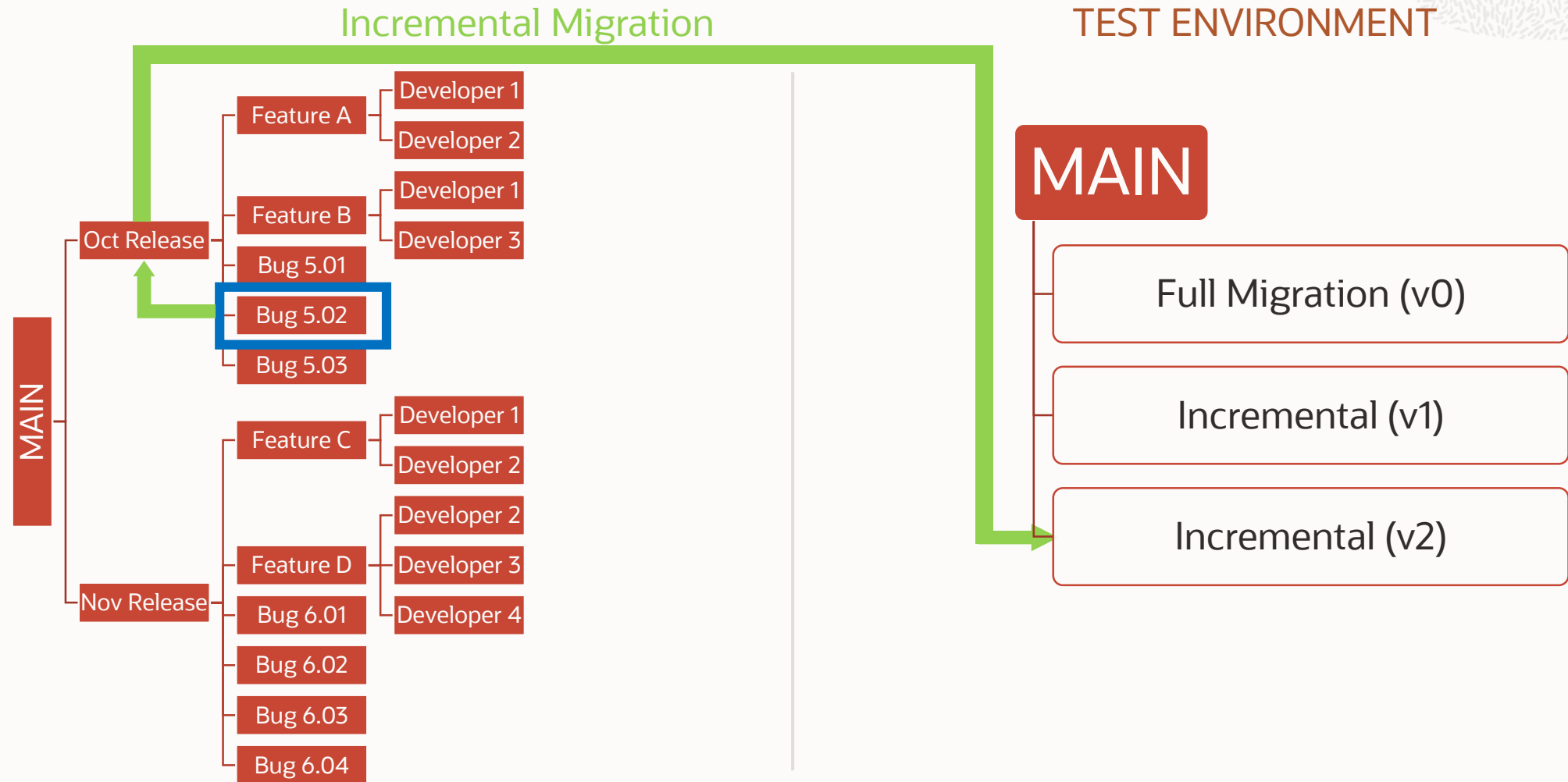
Migration Process

Bug Fixes / Features Completed in October Release



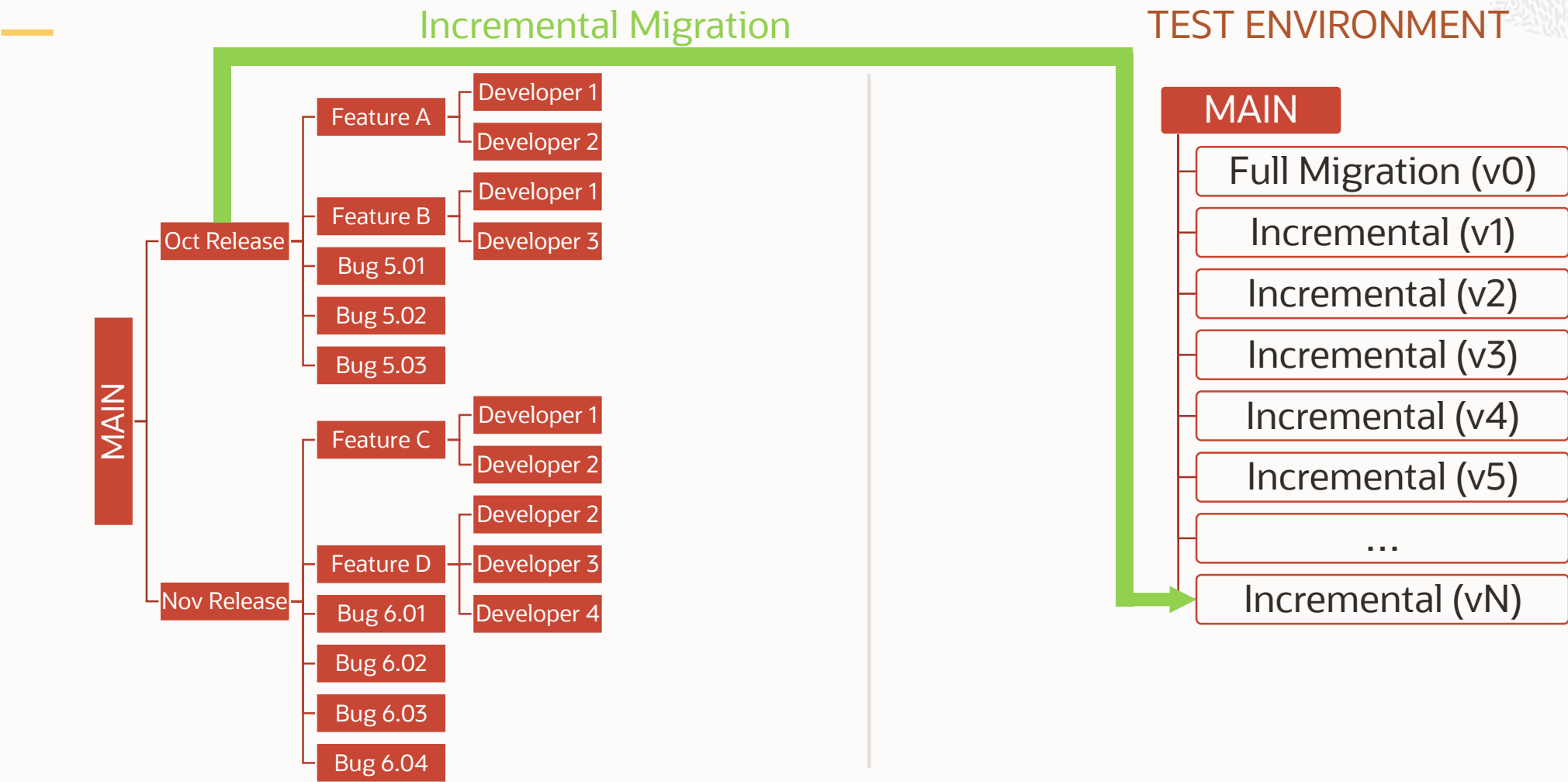
Migration Process

Bug Fixes / Features Completed in October Release



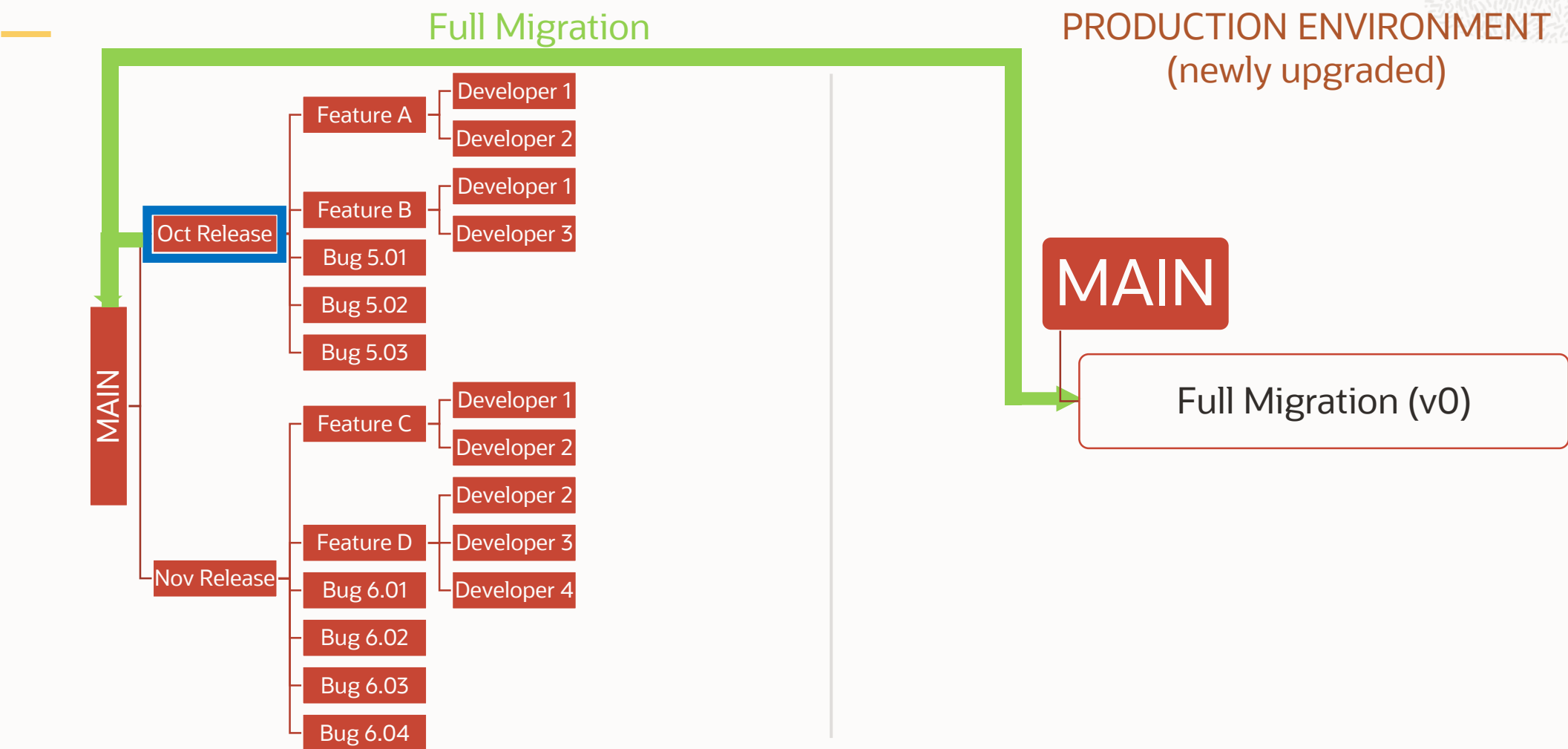
Migration Process

Bug Fixes / Features Completed in October Release



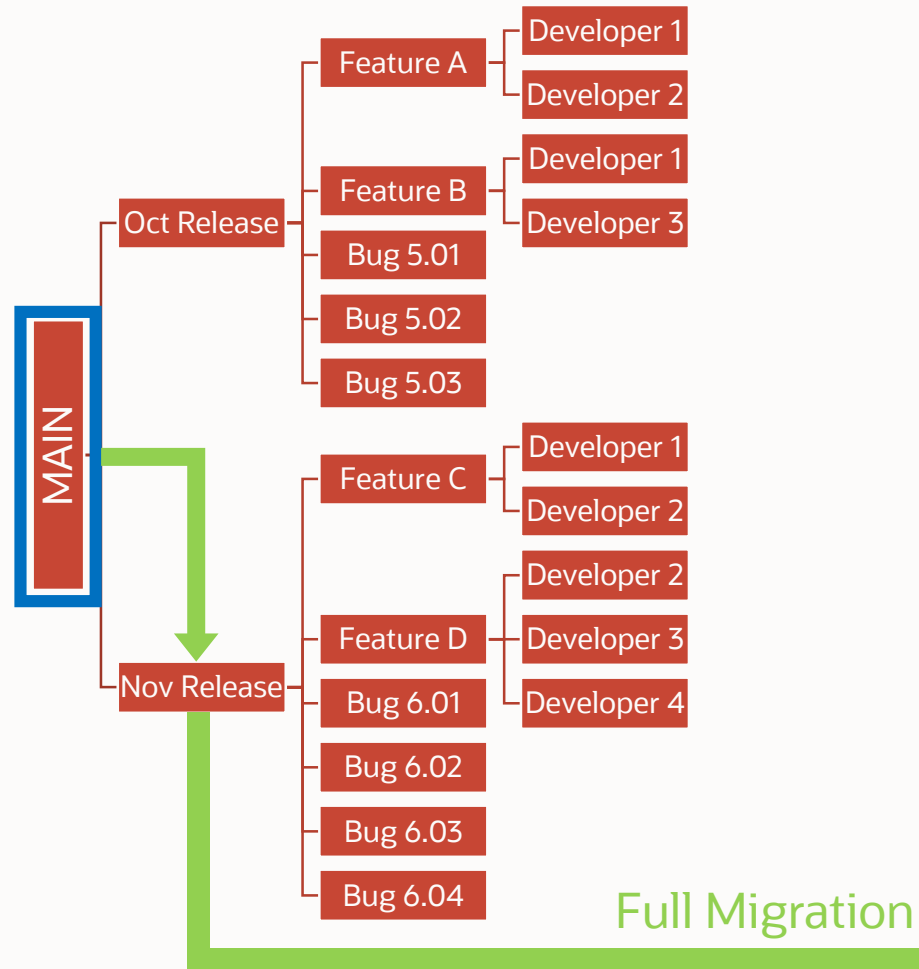
Migration Process

October Release—First IP2017 Release

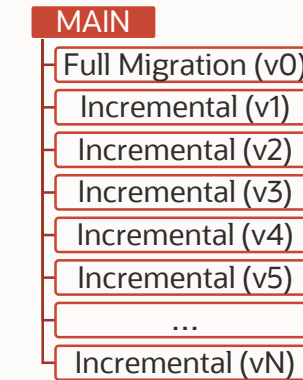


Migration Process

November Release—Start Testing



TEST ENVIRONMENT

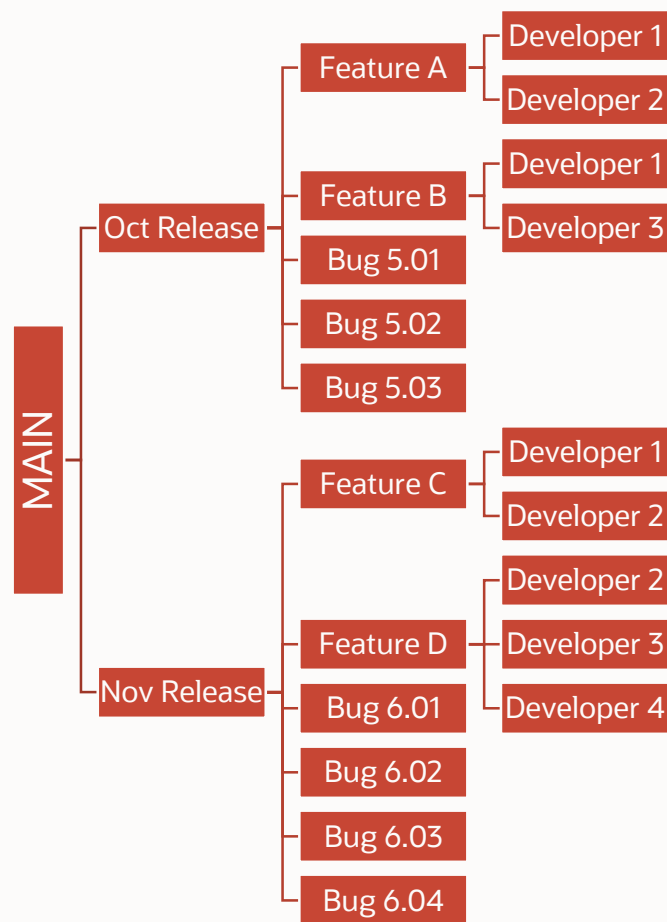


Full Migration (v0)

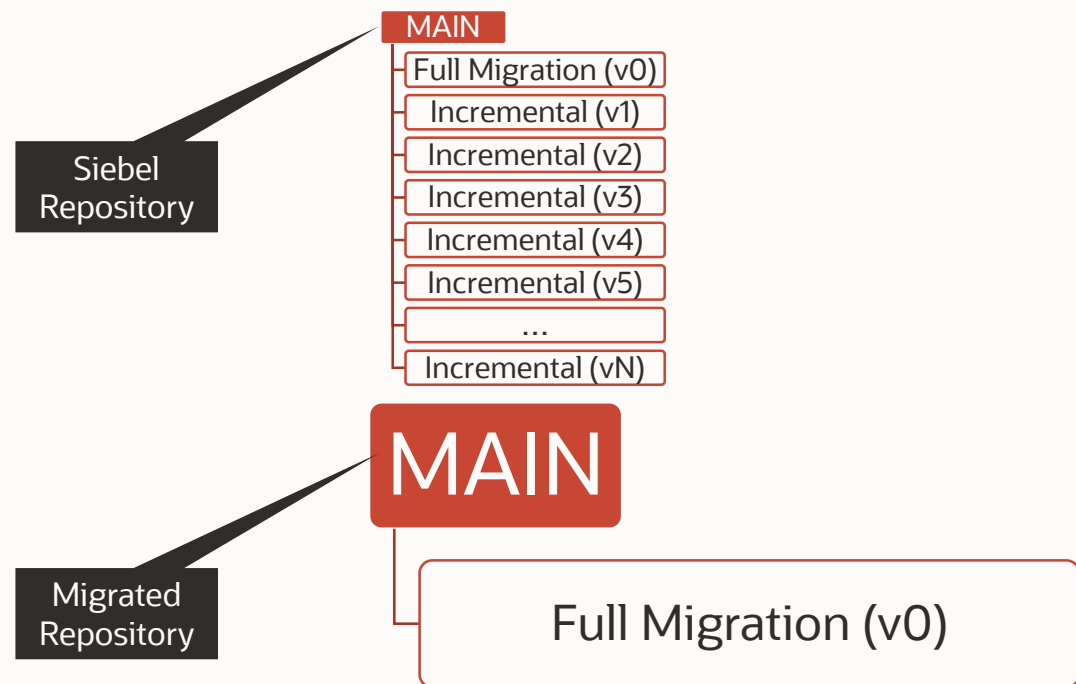
- Rebase November from MAIN
- November now includes all of October
- Full Migration—Different Branch

Migration Process

November Release—Two MAINs???



TEST ENVIRONMENT

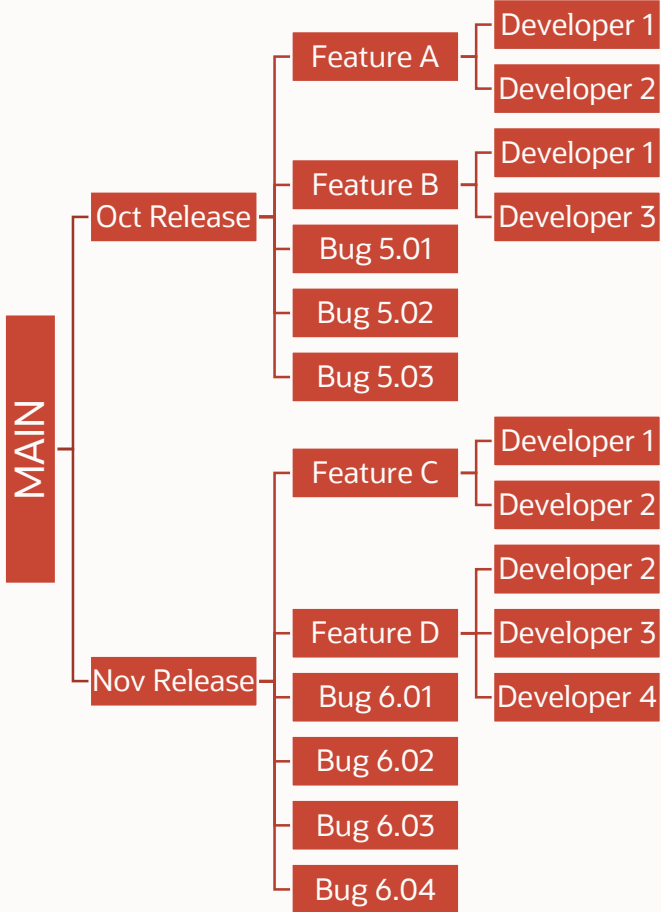


- Two Repositories

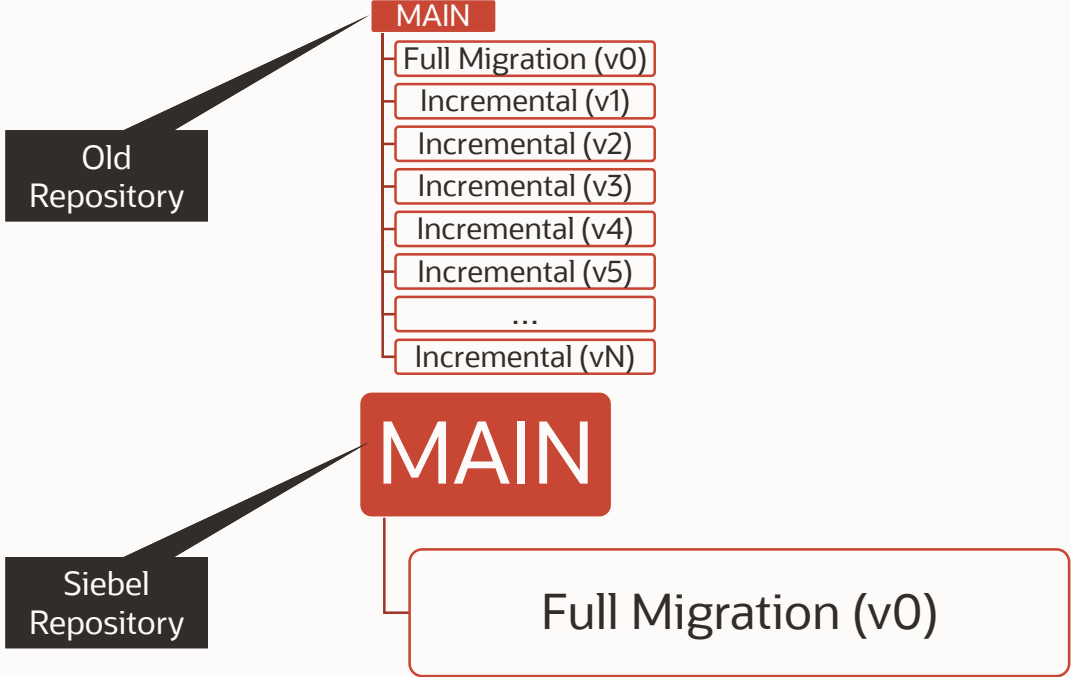


Migration Process

November Release—Two MAINs???



TEST ENVIRONMENT

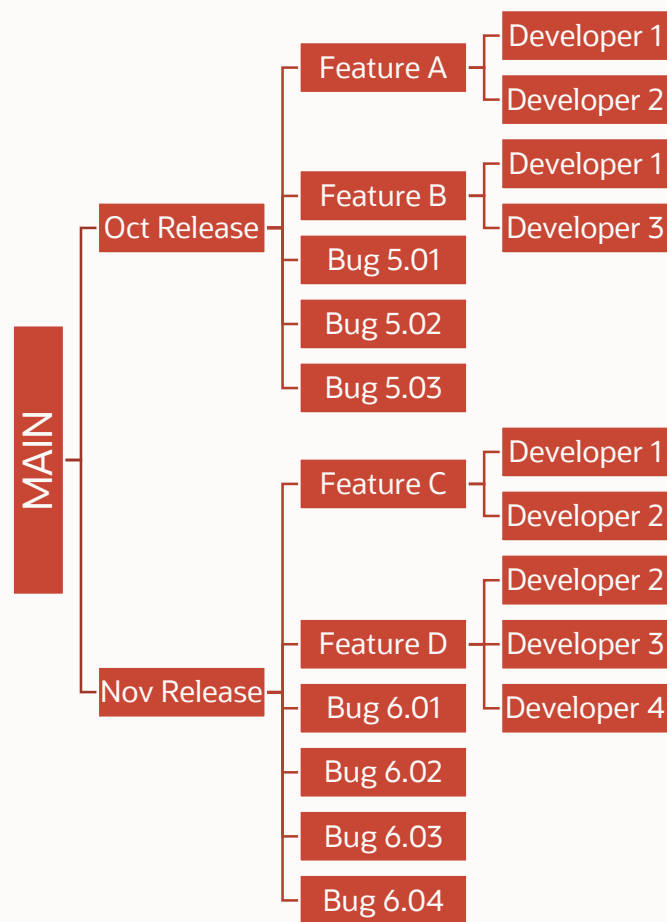


- Rename repositories
- Restart Siebel Services

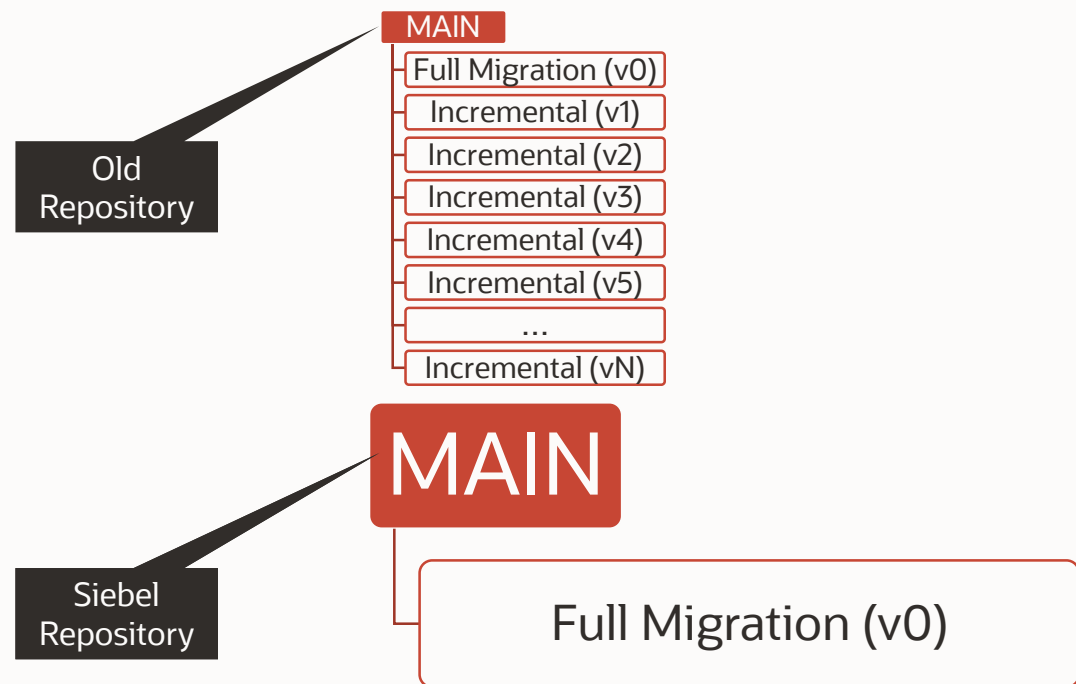


Migration Process

November Release—Two MAINs???



TEST ENVIRONMENT

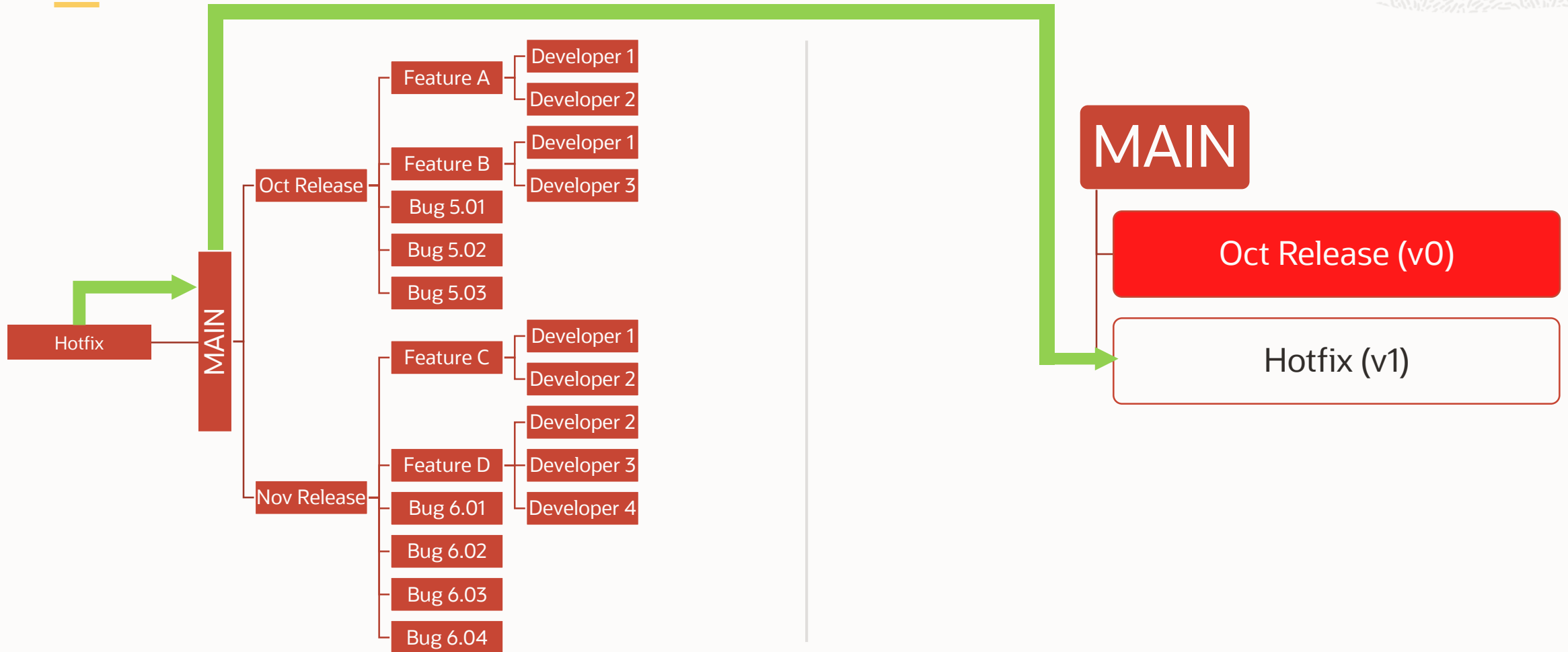


- Optionally, delete old repository (RRcleanup)



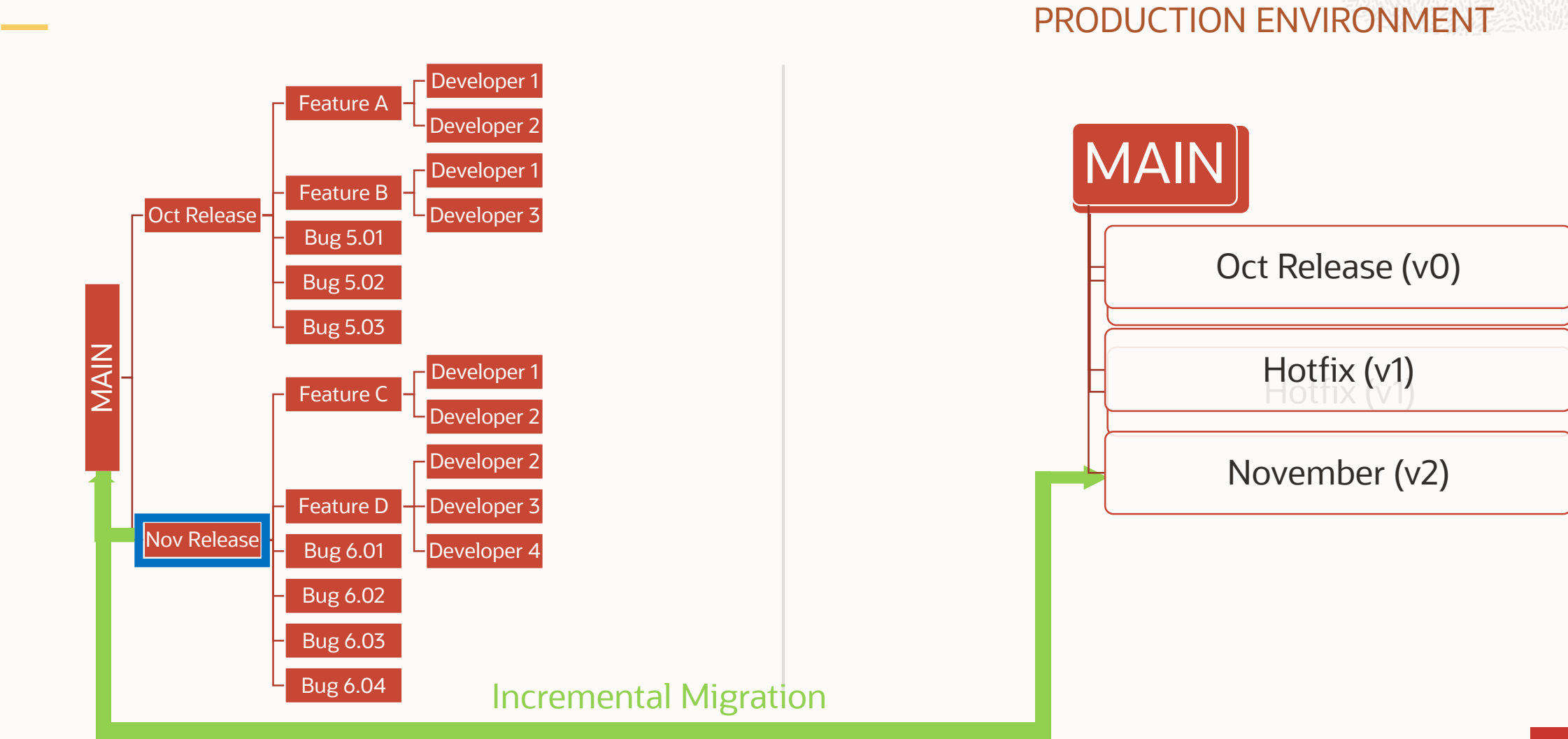
Production Migration

Hotfix required while November in Test



Migration Process

November Release—Ready for Deployment





What's Next

GOALS

- Understand Roadmap

The Future



- Workspace-enable remaining Repository objects
 - Tasks
 - Schema
 - Etc.
- Workspace-enable Manifest-related data
 - JS files
 - CSS files
 - HTML files

The Future



- Workspace-enablement Framework for additional administrative objects
 - Data Maps
 - Views
 - Responsibilities
- Address components that need restart after Incremental Migration
 - EAI
 - JMS Receiver
- Improve schema application
 - Minimizes downtime

Key Takeaways

- 1 Highly adaptable Migration Application for moving configuration and data between environments
- 2 Supports many different migration scenarios and includes API for CI/CD automation
- 3 Enhanced user experience for Siebel Administrators



Thanks!

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