ORACLE

Siebel Migration Application

Walk-Through for Siebel CRM Administrators

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October, 2020

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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

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Overview of Migration Application

GOALS

- Understand basic setup
- Define Migration object types

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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

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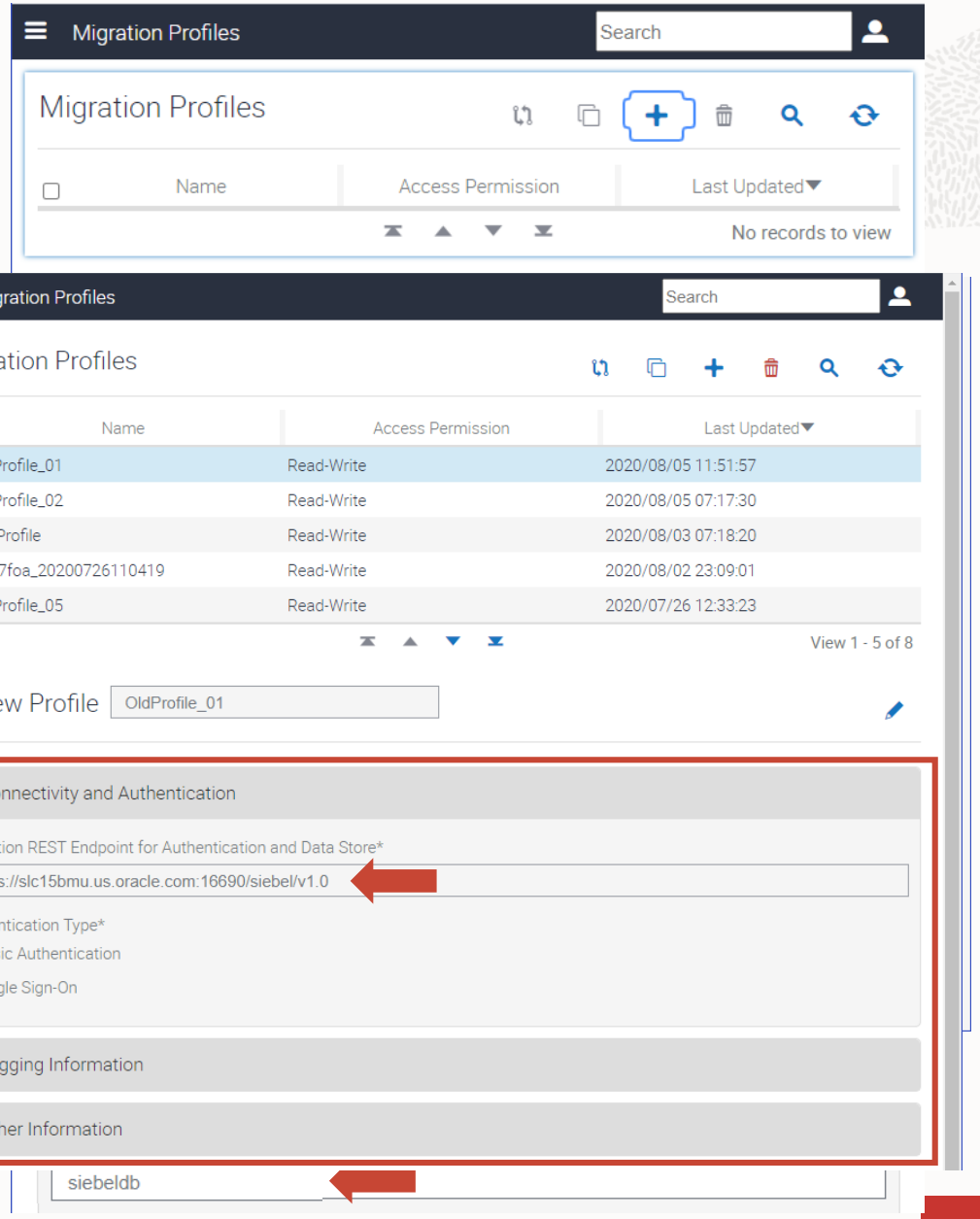
Migration Application User Interface
SMC Profile

- 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 <u>any</u> Siebel database



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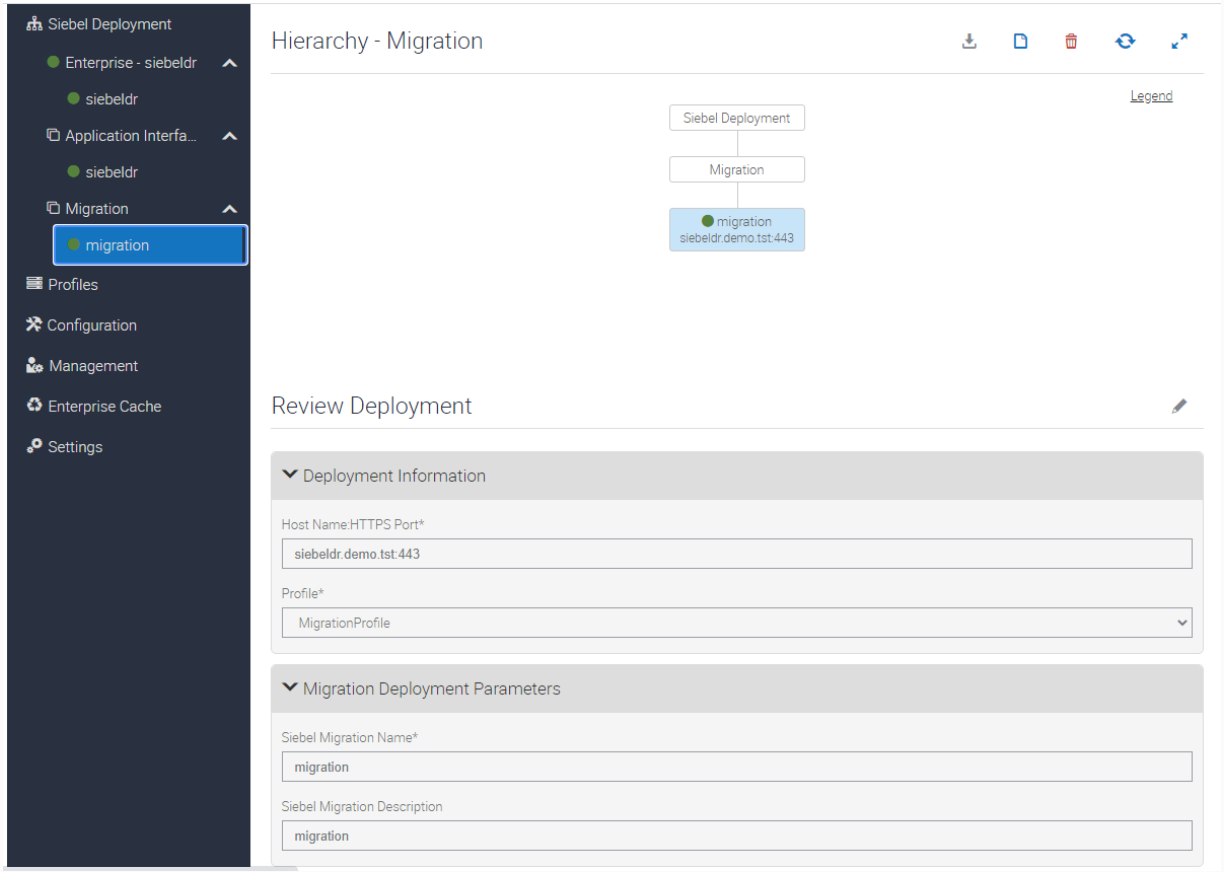
Migration Application User Interface

SMC Deployment

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

NOTES

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



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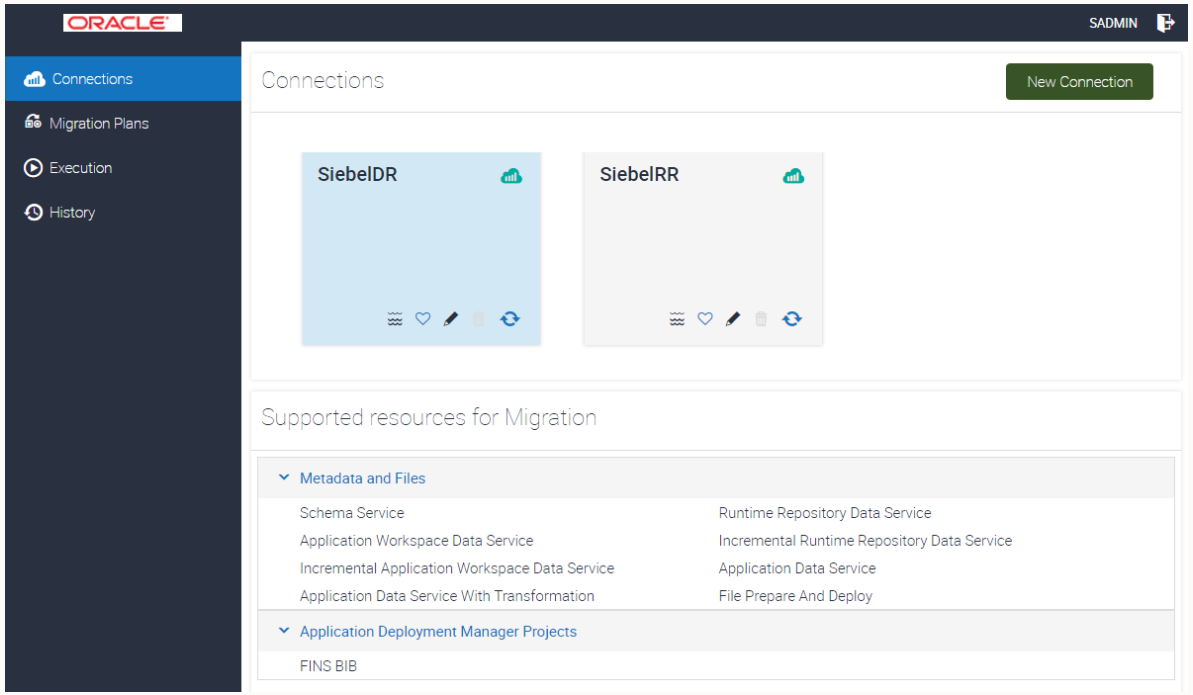
Migration Application User Interface
Connections

- 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)



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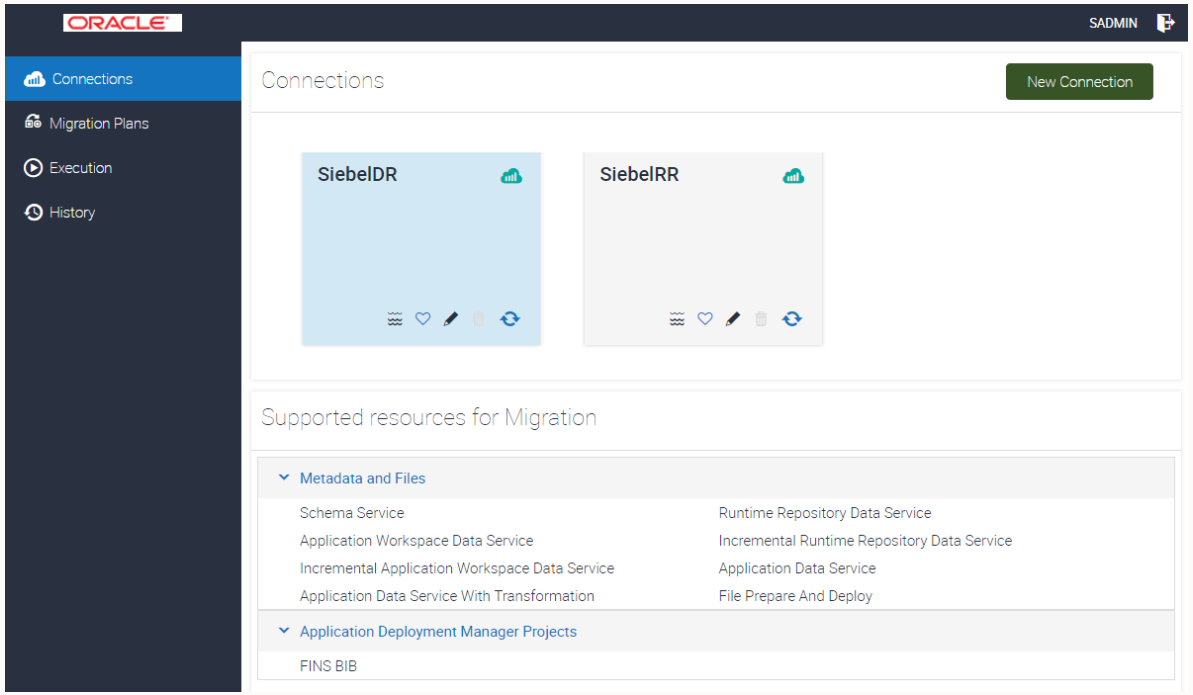
Migration Application User Interface

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)



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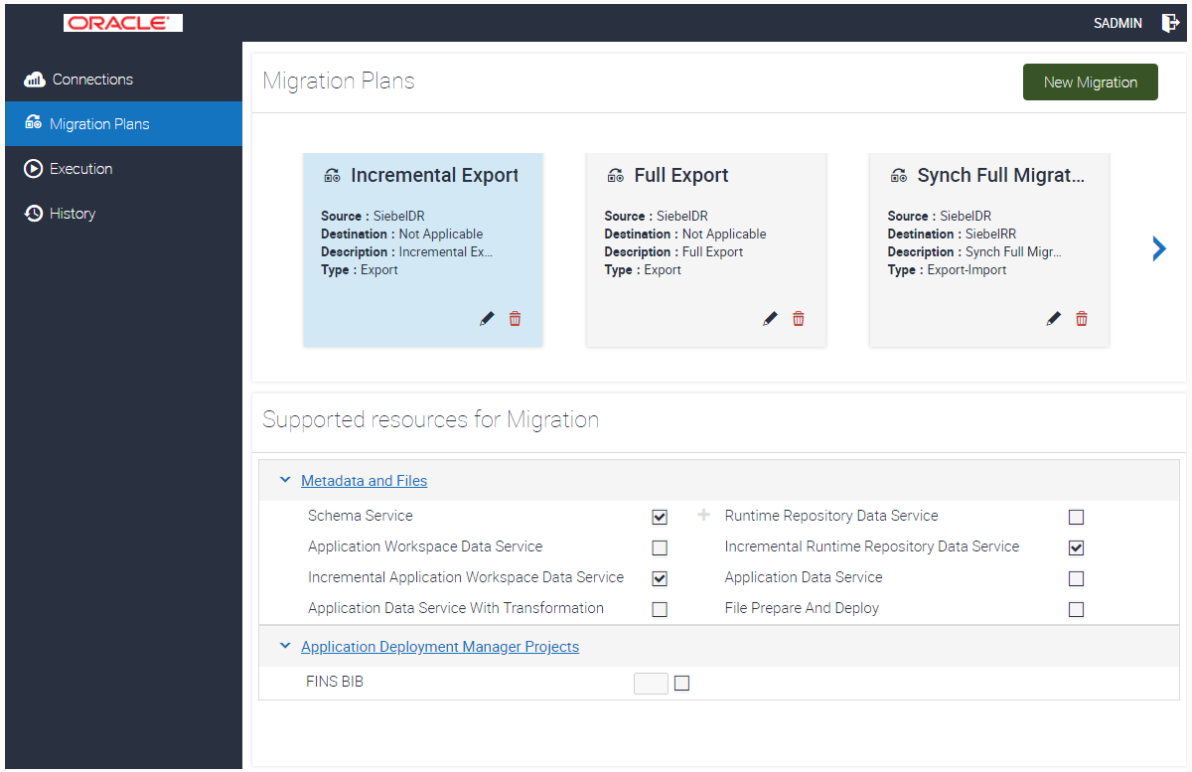
Migration Application User Interface

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.



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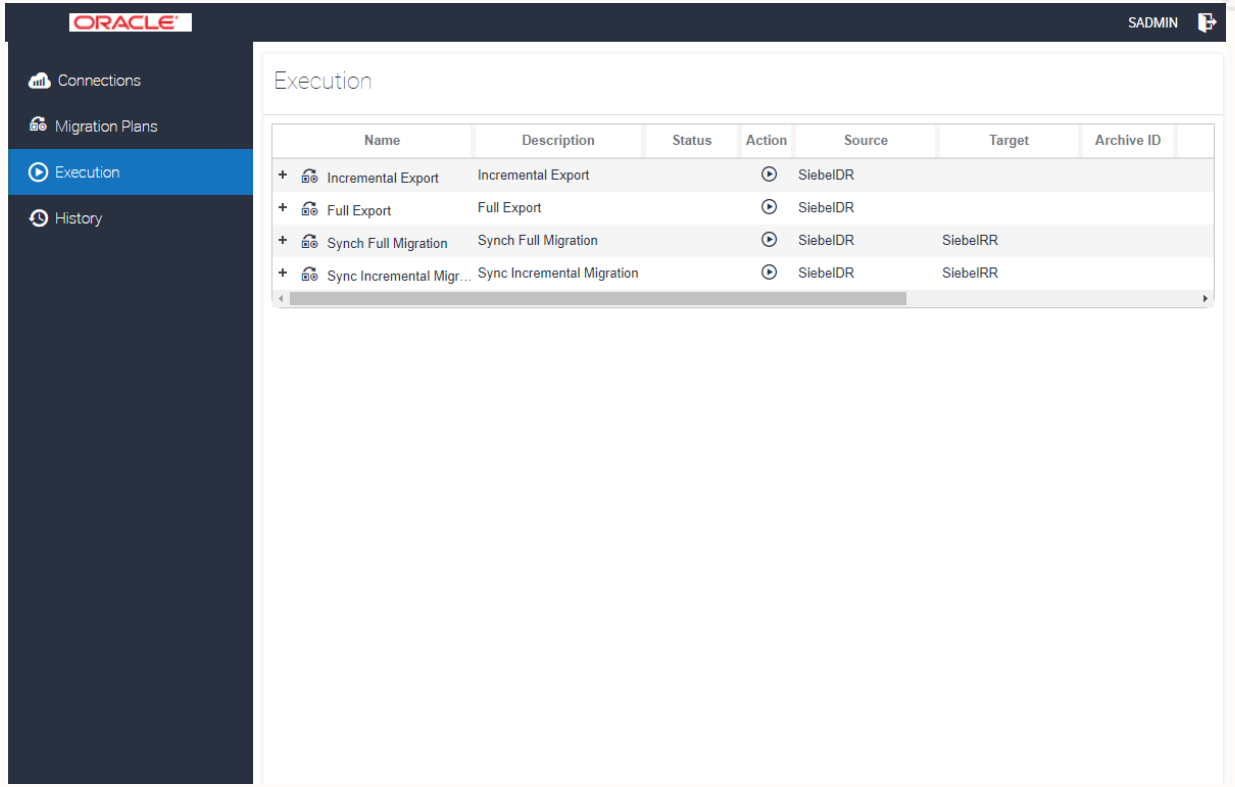
Migration Application User Interface
Execution

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



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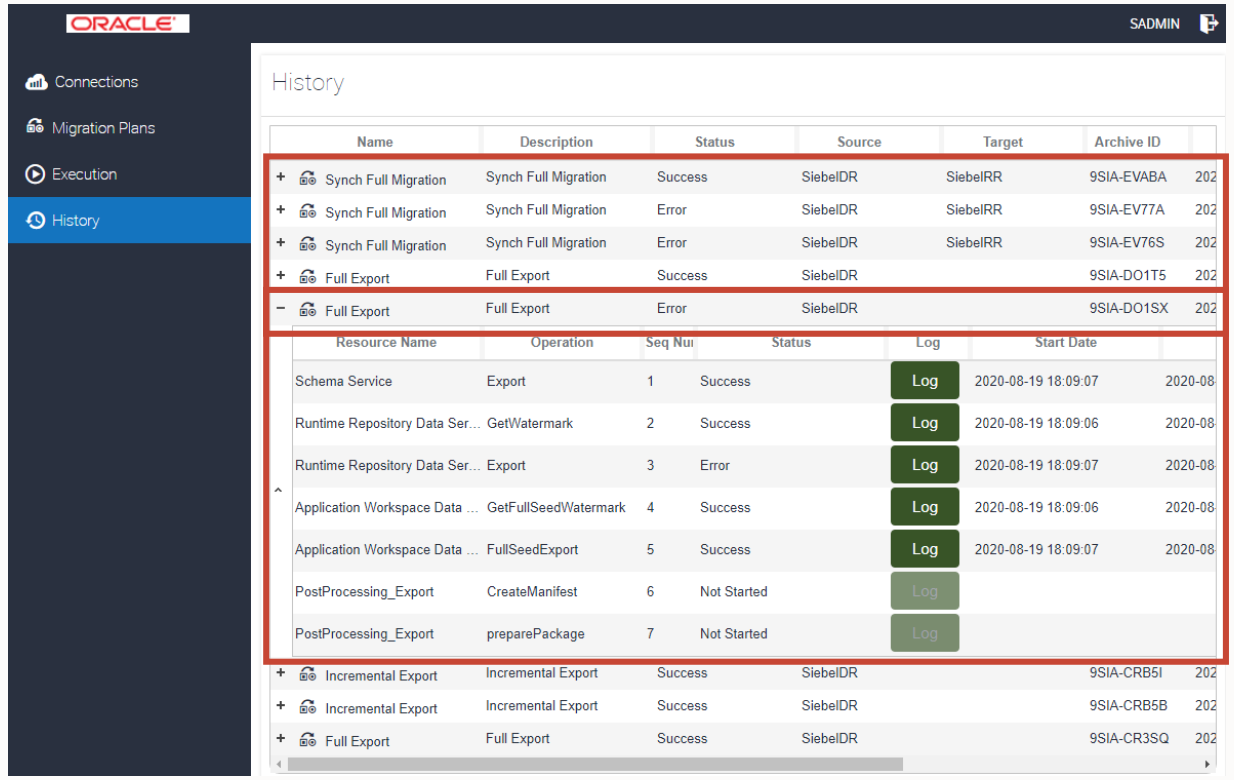
Migration Application User Interface
History

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



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Types of Migration

GOALS

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

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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!

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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

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Resources that Migrate

GOALS

- Identify Possible Resources

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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

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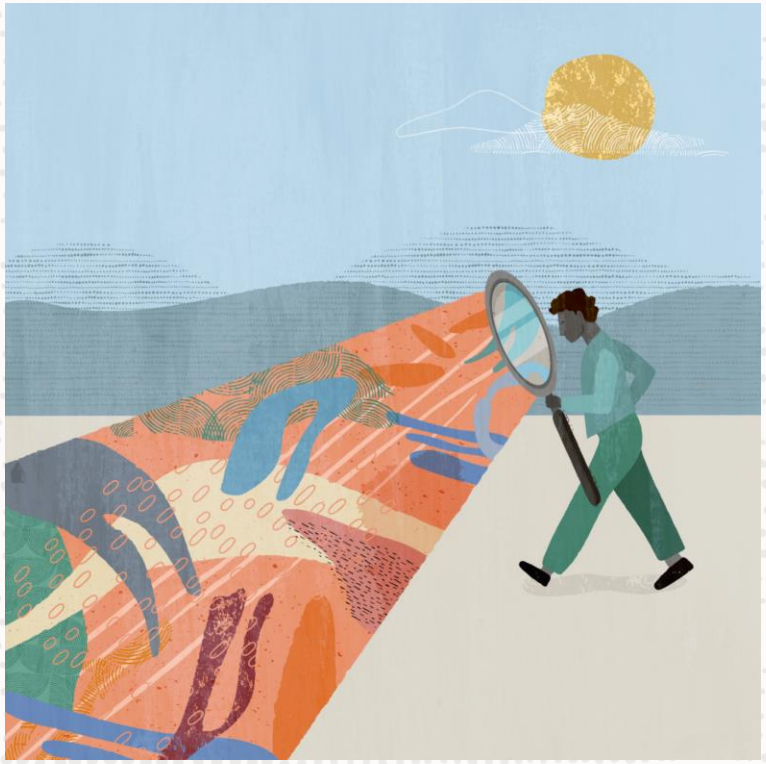

Relationship between Workspaces & Migration

GOALS

- Maximize Parallel Development Opportunities
- Optimize Testing

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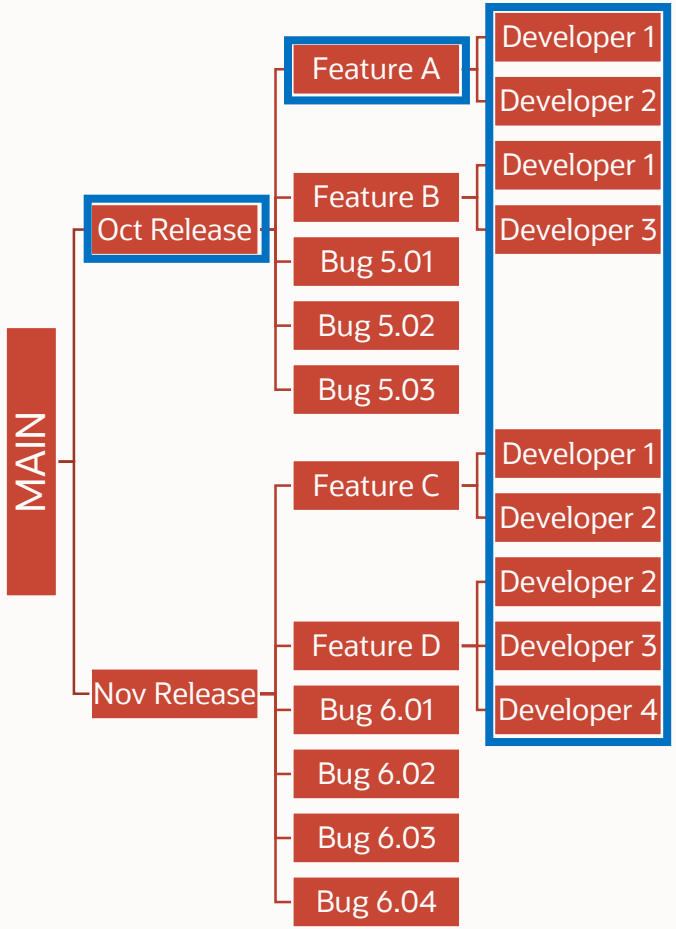
Basic Workspace Framework

- 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



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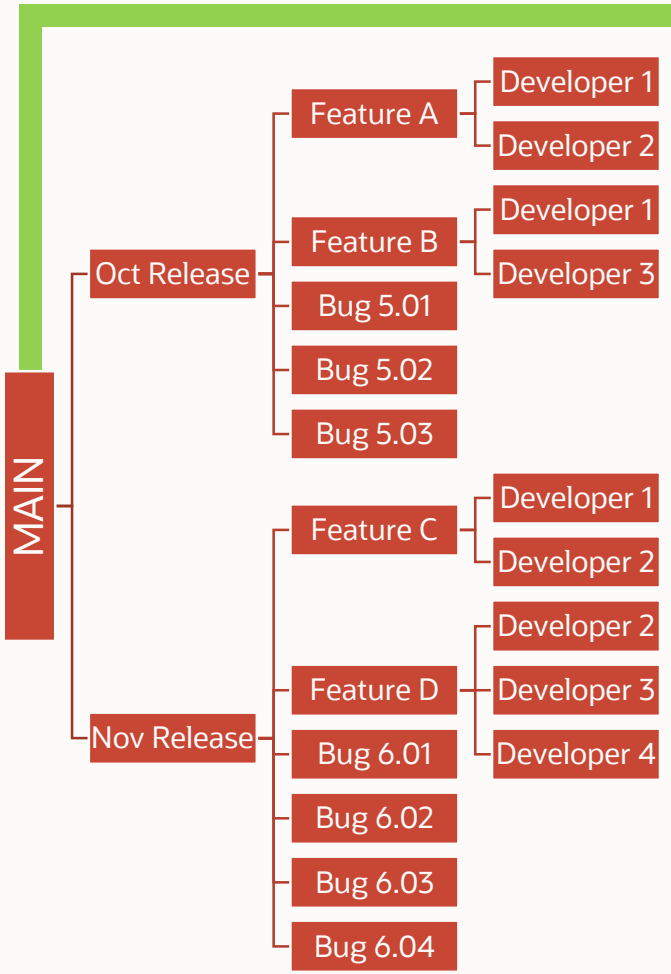
Full Migration



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

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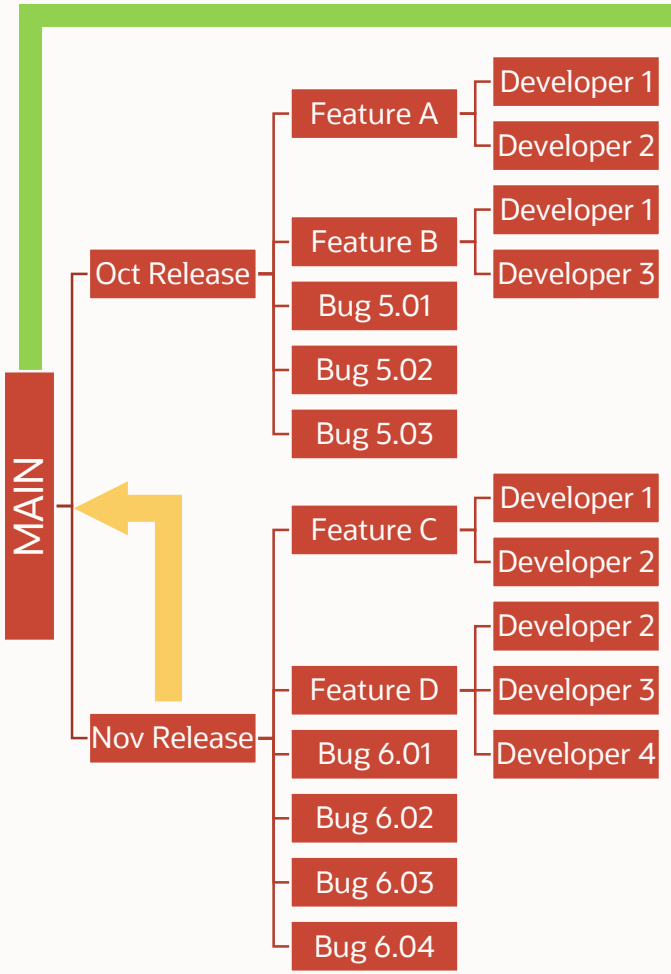
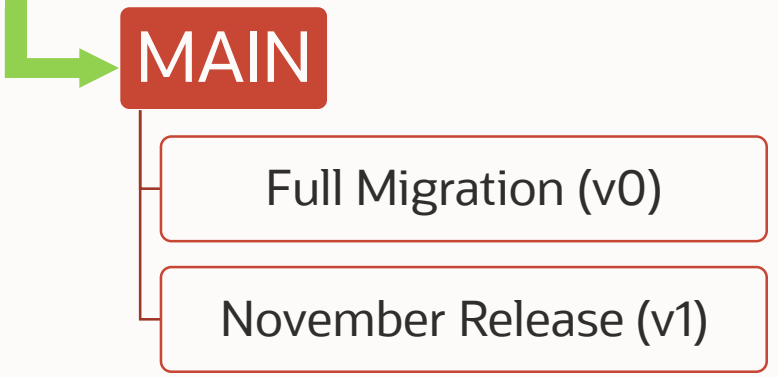
Incremental Migration





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

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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

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Migration Scenarios

GOALS

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

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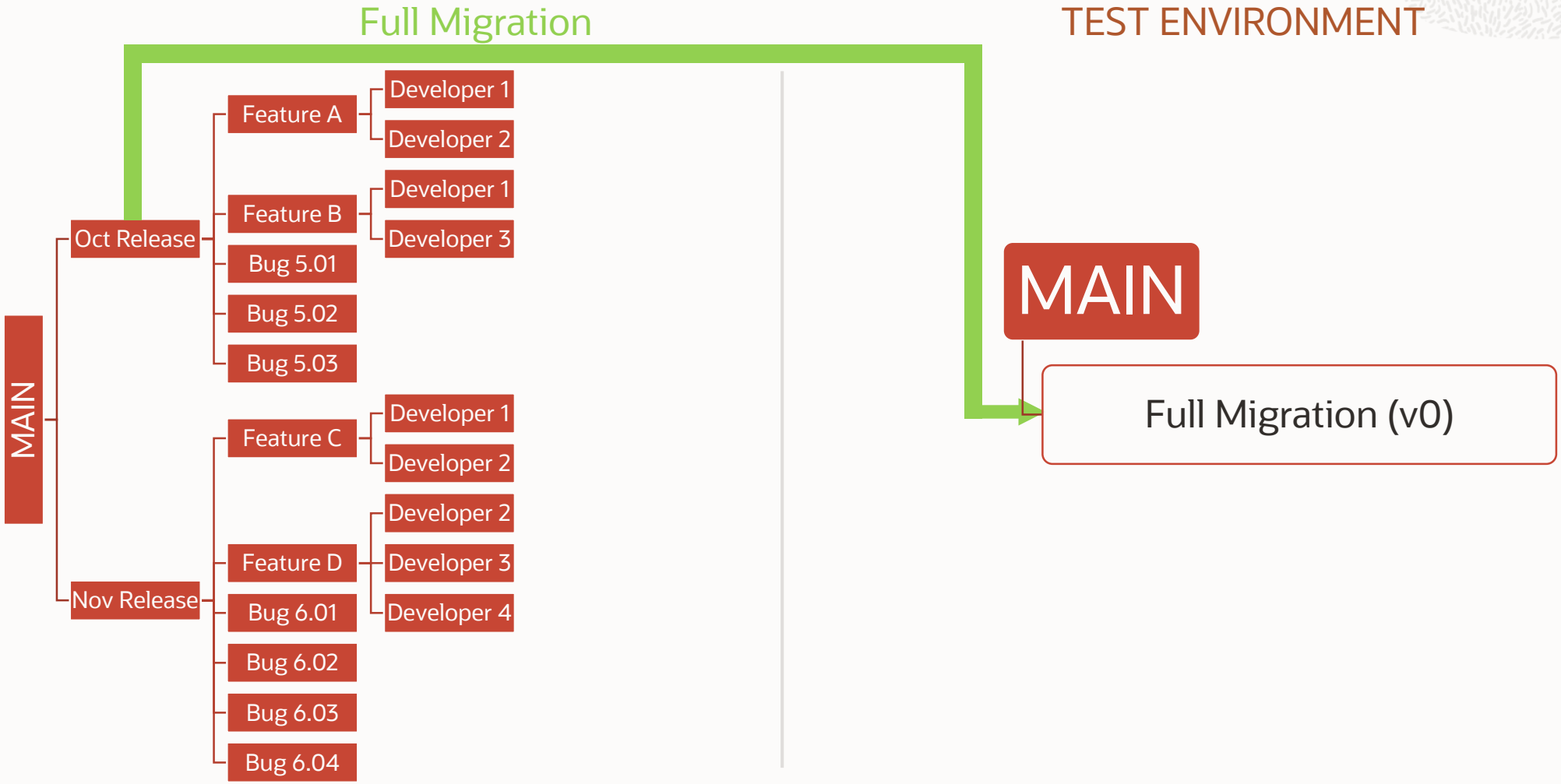
Migration Process

October Release—First IP2017 Release



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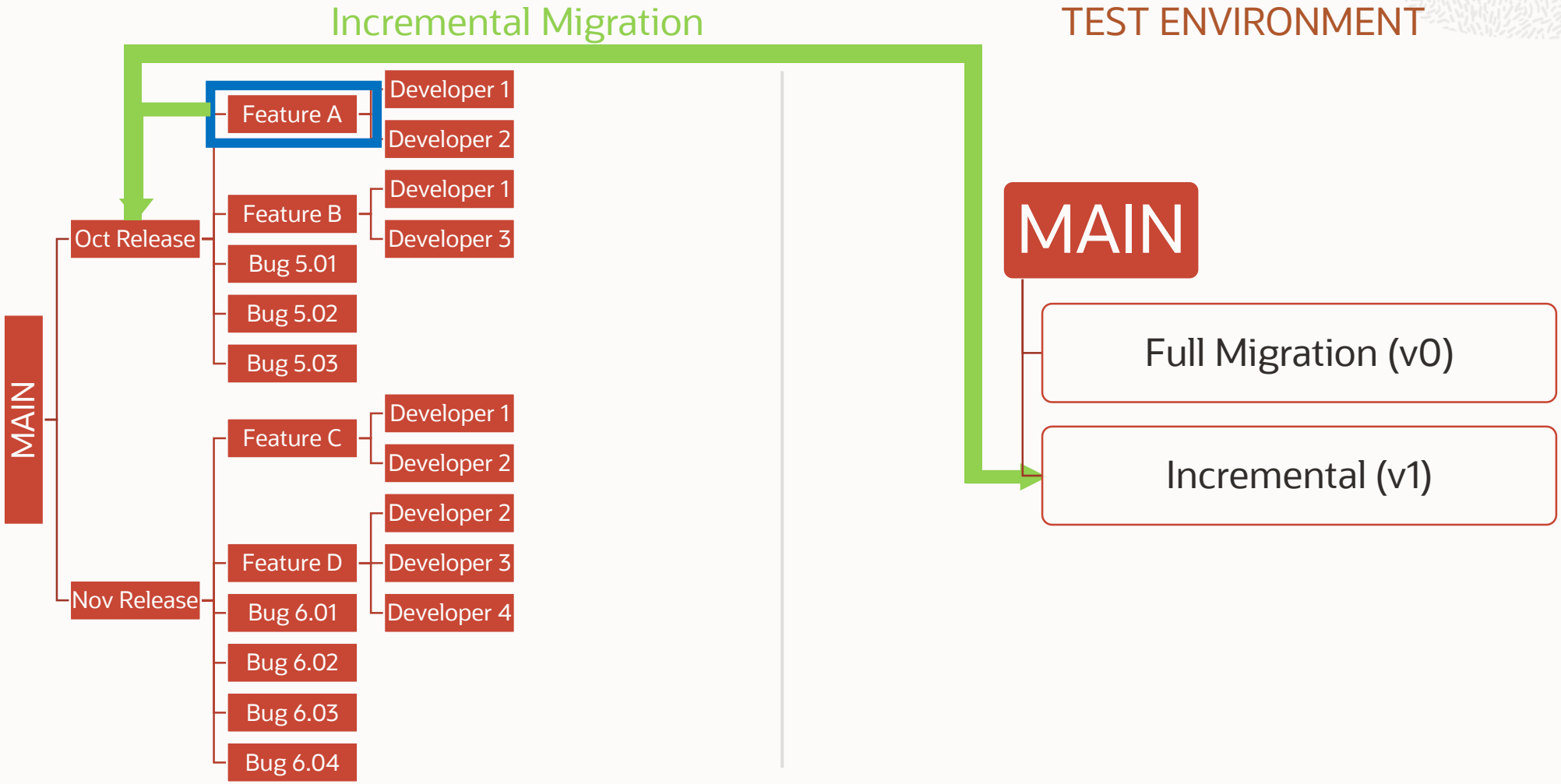
Migration Process

Bug Fixes / Features Completed in October Release



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Migration Process

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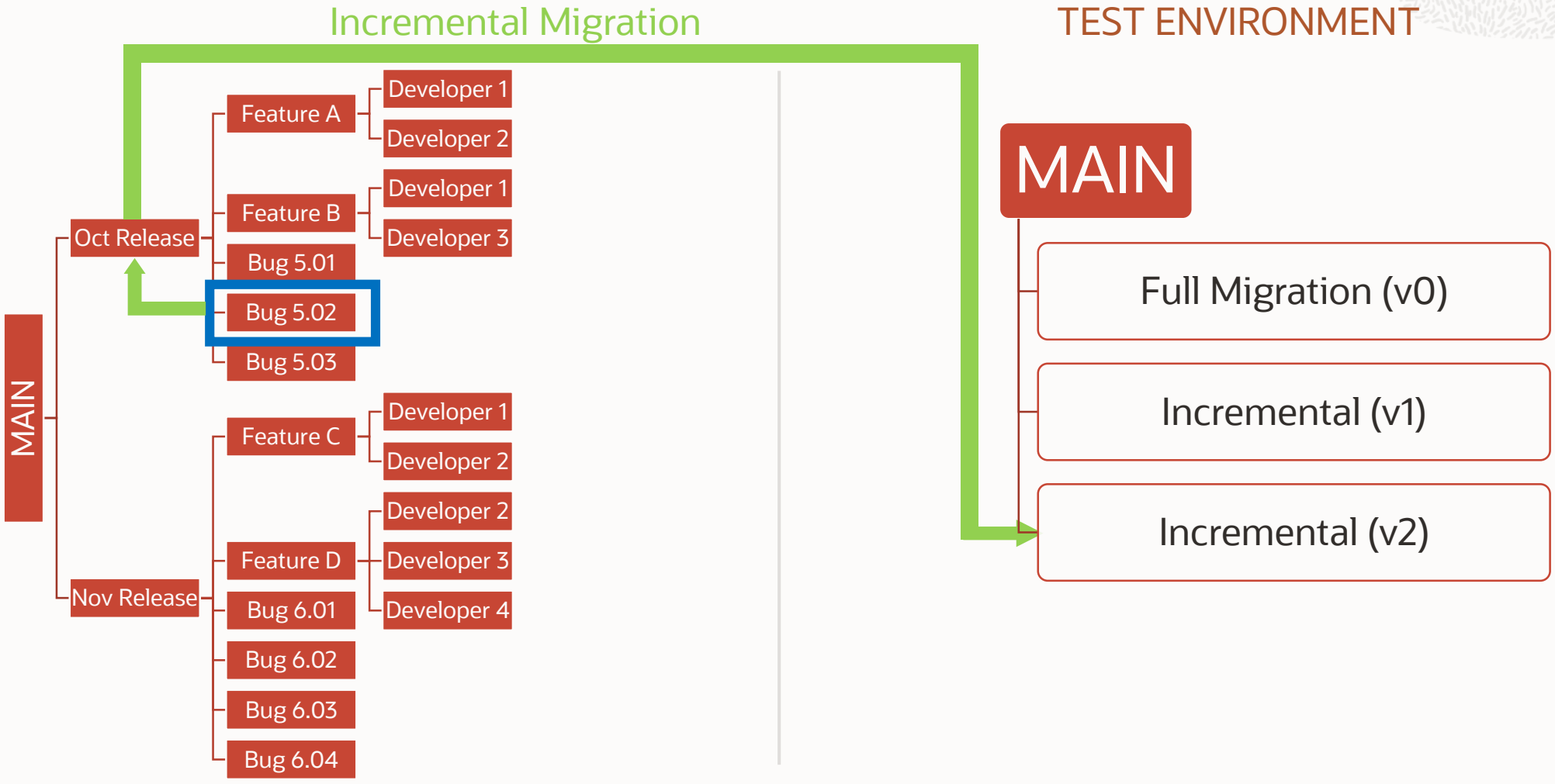

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Migration Process

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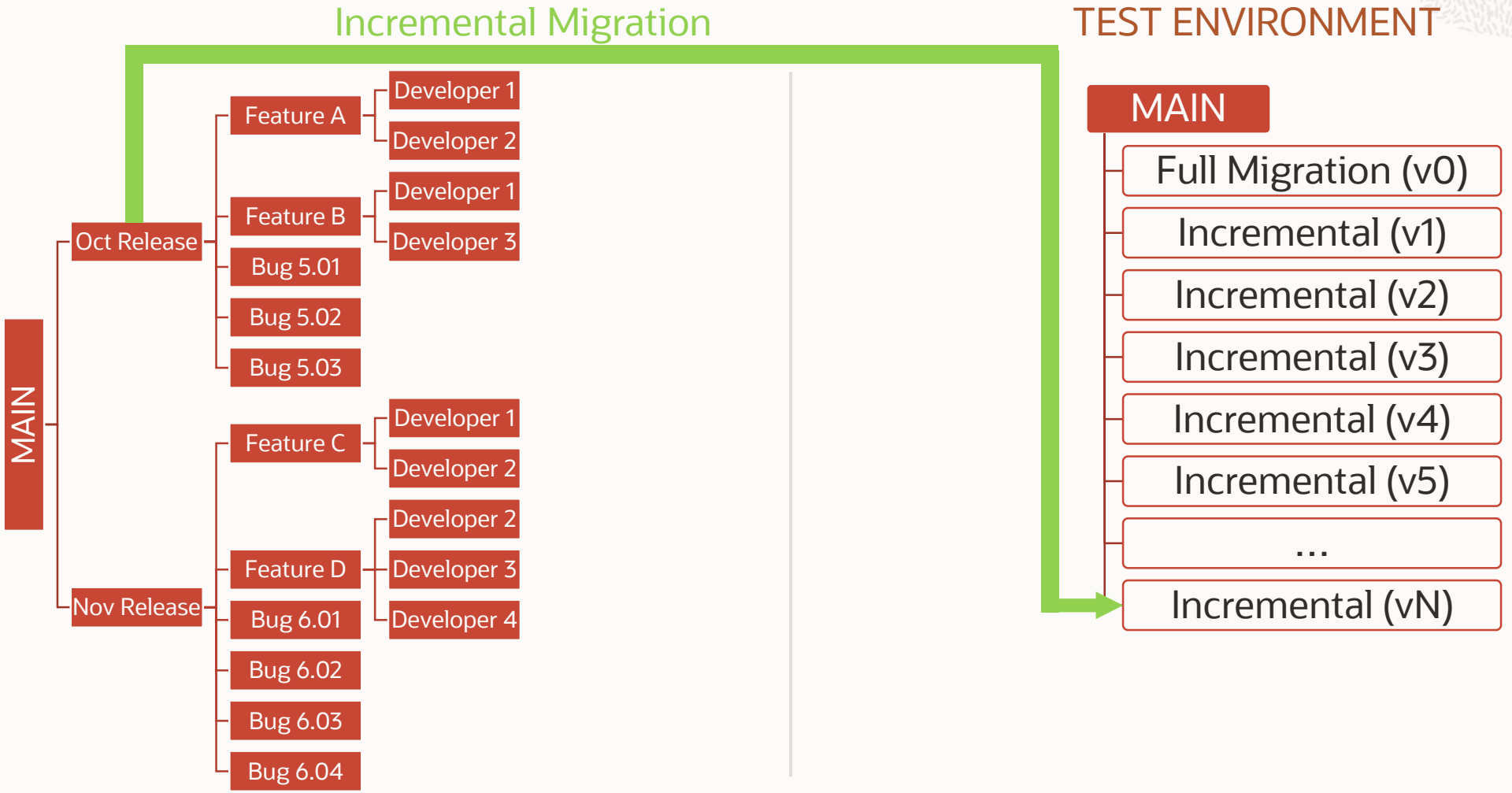

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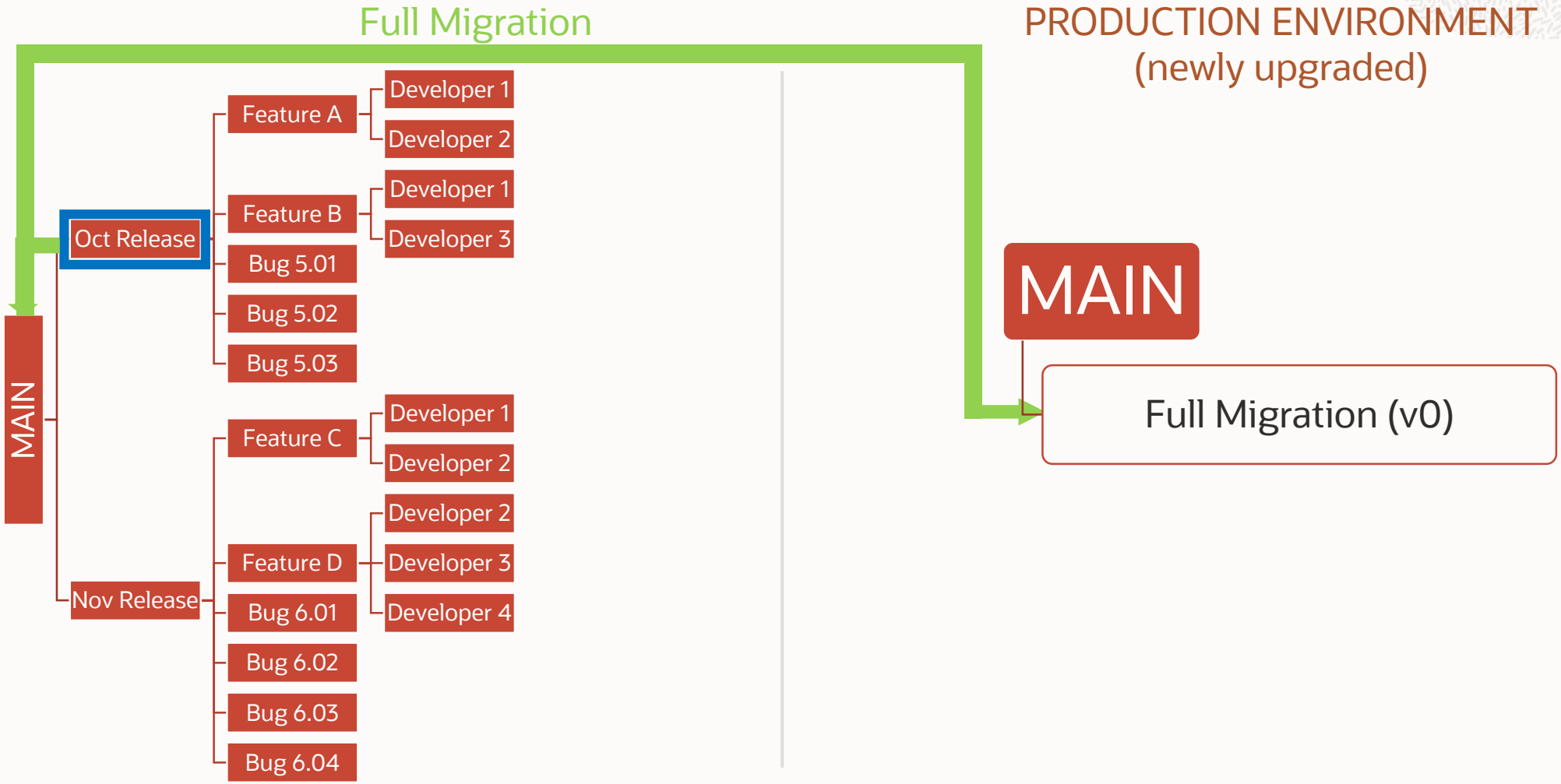
Migration Process

October Release—First IP2017 Release



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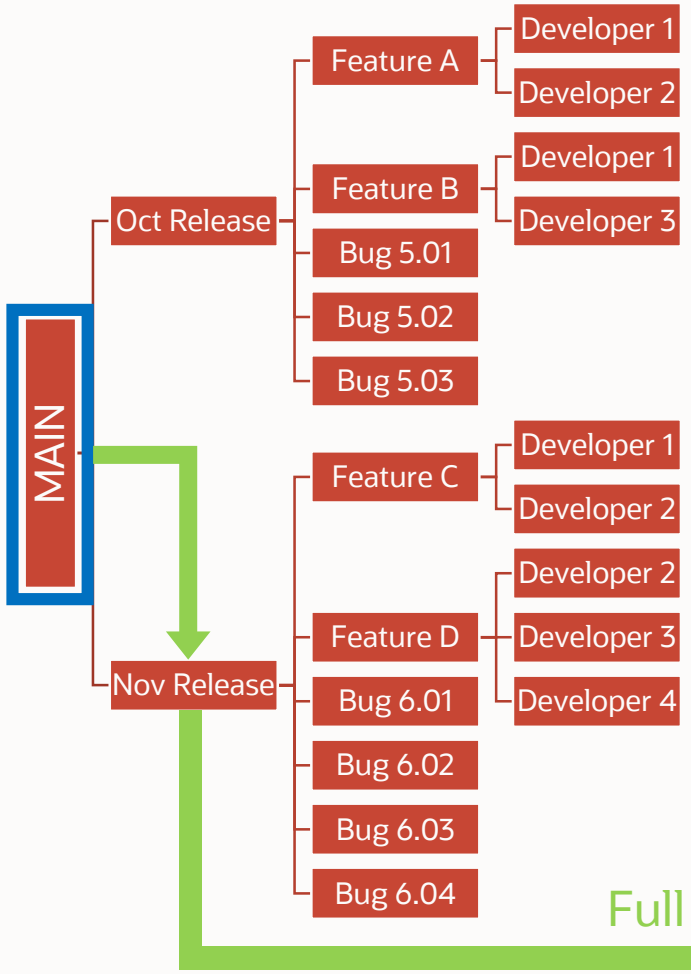
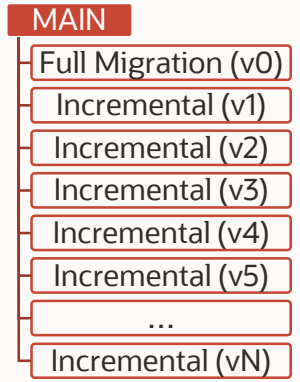
Migration Process

November Release—Start Testing



Full Migration

TEST ENVIRONMENT



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

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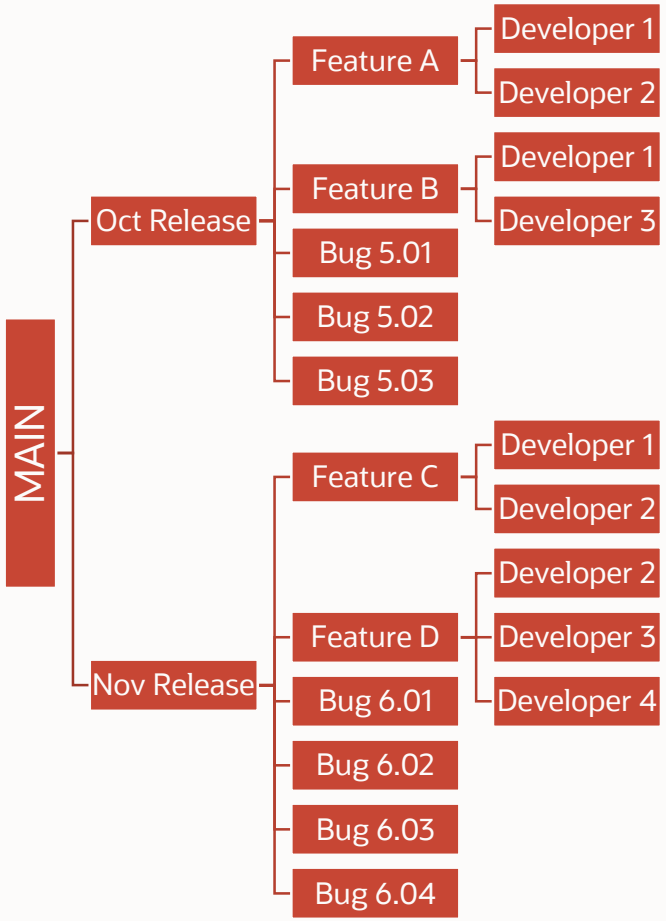
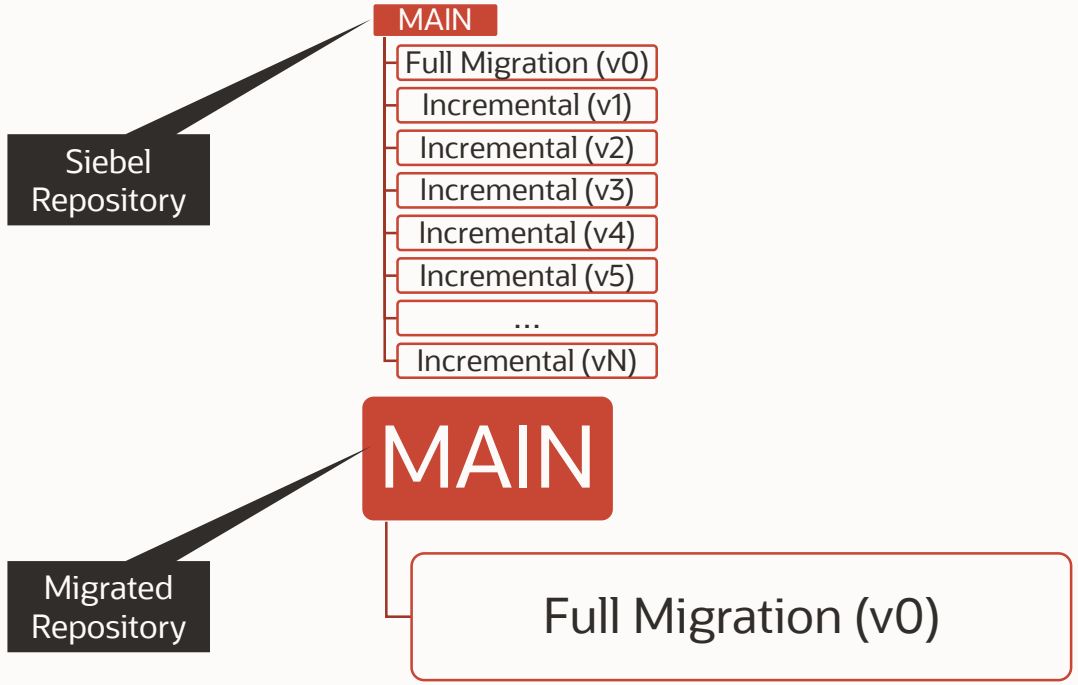
Migration Process

November Release—Two MAINs???



TEST ENVIRONMENT



- Two Repositories

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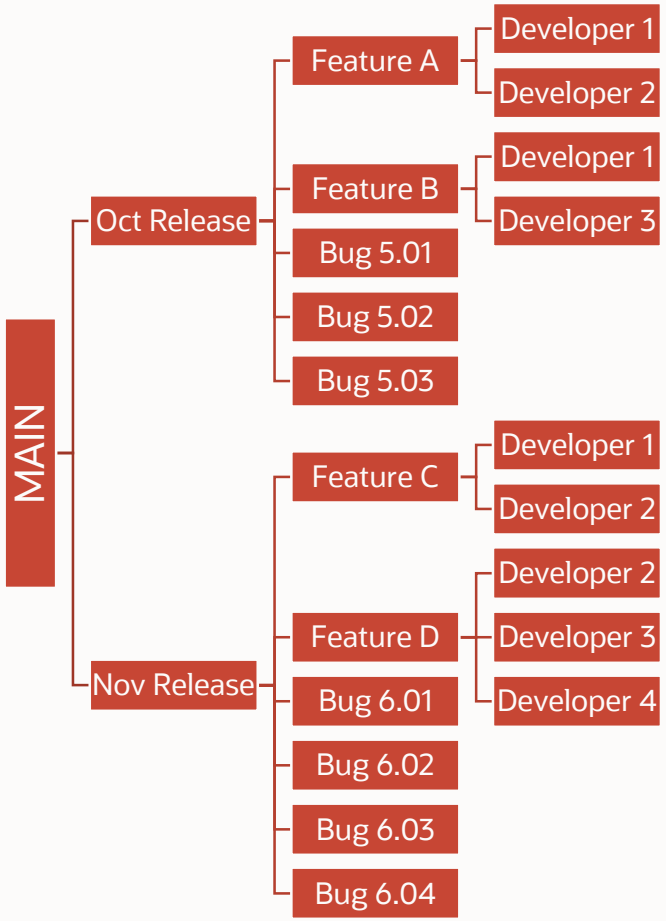
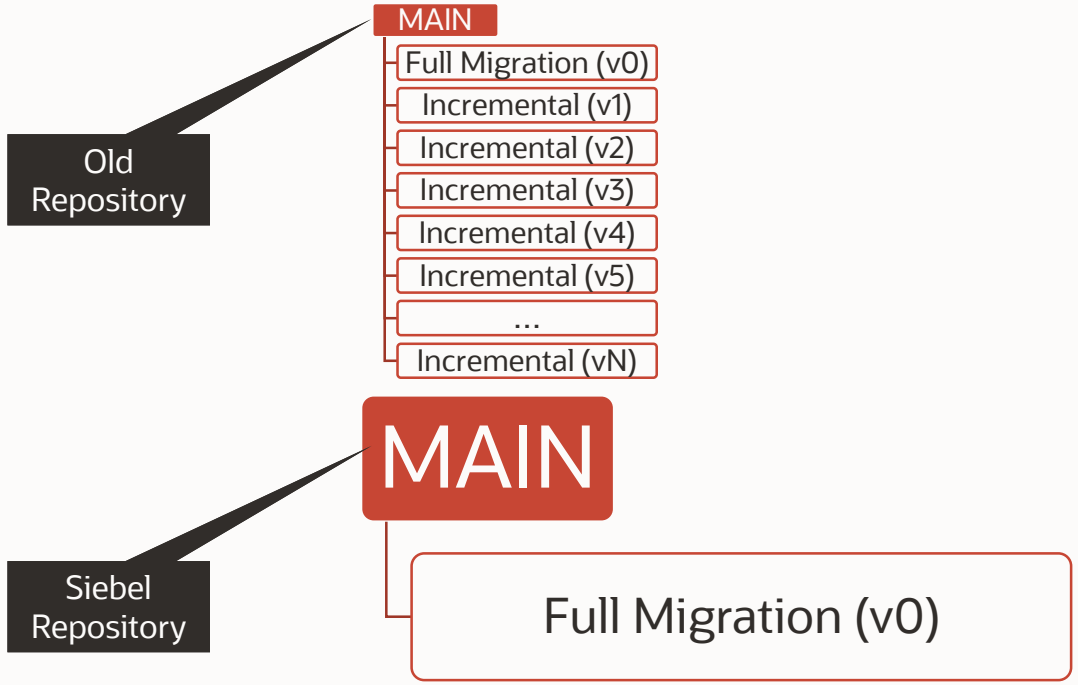
Migration Process

November Release—Two MAINs???



TEST ENVIRONMENT



- Rename repositories
- Restart Siebel Services

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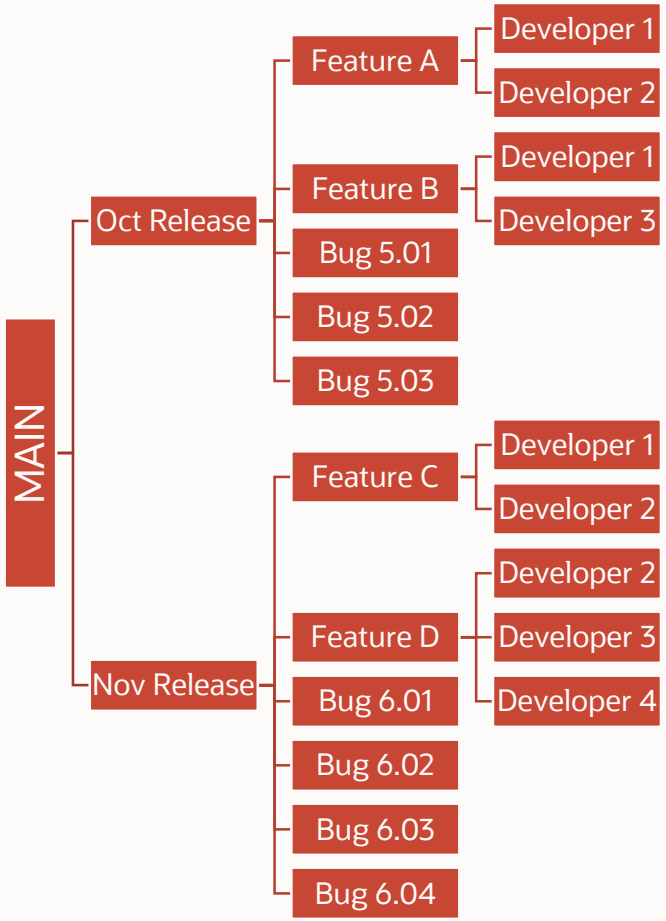
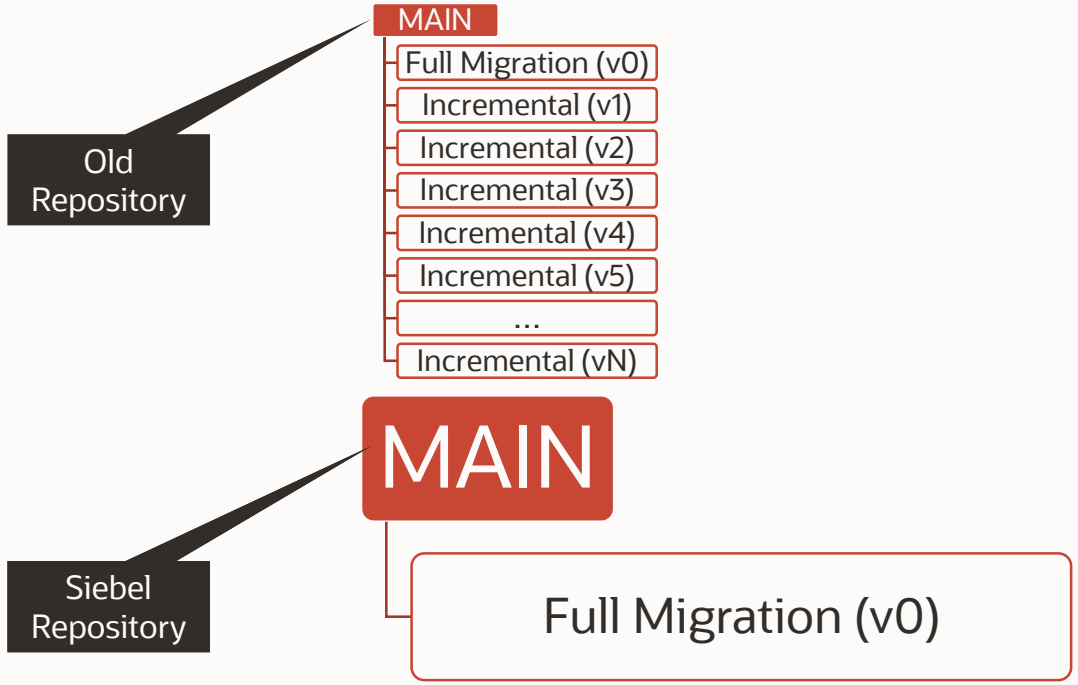
November Release—Two MAINs???



TEST ENVIRONMENT



- Optionally, delete old repository (RRcleanup)

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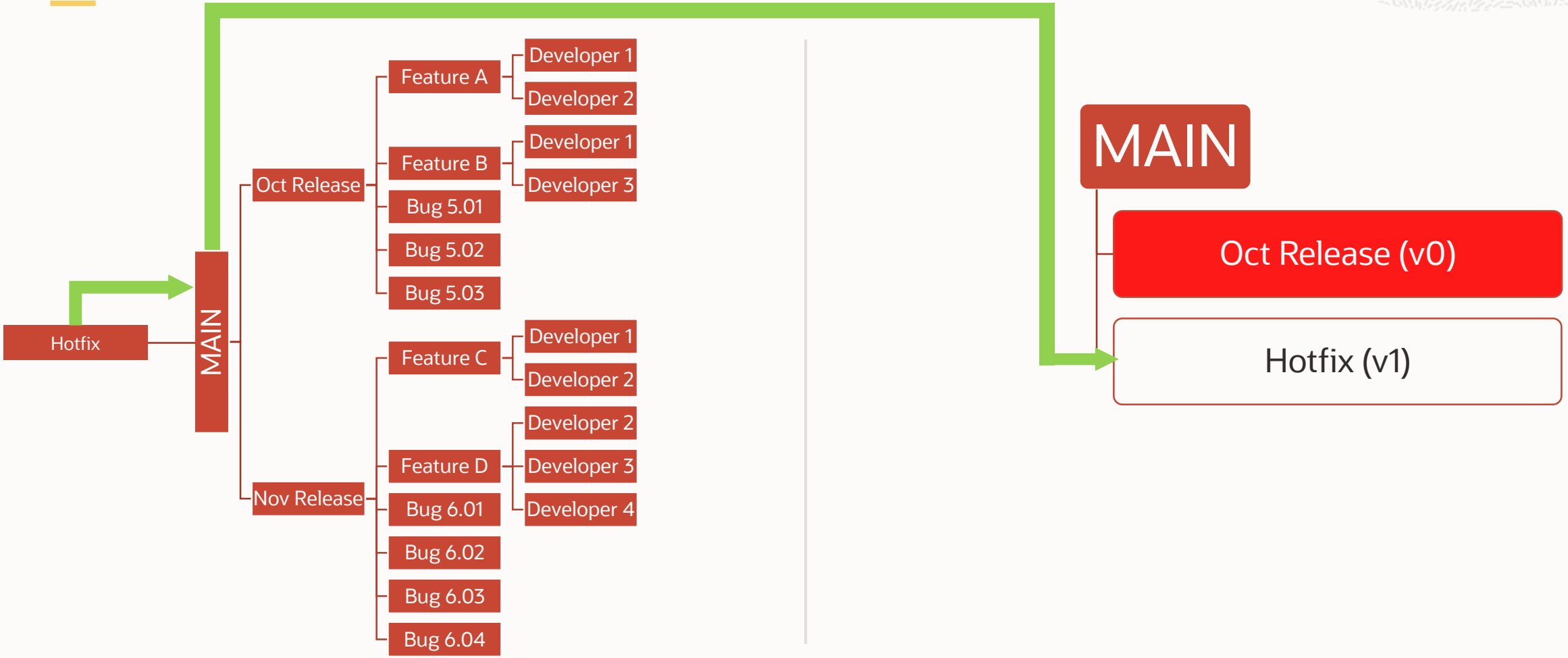
Production Migration

Hotfix required while November in Test



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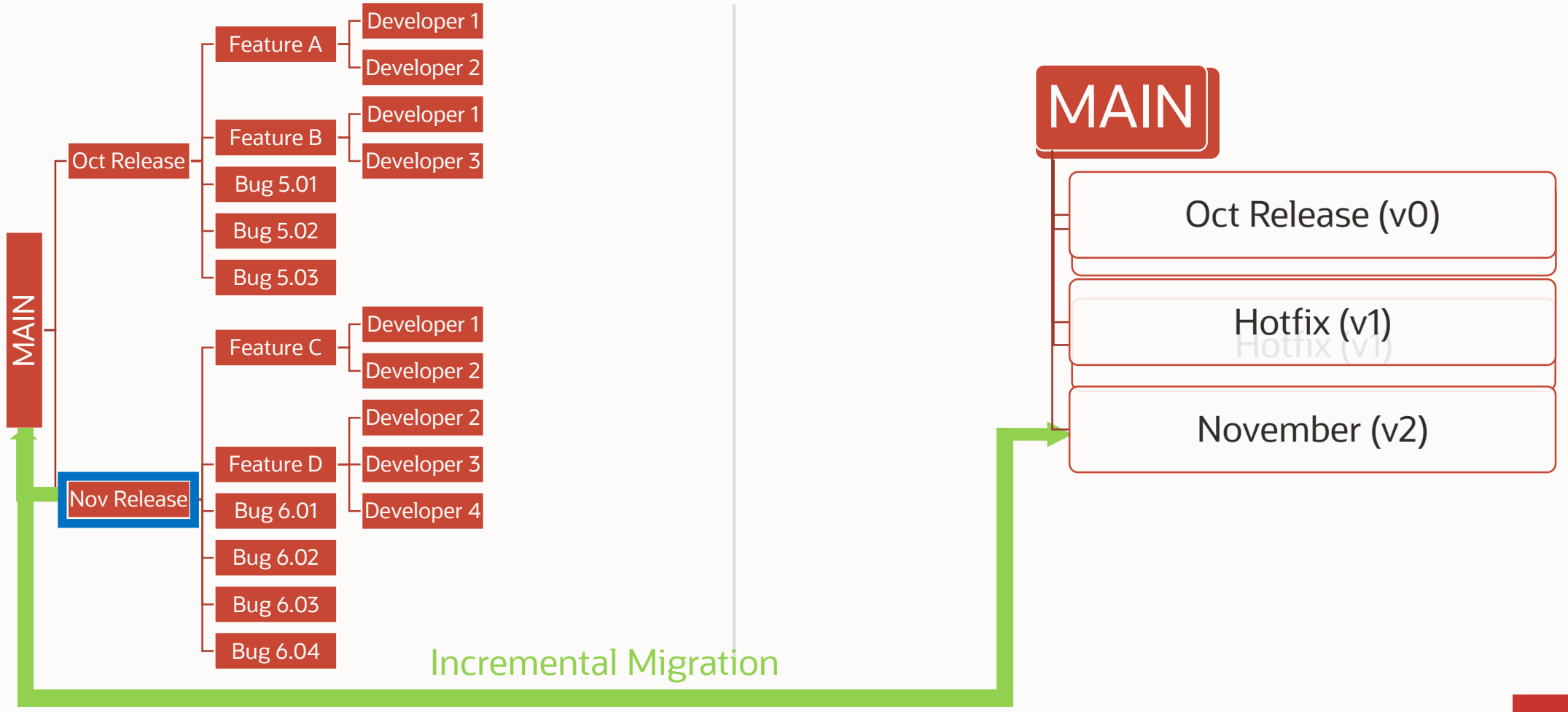
Migration Process

November Release—Ready for Deployment



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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

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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

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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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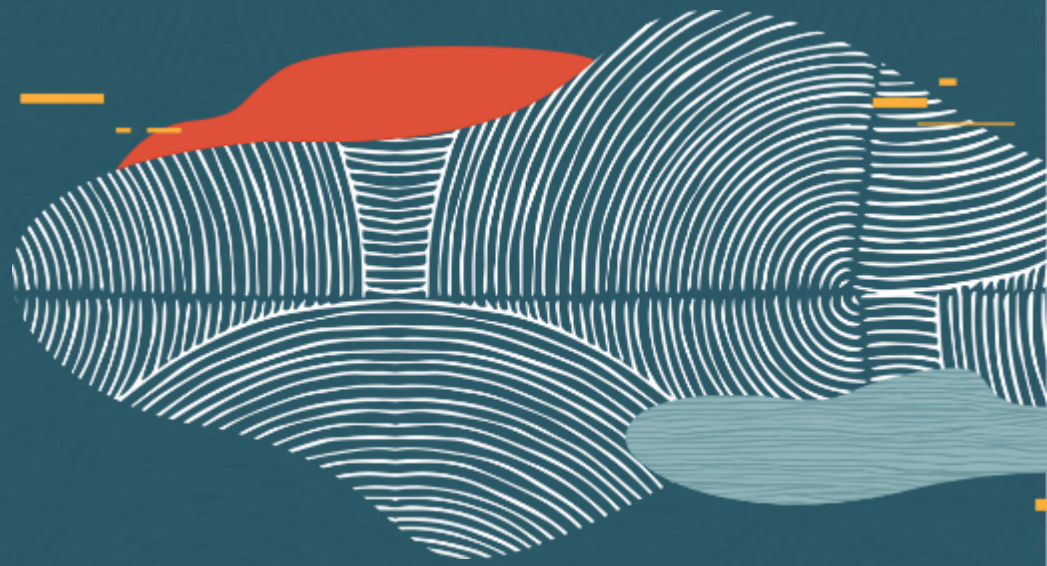

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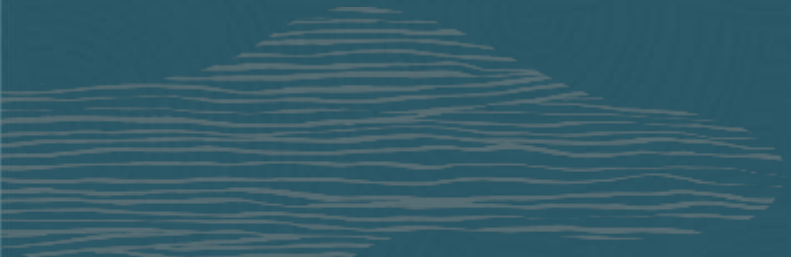

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Siebel CRM YouTube
Siebel CRM Sales Team ✉
Siebel CRM ACS Services ✉
Oracle Support Value
Partner Spotlights

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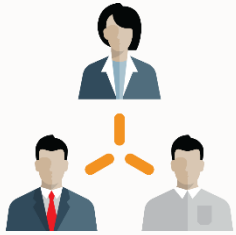
(Free content, click Preview)
Siebel CRM Bookshelf
Siebel CRM Github
Siebel CRM Advisor Webcasts
My Oracle Support Community

Siebel CRM Statement of Direction
Siebel CRM Release Updates
Siebel CRM Premier Support
Datasheets – Features by Release
Siebel CRM Ideas (Collaboration)



Siebel CRM Customer Connect CAB portal
LinkedIn Customer Connect
Newsletter Email Distribution list (Customer) & (Partner)
Virtual CAB replays

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