Oracle Policy Automation Connector for Siebel Installation Guide
# Oracle Policy Automation Connector for Siebel Installation Guide V10.3.0

## Contents

### Overview
- Pre-requisites ................................................................. 6
- System Requirements.......................................................... 7
- Parameter Sheet................................................................. 7

### Installing the Connector
- Typical Installation............................................................ 10
- Step 1 – Run the Installer .................................................. 10
- Step 2 – Oracle Policy Automation Runtime Installation .......... 12
  - Deploy Determinations Server to the Application Server ........ 12
  - Test the Determinations Server Deployment ....................... 12
  - Deploy Web Determinations to the Application Server ........... 13
  - Test the Oracle Web Determinations for Siebel Deployment .... 13
  - Modify the siebel-data-adapter.properties .......................... 14
- Step 3 - Import the SIF Archive ............................................ 15
- Step 4 - Add Screens to the Application ............................... 16
- Step 5 - Compile Objects/Projects ....................................... 16
- Step 6 - Apply Schema Changes ......................................... 17
- Step 7 - Run the Business Services ..................................... 17
- Step 8 – Copy Across the Web Template and XSLT File ........... 18
- Step 9 – Additional Web Templates for Siebel 7.8 ................. 19
- Step 10 – Deploy new SRF to Siebel Server hosting the EAI Object Manager ....... 19
- Step 11 – Finalize the Installation ....................................... 19

### Manual Installation
- Siebel Client Configuration .................................................. 20
  - Step 1 - Add the List of Values ....................................... 20
  - Step 2 - Add Responsibilities ........................................... 21
  - Step 3 - Import Mappings for the AdminSmokeTest and AdminSmokeTestIO .......................... 22
  - Step 4 - Import the Outbound Web Services ....................... 22
  - Step 5 - Import the Inbound Web Services ......................... 23
  - Step 6 - Input the Symbolic URL Definitions ...................... 23
  - Step 7 – Import and Activate the Work Flows ....................... 24

### Finalize and Validate the Connector Installation
- Step 1 - Run the Admin Smoke Test for Determination Server ...... 26
- Step 2 - Run the Admin Smoke Test for Web Determinations .......... 26
- Step 3 – Check the plug-in is working for Oracle Policy Modeling .... 27
- Step 4 – Migrate Changes to the Siebel Server ........................ 30

### Upgrade the Connector
- Step 1 - Uninstall the existing OPA Connector windows install. ....... 31
- Step 2 - Install the new OPA Connector .................................. 31
- Step 3 – Upgrade Rulebases ............................................... 31
- Step 4 – Deploy the new Siebel Determinations Server and Siebel Web Determinations web applications ....... 31
- Step 5 – Import the Sif Archive ............................................ 31
- Step 6 - Compile Objects/Projects ....................................... 32
Step 7 – Apply Schema Changes..............................................................32
Step 8 – Run the Upgrade Business Service ...........................................32
Step 9 – Deploy the compiled srf file to the Siebel Server ......................33

Install the Active Object Patch 34
Overview

This document contains step by step instructions on how to install the Oracle Policy Automation Connector for Siebel (hereafter known as the OPA Connector for Siebel) to an existing Siebel environment. The OPA Connector for Siebel consists primarily of a number of Siebel repository objects which can be imported via a SIF file using Siebel Tools. There is also a configuration that affects Siebel data which must be done via a Siebel client.

This guide provides both a typical installation section and a manual installation section. The typical installation provides a quick method of installing the OPA Connector for Siebel on a typical Siebel environment. The manual installation provides detailed steps on how to configure Siebel to use the connector with minimal automation. The following diagram shows the differences between the two sections.

This document assumes a good working knowledge of using Siebel Tools as well as Siebel Administrator skills in the maintenance of data via a Siebel client.
The following diagram shows the flow of OPA Connector for Siebel configuration through a Siebel development landscape:

![Diagram showing flow of OPA Connector for Siebel configuration](image)

**Note:**
The solid arrows represent the data flow between Siebel applications/services and datastores. The dotted arrows represent the creation of the SRF via compilation or file copy. The lightly shaded boxes represent the Siebel datastores that are present, but not used in this installation process.

**Pre-requisites**
- Siebel Server*
- Siebel Mobile Client & Tools
- Oracle Policy Automation

* **Note:**
Siebel Server is not a pre-requisite if you wish to have the connector installed locally. If this is the case, whenever the installation requests you to open a Siebel Mobile Client, select the *local* datasource instead of the *server* datasource.
System Requirements

<table>
<thead>
<tr>
<th>Product</th>
<th>Interoperable Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Siebel CRM Base</td>
<td>8.0.x, 8.1.x, 8.2.x</td>
</tr>
<tr>
<td>Oracle Policy Modeling</td>
<td>10.3.x, 10.2.x, 10.1.1*</td>
</tr>
<tr>
<td>Oracle Policy Automation</td>
<td>10.3.x, 10.2.x, 10.1.1*</td>
</tr>
</tbody>
</table>

* If you are using Oracle Policy Automation/Modeling 10.1 then use the latest 10.1 release of Oracle Policy Automation Connector for Siebel (V10.1.2). If you are using Oracle Policy Automation 10.2 then use the latest 10.2 release of Oracle Policy Automation Connector for Siebel (V10.2.x). If you are using Oracle Policy Automation 10.3 then use the latest 10.3 release of Oracle Policy Automation Connector for Siebel (V10.3x).

**Note:**
All versions of Siebel 8.x are supported, up to and including 8.2. See the appropriate Siebel documentation for all other requirements. Siebel 7.8 is supported, however, the Siebel server and Siebel Web Server Extensions must be patched to version 7.8.2.8 or later. For a 7.8 install there are some variations in the installation process. These will be noted at the appropriate points in the installations process.

Parameter Sheet
The following is a list of parameters that are used to replace the environment variables during this install process. These parameters must be used consistently.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;install_dir&gt;</td>
<td>The folder where the installation source files are copied to</td>
<td>C:\ Program Files\Oracle\Policy Automation - Siebel</td>
</tr>
<tr>
<td>&lt;ds_url&gt;</td>
<td>Determinations Server URL</td>
<td><a href="http://localhost:8080/siebel-determinations-server">http://localhost:8080/siebel-determinations-server</a></td>
</tr>
<tr>
<td>&lt;owd_int_url&gt;</td>
<td>The Oracle Web Determinations URL used by the Siebel Embedded OWD View</td>
<td><a href="http://localhost:8080/siebel-wd-embedded">http://localhost:8080/siebel-wd-embedded</a></td>
</tr>
<tr>
<td>&lt;owd_ext_url&gt;</td>
<td>The standalone Oracle Web Determinations URL</td>
<td><a href="http://localhost:8080/siebel-web-determinations">http://localhost:8080/siebel-web-determinations</a></td>
</tr>
<tr>
<td>&lt;local_db_user&gt;</td>
<td>Username to connect to local database (sqlanywhere)</td>
<td>JOHN</td>
</tr>
<tr>
<td>&lt;local_db_pwd&gt;</td>
<td>Password for the above</td>
<td>&lt;your password&gt;</td>
</tr>
<tr>
<td>&lt;server_db_user&gt;</td>
<td>Username to connect to server database (oracle/MS)</td>
<td>SIEBEL</td>
</tr>
<tr>
<td>&lt;server_db_pwd&gt;</td>
<td>Password for the above</td>
<td>&lt;your password&gt;</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td><code>&lt;application&gt;</code></td>
<td>The Siebel application you wish to install the connector to</td>
<td>Siebel Public Sector</td>
</tr>
<tr>
<td><code>&lt;webclient_dir&gt;</code></td>
<td>The folder which Siebel web client is installed</td>
<td>C:\program files\8.0\web client</td>
</tr>
<tr>
<td><code>&lt;tools_dir&gt;</code></td>
<td>The folder in which Siebel tools is installed</td>
<td>C:\program files\8.0\tools</td>
</tr>
<tr>
<td><code>&lt;Siebel_dir&gt;</code></td>
<td>The folder which Siebel server is installed</td>
<td>E:\sba81\siebsrvr</td>
</tr>
<tr>
<td><code>&lt;webclient_srf&gt;</code></td>
<td>The path to the SRF file used by the mobile client. Note that standard</td>
<td><code>&lt;webclient_dir&gt;\objects\ENU\siebel_sia.srf</code></td>
</tr>
<tr>
<td></td>
<td>Siebel builds use siebel.srf whereas SIA builds use siebel_sia.srf</td>
<td></td>
</tr>
<tr>
<td><code>&lt;media_dir&gt;</code></td>
<td>The folder where the OPA for Siebel connector installer files are located</td>
<td>F:\</td>
</tr>
</tbody>
</table>
Installing the Connector

The OPA Connector for Siebel comprises of a number of SIF files containing Siebel repository components, runtime web-service deployments, rulebases, configuration files, documentation and Siebel data import files.

The OPA Connector for Siebel MSI will install all of these resources onto a Windows NT based Siebel development client, and attempt to import the SIF files into your Siebel database.

Once the SIF files are imported you will be required to follow a number of manual steps to complete the Siebel installation process.

**Important:**

If you have a previous version of OPA Connector for Siebel installed, then you **must** first go to either Migration Issues in the OPA Connector for Siebel Developer Help or Upgrading from previous versions in the OPA Connector for Siebel Release Notes.
Typical Installation

The typical installation describes the procedure to perform an installation of the OPA connector in most scenarios. It leverages as much automation as possible to minimize install time and data entry mistakes. To understand what processes are automated, and to perform a more custom installation, please refer to the Manual Installation.

Step 1 – Run the Installer

During the installation process, all of the resources required by the connector are installed onto a Windows NT based machine.

It is strongly recommended that the OPA Connector for Siebel's SIF files are first imported into a Siebel local database development environment.

1. Double click the setup.exe to begin the installation and follow the on-screen instructions; you are presented with the Setup Type screen
2. Choose Custom to change the installation directory; you are presented with the Custom Setup screen.
3. On the *Setup Type* screen, if you wish to change the installation directory, click on the *Change...* button and enter the value of `<install_dir>` on your parameter sheet.

**Note:**
If you are installing the Oracle Policy Modeling Plugin you must install Oracle Policy Modeling first.

4. Click **Next** then on the *Ready to Install the Program* (final) screen shown below click **Install** to copy the required files to the installation directory.
Step 2 – Oracle Policy Automation Runtime Installation

Deploy Determinations Server to the Application Server

A special version of the Oracle Determinations Server is bundled with this version of the OPA Connector for Siebel, for use with benefit plans. It is delivered as a application package (.war file for java, zipped web application for .NET) and comes pre-loaded with the AdminSmokeTest and BPlan_Sample rulebases.

The web application file to be deployed is located at:
<install_dir>\Determinations Server\ then either \DotNet\ or \Java\.

If you are using the Siebel connector for purposes other than generating benefit plans then you can use the standard determinations server, either .Net or Java, which is bundled with the OPA runtime package.

For detailed instructions on deploying Oracle Determinations Server please refer to the Oracle Policy Automation Runtime Installation Guide.

Test the Determinations Server Deployment

To verify that Oracle Determinations Server has successfully started, type the following into a browser:
<ds_url>/siebel-determinations-server/soap.asmx?wsdl for .NET
<ds_url>/siebel-determinations-server/soap?wsdl for Java

To deploy the AdminSmokeTest to Oracle Determinations Server and test the service, open a web browser and enter either:

<ds_url>/<service>/<optional generic/specific if assess service>/<rulebase>.asmx?wsdl for .NET
or
<ds_url>/<service>/soap/<optional generic/specific if assess service>/<rulebase>?wsdl for Java)

For example:
http://localhost/siebel-determinations-server/assessio/soap/AdminSmokeTestIO.asmx?wsdl

You should see a WSDL of the AdminSmokeTest rulebase similar to this .NET example:
Deploy Web Determinations to the Application Server

Two versions of Oracle Web Determinations (OWD) are bundled with this version of the Siebel Connector, one is intended to be viewed inside a Siebel Embedded Web Determination’s View, the other is to deploy standalone. Both of the OWD for Siebel versions have the required plug-in to communicate with the Policy Automation Session business components in Siebel. The required file to be deployed is located at:

<install_dir>\Web Determinations\then either:
\DotNet\ or  Java\n
For detailed instructions on deploying Oracle Web Determinations please refer to the Oracle Policy Automation Runtime Installation Guide.

Test the Oracle Web Determinations for Siebel Deployment

To verify that the Oracle Web Determinations websites have been successfully deployed enter <owd_int_url> into a browser and you should see the following:
Enter <owd_ext_url> into a browser and you should see the following

Modify the siebel-data-adapter.properties

The properties files deployed with the two versions of Oracle Web Determinations (siebel-wd-embedded and siebel-web-determinations) need to be modified to point at the Siebel EAI Object Manager and given the appropriate user permissions.

1. Open the two Properties files from the expanded Oracle Web Determinations deployment; for example:
   C:\Program Files\Apache Software Foundation\Tomcat 6.0\webapps\siebel-web-determinations\WEB-INF\classes\configuration\ siebel-data-adapter.properties
   or
   C:\Program Files\Apache Software Foundation\Tomcat 6.0\webapps\siebel-wd-embedded\WEB-INF\classes\configuration\ siebel-data-adapter.properties

You should see the following parameters:
   URL=http://localhost/eai_anon_enu/start.swe?SWEExtSource=SecureWebService&SWEExtCmd=Execute
   username=SADMIN
   password=SADMIN
   AdminSmokeTest.configName=AdminSmokeTest
   AdminSmokeTest.externalId=firstname

2. Change the emboldened entries. localhost should be changed to the server hosting the Siebel Web Extensions.

3. Test that the Siebel EAI object Manager specified above is accepting requests; copy the URL into a browser; you should see the following response; note that although the message returned contains a SOAP fault, it indicates that the EAI is up and awaiting requests. If you are using Internet Explorer as your browser ensure the internet Options-> Advanced->Browsing-> Show friendly HTTP error messages is not checked.
4. Restart the application server to activate the changes

**Note:**
The username and password can be left in plain text until the installation is verified but should then be encrypted; refer to *Encrypt the User Credentials* in the *Siebel Data Adapter Configuration File* topic of the OPA Connector for Siebel Help.

**Step 3 - Import the SIF Archive**

To import the SIF archive, do the following:

1. Open Siebel Tools and login to the *Local* datasource
2. Select the *Tools*->*Import from Archive...* menu option
3. From the *File* dialog, open the file to `<install_dir>/SiebelObjects/pa-release.sif` (if installing to Siebel 7.8 use `<install_dir>/SiebelObjects/7.8/pa-release.sif`)  
4. On the *Import* wizard, accept the default value of *Merge* for conflict resolution, then click on the *Next* button
5. On the *Object Comparison* screen, click on the *Next* button
6. On the *Do you wish to proceed?* dialog, click on the *Yes* button
7. On the Import wizard *Summary*, click on the *Finish* button
Note:
If you see a message similar to below, for Siebel 8.2, you will need to lock the Table Policy Automation before importing the SIF

To lock projects and/or checkout objects, do the following:

1. Select Siebel Objects->Project from the Object Explorer tree
2. Click on Query for *Policy Automation*
3. Check the Locked checkbox for all of the Policy Automation projects
4. Select Siebel Objects->Application from the Object Explorer tree
5. Click on Query for <application> and select it
6. Right click and select Check Out Object
7. Click on the Check Out button

Step 4 - Add Screens to the Application

To add screens to the application, do the following:

1. Select Siebel Objects->Application from the Object Explorer tree
2. Click on Query for the <application> (for example, Public Sector) and select it
3. Select Siebel Objects->Application->Page Tab from the Object Explorer tree
4. Add a new screen by doing the following:
   a. Press the Ctrl-N keys to open a new screen
   b. On the new screen, click on the dropdown selection list
   c. Select the Policy Automation Administration Screen
   d. Click on OK
   e. Add a Sequence of <the next number after the largest in seq>
   f. Add a Text String Reference of X_PA_ADMIN
5. Repeat these steps for the Policy Automation Smoke Test Screen using the Text String Reference of X_PA_EXAMPLES
6. Select Siebel Objects->Application-> Screen Menu Item option from the Object Explorer tree
7. Repeat steps 4 and 5 of this procedure

Step 5 - Compile Objects/Projects

To perform an incremental compile on objects and or projects, do the following:

1. Right click <application> -> Compile Selected Objects
   a. Select the Siebel repository file: <webclient_srf>
   b. Click on Compile
2. Select the Tools->Compile Projects menu option; if this is your first compile, then you need to compile all projects, otherwise compile locked projects
   a. Select the Siebel repository file: <webclient_srf>
   b. Click on Compile
Step 6 - Apply Schema Changes

To apply the schema changes to the server database, you will need to have your Siebel Database Administrator open the Enterprise Management console for the Oracle database being used to apply the database changes and apply a generated DDL file or apply the changes directly from Siebel Tools.

1. Open Siebel Tools and navigate to Tables in the Object Explorer
2. Query for 'Table Policy Automation' as the project name
3. Choose Generate DDL and give the generated file to your DBA (recommended) or
4. Choose Apply; the changes will be applied immediately
5. Select Current Query from the Tables dropdown
6. Input the database user and password with suitable privileges and optionally the location of the DDL file (Please consult Siebel Bookshelf if you require more information on applying schema changes)

The tables are added to the Siebel default schema named 'SIEBEL'. If your Siebel database uses a different schema, then make the appropriate changes to the DDL prior to execution.

Step 7 - Run the Business Services

(See Manual Installation if you wish to avoid this step)

Run a Business Service script to add the required seed data and import the Smoke Test mapping while in the mobile client.

The business service assumes that no versions of the Connector have been previously installed. If you want to overwrite previous versions, you should rename/delete any existing Mappings, the Determination Server Outbound web service, the Policy Automation Inbound Web Service and the Employee and Web Determination Symbolic URL entries.

Before running the Business Service you should check the following:

- If you imported the sif file (in Step 3 – Import the SIF Archive) to a local copy of the Siebel server you should check-in all changes. This includes all Policy Automation projects and also any projects modified in Step 4 Add Screens to the Application.
- Make sure that the Policy Automation Workflows project is locked on the server.

You can run the installation service on a local version of the Siebel server, but it must be repeated on the Siebel server in order to complete the installation on the server.

1. Run a Business Service script by doing the following:
   a) Open the Siebel Mobile client, ensuring that you are connected to the Server datasource.
   b) Go to Administration->Business Service->Simulator
   c) Click New and add a new Service Name of Policy Automation Install and a new Method Name of Install Connector with Examples.

Optional step:

By default, it will associate the views with the Siebel Administrator responsibility. If you want to associate with another responsibility, click New for Input Arguments, click the Pick button for the property name and create a Responsibility property with the name of the responsibility you want to add. You can run the install method multiple times if you need to associate with multiple responsibilities.

d) Click on Run to insert the necessary LOVs and also remove any incorrect ones, and create the view records. When complete, you should see an Install successful message.
e) Change the Method Name to *Install Benefit Plan*

f) Click **Run** to insert the benefit plan configuration and outbound web service

2. Import the Smoke Test mapping while in the mobile client by doing the following:

   a) Go to **Administration->Business Service->Simulator**
   
   b) Click **New** and add a new **Service Name of** Policy Automation Install and a new **Method Name of** Install Examples
   
   c) Click **New** in the **Input Arguments** applet
   
   d) Click the **Property Name** column popup, then select **New**
   
   e) Add a new property with a **Name of** Examples Directory and a **Value of** the path to the *Mapping.xml* file (*<install_dir>\Examples\*).
   
   f) Click on **Run** to insert the AdminSmokeTest mapping record which can be viewed on the **Administration – Policy Automation** screen. When complete, you should see an **Install successful** message.

---

**Step 8 – Copy Across the Web Template and XSLT File**

1. Copy the Web Template that is used for the Embedded Oracle Web Determinations view, as follows:
   
   *<install_dir>\Siebel Object\SingleControl.swt*
   to
   
   *<webclient_dir> \WEBTEMPL*

2. Copy the Decision Report XSLT file that is used for Decision Reports, as follows:
   
   *<install_dir>\Siebel Object\decision_report.xslt*
   to
   
   *<webclient_dir>\XSLT*

   *<Siebel_dir>\XSLT*
Step 9 – Additional Web Templates for Siebel 7.8

If you are deploying to Siebel 7.8, you will need to add two Web Templates as well as the definition, into Siebel tools.

1. Copy `CCAppletFormGridLayout_withJS.swt` and `ccview_parentdetails.swt` from:

   `<install_dir>\Siebel Object\7.8`
to:

   `<webclient_dir> \WEBTEMPL`
   `<tools_dir>\WEBTEMPL`
   `<Siebel_dir>\WEBTEMPL` (only valid on the server)

Import Additional78WebTemplates.sif into Siebel Tools
Compile the Applet Form Grid Layout With JS and View Parent Details Web Template definitions into the SRF

Step 10 – Deploy new SRF to Siebel Server hosting the EAI Object Manager

Once you have added the Connector components, you need to copy the SRF to the `<Siebel_dir>\Objects\Enu` directory.

**Note:**
This assumes that there is only one Siebel Server and it is running the EAI Object Manager component group.

Step 11 – Finalize the Installation

Finalizing the installation requires that you check the outbound and inbound web service definitions and the Symbolic URL representation (it may be useful to refer the Manual Installation section of this guide) and run the Admin Smoke Test.

For full details, go to Finalize and Validate the Connector Installation.
Manual Installation

The manual installation describes the procedure to install the OPA connector without running the Policy Automation Install business service (Step 7 of Typical Install). **You will still need to complete the other steps.** This section references a number of OPA Connector Siebel Objects by name to allow you to customize the installation to suit your particular requirements. Before commencing the manual install, first ensure that you have imported the SIF archive (see *Step 3 - Import the SIF Archive*) and that you have made the appropriate modifications to the siebel-data-adapter.properties file (see *Modify the siebel-data-adapter.properties*).

Siebel Client Configuration

Start the appropriate Siebel Client for the Application that you are using e.g. Public Sector and log in with Siebel Administrator responsibility so that the seed data for the OPA Connector can be added to the Siebel database.

This section covers adding the required objects into the Siebel Client that should normally be added by the Run Business Service step.

Step 1 - Add the List of Values

To add the list of values, do the following:

1. Launch the Siebel Mobile Client, connecting to the server database
2. Go to the **Administration – Data->List of Values Explorer** menu option
3. Add the following value types:
   a. PA_MAP_ATTR_DTYPE
   b. PA_MAP_DEFAULT_VALUE
   c. PA_MAP_OUTCOME_RPT_STYLE
   d. PA_MAP_OUTCOME_TYPE

4. In the **Types** tree, expand PA_MAP_ATTR_DTYPE, highlight **Values** and add the following values (note case sensitivity):
   a. Auto
   b. Boolean
   c. Date
   d. Datetime
   e. Number
   f. Text
   g. Time

5. In the **Types** tree, expand PA_MAP_DEFAULT_VALUE, highlight **Values** and add the following values:
   a. Error
   b. Uncertain
   c. Unknown
   d. Default

6. In the **Types** tree, expand PA_MAP_OUTCOME_RPT_STYLE, highlight **Values** and add the following values:
   a. Base Only
   b. Full
   c. None
7. In the **Types** tree, expand **PA_MAP_OUTCOME_TYPE**, highlight **Values** and add the following values:
   a. Attribute
   b. Relationship

The resulting **List of Values** should look similar to below:

8. Go to the **Administration – Data->List of Values** menu option
9. Click on the **Clear Cache** button.

**Step 2 - Add Responsibilities**

To add responsibilities, do the following:

1. Go to the **Administration – Application->Views** screen menu and add the following views:
   a. **Policy Automation Mapping Entity View**
   b. **Policy Automation Mapping Relationship View**
   c. **Policy Automation IO Mappings View**
   d. **Policy Automation Smoke Test View**
   e. **Policy Automation New Session View**
   f. **Policy Automation Web Determinations View**
   g. **Policy Automation Mappings IO List View**
   h. **Policy Automation Decision Report List Only View**
   i. **Policy Automation Decision Report Viewer**

2. Go to the **Administration – Application -> Responsibilities** screen and create a new Responsibility **Policy Automation**. If you wish to use the Siebel thin web client, ensure that you set "Web Access" for the responsibility to "Yes"

3. Add the user SADMIN to the **Policy Automation** responsibility
4. For each of the views created in 1 (above), add the **Siebel Administrator** responsibility
5. Logout and restart the client
6. Verify that you can now see the Policy Administration tabs

Step 3 - Import Mappings for the AdminSmokeTest and AdminSmokeTestIO

To import the mapping for the AdminSmokeTest, do the following:

1. Go to Administration – Policy Automation – Mappings
2. Click on the Import button
3. Click on the Browse... button in the presented dialog
4. Open the file <install_dir>/examples/SmokeTest/Mapping.xml
5. Click on the Import button in the presented dialog

To import the mapping for the AdminSmokeTestIO, do the following:

6. Go to Administration – Policy Automation – IO Mappings
7. Click on the Import button
8. Click on the Browse... button in the presented dialog
9. Open the file <install_dir>/examples/SmokeTest/MappingIO.xml
10. Click on the Import button in the presented dialog

Step 4 - Import the Outbound Web Services

To import the outbound web service, do the following:

1. Go to Administration->Web Services->Outbound Web Services
2. Click on Import in the Outbound Web Services applet
3. Click on Browse... in the presented dialog
4. Open the file <install_dir>/examples/SmokeTest/OutboundWebService.xml
5. Click on **Import** in the presented dialog
6. Highlight the **DeterminationsServer** record
7. Modify the **Address** to `<ds_url>/soap/AdminSmokeTest` in the **Service Ports** applet
8. Repeat **Steps 2-7** choosing the file `<install_dir>/examples/SmokeTest/OutboundWebServiceIO.xml`

### Step 5 - Import the Inbound Web Services

To import the outbound web services, do the following:

- Go to **Administration->**Web Services->**Inbound Web Services**
1. Click on **Import** in the **Inbound Web Services** applet
2. Click on **Browse…** in the presented dialog
3. Open the file `<install_dir>/examples/InboundWebService.xml`
4. Click on **Import** in the presented dialog
5. Highlight the **Policy Automation Inbound** record
6. Modify each **Address** entry to the name of the machine hosting the EAI_Anon_Enu Web Server Extension, in the **Service Ports** applet
7. Repeat **Steps 2-7** choosing the file `<install_dir>/examples/InboundWebServiceIO.xml`

### Step 6 – Input the Symbolic URL Definitions

To add the symbolic URL definitions, do the following:

a. Go to **Administration-> Integration->** WI Symbolic URL List-> **Host Administration**

b. Add a hostname called **OWD Server**, with a virtual name of **OWD Server**

c. Create a Symbolic URL with the following parameters
d. This Symbolic URL is used by popup windows launched from the Session applet; make modifications to URL as follows:

<table>
<thead>
<tr>
<th>Param</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Web Determinations</td>
</tr>
<tr>
<td>URL</td>
<td><code>&lt;owd_int_url&gt;/startsession/[rulebase]?user=[UserID] &amp;caseID=[SessionID],[UserID],[ObjectID],[Configuration]</code></td>
</tr>
<tr>
<td>Host Name</td>
<td>OWD Server</td>
</tr>
<tr>
<td>Fixup Name</td>
<td>Default</td>
</tr>
<tr>
<td>SSO Disposition</td>
<td>IFrame</td>
</tr>
</tbody>
</table>

Create the Symbolic arguments with the following:

<table>
<thead>
<tr>
<th>Name</th>
<th>Required Arg</th>
<th>Arg Type</th>
<th>Arg Value</th>
<th>Append ?</th>
<th>Substitute ?</th>
<th>Seq #</th>
</tr>
</thead>
<tbody>
<tr>
<td>IFrame</td>
<td>Y</td>
<td>Command</td>
<td>Name=webdeterminations Width=100% Height=100%</td>
<td>Y</td>
<td>N</td>
<td>1</td>
</tr>
<tr>
<td>PopupSize</td>
<td>Y</td>
<td>Command</td>
<td>1024x768</td>
<td>Y</td>
<td>N</td>
<td>2</td>
</tr>
<tr>
<td>FreePopup</td>
<td>Y</td>
<td>Command</td>
<td>False</td>
<td>Y</td>
<td>N</td>
<td>3</td>
</tr>
<tr>
<td>[Configuration]</td>
<td>Y</td>
<td>Field</td>
<td>Associated Configuration</td>
<td>N</td>
<td>Y</td>
<td>4</td>
</tr>
<tr>
<td>[locale]</td>
<td>Y</td>
<td>Constant</td>
<td>en-US</td>
<td>N</td>
<td>Y</td>
<td>5</td>
</tr>
<tr>
<td>[rulebase]</td>
<td>Y</td>
<td>Field</td>
<td>Associated Configuration</td>
<td>N</td>
<td>Y</td>
<td>6</td>
</tr>
<tr>
<td>[SessionID]</td>
<td>N</td>
<td>Field</td>
<td>Session ID</td>
<td>N</td>
<td>Y</td>
<td>7</td>
</tr>
<tr>
<td>[UserID]</td>
<td>N</td>
<td>Command</td>
<td>UseSiebel.loginId</td>
<td>N</td>
<td>Y</td>
<td>8</td>
</tr>
<tr>
<td>[ObjectID]</td>
<td>N</td>
<td>Field</td>
<td>Source Object ID Value</td>
<td>N</td>
<td>Y</td>
<td>9</td>
</tr>
</tbody>
</table>
e. This Symbolic URL is used by the Admin Smoke Test view and uses a minimal Symbolic URL parameters to avoid having to customize the Employee business component; make modifications to URL as follows:

<table>
<thead>
<tr>
<th>Param</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Employee</td>
</tr>
<tr>
<td>URL</td>
<td>&lt;owd_ext_url&gt;/startsession/AdminSmokeTest/en-US?user=[UserID]&amp;caseID=,[UserID],[ObjectID],AdminSmokeTest</td>
</tr>
<tr>
<td>Host Name</td>
<td>OWD Server</td>
</tr>
<tr>
<td>Fixup Name</td>
<td>Default</td>
</tr>
<tr>
<td>SSO Disposition</td>
<td>IFrame</td>
</tr>
</tbody>
</table>

Create the Symbolic arguments with the following:

<table>
<thead>
<tr>
<th>Name</th>
<th>Required Arg</th>
<th>Arg Type</th>
<th>Arg Value</th>
<th>Append?</th>
<th>Substitute?</th>
<th>Seq#</th>
</tr>
</thead>
<tbody>
<tr>
<td>PopupSize</td>
<td>Y</td>
<td>Command</td>
<td>1024x768</td>
<td>Y</td>
<td>N</td>
<td>1</td>
</tr>
<tr>
<td>FreePopup</td>
<td>Y</td>
<td>Command</td>
<td>False</td>
<td>Y</td>
<td>N</td>
<td>2</td>
</tr>
<tr>
<td>[UserID]</td>
<td>N</td>
<td>Command</td>
<td>UseSiebelLoginId</td>
<td>N</td>
<td>Y</td>
<td>3</td>
</tr>
<tr>
<td>[ObjectID]</td>
<td>N</td>
<td>Field</td>
<td>Id</td>
<td>N</td>
<td>Y</td>
<td>4</td>
</tr>
</tbody>
</table>

**Step 7 – Import and Activate the Work Flows**

To activate the workflows only, do the following:

1. Open the **Siebel Mobile** client, ensuring that you are connected to the Server source
2. Go to **Administration->Business Process->Workflow Deployment**
3. In the lower active workflow processes applet, from the menu select **Import Processes**
4. Locate the file `<install_dir>\SiebelObjects\[workflow process name].xml`
5. Click on the **Import** button

If you want to edit the workflows, do the following:

i. Open the **Siebel Tools** client, ensuring that you are connected to the Server source
ii. Go to **Workflow Process** in the Object Explorer
iii. In the right hand applet, right click and select **Import Workflow Process**
iv. Locate the file `<install_dir>\SiebelObjects\[workflow process name].xml`
v. Click on the **Publish/Activate** button on the **WF/Task Editor Toolbar**
vi. Import the workflows listed below in the following order (the order is important):

a. Policy Automation Assess Workflow.xml
b. Policy Automation PreseedSession.xml
c. Policy Automation RetrieveSessionPost.xml
d. Policy Automation RetrieveSessionPre.xml
e. Policy Automation RetrieveSession Impl.xml
f. Policy Automation RetrieveSession.xml
g. Policy Automation RetrieveMapping.xml
h. Policy Automation RetrieveSessionListPost.xml
i. Policy Automation RetrieveSessionListPre.xml
j. Policy Automation RetrieveSessionList Impl.xml
k. Policy Automation RetrieveSessionList.xml
l. Policy Automation SaveSession Impl.xml
m. Policy Automation SaveSessionPost.xml
n. Policy Automation SaveSessionPre.xml
o. Policy Automation SaveSession.xml
p. Policy Automation Assess IO
q. Policy Automation Get IO
r. Policy Automation Get IO Metadata
s. Policy Automation Save Session IO Pre
t. Policy Automation Save Session IO Post
u. Policy Automation Save Session IO Impl
v. Policy Automation Save Session IO

Notes:
If you have installed a previous version of the OPA Connector for Siebel, it is recommended that you delete any Policy Automation * workflow processes.
The order that you import and activate the workflows is important; please follow the order shown above.

vii. Check that the workflows appear as records in the Active Workflow Process view
Finalize and Validate the Connector Installation

Step 1 - Run the Admin Smoke Test for Determination Server

To run the Admin Smoke Test, do the following:

1. Navigate to the **Policy Automation Smoke Test** tab and verify that the **Siebel Administrator** employee is shown
2. Click on **DS Smoke Test** button in the **Employee** applet
3. Verify that a popup window returns with: "Smoke test succeeded: The current record is a valid Siebel Admin record."
4. In top right hand corner of the applet, go to the next record
5. Click on **DS Smoke Test** in the **Employee** applet
6. Verify that a popup window returns with: "Smoke test succeeded: The current record is NOT a valid Siebel Admin record."

Step 2 - Run the Admin Smoke Test for Web Determinations

To run the Admin Smoke Test, do the following:

1. Navigate to the **Policy Automation Smoke Test** tab and verify that the **Siebel Administrator** employee is shown
2. Click on **WD Smoke Test** button in the **Employee** applet
3. Verify that a popup window looks like this:

![Smoke Test Window](image)

4. In top right hand corner of the applet, go to the next record
5. Click on **WD Smoke Test** in the **Employee** applet
6. Verify that a popup window looks like this:

Step 3 – Check the plug-in is working for Oracle Policy Modeling

1. Launch the **Oracle Policy Modeling** application and select **File - New Project...**; the **New Project** dialog is presented.
2. In the *New Project* dialog, give the project a name and click on the **Create** button; it is suggested that you use the same name as the data mapping you are **importing**.

![New Project Dialog](image1)

3. From the main menu, select **Tools - Siebel - Import Data Model**; the **Import Data Model** dialog is presented.

![Import Data Model Dialog](image2)
4. On the `Import Data Model` dialog, locate the `<mapping name>_Mapping.XML` file and click on the `Open` button to **import** the data mapping to your project.

You will notice that a new `SiebelDataModel.xsrc` properties file has been placed in your project; by default, the properties file will always be given that name.

5. Double click on the properties file (`SiebelDataModel.xsrc`) to view its contents:
Step 4 – Migrate Changes to the Siebel Server

After validating that the admin smoke test works in the Mobile client the SRF file is ready to be migrated to the Siebel Server Object Manager:

1. Stop the Siebel Server Service
2. Copy `<webclient_dir>/Objects/ENU/Siebel_sia.srf` to `<Siebel_dir>/Objects/ENU/Siebel/Siebel_sia.srf`, ensuring that you make a backup before replacing it
3. Start the Siebel Server Service
4. Wait until Services have resumed
5. Launch a thin web client and validate that the admin smoke test is still successful.
Upgrade the Connector

Oracle Policy Automation Connector for Siebel 10.3 uses Oracle Policy Automation 10.3 runtimes. All rulebases used by previous versions of the connector must be upgraded using Oracle Policy Automation 10.3.

For more information on this process, see Upgrade a project and What’s new in the Oracle Policy Modeling help.

If you are upgrading from an existing OPA Connector for Siebel 10.1 or 10.2 you should follow the procedure below.

Step 1 - Uninstall the existing OPA Connector windows install.

The Windows installer for Oracle Policy Automation Connector for Siebel only places files on your hard drive and does not affect Siebel or the Oracle Policy Automation Connector for Siebel directly. Before installing Oracle Policy Automation Connector for Siebel 10.3, you should first uninstall your currently installed version as follows:

1. Go to Start Menu -> Control Panel -> Add or Remove Programs
2. Select Oracle Policy Automation Connector for Siebel <version> and click on the Remove button

Step 2 - Install the new OPA Connector

Refer to Step 1 - Run the installer in the Oracle Policy Automation Connector for Siebel Installation Guide.

Step 3 – Upgrade Rulebases

Use Oracle Policy Modeling to upgrade the rulebases used by the OPA Connector for Siebel. For more information on this process see Upgrade a project in the Oracle Policy Modeling Help.

Step 4 – Deploy the new Siebel Determinations Server and Siebel Web Determinations web applications

The web applications for .NET and Java have both changed and need to be updated. You should deploy and test the appropriate web applications which can be found at: <install dir>\Determinations Server, and <install dir>\Web Determinations.

If you have made substantial changes to the web applications (by customizing the web templates for example) you should make sure that you keep a copy of that web application before replacing it with the new versions.

The template files (.vm files) have changed for the 10.3 version of Web Determinations and any existing template customizations will have to be merged with the new templates in order to work properly in the new Web Determinations applications.

Step 5 – Import the Sif Archive.

1. Open Siebel Tools and login to the Local datasource
2. In the Object Explorer, go to Projects and lock the following projects:
   - Policy Automation
   - Policy Automation Smoke Test
Policy Automation Workflows
- Table Policy Automation

3. Select the Tools->Import from Archive... menu option
4. From the File dialog, open the file to <install_dir>/SiebelObjects/pa-release.sif
5. On the Import wizard, accept the default value of Merge for conflict resolution, then click on the Next button
6. On the Object Comparison screen, click on the Next button
7. On the Do you wish to proceed? dialog, click on the Yes button
8. On the Import wizard Summary screen, click on the Finish button.

Step 6 - Compile Objects/Projects
1. Select the Tools->Compile Projects menu option
2. Select All Projects
3. Select the Siebel repository file: <webclient_srf>
4. Click on Compile.

Step 7 – Apply Schema Changes
To apply the schema changes to the server database, you will need to have your Siebel Database Administrator open the Enterprise Management console for the Oracle database being used to apply the database changes. You then need to apply a generated DDL file or apply the changes directly from Siebel Tools.

1. Open Siebel Tools and navigate to Tables in the Object Explorer
2. Query for S_PA_* as the table name or Table Policy Automation as the project name
3. Choose Generate DDL and give the generated file to your DBA (recommended) or
4. Choose Apply; the changes will be applied immediately
5. Select Current Query from the Tables dropdown
6. Input the database user and password with suitable privileges and optionally the location of the DDL file (Please consult Siebel Bookshelf if you require more information on applying schema changes)

Step 8 – Run the Upgrade Business Service
1. Start Siebel Web Client
2. Go to Administration Business Service -> Simulator
3. Create a new Service instance: Service name "Policy Automation Install", Method name: "Upgrade Connector to 10.3 with Examples"
4. Click on the Run button.
Step 9 – Deploy the compiled srf file to the Siebel Server

Web Determinations relies on Siebel Inbound Web Services to run and so the compiled .srf file with the new workflows and business services will need to be copied to the Siebel Server.

1. Stop the Siebel Server
2. Copy the .srf file compiled in step 6 to the Siebel server
3. Restart the Siebel Server
Install the Active Object Patch

This release of the Oracle Policy Automation Connector for Siebel contains an enhancement to the Active Object handling of the Business Object Mappings. Because this changes existing functionality it has been provided an optional installable patch.

Once installed, this patch will allow Mapping using Active Business Objects to load child records. For more information on the limitations this patch overcomes, see Active Business Objects in the Oracle Policy Automation Connector for Siebel Developer Help

**Note:**
If you choose to install this optional patch, you should do so only after all other install or upgrade tasks have been completed.

The `pa-abo.sif` imported in the instructions below can be found at the following location:

<install dir>\SiebelObjects\pa-abo.sif

To install the Active Object patch, do the following:

1. Start Siebel Tools
2. Lock the Project "Policy Automation"
3. Import the .sif file `pa-abo.sif`
4. Choose *Merge the object definition from the archive file with the definition in the repository* and click Next.
5. Review the changes and click Next.
6. Click "Yes" when prompted and then Finish to complete the import
7. Compile the "Policy Automation" Project