



# Oracle® Business Intelligence Infrastructure Upgrade Guide

Version 10.1.3.2

December 2006

Part Number: B31771-01

Copyright © 2006, Oracle. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS. Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

Oracle, JD Edwards, PeopleSoft, and Siebel are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

# Contents

## **Chapter 1: What's New in This Release**

## **Chapter 2: Before Upgrading to the New Oracle BI Infrastructure**

New Names for Oracle Business Intelligence Infrastructure Components	7
Key Changes to the Oracle BI Infrastructure	8
Overview of the Upgrade Steps for the Different Versions of Siebel Analytics	9
Upgrading Third-Party or Other Deployment Components	9
Which Siebel Business Analytics Platform Components to Upgrade	10
Backing Up Siebel Business Analytics Files and Folders	10
Files Automatically Backed Up on Windows Operating Systems	11
Files Automatically Backed Up on Linux and UNIX Operating Systems	12

## **Chapter 3: Performing an Oracle BI Infrastructure Upgrade**

Upgrading the Oracle BI Infrastructure Components	13
Upgrading the Siebel Analytics Web Catalog to Oracle BI Presentation Catalog	14
Upgrading the Web Catalog for Microsoft Windows for Less Than 4000 Users	14
Upgrading the Web Catalog for Linux or UNIX for Less Than 4000 Users	15
Upgrading the Web Catalog for More Than 4000 Users	16
Upgrading an Existing Repository for Use with Oracle BI Infrastructure	18
Upgrading WebARchive Files	18
Upgrading Oracle BI Disconnected Analytics	18
Presentation Services Changes Required After Silent Upgrade	19
Upgrading the Siebel Analytics Microsoft Excel Add-In	20
Upgrading Usage Tracking Schemas	20

## **Chapter 4: After Upgrading to the New Oracle BI Infrastructure**

Reapplying Customized Settings or Strings	21
Reapplying Customized Style Sheets	21

## Contents

Reconfiguring Oracle BI Scheduler	22
Reconfiguring the Oracle BI Scheduler Server	22
Recreating Oracle BI Scheduler Settings on Microsoft Windows	23
Verifying the Version Number of Upgraded Components	23
Changes After Upgrade from Siebel Business Analytics to Oracle BI Infrastructure	23
Upgrading from a Pre-Release Version of Oracle BI Infrastructure	25
Testing Oracle BI Infrastructure	25
Uninstalling an Upgrade to Oracle BI Infrastructure	25

## Index

# 1

## What's New in This Release

Oracle Business Intelligence Enterprise Edition consists of components that were formerly available from Siebel Systems as Siebel Business Analytics Platform, with a number of significant enhancements.

The *Oracle Business Intelligence Infrastructure Upgrade Guide* is part of the documentation set for Oracle Business Intelligence Enterprise Edition. This guide contains information about upgrading from Siebel Business Analytics Platform version 7.8 to Oracle Business Intelligence Infrastructure 10.1.3.2. This guide contains new material and material that was previously published under the title *Siebel Business Analytics Platform Upgrade Guide*.

**NOTE:** This guide does not describe the process to upgrade the data and metadata provided with pre-built Analytics applications. For information about upgrading Analytics applications, see the documentation for Oracle Business Intelligence Applications.

Oracle recommends reading the Oracle Business Intelligence Enterprise Edition Release Notes before installing, using, or upgrading the Oracle BI Infrastructure. The Oracle Business Intelligence Enterprise Edition Release Notes are available:

On the Oracle Business Intelligence Enterprise Edition CD-ROM.

On the Oracle Technology Network at [http://www.oracle.com/technology/documentation/bi\\_ee.html](http://www.oracle.com/technology/documentation/bi_ee.html) (to register for a free account on the Oracle Technology Network, go to <http://www.oracle.com/technology/about/index.html>).

### What's New in *Oracle Business Intelligence Infrastructure Upgrade Guide*, Version 10.1.3.2

The *Oracle Business Intelligence Infrastructure Upgrade Guide* is for organizations that are upgrading their Siebel Business Analytics platform to Oracle Business Intelligence Infrastructure 10.1.3.2.

Table 1 lists the major changes described in this version of the documentation.

Table 1. New Product Features in *Oracle Business Intelligence Infrastructure Upgrade Guide*, Version 10.1.3.2

Topic	Description
<a href="#">New Names for Oracle Business Intelligence Infrastructure Components on page 7</a>	Added a table that maps Siebel Business Analytics Platform component names to their new Oracle Business Intelligence Infrastructure names.
<a href="#">Reconfiguring Oracle BI Scheduler on page 22</a>	Added information about post-upgrade tasks for Oracle BI Scheduler.

## What's New in This Release

Table 1. New Product Features in *Oracle Business Intelligence Infrastructure Upgrade Guide*, Version 10.1.3.2

Topic	Description
<a href="#">Upgrading the Siebel Analytics Web Catalog to Oracle BI Presentation Catalog on page 14</a>	Added information about upgrading the Siebel Analytics Web Catalog to the Oracle BI Presentation Catalog.
<a href="#">Upgrading Usage Tracking Schemas on page 20</a>	Added information about changes to Usage Tracking and how to upgrade.
<a href="#">After Upgrading to the New Oracle BI Infrastructure on page 21</a>	Added information describing changes after upgrade, and post-upgrade tasks.

# 2

## Before Upgrading to the New Oracle BI Infrastructure

The decision to upgrade the Oracle Business Intelligence Infrastructure should be based on specific business requirements to take advantage of new infrastructure functionality. To help you in planning for the upgrade, this chapter provides information about the upgrade process and the tasks to perform before upgrading the Siebel Business Analytics Platform to the Oracle BI Infrastructure. It contains the following topics:

[New Names for Oracle Business Intelligence Infrastructure Components on page 7](#)

[Key Changes to the Oracle BI Infrastructure on page 8](#)

[Overview of the Upgrade Steps for the Different Versions of Siebel Analytics on page 9](#)

[Upgrading Third-Party or Other Deployment Components on page 9](#)

[Which Siebel Business Analytics Platform Components to Upgrade on page 10](#)

[Backing Up Siebel Business Analytics Files and Folders on page 10](#)

## New Names for Oracle Business Intelligence Infrastructure Components

Siebel Business Analytics Platform is now Oracle Business Intelligence Infrastructure. Oracle Business Intelligence infrastructure component names have replaced the former Siebel Business Analytics platform component names. [Table 2](#) shows the correspondence between old and new component names.

Table 2. Correspondence Between Old and New Component Names

Old Name	New Name
Siebel Analytics Server	Oracle Business Intelligence Server
Siebel Analytics Web Server	Oracle Business Intelligence Presentation Services
Siebel Analytics Scheduler	Oracle Business Intelligence Scheduler
Siebel Answers	Oracle Business Intelligence Answers
Siebel Delivers	Oracle Business Intelligence Delivers
Siebel Intelligence Dashboards	Oracle Business Intelligence Interactive Dashboards
Siebel Analytics Web Catalog	Oracle Business Intelligence Presentation Catalog
Siebel Analytics Catalog Manager	Oracle Business Intelligence Catalog Manager

Table 2. Correspondence Between Old and New Component Names

Old Name	New Name
Siebel Analytics Server Administration Tool	Oracle Business Intelligence Server Administration Tool
Siebel Disconnected Analytics or Mobile Analytics	Oracle Business Intelligence Disconnected Analytics
Siebel Open Intelligent Interface	Oracle Open Intelligence Interface
<i>Related component programs:</i>	<i>Related component programs:</i>
Chart image server	Chart image server
Siebel Analytics Client Tools	Oracle Business Intelligence Client Tools
Siebel Analytics ODBC Client	Oracle Business Intelligence ODBC Client
Siebel Briefing Book Reader	Oracle Business Intelligence Briefing Book Reader
Siebel Business Analytics Briefing Books	Oracle Business Intelligence Briefing Books
Siebel Analytics Microsoft Excel add-in	Oracle Business Intelligence Microsoft Excel add-in
XML Publisher	Oracle Business Intelligence Publisher

## Key Changes to the Oracle BI Infrastructure

The Oracle BI Infrastructure includes the following major features that are either new with Oracle BI or represent substantial changes from Siebel Business Analytics that might be relevant to your deployment after the upgrade is complete.

The Oracle BI Infrastructure has a new install path and folder structure. Binaries and configuration files are stored in `\$OracleBI_HOME\server\` (Windows) or `/$OracleBI_HOME/Server/` (Linux and UNIX).

The Oracle BI Presentation Catalog architecture has changed from that of the Siebel Analytics Web Catalog. The Presentation Catalog is no longer a single file, but is split across multiple files that are stored in directories on the operating system. The utility `\OracleBI\web\bin\sawmigrate.exe` (Windows) or `/OracleBI/web/bin/sawmigrate` (Linux or UNIX) converts legacy Web Catalog files to the new file and directory structure. For information about how to convert, see [Upgrading the Siebel Analytics Web Catalog to Oracle BI Presentation Catalog on page 14](#).

Oracle BI Infrastructure 10.1.3.2 Clustering now includes support for clustering servers running Presentation Services and clustering servers running Oracle BI Scheduler. For information about these new features, see the *Oracle Business Intelligence Enterprise Edition Deployment Guide*.

Oracle BI Presentation Services is secured against cross-site scripting (XSS). By default, the HardenXSS element is set to true. This means that users will not be able to use HTML to mark up reports and dashboards. For more information on the HardenXSS setting and how to allow users to enter HTML, see the *Oracle Business Intelligence Presentation Services Administration Guide*.

## Overview of the Upgrade Steps for the Different Versions of Siebel Analytics

The steps required for upgrade depend on the version of Siebel Analytics that you have installed:

Upgrading from Siebel Analytics 7.8.x to Oracle BI Infrastructure 10.1.3.2 requires only that you follow the procedures in this guide. It is not necessary to uninstall Siebel Analytics 7.8.4 or 7.8.5 when you upgrade to Oracle BI Infrastructure 10.1.3.2. Note that it is necessary to uninstall the Siebel Analytics Microsoft Excel add-in.

Upgrading from Siebel Analytics 7.5.x, 7.7, and 7.7.1 x requires these steps:

Save copies of webcat files, repository files, and any other required files, as described in [Backing Up Siebel Business Analytics Files and Folders on page 10](#).

Uninstall Siebel Analytics.

Run the Oracle BI Infrastructure installer, as described in *Oracle Business Intelligence Infrastructure Installation and Configuration Guide*.

Use the sawmigrate utility to migrate the Web Catalog, as described in [Upgrading the Siebel Analytics Web Catalog to Oracle BI Presentation Catalog on page 14](#).

Open the Siebel Analytics repository in Oracle BI Server Administration Tool and save it, as described in [Upgrading an Existing Repository for Use with Oracle BI Infrastructure on page 18](#).

## Upgrading Third-Party or Other Deployment Components

Before beginning the infrastructure upgrade process, see *System Requirements & Supported Platforms for Oracle Business Intelligence Enterprise Edition*. Upgrading to Oracle Business Intelligence Infrastructure might require upgrading third-party or other deployment components, such as the Presentation Services servlet, database software, and ODBC drivers.

If an upgrade of a component is required, then that component upgrade must be performed before the Oracle BI Infrastructure upgrade is performed.

The components that must be upgraded depend on the version of Siebel Business Analytics that you are upgrading from and on the deployment environment. You must ensure that your system satisfies all of the requirements for the Oracle BI Infrastructure. The following are examples of some requirements:

For all Microsoft Windows, Linux, and UNIX versions, JDK 1.5 or higher must be installed before you upgrade.

On Windows 2003 SP1, the DEP settings must be changed before you upgrade.

For Microsoft Windows systems that use the Microsoft Excel add-in, .Net Framework 2.0 must be installed before you upgrade.

For Red Hat Linux, ensure that gcc files (C++ shared object files) are installed before you upgrade.

## Which Siebel Business Analytics Platform Components to Upgrade

If you decide to upgrade, then you must upgrade all Siebel Business Analytics Platform components. For example, you cannot open a newer version of the repository on an older version of the Server Administration Tool; that is, a repository saved under Oracle BI 10.1.3.2 cannot be opened on Siebel Business Analytics 7.8.x.

The Oracle Business Intelligence Administrator must ensure that the versions of major Oracle Business Intelligence components that are installed on the same machine or that form part of the Oracle BI deployment are from the same release. For example, if only the Oracle Business Intelligence Presentation Services is upgraded on a system, but the 7.8 release of Siebel Analytics Server remains installed, then the two servers will not work together properly.

For information about checking the version number of Oracle BI components after you have completed the upgrade process, see [Verifying the Version Number of Upgraded Components on page 23](#).

## Backing Up Siebel Business Analytics Files and Folders

Before uninstalling or upgrading the Siebel Business Analytics Platform to the Oracle Business Intelligence Infrastructure software, you should back up configuration files, the Siebel Business Analytics Web Catalog, the Siebel Business Analytics repository file, and any files that you have customized, such as message files, style sheets, or custom skins in SiebelAnalyticsData\Web\Res, and move the files to a temporary location.

If either the instanceconfig.xml file or the Analytics Windows registry strings have been customized, then these should be backed up for comparison to the new installation's instanceconfig.xml file or Analytics Windows registry strings. If the customizations are still viable in the new release, then they should be applied accordingly.

When you upgrade from Siebel Analytics 7.8.x to Oracle BI Infrastructure, certain files are also automatically backed up. The files are saved to the following directories:

\$OracleBI\_HOME, the root install directory for Oracle BI Infrastructure

\$OracleBIData\_HOME, the root install directory for Oracle BI data

The names of the files backed up depends on the underlying operating system:

[Files Automatically Backed Up on Windows Operating Systems on page 11](#)

[Files Automatically Backed Up on Linux and UNIX Operating Systems on page 12](#)

## Files Automatically Backed Up on Windows Operating Systems

The installer automatically backs up the Windows files that are listed in [Table 3](#). Oracle BI Infrastructure 10.1.3.2 has two top-level directories: \$OracleBI\_HOME, the root install directory, and \$OracleBIData\_HOME, the root install directory for Oracle BI data.

Typically, these directories are in the same parent directory; for example, D:\OracleBI\OracleBI is \$OracleBI\_HOME and D:\OracleBI\OracleBIData is \$OracleBIData\_HOME. The backup files are saved to the one of two directories, \$OracleBI\_HOME or \$OracleBIData\_HOME.

Table 3. Locations of Siebel Analytics Configuration Files and Folders Backed Up Under Windows

File or Folder Name	Oracle BI Location Copied To
\SiebelAnalyticsData\Web\Catalog\Deliveries folder	Oracle Business Intelligence Presentation Services machine
DBFeatures.INI file	\$OracleBI_HOME\server\Config\DBFeatures.INI.78
NQClusterConfig.INI file	\$OracleBI_HOME\server\Config\NQClusterConfig.INI.78
NQConfig.INI file	\$OracleBI_HOME\server\Config\NQConfig.INI.78
Repository (.rpd) file	\$OracleBI_HOME\server\Repository (.rpd files)
instanceconfig.xml file	\$OracleBIData_HOME\Web\config\Instanceconfig.xml.78
Web Catalog directory	\$OracleBIData_HOME\Web\catalog\*.webcat

## Files Automatically Backed Up on Linux and UNIX Operating Systems

The installer automatically backs up the Linux or UNIX files that are listed in [Table 4](#) and copies them to the indicated locations. Oracle BI Infrastructure 10.1.3.2 has two top-level directories, OracleBI and OracleBIData. Typically, directories are in the same parent directory; for example, /usr/local/OracleBI and /usr/local/OracleBIData.

Table 4. Locations of Siebel Analytics Configuration Files and Directories Backed Up Under UNIX

Siebel Analytics File or Directory Name	Oracle BI Location Copied To
/SiebelAnalyticsData/Web/catalog/Deliveries folder	Oracle Business Intelligence Web Server machine
DBFeatures.INI file	OracleBI/server/Config
Instanceconfig.xml file	OracleBIData/web/config
NQClusterConfig.INI file	OracleBI/server/Config
NQSCONFIG.INI file	OracleBI/server/Config
odbc.ini file	OracleBI/setup
Repository (.rpd) file	OracleBI/server/Repository
user.csh file	OracleBI/setup
user.sh file	OracleBI/setup
Web Catalog directory	Oracle Business Intelligence Web Server machine

# 3

## Performing an Oracle BI Infrastructure Upgrade

The upgrade process consists of installing the new Oracle BI Infrastructure software in the same network and machine locations as an earlier version of Siebel Analytics. If you use Oracle BI Disconnected Analytics, then you must also follow a separate upgrade process. A license is not required to upgrade the Siebel Business Analytics Platform to the Oracle BI Infrastructure.

This chapter contains the following topics:

[Upgrading the Oracle BI Infrastructure Components on page 13](#)

[Upgrading the Siebel Analytics Web Catalog to Oracle BI Presentation Catalog on page 14](#)

[Upgrading an Existing Repository for Use with Oracle BI Infrastructure on page 18](#)

[Upgrading WebARhive Files on page 18](#)

[Upgrading Oracle BI Disconnected Analytics on page 18](#)

[Upgrading the Siebel Analytics Microsoft Excel Add-In on page 20](#)

[Upgrading Usage Tracking Schemas on page 20](#)

### Upgrading the Oracle BI Infrastructure Components

This section explains how to perform the upgrade procedure for Oracle BI Infrastructure components except for Oracle BI Disconnected Analytics.

Before performing the upgrade procedure, ensure that you have reviewed the information in the preceding chapter and performed all applicable tasks.

#### *To upgrade the Oracle BI Infrastructure components*

- 1 Run the installer for 10.1.3.2 on the machine(s) where the 7.8.x component(s) are installed. The installer detects the existing version and updates the binary files.
- 2 If you are prompted to either keep the existing configuration or to restore the default, choose to keep the existing configuration.

For more information about installer prompts that might appear during the upgrade process, see the *Oracle Business Intelligence Infrastructure Installation and Configuration Guide*.

- 3 Delete the file SiebelAnalytics.webcat.version:

Under Microsoft Windows: \$INSTALLDIR\SiebelAnalyticsData\Web\catalog

Under Linux: \$INSTALLDIR/SiebelAnalyticsData/web/catalog

**NOTE:** The Web Catalog file must be upgraded to the new Presentation Catalog format following the procedure that is described in [“Upgrading the Siebel Analytics Web Catalog to Oracle BI Presentation Catalog.”](#)

- 4 Review and perform the remaining applicable upgrade tasks that are described in this chapter.
- 5 Proceed to [Chapter 4, “After Upgrading to the New Oracle BI Infrastructure”](#) and perform all applicable post-upgrade tasks.

**NOTE:** If you use Oracle BI Scheduler, carefully read [“Reconfiguring Oracle BI Scheduler”](#) on page 22.

## Upgrading the Siebel Analytics Web Catalog to Oracle BI Presentation Catalog

After the upgrade is complete, you must convert the Siebel Analytics Web Catalog to the Oracle BI Presentation Catalog format. The steps that you follow depend on the operating system and on the number of users:

[Upgrading the Web Catalog for Microsoft Windows for Less Than 4000 Users on page 14](#)

[Upgrading the Web Catalog for Linux or UNIX for Less Than 4000 Users on page 15](#)

[Upgrading the Web Catalog for More Than 4000 Users on page 16](#)

### Upgrading the Web Catalog for Microsoft Windows for Less Than 4000 Users

Follow these steps to convert the Web Catalog to the Presentation Catalog structure when you have less than 4000 Web Catalog users or plan to have less than 4000 Presentation Services users. The steps use mywebcat.webcat as the example name for the Web Catalog.

#### *To upgrade the Web Catalog for Windows for less than 4000 users*

- 1 Copy the existing custom webcat file to \$OracleBIData\_HOME\web\catalog.
- 2 Stop Presentation Services.

- 3 Assuming that the name of the Web Catalog is mywebcat.webcat, run the sawmigrate utility:

```
$OracleBI\web\bin>sawmigrate $OracleBIData_HOME\web\catalog\mywebcat.webcat
```

The sawmigrate utility runs and writes a report to the shell, screen, or console in which the utility was run. The report includes warning and error messages and a list of objects that might have failed to upgrade. The utility creates a directory named mywebcat under \$OracleBIData\_HOME/web/catalog with shared folders, users, and other catalog objects.

**NOTE:** The upgrade of a large Web Catalog can take several hours to complete (approximately 1 hour per 30MB of catalog data). Killing the sawmigrate process before it completes results in an incomplete upgrade.

## Upgrading the Web Catalog for Linux or UNIX for Less Than 4000 Users

Follow these steps to convert the Web Catalog on Linux or UNIX to the Presentation Catalog structure when you have less than 4000 Web Catalog users or plan to have less than 4000 Presentation Services users. The steps use mywebcat.webcat as the example name for the Web Catalog.

### *To upgrade the Web Catalog for Linux or UNIX for less than 4000 users*

- 1 Copy the existing custom webcat file to the \$OracleBIData\_HOME/web/catalog directory.
- 2 Stop Presentation Services.
- 3 Delete the existing default directory in \$OracleBIData\_HOME/web/catalog.
- 4 Change to bash shell and then source saw.sh, which is located in the \$OracleBI\_HOME/setup directory. This command sets environment variables including ANA\_INSTALL\_DIR, PATH, LD\_LIBRARY\_PATH, and JAVA\_HOME.

```
bash
```

```
source saw.sh
```

**NOTE:** If you do not source saw.sh before you run the sawmigrate utility, then you might get shared library errors.

- 5 Assuming that the name of the Web Catalog is mywebcat.webcat, run the sawmigrate utility, which resides in \$OracleBIData\_HOME/web/bin from the bash shell:

```
sawmigrate $OracleBIData_HOME/web/catalog/mywebcat.webcat
```

The sawmigrate utility runs and writes a report to the shell, screen, or console in which the utility was run. The report includes warning and error messages and a list of objects that might have failed to upgrade. The utility creates a directory named mywebcat under \$OracleBIData\_HOME/web/catalog with shared folders, users, and other catalog objects.

**NOTE:** The upgrade of a large Web Catalog can take several hours to complete (approximately 1 hour per 30MB of catalog data). Killing the sawmigrate process before it completes results in an incomplete upgrade.

## Upgrading the Web Catalog for More Than 4000 Users

If you have a large Web Catalog file with more than 4000 users or if you plan to have more than 4000 Presentation Catalog users in the future, then upgrade the Web Catalog using the following procedure for either Windows, Linux, or UNIX systems.

### *To upgrade the Web Catalog for more than 4000 users*

- 1 Stop Presentation Services.
- 2 Make the following entries in the instanceconfig.xml file. This file is located in \$OracleBIData\_HOME\web\config on Windows systems and in \$OracleBIData\_HOME/web/config on Linux or UNIX systems.

```
<Catalog>
  <AccountIndexRefreshSecs>3600000</AccountIndexRefreshSecs>
  <AccountCacheTimeoutSecs>3600000</AccountCacheTimeoutSecs>
  <PrivilegeCacheTimeoutSecs>3600000</PrivilegeCacheTimeoutSecs>
  <CacheTimeoutSecs>3600000</CacheTimeoutSecs>
  <CacheCleanupSecs>3600000</CacheCleanupSecs>
  <HashUserHomeDirectories>2</HashUserHomeDirectories>
</Catalog>
```

The HashUserHomeDirectories setting addresses file system limitations and hashes the users' home directories. For example, for the user named Steve, the logical folder "/users/steve" becomes the physical tree on the disk "/users/st/steve". The other settings turn off rebuilding of catalog caches.

- 3 Save the instanceconfig.xml file.
- 4 Copy the existing custom webcat file to \$OracleBIData\_HOME\web\catalog on Windows or \$OracleBIData\_HOME/web/catalog on Linux or UNIX systems.
- 5 On Linux or UNIX systems, delete the existing default directory in \$OracleBIData\_HOME/web/catalog.
- 6 On Linux or UNIX systems, change to bash shell and then source saw.sh, which is located in the \$OracleBI\_HOME/setup directory. This command sets environment variables including ANA\_INSTALL\_DIR, PATH, LD\_LIBRARY\_PATH, and JAVA\_HOME.

```
bash
```

```
source saw.sh
```

**NOTE:** If you do not source saw.sh before you run the sawmigrate utility, then you might get shared library errors.

- 7 Assuming that the name of the Web Catalog is mywebcat.webcat, run the sawmigrate utility using the command that is appropriate for the system:

On Windows systems:

```
sawmigrate -c $OracleBIData_HOME\web\config\instanceconfig.xml  
$OracleBIData_HOME\web\catalog\mywebcat.webcat
```

On Linux or UNIX systems:

```
sawmigrate -c $OracleBIData_HOME/web/config/instanceconfig.xml  
$OracleBIData_HOME/web/catalog/mywebcat.webcat
```

The sawmigrate utility runs and writes a report to the shell, screen, or console in which the utility was run. The report includes warning and error messages and a list of objects that might have failed to upgrade. The utility creates a directory named mywebcat under \$OracleBIData\_HOME/web/catalog with shared folders, users, and other catalog objects. Users' home directories are hashed.

**NOTE:** The upgrade of a large Web Catalog can take several hours to complete (approximately 1 hour per 30MB of catalog data). Killing the sawmigrate process before it completes results in an incomplete upgrade.

- 8 After running the sawmigrate utility and creating the Presentation Catalog file structure, remove the following entries from the instanceconfig.xml file:

```
<Catalog>  
  <AccountIndexRefreshSecs>3600000</AccountIndexRefreshSecs>  
  <AccountCacheTimeoutSecs>3600000</AccountCacheTimeoutSecs>  
  <PrivilegeCacheTimeoutSecs>3600000</PrivilegeCacheTimeoutSecs>  
  <CacheTimeoutSecs>3600000</CacheTimeoutSecs>  
  <CacheCleanupSecs>3600000</CacheCleanupSecs>  
</Catalog>
```

**NOTE:** Retain the following setting:

```
<Catalog>  
  <HashUserHomeDirectories>2</HashUserHomeDirectories>  
</Catalog>
```

## Upgrading an Existing Repository for Use with Oracle BI Infrastructure

To use an existing repository with the upgraded Oracle BI Infrastructure, use the following procedure.

### *To convert the older repository to the new platform format*

- 1 Ensure that Oracle Business Intelligence Enterprise Edition is running.
- 2 Using the Oracle BI Infrastructure Server Administration Tool, open the repository file in online mode.
- 3 Save the repository file.

**NOTE:** If you omit this step, then when the upgraded Oracle BI Infrastructure uses the old repository file, the repository is converted to the new format in memory for use by Oracle BI Infrastructure, but the upgraded repository is not saved.

## Upgrading WebARhive Files

After an upgrade, you must redeploy all WebARhive (WAR) files. If you do not redeploy the files, then you might get an error.

For information about creating and deploying a WAR file for Oracle BI Presentation Services, see the *Oracle Business Intelligence Infrastructure Installation and Configuration Guide*.

## Upgrading Oracle BI Disconnected Analytics

**NOTE:** Oracle BI Disconnected Analytics is not part of the Oracle BI Infrastructure 10.1.3.2 base upgrade.

To silently upgrade Oracle BI Disconnected Analytics, perform the following procedure on each machine that runs Oracle BI Disconnected Analytics.

**To upgrade Oracle BI Disconnected Analytics**

- 1 Run the following command:

```
setup.exe -W I ni tJavaHome. propertyVal ue="C: /j 2sdk1. 4. 2_03" -W
setupTypes. sel ectedSetupTypeI d="Di sconnectedCl i ent" -G
repl aceExi sti ngResponse="yesToAl l " -G repl aceNewerResponse="yesToAl l " -si l ent
```

where the options have the following values:

Option Value	Meaning
-W I ni tJavaHome. propertyVal ue="C: /j 2sdk1. 4. 2_03"	Specify the required Java SDK location.
-W setupTypes. sel ectedSetupTypeI d="Di sconnectedCl i ent"	Specify the installation setup-type as DisconnectedClient.
-G repl aceExi sti ngResponse="yesToAl l "	These two settings tell the installer to take the rest as default, and continue to the end.
-G repl aceNewerResponse="yesToAl l "	
-si l ent	Run the installation in silent mode.

- 2 Restart the computer on which the Oracle BI Disconnected Analytics Client was upgraded. After restarting, synchronize each Oracle BI Disconnected Analytics application. The *Oracle Business Intelligence Disconnected Analytics Administration and Configuration Guide* describes how to synchronize an application.

After you upgrade Oracle BI Disconnected Analytics silently, you must make the changes described in the next section, [Presentation Services Changes Required After Silent Upgrade](#).

**Presentation Services Changes Required After Silent Upgrade**

These changes must be made to support Oracle BI Disconnected Analytics after an upgrade.

**To modify Presentation Services**

- 1 The Web Catalogs for each Oracle BI Disconnected Analytics application must be upgraded and archived as described in [Upgrading the Siebel Analytics Web Catalog to Oracle BI Presentation Catalog on page 14](#).
- 2 Some XML tags in the Oracle BI Disconnected Analytics application configuration file have been deprecated in Oracle BI Infrastructure 10.1.3.2. You should remove these tags for each application. See the *Oracle Business Intelligence Disconnected Analytics Administration and Configuration Guide* for details.

## Upgrading the Siebel Analytics Microsoft Excel Add-In

The Siebel Analytics Microsoft Excel add-in that was distributed with previous versions does not work with Oracle Business Intelligence Infrastructure 10.1.3.2. Follow these steps to upgrade the add-in:

### *To upgrade the Microsoft Excel add-in*

- 1 Uninstall the Siebel Analytics Microsoft Excel add-in.
- 2 Install the Oracle Business Intelligence Microsoft Excel add-in.

## Upgrading Usage Tracking Schemas

Oracle BI Infrastructure requires a number of setup tasks to enable usage tracking. Specific applications might require additional steps.

Oracle BI Infrastructure 10.1.3.2 adds the following columns to usage tracking:

- SAW\_DASHBOARD\_PG, which indicates the page within the dashboard
- PRESENTATION\_NAME, which indicates the name of the Presentation Catalog
- ERROR\_TEXT, which contains error messages from backend databases
- RUNAS\_USER\_NAME, which contains the name of the user being impersonated

These new columns require updating the physical schemas. SQL scripts that upgrade the schemas reside in the \$INSTALL\server\Schema directory. To upgrade the schema, run the script for the database that you are using:

- Oracle\_alter\_nq\_acct.sql
- DB2\_alter\_nq\_acct.sql
- SQLServer\_alter\_nq\_acct.sql
- Teradata\_alter\_nq\_acct.sql

The directory \$OracleBI\_HOME/server/Sample/Usage Tracking contains the following to help you understand and use the new usage tracking features in Oracle BI Infrastructure 10.1.3.2:

- SQL\_Server\_Time, scripts for populating sample tables
- Usage Tracking, a new Presentation Catalog for the Oracle BI Infrastructure 10.1.3.2 Usage Tracking features
- UsageTracking.rpd, a new repository file for the Oracle BI Infrastructure 10.1.3.2 Usage Tracking features

For information about merging Presentation Catalogs, see the *Oracle Business Intelligence Presentation Services Administration Guide*. For information about merging repository (.rpd) files, see the *Oracle Business Intelligence Server Administration Guide*.

# 4

## After Upgrading to the New Oracle BI Infrastructure

This chapter explains post-upgrade considerations and tasks. It contains the following topics:

[Reapplying Customized Settings or Strings on page 21](#)

[Reapplying Customized Style Sheets on page 21](#)

[Reconfiguring Oracle BI Scheduler on page 22](#)

[Verifying the Version Number of Upgraded Components on page 23](#)

[Changes After Upgrade from Siebel Business Analytics to Oracle BI Infrastructure on page 23](#)

[Upgrading from a Pre-Release Version of Oracle BI Infrastructure on page 25](#)

[Testing Oracle BI Infrastructure on page 25](#)

[Uninstalling an Upgrade to Oracle BI Infrastructure on page 25](#)

### Reapplying Customized Settings or Strings

If either the instanceconfig.xml file or Analytics Windows registry strings were customized in the previous deployment, then compare the backed-up versions to the new versions. If the customizations are still viable in the new release, then reapply them.

### Reapplying Customized Style Sheets

**NOTE:** The look and feel in Oracle Business Intelligence Enterprise Edition has changed. Existing custom style sheets might require substantial changes. See the *Oracle Business Intelligence Presentation Services Administration Guide* for more information.

Because of the changes to skins and styles in Oracle BI Infrastructure, review your deployment's customizations manually, reapply them, and test them thoroughly to ensure that there are no problems.

The default skins and styles that ship with the Oracle BI Infrastructure are located in the Oracle BI Presentation Services application resources directory (\web\app\res directory in the installation directory) in the sk\_\* and s\_\* folders. The name of the new style and skin is Oracle10. An updated style that resembles the old Siebel one is included with the default styles and skins.

After you have tested them, but before you copy the default views.css files back to the implementation server, perform the following task on the server to clear the server caches.

### *To clear the server caches and restore the default views*

- 1 Shut down Oracle Business Intelligence Server, Oracle Business Intelligence Presentation Services, and Microsoft Internet Information Server (IIS).
- 2 Remove the custom views.css from the directory where it has been installed. For example:  
`$INSTALL\web\app\res\s_Siebel7\b_mozilla_`  
or  
`$INSTALL\Siebel AnalyticsData\Web`
- 3 Clear the Siebel Analytics Web Server Cache:  
Delete the nQs\_\*.temp files in the C:\WINNT\Temp directory.
- 4 Clear the Browser Cache:  
From the Internet Explorer menu, navigate to Tools > Internet Options > Settings > View Files, and delete all the files in this folder.
- 5 Restore the default views.css files to the appropriate folder.
- 6 Restart the Oracle Business Intelligence Server, Oracle Business Intelligence Presentation Services, and IIS.

## Reconfiguring Oracle BI Scheduler

After you upgrade Siebel Analytics Scheduler to Oracle BI Scheduler, perform the following tasks:

[Reconfiguring the Oracle BI Scheduler Server on page 22](#) (all platforms)

[Recreating Oracle BI Scheduler Settings on Microsoft Windows on page 23](#) (Microsoft Windows)

### Reconfiguring the Oracle BI Scheduler Server

After the Oracle Business Intelligence upgrade is finished, you must complete additional tasks to properly configure the Oracle BI Scheduler server. The Scheduler Administrator credentials must be stored in the Presentation Services Credential Store, and Presentation Services must be directed to this store. This is required for proper communication between Presentation Services and Scheduler and to enable the Delivers functionality.

For complete information on adding Scheduler credentials to the Presentation Services credential store, on configuring Presentation Services to identify the store, and on additional configuration tasks that you might need for your deployment, see the chapter on configuring BI Scheduler in the *Oracle Business Intelligence Infrastructure Installation and Configuration Guide*.

## Recreating Oracle BI Scheduler Settings on Microsoft Windows

On Microsoft Windows, when you upgrade Oracle BI Scheduler, the Windows registry key settings from earlier releases are exported to a file named SiebelAnalytics.reg. You must recreate these Scheduler settings manually in the instanceconfig.xml file by referring to the SiebelAnalytics.reg file.

The SiebelAnalytics.reg file is located in the directory OBIEE\Install\_Backup\10.13.2006\_14.50.45 (where the last directory is the timestamp of when the Siebel Analytics upgrade took place).

## Verifying the Version Number of Upgraded Components

After the upgrade, you should verify that all components were upgraded. [Table 5](#) provides information about checking the version number of Oracle BI Infrastructure components.

Table 5. Checking the Oracle BI Infrastructure Component Version Numbers

Component	Path to Version Number
Oracle BI Infrastructure	Open the file \$OracleBI_HOME\Document\version.txt (Windows).
	Open the file \$INSTALLDIR/Document/version.txt (UNIX).
	version.txt is installed in \$OracleBI_HOME for all components. For some components, version.txt is installed in other place. For example, for Oracle BI Server, it is also installed in \$OracleBI\server\document
Presentation Services	Click the link Access Presentation Services Administration.
Catalog Manager	(Toolbar) Help > About Catalog Manager
Job Manager	(Toolbar) Help > About Job Manager
ODBC Client	(ODBC Toolbar) Help > About
Server Administration Tool	(Toolbar) Help > About Administration Tool

## Changes After Upgrade from Siebel Business Analytics to Oracle BI Infrastructure

After you upgrade to Oracle BI 10.1.3.2, you will see the following changes:

In Oracle BI 10.1.3.2, the installed folder structure is changed. All the existing directories and files are backed up from \$OracleBI\_HOME, the root install directory and \$OracleBIData\_HOME data directory to \$OracleBI\_HOME/Install\_Backup/backupAnalytics.

For Microsoft Windows, the entire HKLM/SOFTWARE/Siebel Systems, Inc./Siebel Analytics registry key is exported to \$OracleBI\_HOME/Install\_Backup/<InstallTime>/SiebelAnalytics.reg and deleted. In Oracle BI 10.1.3.2, the registry dependency has been removed on Windows. The Oracle BI Infrastructure uses System variables to define the SAROOT, SADATA, and SATEMP folders.

Siebel Analytics services are removed, and the following Oracle BI Services are installed: Oracle BI Presentation Server, Oracle BI Scheduler Server, Oracle BI Cluster Controller and Oracle BI Java Host.

Oracle BI 10.1.3.2 is installed to existing \$OracleBI\_HOME and \$OracleBIData\_HOME directories.

If \$OracleBI\_HOME/Config/DBFeatures.INI exists, it is migrated to \$OracleBI\_HOME/server/Config/DBFeatures.INI.78.

If \$OracleBI\_HOME/Config/NQClusterConfig.INI exists, it is migrated to \$OracleBI\_HOME/server/Config/NQClusterConfig.INI.78.

If \$OracleBI\_HOME/Config/NQSCConfig.INI exists, it is migrated to \$OracleBI\_HOME/server/Config/NQSCConfig.INI.78.

All \$OracleBI\_HOME/Repository/\*.rpd files are copied from the old Repository to \$OracleBI\_HOME/server/Repository. If demo1.rpd exists, it is copied to server/Repository/demo1.rpd.78. If ORA\_northwind.rpd exists, it is copied to server/Repository/ORA\_northwind.rpd.7.

If \$OracleBI\_HOME/setup/odbc.ini exists, it is migrated to \$OracleBI\_HOME/setup/odbc.ini.78.

If \$OracleBI\_HOME/setup/user.sh exists, it is migrated to \$OracleBI\_HOME/setup/user.sh.78.

If \$OracleBIData\_HOME/web/config/instanceconfig.xml exists, it is migrated to \$OracleBIData\_HOME/web/config/instanceconfig.xml.78.

All \$OracleBIData\_HOME/web/catalog/\*.webcat files are copied to \$OracleBIData\_HOME/web/catalog. You must migrate the webcat to Oracle BI Infrastructure webcat using sawmigrate utility after the upgrade is complete. The upgrade does not migrate the Web Catalog. For information about using sawmigrate, see [Upgrading the Siebel Analytics Web Catalog to Oracle BI Presentation Catalog on page 14](#). You must also reapply style sheets. See [Reapplying Customized Style Sheets on page 21](#).

If the \$OracleBIData\_HOME/web/Res directory is not empty, the contents is copied to \$OracleBIData\_HOME/web/res

If the \$OracleBIData\_HOME/Disconnected directory is not empty, the contents is copied to \$OracleBIData\_HOME/disconnected

If the \$OracleBIData\_HOME/web/catalog/Deliveries directory is not empty, the contents are copied to the new Oracle BI Infrastructure directory \$OracleBIData\_HOME/web/catalog/deliveries.

This deliveries directory is used only by the sawmigrate utility. After sawmigrate is done, the 10.1.3.2 deliveries content will be in the catalog directory tree itself, and then the copied directory can be deleted.

Usage Tracking schemas contain new columns that require updating of the physical schemas. See [Upgrading Usage Tracking Schemas on page 20](#) for details.

## Upgrading from a Pre-Release Version of Oracle BI Infrastructure

When you upgrade from a pre-release version of the Oracle BI Infrastructure to this version of the Oracle BI Infrastructure, you will see the following changes:

All the configuration files (NQSConfig.ini, NQSClusterConfig.ini, instanceconfig.xml) are not updated.

All the libraries (.dll files on Windows) are updated:

If you choose to keep the existing configuration (the default) during the upgrade, all the libraries (.dll files on Windows) are updated.

If you do not choose to keep the existing configuration, then NQSConfig.INI, NQSClusterConfig.INI, and instanceconfig.xml are reset to default values.

## Testing Oracle BI Infrastructure

After you perform the upgrade, you should carefully test the system to ensure that all legacy functionality works properly.

## Uninstalling an Upgrade to Oracle BI Infrastructure

If you uninstall an upgraded version of Oracle BI Infrastructure, that is, you upgrade from Siebel Analytics 7.8.4.X or 7.8.5.X to Oracle BI Infrastructure 10.1.3.2 and then uninstall the upgrade, the data that is automatically backed up is not automatically removed. You must manually delete the directory to recover the space.



# Index

## A

### **Analytics repository**

older repositories, using while upgrading 18

## B

### **backups**

Siebel Analytics files 10

## C

### **client environments**

upgrade 10

### **component**

version number 23

### **customized style sheets** 21

### **customized style sheets**

reapplying 21

## D

### **Disconnected Analytics Client**

required changes 19

silent mode, upgrading in 18

## M

### **Microsoft Excel Add-In**

upgrading 20

## O

### **older repositories, using while**

upgrading 18

### **Oracle BI Clustering**

new features 8

### **Oracle BI infrastructure**

about 8

changed features 8

component names 7

new features 8

### **Oracle BI Presentation catalog**

upgrading to 14

### **Oracle BI to Oracle BI upgrade**

changes 25

## S

### **Siebel Analytics files**

backing up 10

### **Siebel Analytics Web Catalog**

replacement 8

### **Siebel to Oracle BI upgrade**

changes 23

uninstall of upgrade 25

### **silent mode**

upgrading Disconnected Analytics Client 18

### **skins and styles**

changes 21

default Oracle BI Infrastructure 21

### **style sheets**

reapplying 21

## U

### **upgrade**

changes after upgrade 21

### **upgrading** 14, 21

platform upgrade defined 13

platform upgrade process 13

WAR files 18

web catalog 14

### **usage tracking**

new columns 20

upgrade scripts 20

## V

### **version number**

component 23

## W

### **WAR files**

upgrading 18

### **web catalog** 14

### **WebARchive files**

upgrading 18

