



# **Siebel Business Analytics Applications Installation and Administration Guide**

Version 7.8.4

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# 1

## What's New in This Release

### What's New in Siebel Business Analytics Applications Installation and Administration Guide, Version 7.8.4

Table 1 lists changes described in this version of the documentation to support Release 7.8.4 of the software.

Table 1. What's New in Siebel Business Analytics Applications Installation and Administration Guide, Version 7.8.4

Topic	Description
<a href="#">Oracle-Specific Database Guidelines for Siebel Data Warehouse on page 38</a>	Added information for Oracle 10g database version.
<a href="#">Configuring DAC to Support SQL Server 2005 on page 44</a>	Added this procedure.
<a href="#">Connecting from DAC to SQL Server Using Dynamic Port Allocation on page 45</a>	Added this procedure.
<a href="#">Copying Database Parameter Files on page 87</a>	Revised this procedure.
<a href="#">Updating Siebel Transactional Database Schema Definitions on page 104</a>	Revised this procedure.
<a href="#">Stopping the Informatica Repository Server on UNIX on page 127</a>	Added this procedure.
<a href="#">About the DAC Task Definitions Tab on page 184</a>	Added information about new features.
<a href="#">Overview of Analytics Bridge Applications on page 255</a>	Revised Analytics Bridge Applications compatibility table.
<a href="#">Importing Syndicated Data into Siebel Data Warehouse on page 346</a>	Corrected information in this topic.
Installing the Teradata Patch on Windows Installing the Teradata Patch on UNIX	Removed these procedures. <b>NOTE:</b> The Teradata patch is not required if you are using Informatica version 7.1.2 or later. It is only required if you are using Informatica version 6.2.2 or earlier.
Upgrading the Siebel Data Warehouse	Moved this chapter into the <i>Siebel Business Analytics Applications Upgrade Guide</i> .

## What's New in Siebel Business Analytics Applications Installation and Administration Guide, Version 7.8.3

Table 2 lists changes described in this version of the documentation to support Release 7.8.3 of the software.

Table 2. What's New in Siebel Business Analytics Applications Installation and Administration Guide, Version 7.8.3

Topic	Description
<a href="#">Operating System, Driver, and Connectivity Requirements for Siebel Data Warehouse on page 33</a>	Corrected information about the required version of Informatica Server and Informatica Repository Server.
<a href="#">Source and Data Warehouse Code Pages for Latin-1 General (8-bit ASCII) to Latin-1 General (8-bit ASCII) on page 51</a>	Added new topic about 8-bit ASCII code pages.
<a href="#">Analytics Applications Installation and Configuration Flow on page 63</a>	Revised installation flow diagram to show the Siebel Analytics platform must be installed before installing Oracle's Siebel Analytics Applications.
<a href="#">Localizing Siebel Business Analytics Deployments on page 269</a>	Moved this appendix from <i>Siebel Analytics Platform Installation and Configuration Guide</i> into Siebel Business Analytics Applications Installation and Administration Guide.
<a href="#">Integrating Analytics Dashboards and Operational Applications Data on page 279</a>	Moved this appendix from <i>Siebel Analytics Platform Installation and Configuration Guide</i> into Siebel Business Analytics Applications Installation and Administration Guide.
<a href="#">Integrated Security for Analytics Applications on page 295</a>	Moved this appendix from <i>Siebel Analytics Platform Installation and Configuration Guide</i> into Siebel Business Analytics Applications Installation and Administration Guide.
<a href="#">Configuring Metadata for Analytics Applications on page 327</a>	Moved this appendix from <i>Siebel Analytics Platform Installation and Configuration Guide</i> into Siebel Business Analytics Applications Installation and Administration Guide.
<a href="#">Siebel Data Warehouse for Life Sciences Data Considerations on page 345</a>	Extensively revised information about syndicated data loading.

## What's New in Siebel Business Analytics Applications Installation and Administration Guide, Version 7.8.2

Table 3 lists changes described in this version of the documentation to support Release 7.8.2 of the software.

Table 3. What's New in Siebel Business Analytics Applications Installation and Administration Guide, Version 7.8.2.

Topic	Description
Book title change	The name of the <i>Siebel Data Warehouse Installation and Administration Guide</i> changed to <i>Siebel Business Analytics Applications Installation and Administration Guide</i> .
<a href="#">Overview of Analytics Product Licensing on page 17</a>	Added new chapter that describes the licensing options available for Siebel Analytics Platform and Siebel Analytics Applications.
<a href="#">Running the Analytics Applications Installation Wizard (Windows) on page 65</a>	Added new instructions for installing Siebel Analytics Applications.
<a href="#">Running the Informatica PowerCenter Installation Wizard (Windows) on page 66</a>	Added new instructions for installing Informatica PowerCenter 7.1.2.
<a href="#">Setting Up the Informatica Server on page 84</a>	Revised procedure for new version of Informatica.
<a href="#">Setting Up the Informatica Repository Server on page 89</a>	Revised procedure for new version of Informatica.
<a href="#">Pointing to the Informatica Repository on page 93</a>	Revised procedure for new version of Informatica.
<a href="#">Updating Siebel Transactional Database Schema Definitions on page 104</a>	Updated SIF file information.
<a href="#">Teradata-Specific Installation and Configuration Checklist (Windows) on page 108</a>	Added new checklist for Teradata installations.
<a href="#">Installing and Configuring the Informatica Repository Server on UNIX on page 115</a>	Revised procedure for new version of Informatica.
<a href="#">Installing and Configuring the Informatica Server on UNIX on page 117</a>	Revised procedure for new version of Informatica.
<a href="#">Updating the Informatica License Files on UNIX on page 124</a>	Added procedure required for new version of Informatica.
<a href="#">Teradata-Specific Installation and Configuration Checklist for UNIX on page 132</a>	Added new checklist for Teradata installations.
<a href="#">Upgrading Siebel Analytics Applications and Data Warehouse on page 135</a>	Revised information on upgrading to Siebel Analytics Applications version 7.8.2.
<a href="#">Analytics Bridge Applications on page 255</a>	Revised information on the Siebel Analytics Bridge applications.

## What's New in This Release ■

The features listed in [Table 4](#) were introduced in Version 7.8.1, the Limited Distribution release of the software.

Table 4. What's New in Siebel Data Warehouse Installation and Administration Guide, Version 7.8.1

Topic	Description
<a href="#">Setting Up DAC System Properties on page 73</a>	Added description of new DAC system properties: <ul style="list-style-type: none"> <li>■ Verify and Create Non-Existing Indices</li> <li>■ Drop and Create Change Capture Views Always</li> </ul>
<a href="#">Creating Transactional and Data Warehouse Database Connections on page 79</a>	Added new topic.
<a href="#">Comparing and Merging DAC Repositories on page 163</a>	Added new topic.
<a href="#">Replacing an Informatica Workflow with a Custom SQL File on page 166</a>	Added new topic.
<a href="#">Determining the Informatica Server Maximum Sessions Parameter Setting on page 166</a>	Added new topic.
<a href="#">Determining the Number of Transactional and Data Warehouse Database Connections on page 167</a>	Added new topic.
<a href="#">Running Two DAC Servers on the Same Machine on page 168</a>	Added new topic.
<a href="#">Tracking Deleted Records on page 169</a>	Added new topic.
<a href="#">Customizing Index and Analyze Table Syntaxes on page 171</a>	Added new topic.
<a href="#">About the DAC Indices Tab on page 181</a>	Added description of new Always Drop & Create column on the Indices tab.  Added description of new Index Override column on the Databases subtab of the Indices tab.
<a href="#">Siebel Data Warehouse for Life Sciences Data Considerations on page 345</a>	Extensively revised chapter.

# 2

## Overview of Analytics Product Licensing

This chapter provides an overview of Oracle's Siebel Business Analytics product licensing. It includes the following topic: [“Analytics Product Licensing” on page 17](#).

### Analytics Product Licensing

Siebel Business Analytics has the following licensed products.

#### Siebel Business Analytics Platform

The Siebel Business Analytics platform product is a set of servers and tools used to build Analytics applications. Using the Siebel Business Analytics platform, you can develop your own integrated business intelligence application solution. The Siebel Business Analytics platform is described in [Table 5](#).

Table 5. Siebel Business Analytics Platform Components

Siebel Business Analytics Platform Components
Siebel Business Analytics Server
Siebel Business Analytics Web Server
Siebel Business Analytics Scheduler Server
Siebel Data Warehouse Administration Console (Client and Server)
Related component programs:
■ Siebel Business Analytics Administration Tool
■ Siebel Business Analytics Catalog Manager
■ Siebel Business Analytics ODBC Client
■ Siebel Business Analytics Client Tools

The following documentation is applicable to the Siebel Business Analytics platform:

- **Siebel Analytics Platform Installation and Configuration Guide.** This guide provides information about the installation and configuration of the Siebel Analytics platform.
- **Siebel Business Analytics Web Administration Guide.** This guide provides post-installation configuration and administration procedures for Siebel Answers, Siebel Delivers, Siebel Intelligence Dashboards, the Analytics Web Catalog, and the Analytics Web Server.
- **Siebel Business Analytics Server Administration Guide.** This guide provides information about administration of the Analytics Server, Analytics repository files, and Mobile Analytics.

## Siebel Business Analytics Applications

Siebel Business Analytics Applications are prebuilt business intelligence solutions. Siebel Business Analytics Applications are of two types:

- Siebel Business Analytics Applications (CRM)
- Siebel Enterprise Analytics Applications

You must install the Siebel Business Analytics platform before you install the Siebel Business Analytics Applications products.

### Siebel Business Analytics Applications (CRM)

These Analytics applications support Siebel CRM applications, such as Siebel Sales, Siebel Service, and Siebel Marketing. If you already own a Siebel CRM application, you can purchase Siebel Business Analytics platform and Siebel Business Analytics Applications to work with the Siebel CRM application.

The Analytics CRM applications consist of the components shown in [Table 6](#).

Table 6. Siebel Business Analytics Applications (CRM) Components

Component	Description
DAC metadata repository files	This content includes repository objects such as tables, subject areas, execution plans, and tasks, and is contained in XML files.
Embedded Informatica ETL Tool	This is a third-party application that performs the extract, transform, and load operations for the Data Warehouse.
Prebuilt Informatica content	This content includes Extract-Transform-Load (ETL) repository objects, such as mappings, sessions, and workflows, and is contained in the Informatica repository file (Siebel_DW_Rep.rep).
Prebuilt metadata content	This metadata content is contained in the Siebel Analytics repository file (SiebelAnalytics.rpd).
Prebuilt reports and dashboard content	This content is contained in the Siebel Analytics Web Catalog file (SiebelAnalytics.webcat).
Prebuilt Siebel Data Warehouse	The Siebel Relationship Management Warehouse (RMW) is also referred to as the Siebel Data Warehouse.

The Siebel Business Analytics Applications Installation and Administration Guide provides installation and configuration information about the Analytics Applications components referred to above. It also covers the configuration and administration of the Data Warehouse Administration Console (DAC).

**Siebel Enterprise Analytics Applications**

Siebel Enterprise Analytics Applications are analytics applications that provide complete support for enterprise data, including financial, supply chain, and workforce sources. These enterprise applications typically source from non-Siebel data sources (such as SAP, Oracle, or PeopleSoft). They are separate products and licensed separately from the Siebel Business Analytics Applications (CRM). Siebel Enterprise Analytics Applications do not interoperate directly with Siebel Business Applications, but they can be integrated with Siebel CRM solutions.

Siebel Enterprise Analytics Applications components are shown in table [Table 7](#).

Table 7. Siebel Enterprise Analytics Applications Components

Component	Description
Embedded Informatica ETL Tool	This is a third-party application that performs the extract, transform, and load operations for the Data Warehouse.
Prebuilt Informatica content	<p>This content includes Extract-Transform-Load (ETL) repository objects, such as mappings, sessions, and workflows.</p> <p>This content is sourced from SAP R/3, Oracle, PeopleSoft applications, and other data sources.</p> <p>This content is contained in the Informatica repository file (Shell.rep).</p>
Prebuilt metadata content	This metadata content is contained in the Siebel Analytics repository file (SiebelAnalytics.rpd).
Prebuilt reports and dashboard content	This content is contained in the Siebel Analytics Web Catalog file (SiebelAnalytics.webcat).
Prebuilt Siebel Customer-Centric Enterprise Warehouse	<b>NOTE:</b> This data warehouse is not to be confused with the Siebel Relationship Management Warehouse (RMW) or Siebel Data Warehouse.

The *Siebel Customer-Centric Enterprise Warehouse Installation and Configuration Guide* provides installation and configuration information about the Siebel Analytic Applications (Enterprise) product.



# 3

## Overview of Siebel Data Warehouse

This chapter provides an overview of Oracle's Siebel Data Warehouse. It includes the following topics:

- [Siebel Data Warehouse Overview on page 21](#)
- [Siebel Data Warehouse Architecture on page 22](#)
- [About the Data Warehouse Application Console on page 24](#)

### Siebel Data Warehouse Overview

The Siebel Data Warehouse is a unified data repository for all customer-centric data. The purpose of the Siebel Data Warehouse is to support the analytical requirements of Siebel Business Applications.

**NOTE:** The Siebel Data Warehouse is also referred to as the Siebel Relationship Management Warehouse (RMW).

The Siebel Data Warehouse includes the following:

- A data integration engine that combines data from the Siebel transactional database and other data sources to build a data warehouse.
- An open architecture to allow organizations to use third-party analytical tools in conjunction with the Siebel Data Warehouse using the Siebel Analytics Server.
- Optional prebuilt data extractors to incorporate data from external applications into the Siebel Data Warehouse (licensed separately).
- A set of ETL (extract-transform-load) processes that takes data from the Siebel Business Applications transactional data (OLTP) and creates the Siebel Data Warehouse tables.

For more information about ETL processing, see *Siebel Data Warehouse Data Model Reference*.

- The Data Warehouse Application Console (DAC), a centralized console for the set up, configuration, administration, loading, and monitoring of the Siebel Data Warehouse.

Figure 1 provides an overview of the Siebel Data Warehouse.

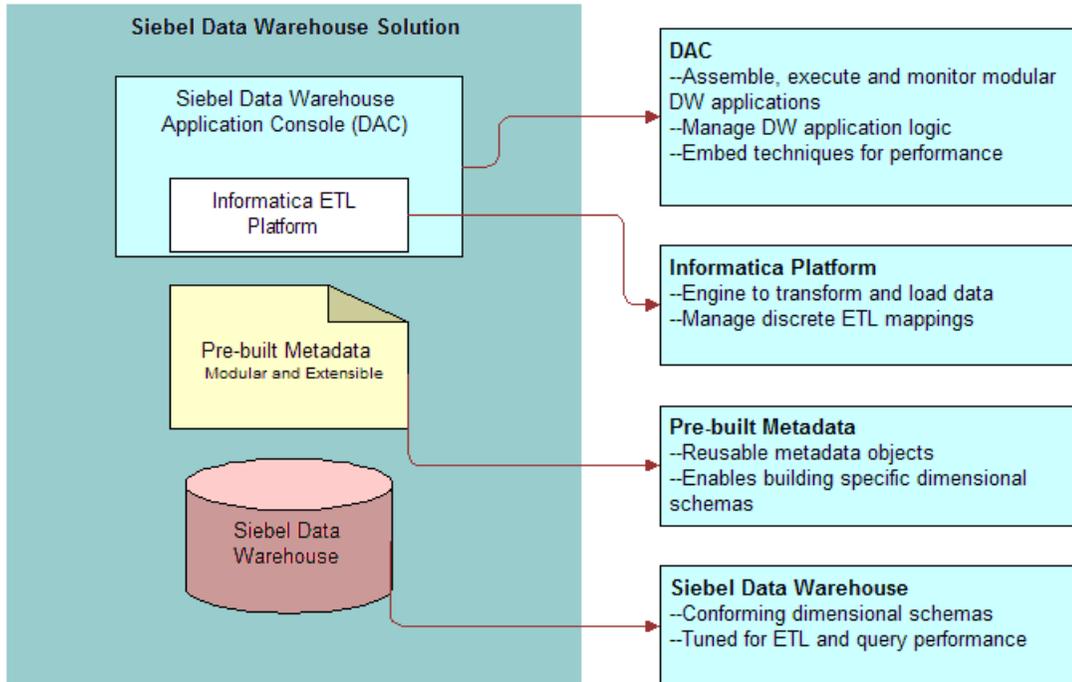


Figure 1. Data Warehouse Overview

## Siebel Data Warehouse Architecture

High-level analytical queries, like those commonly used in Siebel Analytics, scan and analyze large volumes of data using complex formulas. This process can take a long time when querying a transactional database, which impacts overall system performance.

For this reason, the Siebel Data Warehouse was constructed using dimensional modeling techniques to allow for fast access to information required for decision making. The Siebel Data Warehouse derives its data from Siebel operational applications, and uses Informatica's data integration technology to extract, transform, and load data from the Siebel transactional database into the Siebel Data Warehouse.

Figure 2 illustrates the Siebel Data Warehouse architecture.

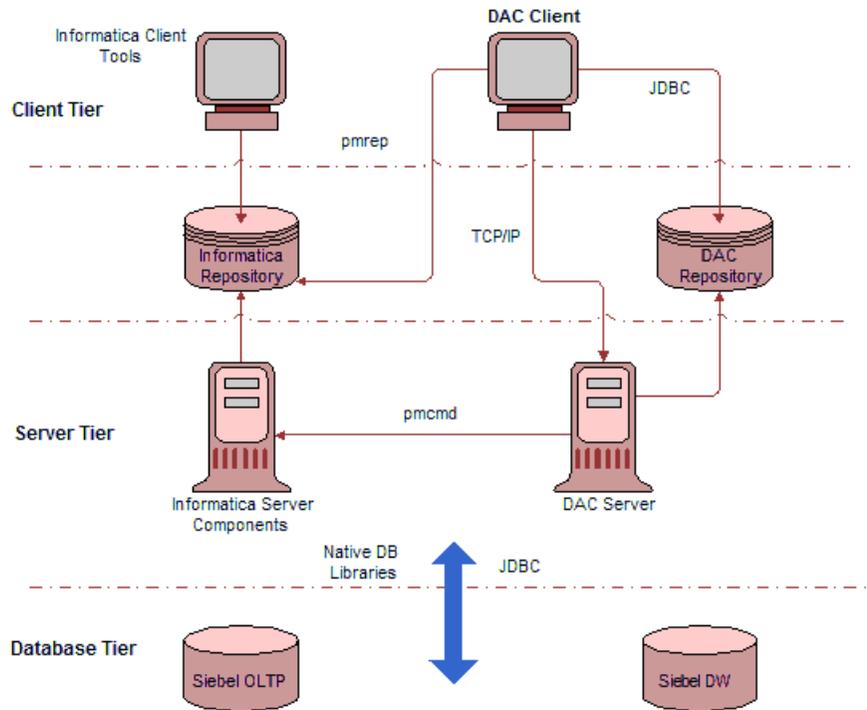


Figure 2. Siebel Data Warehouse Architecture

## Siebel Data Warehouse Architecture Components

The Siebel Data Warehouse architecture comprises the following components:

- **DAC client.** A command and control interface for the data warehouse to allow for set up, configuration, administration, and monitoring of data warehouse processes.
- **DAC server.** Executes the instructions from the DAC client. The DAC server manages data warehouse processes, including scheduling, loading of the ETL, and configuring the subject areas to be loaded. It dynamically adjusts its actions based on information in the DAC repository. Depending on your business needs, you might incrementally refresh the Siebel Data Warehouse once a day, once a week, once a month, or on another similar schedule.
- **DAC repository.** Stores the metadata (semantics of the Siebel Data Warehouse) that represents the data warehouse processes.
- **Informatica Server.** When the server is loading or refreshing the Siebel Data Warehouse, it is recommended that the server be dedicated to that activity. However, when the ETL server is not loading or refreshing the Siebel Data Warehouse, you can use it for other purposes.
- **Informatica Repository Server.** Manages the Informatica repository.
- **Informatica Repository.** Stores the metadata related to Informatica workflows.

- **Informatica client utilities.** Tools that allow you to create and manage the Informatica repository.

## About the Data Warehouse Application Console

The Data Warehouse Application Console (DAC) provides a framework for the entire life cycle of data warehouse implementations. It allows you to create, configure, and execute modular data warehouse applications in a parallel, high-performing environment. For information about the DAC process life cycle, see [“About the DAC Process Life Cycle” on page 29](#).

The DAC complements the Informatica ETL platform. It provides *application-specific* capabilities that are not pre-built into ETL platforms. For example, ETL platforms are not aware of the semantics of the subject areas being populated in the data warehouse nor the method in which they are populated. The DAC provides these application capabilities at a layer of abstraction above the ETL execution platform, as illustrated in Figure 3.

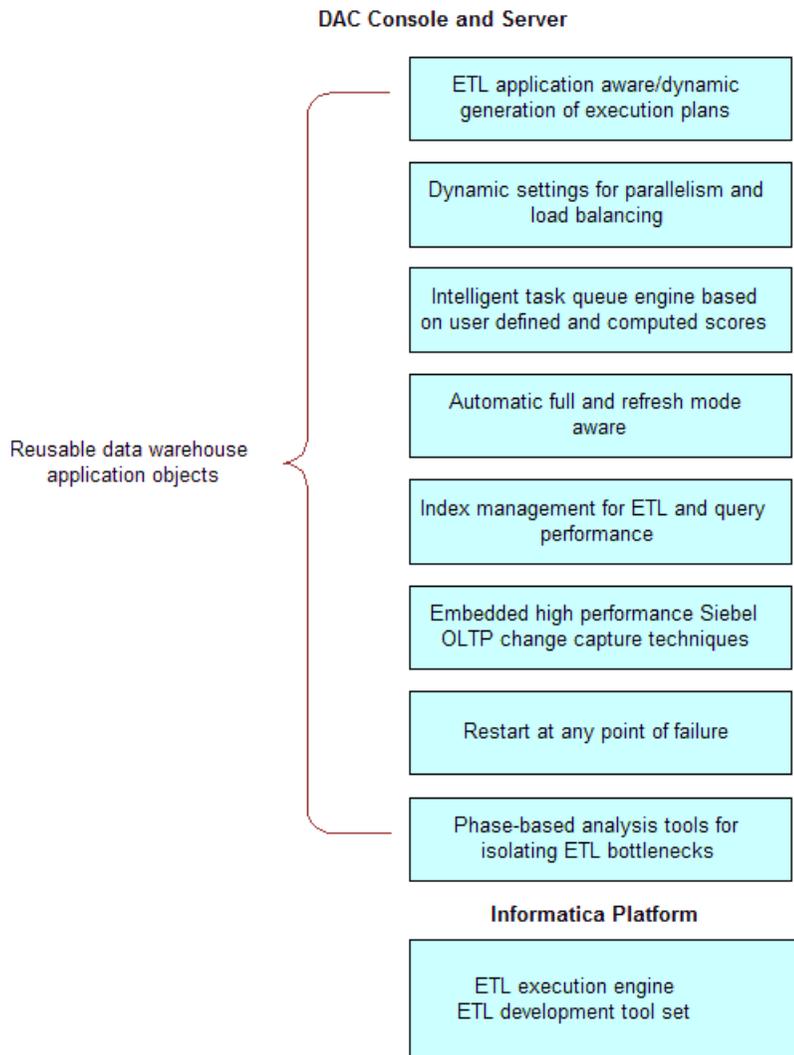


Figure 3. DAC Application-Specific Capabilities

## Important DAC Features

Important DAC features allow you to do the following:

### Minimize install, setup, and configuration time

- Create physical data model in the data warehouse
- Accelerate Informatica configuration
- Set language, currency, and other settings
- Develop data warehouse applications

### Manage metadata driven dependencies and relationships

- Generate custom ETL execution plans
- Automate change capture for the Siebel transactional database
- Capture deleted records
- Assist in index management
- Perform metadata validation checks
- Perform dry-run development and testing
- Provide in-context documentation

### Provide reporting and monitoring to isolate bottlenecks

- Perform error monitoring and email alerting
- Perform structured ETL analysis and reporting

### Utilize performance execution techniques

- Automate full and refresh mode optimization rules
- Set the level of Informatica session concurrency
- Load balance across multiple Informatica servers
- Restart from point of failure

- Queue execution tasks for performance (See [Figure 4.](#))

The DAC manages the task execution queue based on metadata driven priorities and scores computed at runtime. This combination allows for flexible and optimized execution.

**Metadata Driven Priority Assignment**

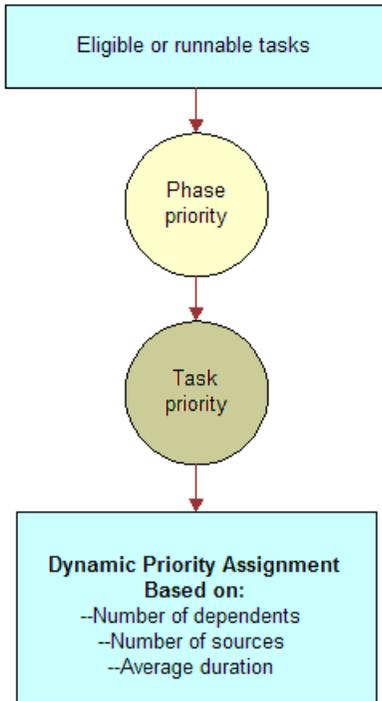


Figure 4. Task Execution Queue

## About DAC Repository Objects

The DAC repository stores application objects in a hierarchical framework that defines a data warehouse application.

A data warehouse application comprises the following repository objects:

- **Tables.** Physical database tables defined in the database schema. Can be transactional database tables or data warehouse tables. Table types can be fact, dimension, hierarchy, aggregate, and so on.
- **Table group.** A logical grouping of tables that defines a logical relationship between its component tables. The table group definition is based on a central or a main table that drives the relationship between itself and the other tables in the group. For example, table groups can be star schemas based on a central fact and its dimensions and aggregates.

- **Subject area.** A logical grouping of table groups that is related to a particular subject or application context. The subject area derives its component tables indirectly from the table group. Subject Area definitions are used for scheduling. A subject area or set of subject areas can be scheduled for full or incremental loads on a single time schedule.
- **Execution plan.** A data transformation plan defined on subject areas that need to be transformed at certain frequencies of time. An execution plan is defined based on business requirements for when the data warehouse needs to be loaded. Execution plans are scheduled in sequence, not in parallel.
- **Task.** A Task can be related to data transformation or database objects. Tasks typically operate on a set of database tables, but they can be independent of the database, for example, creating a file or executing an OS command. Tasks can be of different types, such as extract, load, or batch script, and so on, and can be classified as pre-ETL or post-ETL.
- **Dependency Rule.** A rule that determines the order in which tasks are executed. Dependency rules are defined to determine the sequence of when tasks can run, ensuring that data consistency is maintained for the warehouse. Dependency rules are defined at the task level.
- **Schedule.** A schedule specifies when and how often an execution plan runs. An execution plan can be scheduled for different frequencies or recurrences by defining multiple schedules.

Figure 5 shows the hierarchical relationship among the repository objects.

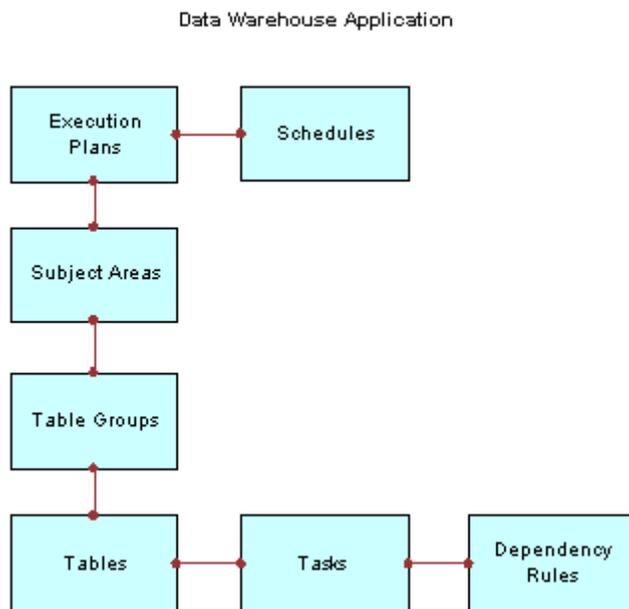


Figure 5. DAC Object Hierarchy

## About the DAC Process Life Cycle

The DAC is used by different user groups to design, execute, monitor, and diagnose data warehouse applications. These phases together make up the DAC process life cycle, as shown in [Figure 6](#).

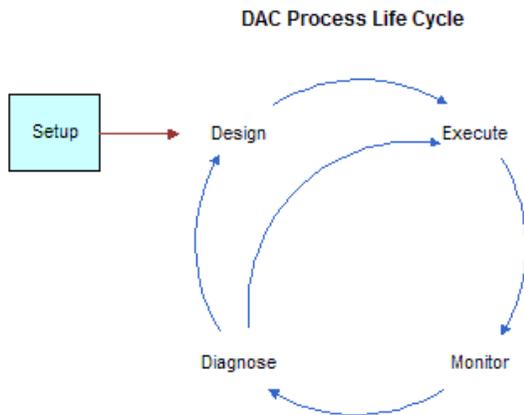


Figure 6. DAC Process Life Cycle

The phases of the process and the actions associated with them are as follows:

- Setup (Data warehouse developer)
  - Set up database connections
  - Set up application and database servers
  - Set up email recipients
- Design (Data warehouse developer)
  - Design data warehouse applications
  - Define application objects
- Execute (Data warehouse/ETL administrator)
  - Define scheduling parameters to execute data warehouse applications
  - Deploy data warehouse applications
  - Access run-time controls to restart or stop currently running schedules
- Monitor (Data warehouse/ETL administrator)
  - Monitor run-time execution of data warehouse applications
  - Monitor users, DAC repository, and application maintenance jobs
- Diagnose (Data warehouse/ETL administrator)
  - View the schedule diagnostics at run time or offline through log files
  - Run Exception Report execution plans



# 4

## Preinstallation Considerations for Analytics Applications

This chapter provides information about preparing to deploy Oracle's Siebel Business Analytics Applications product. You should review this information before you begin the installation process.

**NOTE:** To install the server components, the computers need to meet the conditions specified in *System Requirements and Supported Platforms for Siebel Business Analytics Applications* on Siebel SupportWeb.

This chapter contains the following topics:

- [Siebel Data Warehouse Deployment Configuration on page 32](#)
- [Operating System, Driver, and Connectivity Requirements for Siebel Data Warehouse on page 33](#)
- [IBM DB2 UDB-Specific Database Guidelines for Siebel Data Warehouse on page 36](#)
- [IBM DB2 UDB zOS and OS/390-Specific Database Guidelines for Siebel Data Warehouse on page 37](#)
- [Oracle-Specific Database Guidelines for Siebel Data Warehouse on page 38](#)
- [Additional Suggestions for Optimizing Oracle Performance in Siebel Data Warehouse on page 42](#)
- [SQL Server-Specific Database Guidelines for Siebel Data Warehouse on page 43](#)
- [Deploying Siebel Data Warehouse in Latin-1 General, Unicode and Non-English Environments on page 48](#)

# Siebel Data Warehouse Deployment Configuration

Figure 7 shows the recommended Siebel Data Warehouse deployment configuration.

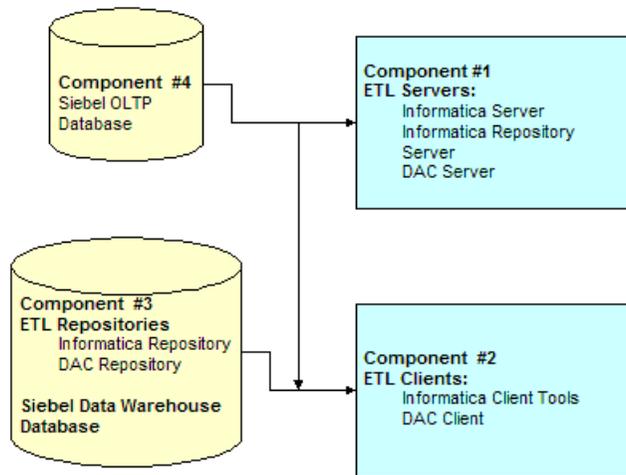


Figure 7. Siebel Data Warehouse Deployment Configuration

- Component 1 hosts all the ETL servers, that is, the Informatica Server, Informatica Repository Server, and the DAC server.

**NOTE:** You can install the Informatica Server on other machines as well to increase performance. The other ETL servers can also be hosted on other machines.

- Component 2 hosts all the ETL clients, that is, the Informatica client tools and the DAC client.
- Components 3 and 4 are database instances that can be hosted on one or more machines. The hardware requirements are entirely dependent on your usage and performance requirements. It is highly recommended that each of these components be defined in their own database instance to allow for instantiating parameters that are optimized for each component's usage.

**NOTE:** For more detailed information about system requirements, see *System Requirements and Supported Platforms for Siebel Business Analytics Applications* on Siebel SupportWeb.

## Operating System, Driver, and Connectivity Requirements for Siebel Data Warehouse

Table 8 provides the operating system, driver, and connectivity software requirements for the Siebel Data Warehouse components.

**NOTE:** For information about the supported versions of the components listed in Table 8, see *System Requirements and Supported Platforms for Siebel Business Analytics Applications* on Siebel SupportWeb.

Table 8. OS, Driver and Connectivity Requirements for Siebel Data Warehouse

Component	Operating System	Software	Connectivity and Driver
1 ETL Servers	<ul style="list-style-type: none"> <li>■ Solaris</li> <li>■ AIX</li> <li>■ HP</li> <li>■ Windows</li> </ul>	<ul style="list-style-type: none"> <li>■ Informatica Server</li> <li>■ Informatica Repository Server</li> <li>■ DAC Server</li> </ul>	<ul style="list-style-type: none"> <li>■ Java SDK</li> <li>■ JDBC drivers</li> <li>■ Javamail</li> </ul>
2 ETL Clients	<ul style="list-style-type: none"> <li>■ Windows</li> </ul>	<ul style="list-style-type: none"> <li>■ Informatica client tools</li> <li>■ DAC client</li> </ul>	<ul style="list-style-type: none"> <li>■ Java SDK</li> <li>■ JDBC drivers</li> <li>■ ODBC drivers</li> </ul>
3 (A) Siebel DW	<ul style="list-style-type: none"> <li>■ Solaris</li> <li>■ AIX</li> <li>■ HP</li> <li>■ Windows</li> <li>■ OS/390</li> </ul>	Database software with Siebel Data Warehouse	Not applicable
3 (B) ETL Repositories	<ul style="list-style-type: none"> <li>■ Solaris</li> <li>■ AIX</li> <li>■ HP</li> <li>■ Windows</li> </ul>	Database software with ETL repositories	Not applicable

## General Guidelines for Setting Up Siebel Data Warehouse

The Siebel Data Warehouse is a database that contains dimensional schemas. Although it is technically possible to put the Siebel Data Warehouse in the same database as the Siebel transactional database, it is not recommended for performance reasons. The Siebel transactional database is structured as an online transaction processing (OLTP) database, whereas the Siebel Data Warehouse is structured as an online analytical processing database. Each is optimized for its own purpose. The reasons for not combining the two databases are:

- The analytical queries interfere with normal use of the transactional database, which is entering and managing individual transactions.
- The data in a transactional database is normalized for update efficiency. Transactional queries join several normalized tables and will be slow (as opposed to prejoined, denormalized analytical tables).
- Historical data cannot be purged from a transactional database, even if not required for current transaction processing, because you need it for analysis. (By contrast, the analytical database is the warehouse for historical as well as current data.) This causes the transactional database to further slow down.
- Transactional databases are tuned for one specific application, and it is not productive to use these separate transactional databases for analytical queries that usually span more than one functional application.
- The analytical database can be specifically tuned for the analytical queries and Extract-Transform-Load (ETL) processing. These are quite different from transactional database requirements.
- On the transactional database, you should place the S\_ETL tables in a separate tablespace. These ETL tables are used by the Siebel Data Warehouse and should not be part of the routine backup processes.

A complete listing of these tables is available in *Siebel Data Warehouse Data Model Reference*.

The Informatica repository stores all of the Informatica object definitions for the ETL mappings that populate the Siebel Data Warehouse. It is a series of repository tables that are stored in a database, which can be transactional, analytical, or a separate database.

The Siebel Data Warehouse works with relational database management systems. In addition to the general requirements, there are additional database management systems (DBMS)-specific requirements depending on the DBMS you are using.

The following general guidelines will help you set up the data warehouse physical database for performance and growth:

- At a minimum, separate the data and index tablespaces. Create more tablespaces to separate heavily used tables and their indices.
- Use the 32K block/page size for tablespaces, because it provides good overall performance and also does not impose low limits to the maximum size to which the tablespace can grow, as compared to 4K, 8K, 16K sizes.

- If you are using multiple disk storage systems, stripe the tablespace containers and files across as many disks as possible.
- Raw devices for tablespaces provide better performance as compared to cooked file systems.
- RAID-5 is known to give a good balance of performance and availability.
- Size the bufferpools based on content and size (number of tables and their sizes) of tablespaces.
- Allocate about 75 percent of the total available server memory to the database, assuming no other application is running on the same server.

During the Siebel Data Warehouse configuration process, when you create the data warehouse tables using the procedure [“Creating Data Warehouse Tables” on page 82](#), you can create tables in one tablespace and indices in another tablespace. However, for performance reasons, it is recommended that you create tablespaces as described in [Table 9](#).

Table 9. Recommended Tablespace Configuration

Tablespace Name	List of Tables
DIM_STG	W_*DS
FACT_STG	W_*FS
DIM	W_*D and W_*MD
FACT	W_*F
AGG	W_*A
OTHER	Remaining W* tables
DIM_INDX	Indices of W_*D tables
FACT_INDX	Indices of W_*F tables
OTHER_INDX	Remaining W* tables

## IBM DB2 UDB-Specific Database Guidelines for Siebel Data Warehouse

Table 10 provides guidelines for parameter settings for DB2 relational database management system (RDBMS) usage. Use these guidelines as a starting point. You will need to make changes based on your specific database sizes, data shape, server size (CPU and memory), and type of storage. The database administrator should make changes to the settings based on performance monitoring and tuning considerations.

Table 10. Recommended DB2 Parameter Settings

Parameter	DB2 UDB V7	DB2 UDB V8	Notes
SHEAPTHRES	400000	400000	
ASLHEAPSZ	15	15	
RQRIOBLK	65535	65535	
QUERY_HEAP_SZ	16384	16384	
JAVA_HEAP_SZ	2048	2048	
MAXAGENTS	400	400	
NUM_INITAGENTS	10	10	
NUM_POOLAGENTS	200	200	
INTRA_PARALLEL	YES	YES	
FCM_NUM_BUFFERS	12288	12288	
SHEAPTHRES_SHR	N/A	=SHEAPTHRES	
DBHEAP	16384	16384	
CATALOGCACHE_SZ	5558	5558	
LOGBUFSZ	2048	2048	
UTIL_HEAP_SZ	10000	10000	
NUM_ESTORE_SEGS	16	NIL	Estore is not needed in DB2 V8 64-bit because the V7 limit of 1.75 GB addressable memory has been lifted.
ESTORE_SEG_SZ	65536	NIL	
LOCKLIST	25000	25000	
APP_CTL_HEAP_SZ	5000	5000	
SORTHEAP	4000	4000	
STMTHEAP	40960	40960	

Table 10. Recommended DB2 Parameter Settings

Parameter	DB2 UDB V7	DB2 UDB V8	Notes
APPLHEAPSZ	2560	2560	
PCKCACHESZ	2560	2560	
STAT_HEAP_SZ	20000	20000	
DLCHKTIME	10000	10000	
MAXLOCKS	50	50	
LOCKTIMEOUT	1200	1200	
MAXAPPLS	500	500	
AVG_APPLS	10	10	
MAXFILOP	500	500	
GROUPHEAP_RATIO	N/A	70	New in V8
APPGROUP_MEM_SZ	N/A	30000	New in V8
DATABASE_MEMORY	N/A	AUTOMATIC	New in V8

## IBM DB2 UDB zOS and OS/390-Specific Database Guidelines for Siebel Data Warehouse

The following requirements apply to IBM DB2 RDBMS usage for zOS and OS/390:

- The Analytics applications communicate with IBM DB2 UDB for z/OS and OS/390 (running on zSeries servers) through IBM DB2 Connect middleware.

The following editions of DB2 Connect are supported:

- **DB2 Connect Enterprise Edition (EE)**. This edition is installed on a midtier server such as an Informatica Server/Client, DAC, and Siebel Business Analytics.
  - **DB2 Connect Unlimited Edition (UE)**. This edition provides the functionality of DB2 Connect Enterprise Edition but is priced differently.
- The ODBC driver for all connections must use the IBM DB2 ODBC Driver.
- Make the appropriate connections using the DB2 Client Configuration Assistant.

- Use the variable settings shown in [Table 11](#).

Table 11. Variable Settings for IBM DB2 UDB zOS and OS/390 Databases

Parameter	Recommended Setting	Notes
IDHTOIN	1800	
CDSSRDEF	Any	
STARJOIN	1	This setting indicates that star join is enabled. The one table with the largest cardinality is the fact table. However, if there is more than one table with this cardinality, star join is not enabled.

## Oracle-Specific Database Guidelines for Siebel Data Warehouse

[Table 12](#) provides parameter guidelines based on the rule-based optimizer for Oracle 8i and the cost-based optimizer for Oracle 9i and Oracle 10g. Use these guidelines as a starting point. You will need to make changes based on your specific database sizes, data shape, server size (CPU and memory), and type of storage. The database administrator should make changes to the settings based on performance monitoring and tuning considerations.

Table 12. Recommended Variable Settings for Oracle Databases

Parameter	Oracle 8i	Oracle 9i/10g	Notes
Always_anti_join	HASH	N/A	
Cursor_space_for_time	TRUE	TRUE	Use only if you do not have many concurrent connections.
Db_block_lru_latches	Set to number of CPUs	N/A	
Db_block_size	32 k	32 k	
Db_cache_size		8.92 MB	
Db_file_direct_io_count	64	N/A	
Db_file_multiblock_read_count	32	32	
DB_files		100	
db_writer_processes	Number of CPUs	Number of CPUs	
Default Pctincrease	0	0	
Dml_locks		1000	

Table 12. Recommended Variable Settings for Oracle Databases

Parameter	Oracle 8i	Oracle 9i/10g	Notes
Hash_area_size	20 MB	N/A	Setting WORKAREA_SIZE_POLICY = AUTO and PGA_AGGREGATE_TARGET to about one-third of the available memory takes care of HASH and SORT areas in Oracle 9i.
Hash_multiblock_io_count	0.5 * (db_file_multiblock_Read_count)	N/A	Make sure that you are <i>not</i> using MTS.
Initial Extent	20 MB	20 MB	
Log_buffer	16 MB	16 MB	
Log_checkpoint_interval		100000	
Next Extent	20 MB	20 MB	
Open_cursors	2000	2000	
Optimizer_index_caching	Unset		Use Unset as the value for this parameter to avoid nested loop index joins (as favored by the optimizer).  Unset is not an allowable value for Oracle 9i. For Oracle 9i, the allowable values are in the range 1 to 100.

Table 12. Recommended Variable Settings for Oracle Databases

Parameter	Oracle 8i	Oracle 9i/10g	Notes
Optimizer_index_cost_adjus tment	Choose appropriate value based on data shape and performance monitoring	Choose appropriate value based on data shape and performance monitoring	This parameter can be used to tune the performance of a system in cases in which the optimizer may be choosing too few or too many index access paths. For example, setting it to 50 percent will make the index access path look half as expensive as normal. The legal range of values for this parameter is 1 to 10000 percent. The default for this parameter is 100 percent, which makes the optimizer cost index access paths at the regular cost.  Also see <a href="#">"Additional Suggestions for Optimizing Oracle Performance in Siebel Data Warehouse"</a> on page 42.
Optimizer_max_permutati ons	2000	2000	May be applicable to other schemas in the database. This means longer parsing times for the access paths, but once these are parsed, they should remain in the shared_pool, provided they do not get aged out. See the notes for Cursor_space_for_time.
Optimizer_mode	ALL_ROWS	CHOOSE	
Pga_aggregate_target	N/A	About one-third of available memory	
Processes		510	

Table 12. Recommended Variable Settings for Oracle Databases

Parameter	Oracle 8i	Oracle 9i/10g	Notes
Query_rewrite_integrity	USE_STALE	TRUSTED	USE_STALE is not an allowable value for Oracle 9i. For Oracle 9i, the allowable values are: <ul style="list-style-type: none"> <li>■ STALE_TOLERATED</li> <li>■ ENFORCED</li> <li>■ TRUSTED</li> </ul>
Query_rewrite_enabled		True	
Rollback_segments	<ul style="list-style-type: none"> <li>■ Initial Extent 50 MB</li> <li>■ Next Extent 50 MB</li> <li>■ Optimum Extent 50 MB</li> </ul>	N/A	For Oracle 9i, use undo_management = AUTO undo_tablespace = UNDO undo_retention = 60000
SGA_max_size		1024 MB	Allocate one-third to one-half of available memory and adjust as needed based on performance monitoring.
Shared_pool_size	150 MB	512 MB	
Shared_pool_reserved_size		200 MB	
Sort_area_retained_size	10 MB	N/A	Setting WORKAREA_SIZE_POLICY = AUTO and PGA_AGGREGATE_TARGET to about one-third of the available memory takes care of HASH and SORT areas in Oracle 9i.
Sort_area_size	10 MB	N/A	Setting WORKAREA_SIZE_POLICY = AUTO and PGA_AGGREGATE_TARGET to about one-third of the available memory takes care of HASH and SORT areas in Oracle 9i.
Sort_multiblock_read_count	4	N/A	
Star_transformation_enabled	TRUE	TRUE	

Table 12. Recommended Variable Settings for Oracle Databases

Parameter	Oracle 8i	Oracle 9i/10g	Notes
Statistics_level		Normal	
Undo_management	N/A	Auto	
Undo_retention	N/A	10000	
Undo_tablespace	N/A	Undo	
Workarea_size_policy	N/A	Auto	

## Additional Suggestions for Optimizing Oracle Performance in Siebel Data Warehouse

- Siebel Business Analytics Applications under Oracle support only binary sorting. If you are running an Oracle client, do one of the following:

- Set the NLS\_SORT parameter to BINARY.
- Choose a NLS\_LANG setting that includes binary.

These settings are required for adequate performance from the dedicated Web client.

- Make sure that cost-based optimization is enabled in the Oracle development, test, and production databases and that statistics are kept up to date. Otherwise, the rule-based optimizer may be used.
- Create foreign keys in the Oracle database, but configure Oracle to not enforce the foreign key relationship. The existence of foreign keys will allow Oracle to better optimize certain queries. By turning off enforcement, the database load should not be negatively affected.
  - In addition, you may also configure the Oracle star-join transformation. This requires non-enforced foreign keys in Oracle and the creation of necessary bitmap indices. This task is optional. It may not be necessary, as ongoing tuning may reach the desired performance goals.
- Analyze application for occurrences of highly skewed data that is indexed. Create histogram statistics for these indices to enable the optimizer to better perform queries.
- To increase data throughput between Siebel Analytics Server and Oracle, change SDU and TDU settings in listener.ora. The default is 2 KB and can be increased to 8 KB.
- On the server side, edit the listener.ora file. Under the particular SID\_LIST entry, modify SID\_DESC as follows:

```
SID_LIST_LISTENER =
    SID_LIST =
        SID_DESC = (SDU=16384)(TDU=16384)
        ORACLE_HOME = /.....)
```

```
        SID_NAME = SOLAP)  
    )  
)
```

- Set the tablespace to at least the same as the Siebel transactional database size. Make sure the temporary tablespace has adequate space.
- Set the number of log file groups to 4.
- Set the size of each log file to 10 MB.
- The `sga_max_size` to 700 MB.
- On the client side, edit the `tnsnames.ora` file. Modify the TNS alias by adding `SDU=` and `TDU=` as follows:

```
myhost_orcl.world=  
  DESCRIPTION=(SDU=16384)(TDU=16384)  
  ADDRESS = (PROTOCOL = TCP)(HOST=myhost)(PORT=1521))  
CONNECT_DATA=(SID=ORCL))
```

## SQL Server-Specific Database Guidelines for Siebel Data Warehouse

This section provides guidelines for SQL Server database usage.

**NOTE:** SQL Server databases with binary sort order or case-sensitive dictionary sort order are supported. Case-insensitive dictionary sort order is not supported.

This section includes the following topics:

- [Setting the ANSI NULL Option on page 43](#)
- [Modifying the DB Library Options Setting on page 44](#)
- [Configuring DAC to Support SQL Server 2005 on page 44](#)
- [Connecting from DAC to SQL Server Using Dynamic Port Allocation on page 45](#)
- [Recommended SQL Server Database Parameters on page 46](#)

### Setting the ANSI NULL Option

Siebel Business Analytics requires that SQL Server databases be created with the ANSI NULL option selected.

#### *To set the ANSI NULL option*

- 1 In the SQL Server Enterprise Manager, right-click the appropriate database, and choose Properties.

- 2 Click the Options tab and select the box for ANSI NULL default.

## Modifying the DB Library Options Setting

In a SQL Server 2000 environment, when loading Analytics tables with international data, or loading more than one language, you need to modify the DB Library Options setting.

### *To modify the DB Library Options setting*

- 1 From the Microsoft SQL Server program menu, select Client Network Utility.
- 2 Select the DB Library Options tab.
- 3 Clear the option Automatic ANSI to OEM.

**NOTE:** SQL Server 2000 automatically tunes many of the server configuration options; therefore, an administrator is required to do little, if any, tuning. Although these configuration options can be modified, the general recommendation is that these options be left at their default values, allowing SQL Server to automatically tune itself based on run-time conditions.

## Configuring DAC to Support SQL Server 2005

The standard DAC configuration supports SQL Server 2000. The DAC can also support SQL Server 2005 with the following configuration changes.

### *To configure the DAC to support SQL Server 2005*

- 1 Modify the connection\_template.xml file:
  - a Navigate to the SiebelAnalytics\DAC\conf directory, and open the connection\_template.xml file in a text editor.
  - b Comment out the section related to SQL Server 2000.
  - c Uncomment the section related to SQL Server 2005.
- 2 Download the SQL Server 2005 JDBC driver from the Microsoft Web site, and install it.
- 3 Copy the sqljdbc.jar file from the SQL Server 2005 JDBC driver installation directory and paste it into the SiebelAnalytics\DAC\lib directory.
- 4 If the DAC is installed on Windows, modify the config.bat file as follows:
  - a Locate the following line:  

```
SQLSERVERLIB=%DAC_HOME%\i\b\msbase.jar;%DAC_HOME%\i\b\mssqlserver.jar;%DAC_HOME%\i\b\msutil.jar
```
  - b Append the following string at the end of the line referred to above if it is not there already:  

```
;%DAC_HOME%\i\b\sqljdbc.jar
```
- 5 If the DAC is installed on UNIX, modify the config.sh or config.csh file as follows:
  - a Locate the following line:

```
SQLSERVERLIB
```

- b** Append the following string at the end of the line referred to above if it is not there already:

```
/lib/sqljdbc.jar
```

- 6** Execute the following script on every instance of the SQL Server 2005 that the DAC will access:  
execute sp\_configure 'show advanced options', 1

```
GO
```

```
RECONFIGURE
```

```
GO
```

## Connecting from DAC to SQL Server Using Dynamic Port Allocation

To connect to a database on Microsoft SQL Server, the DAC requires a database host name, database name, and port number. If you configure an instance of SQL Server to use a static port, you can configure the connection to the DAC using the static port number. However, if you configure an instance of SQL Server to use the dynamic port allocation process, the port number can change every time SQL Server is restarted. In such cases, you must either manually update the new port number or configure the DAC to automatically identify the port number when you enter the database host name and database name. If you choose to update the port number manually, you can find the allocated port number in the Windows registry. To configure the DAC to identify the port number automatically, follow the instructions below.

### *To configure the DAC to identify the SQL Server port number automatically*

- 1** Modify the connection\_template.xml file:
  - a** Navigate to the SiebelAnalytics\DAC\conf directory, and open the connection\_template.xml file in a text editor.
  - b** Find the entry related to the appropriate version of SQL Server.  
There might be two entries, one for SQL Server 2000 and one for SQL Server 2005.
  - c** Remove the port reference from the URL entry.

For example, for SQL Server 2005:

Before modification, the URL entry appears as follows:

```
<URL>jdbc:sql server://%host:%port;databaseName=%connect_str</URL>
```

After modification, the URL entry should appear as follows:

```
<URL>jdbc:sql server://%host;databaseName=%connect_str
```

For SQL Server 2000:

Before modification, the URL entry appears as follows:

<URL>jdbc:msdcsql://%host:%port;DatabaseName=%connect\_str</URL>

After modification, the URI entry should appear as follows:

<URL>jdbc:msdcsql://%host;DatabaseName=%connect\_str</URL>

- 2 When entering SQL Server database connection information in the DAC user interface, for example, in the procedures [“Creating the DAC Metadata Repository” on page 71](#) and [“Creating Transactional and Data Warehouse Database Connections” on page 79](#), leave the Database Port field empty.
- 3 When entering SQL Server database connection information in the DAC user interface and using a named instance of SQL Server:
  - a In the Database Host field, include the instance name as part of the host name using the following format:  
 <hostname\\instance>
 

**NOTE:** The four backslashes are required.
  - b Leave the Database Port field empty.

## Recommended SQL Server Database Parameters

If necessary, SQL Server components can be configured to optimize performance, as shown in [Table 13](#).

Table 13. Recommended Variable Settings for SQL Server Databases

Parameter	Recommended Setting	Notes
Affinity mask	0	
Allow updates	0	
Awe enabled	0	
C2 audit mode	0	
Cost threshold for parallelism	5	
Cursor threshold	-1	
Default full-text language	1033	
Default language	0	
Fill factor	95%	For insert-intensive transactions, set Fill Factor between 90 and 95%. For better query performance, set Fill factor to 95 or even 100%.
Index create memory	1024 KB	Default is 0.
Lightweight pooling	0	

Table 13. Recommended Variable Settings for SQL Server Databases

Parameter	Recommended Setting	Notes
Locks	0	
Max degree of parallelism	0	Default is 0. This turns off parallelism. Max degree of parallelism should be left at 0, which means use parallel plan generation. It should be set to 1 (use only 1 process) if you run multithreaded components (for example, several EIM threads).
Max server memory	2000 MB	Default is 2147483647.
Max text repl size	65536 B	
Max worker threads	100	Default is 255.
Media retention	0	
Min memory per query	1024 KB	
Min server memory	500 MB	Default is 0.
Nested triggers	1	
Network packet size	8192 B	Default is 4096.
Open objects	0	
Priority boost	0	
Query governor cost limit	0	Modify to 60 only if CPU is high.
Query wait	-1 sec	
Recovery interval	0 min	
Remote access	1	
Remote login timeout	20 sec	
Remote proc trans	0	
Remote query timeout	600 sec	
Scan for startup procs	0	
Set working set size	0	
Two-digit year cutoff	2049	
User connections	0	
User options	0	

- **SQL Server memory:** Make sure adequate memory is available.
- **Transaction logs and TempDB:** Reside on a separate disk from those used by database data.

- **Full load:** Full Recovery model for the database.
- **Incremental (Refresh) load:** Change from Full to Bulk-Logged Recovery model.

## Teradata-Specific Database Guidelines for Siebel Data Warehouse

The following requirements apply to Teradata database usage:

- Install the FastLoad and TPump Teradata utilities on the same machine where the Informatica Server is installed.
- When installing Informatica PowerCenter, make sure there are no spaces in the Informatica Server directory name or the directory path. The default directory contains spaces that you must remove manually.

## Deploying Siebel Data Warehouse in Latin-1 General, Unicode and Non-English Environments

This section describes the different settings for Informatica servers and databases when deploying the Siebel Data Warehouse in Latin-1 General, Unicode, and non-English environments. When you configure Informatica, the Informatica repository, and the databases, you will need to refer to this section.

**NOTE:** If you are installing the Siebel Data Warehouse in a UNIX environment, you must use the Unicode character data mode.

The Siebel Data Warehouse can be deployed in various code page environments to support global deployments. The following source and data warehouse configurations are supported:

- **Latin-1 General (7-bit ASCII) to Latin-1 General (7-bit ASCII).** 7-bit ASCII is the character set used for English. See [“Source and Data Warehouse Code Pages for Latin-1 General \(7-bit ASCII\) to Latin-1 General \(7-bit ASCII\)”](#) on page 50.
- **Latin-1 General (8-bit ASCII) to Latin-1 General (8-bit ASCII).** 8-bit ASCII is the character set used for Western European languages that use accented Roman characters. See [“Source and Data Warehouse Code Pages for Latin-1 General \(8-bit ASCII\) to Latin-1 General \(8-bit ASCII\)”](#) on page 51.  
**NOTE:** You must run the Informatica Server in Unicode mode if your source data contains multibyte or ISO 8859-1 (8-bit ASCII) data. For instructions on setting the data movement mode to Unicode, see [“To set up the Informatica Server”](#) on page 84.
- **Unicode to Unicode.** See [“Source and Data Warehouse Code Pages for Latin-1 General \(8-bit ASCII\) to Latin-1 General \(8-bit ASCII\)”](#) on page 51.
- **Code page (multi- or single-byte) to Unicode.** See [“Source and Data Warehouse Code Pages for Code Page to Unicode”](#) on page 55.

- **Code page to code page (where the code pages are the same).** See [“Source and Data Warehouse Code Pages for Code Page to Code Page”](#) on page 56.

The following environment variables need to be set before you begin the installation process:

- **NLS\_LANG (for Oracle).** For instructions, see [“Setting the NLS\\_LANG Environment Variable for Oracle Databases”](#) on page 58.
- **DB2CODEPAGE (for DB2).** For instructions, see [“Setting the DB2CODEPAGE Environment Variable for DB2 Databases”](#) on page 59.

The following environment variable needs to be set during the configuration process:

- **Informatica Server Data Movement.** For instructions, see [“To set up the Informatica Server”](#) on page 84.

## Code Page Overview

A code page contains the encoding to specify characters in a set of one or more languages. An encoding is the assignment of a number to a character in the character set. You use code pages to identify data that might be in different languages. For example, if you are importing Japanese data into a mapping, you must select a Japanese code page for the source data.

When you set a code page, the application or program for which you set the code page refers to a specific set of data that describes the characters the application recognizes. This influences the way that application stores, receives, and sends character data.

### Choosing Code Pages

Choose code pages based on the character data you are using in mappings. Character data can be represented by character modes based on the character size.

Character size is measured by the amount of storage space a character requires in the database. Database character can be one of the following: single byte, double byte or multibyte.

### Code Page Compatibility

Compatibility between code pages is essential for accurate data movement when the Informatica Server runs in the Unicode data movement mode. When two code pages are compatible, the characters encoded in the two code pages are virtually identical.

For accurate data movement, the data warehouse code page must be a superset of the source code page. If the source code page is a superset of the data warehouse code page, the Informatica Server cannot process the characters because they cannot be encoded in the data warehouse code page. The data warehouse then results in incorrect or missing data.

## Source and Data Warehouse Code Pages for Latin-1 General (7-bit ASCII) to Latin-1 General (7-bit ASCII)

This section provides the code pages for Latin-1 General (7-bit ASCII) to Latin-1 General (7-bit ASCII) configurations. 7-bit ASCII is the character set used for English.

### Informatica Server and Repository Server Running on Windows with OS ENU

Table 14 provides the code pages for the Informatica Server and Repository Server running on Windows with OS ENU.

Table 14. Code Pages for Informatica Server and Repository Server on Windows with OS ENU

Component Code Page	Code Page
Source code page	MS Windows Latin 1 (ANSI), superset of Latin 1
Data warehouse code page	MS Windows Latin 1 (ANSI), superset of Latin 1
Informatica Repository code page	MS Windows Latin 1 (ANSI), superset of Latin 1
Informatica Server code page	MS Windows Latin 1 (ANSI), superset of Latin 1

### Informatica Server and Repository Server Running on UNIX with OS ENU

The following environment variables need to be set before you begin the installation process:

- **NLS\_LANG (for Oracle).** For instructions, see [“Setting the NLS\\_LANG Environment Variable for Oracle Databases” on page 58.](#)
- **DB2CODEPAGE (for DB2).** For instructions, see [“Setting the DB2CODEPAGE Environment Variable for DB2 Databases” on page 59.](#)

The following environment variable needs to be set during the configuration process:

- **Informatica Server Data Movement.** For instructions, see [“To set up the Informatica Server” on page 84.](#)

Table 15 provides the code pages for the Informatica Server and Repository Server running on UNIX with OS ENU.

Table 15. Code Pages for Informatica Server and Repository Server on UNIX with OS ENU

Component Code Page	Code Page
Source code page	MS Windows Latin 1 (ANSI), superset of Latin 1
Data warehouse code page	MS Windows Latin 1 (ANSI), superset of Latin 1

Table 15. Code Pages for Informatica Server and Repository Server on UNIX with OS ENU

Component Code Page	Code Page
Informatica Repository code page	ISO 8859-1 Western European
Informatica Server code page	ISO 8859-1 Western European

## Informatica Server on UNIX, Repository Server on Windows, both with OS ENU

The following environment variables need to be set before you begin the installation process:

- **NLS\_LANG (for Oracle).** For instructions, see [“Setting the NLS\\_LANG Environment Variable for Oracle Databases” on page 58.](#)
- **DB2CODEPAGE (for DB2).** For instructions, see [“Setting the DB2CODEPAGE Environment Variable for DB2 Databases” on page 59.](#)

The following environment variable needs to be set during the configuration process:

- **Informatica Server Data Movement.** For instructions, see [“To set up the Informatica Server” on page 84.](#)

Table 16 provides the code pages for the Informatica Server running on UNIX, and the Repository Server on Windows, both with OS ENU.

Table 16. Code Pages for Informatica Server on UNIX, Repository Server on Windows with OS ENU

Component Code Page	Code Page
Source code page	MS Windows Latin 1 (ANSI), superset of Latin 1
Data warehouse code page	MS Windows Latin 1 (ANSI), superset of Latin 1
Informatica Repository code page	MS Windows Latin 1 (ANSI), superset of Latin 1
Informatica Server code page	ISO 8859-1 Western European

## Source and Data Warehouse Code Pages for Latin-1 General (8-bit ASCII) to Latin-1 General (8-bit ASCII)

This section provides the code pages for Latin-1 General (8-bit ASCII) to Latin-1 General (8-bit ASCII) configurations. 8-bit ASCII is the character set used for Western European languages that use accented Roman characters.

**NOTE:** You must run the Informatica Server in UNICODE mode if your source data contains multibyte or ISO 8859-1 (8-bit ASCII) data. For instructions on setting the data movement mode to UNICODE, see [“To set up the Informatica Server” on page 84.](#)

## Informatica Server and Repository Server Running on Windows with OS ENU

Table 17 provides the code pages for the Informatica Server and Repository Server running on Windows with OS ENU.

Table 17. Code Pages for Informatica Server and Repository Server on Windows with OS ENU

Component Code Page	Code Page
Source code page	ISO 8859-1 Western European
Data warehouse code page	ISO 8859-1 Western European
Informatica Repository code page	MS Windows Latin 1 (ANSI), superset of Latin 1
Informatica Server code page	MS Windows Latin 1 (ANSI), superset of Latin 1

## Informatica Server and Repository Server Running on UNIX with OS ENU

The following environment variables need to be set before you begin the installation process:

- **NLS\_LANG (for Oracle).** For instructions, see [“Setting the NLS\\_LANG Environment Variable for Oracle Databases” on page 58.](#)
- **DB2CODEPAGE (for DB2).** For instructions, see [“Setting the DB2CODEPAGE Environment Variable for DB2 Databases” on page 59.](#)

The following environment variable needs to be set during the configuration process:

- **Informatica Server Data Movement.** For instructions, see [“To set up the Informatica Server” on page 84.](#)

Table 18 provides the code pages for the Informatica Server and Repository Server running on UNIX with OS ENU.

Table 18. Code Pages for Informatica Server and Repository Server on UNIX with OS ENU

Component Code Page	Code Page
Source code page	ISO 8859-1 Western European
Data warehouse code page	ISO 8859-1 Western European
Informatica Repository code page	ISO 8859-1 Western European
Informatica Server code page	ISO 8859-1 Western European

## Informatica Server on UNIX, Repository Server on Windows, both with OS ENU

The following environment variables need to be set before you begin the installation process:

- **NLS\_LANG (for Oracle).** For instructions, see [“Setting the NLS\\_LANG Environment Variable for Oracle Databases” on page 58.](#)
- **DB2CODEPAGE (for DB2).** For instructions, see [“Setting the DB2CODEPAGE Environment Variable for DB2 Databases” on page 59.](#)

The following environment variable needs to be set during the configuration process:

- **Informatica Server Data Movement.** For instructions, see [“To set up the Informatica Server” on page 84.](#)

Table 19 provides the code pages for the Informatica Server running on UNIX, and the Repository Server on Windows, both with OS ENU.

Table 19. Code Pages for Informatica Server on UNIX, Repository Server on Windows with OS ENU

Component Code Page	Code Page
Source code page	ISO 8859-1 Western European
Data warehouse code page	ISO 8859-1 Western European
Informatica Repository code page	MS Windows Latin 1 (ANSI), superset of Latin 1
Informatica Server code page	ISO 8859-1 Western European

## Source and Data Warehouse Code Pages for Unicode to Unicode

For a list of the code pages that are supported for source and data warehouse databases, see *System Requirements and Supported Platforms for Siebel Business Analytics Applications*.

The following environment variables need to be set before you begin the installation process:

- **NLS\_LANG (for Oracle).** For instructions, see [“Setting the NLS\\_LANG Environment Variable for Oracle Databases” on page 58.](#)
- **DB2CODEPAGE (for DB2).** For instructions, see [“Setting the DB2CODEPAGE Environment Variable for DB2 Databases” on page 59.](#)

The following environment variables need to be set during the configuration process:

- **Informatica Server Data Movement.** For instructions, see [“To set up the Informatica Server” on page 84.](#)
- **SiebelUnicodeDB.** For instructions on Windows, see [“Setting the SiebelUnicodeDB Environment Variable on Windows” on page 86.](#) For instructions on UNIX, see [“To set SiebelUnicodeDB on the Informatica Server if source and target databases are Unicode on UNIX” on page 126.](#)

## Informatica Server and Repository Server Running on Windows with OS ENU

Table 20 provides the code pages for the Informatica Server and Repository Server running on Windows with OS ENU.

Table 20. Code Pages for Informatica Server and Repository Server on Windows with OS ENU

Component Code Page	Code Page
Source code page	UTF-8 encoding of Unicode
Data warehouse code page	UTF-8 encoding of Unicode
Informatica Repository code page	MS Windows Latin 1 (ANSI), superset of Latin 1
Informatica Server code page	MS Windows Latin 1 (ANSI), superset of Latin 1

## Informatica Server and Repository Server Running on UNIX with OS ENU

Table 21 provides the code pages for the Informatica Server and Repository Server running on UNIX with OS ENU.

Table 21. Code Pages for Informatica Server and Repository Server on UNIX with OS ENU

Component Code Page	Code Page
Source code page	UTF-8 encoding of Unicode
Data warehouse code page	UTF-8 encoding of Unicode
Informatica Repository code page	ISO 8859-1 Western European
Informatica Server code page	ISO 8859-1 Western European

## Informatica Server on UNIX, Repository Server on Windows, both with OS ENU

Table 22 provides the code pages for the Informatica Server running on UNIX, the Repository Server on Windows with OS ENU.

Table 22. Code Pages for Informatica Server on UNIX, Repository Server on Windows with OS ENU

Component Code Page	Code Page
Source code page	UTF-8 encoding of Unicode
Data warehouse code page	UTF-8 encoding of Unicode
Informatica Repository code page	MS Windows Latin 1 (ANSI), superset of Latin 1
Informatica Server code page	ISO 8859-1 Western European

## Source and Data Warehouse Code Pages for Code Page to Unicode

For a list of the code pages that are supported for source and data warehouse databases, see *System Requirements and Supported Platforms for Siebel Business Analytics Applications*.

The following environment variables need to be set before you begin the installation process:

- NLS\_LANG (for Oracle). For instructions, see [“To set the NLS\\_LANG environment variable for Oracle databases” on page 58](#).
- DB2CODEPAGE (for DB2). For instructions, see [“To set the DB2CODEPAGE environment variable for DB2 databases” on page 59](#).

The following environment variables need to be set during the configuration process:

- Informatica Server Data Movement. For instructions, see [“To set up the Informatica Server” on page 84](#).
- SiebelUnicodeDB. For instructions on Windows, see [“Setting the SiebelUnicodeDB Environment Variable on Windows” on page 86](#). For instructions on UNIX, see [“To set SiebelUnicodeDB on the Informatica Server if source and target databases are Unicode on UNIX” on page 126](#).
- If the Informatica Server is running on Unix, then you also need to set the PMREPCODEPAGE environment variable appropriately. For example: PMREPCODEPAGE=MS932.

**NOTE:** Informatica Server can only run <LANG> OS based on the source code page. For example, if the source code page is Japanese then the Informatica Server should be running on JPN OS.

The following information uses <LANG> = JPN as an example. If you are using a language other than Japanese, replace the code page with the appropriate language.

### Informatica Server and Repository Server Running on Windows and OS <LANG>

Table 23 provides the code pages for the Informatica Server and Repository Server running on Windows with OS <LANG>.

Table 23. Informatica Server and Repository Server on Windows with OS <LANG>

Component Code Page	Code Page
Source code page	MS Windows Japanese, superset of shift JIS
Data warehouse code page	MS Windows Japanese, superset of shift JIS
Informatica Repository code page	MS Windows Japanese, superset of shift JIS
Informatica Server code page	MS Windows Japanese, superset of shift JIS

## Informatica Server and Repository Server Running on UNIX with OS <LANG>

Table 24 provides the code pages for the Informatica Server and Repository Server running on UNIX with OS <LANG>.

Table 24. Code Pages for Informatica Server and Repository Server on UNIX with OS <LANG>

Component Code Page	Code Page
Source code page	MS Windows Japanese, superset of shift JIS
Data warehouse code page	MS Windows Japanese, superset of shift JIS
Informatica Repository code page	MS Windows Japanese, superset of shift JIS
Informatica Server code page	MS Windows Japanese, superset of shift JIS

## Informatica Server on UNIX, Repository Server on Windows, both with OS <LANG>

Table 25 provides the code pages for the Informatica Server running on UNIX and the Repository Server running on Windows, both with OS <LANG>.

Table 25. Code Pages for Informatica Server on UNIX, Repository Server on Windows, OS <LANG>

Component Code Page	Code Page
Source code page	MS Windows Japanese, superset of shift JIS
Data warehouse code page	MS Windows Japanese, superset of shift JIS
Informatica Repository code page	MS Windows Japanese, superset of shift JIS
Informatica Server code page	MS Windows Japanese, superset of shift JIS

## Source and Data Warehouse Code Pages for Code Page to Code Page

For a list of the code pages that are supported for source and data warehouse databases, see *System Requirements and Supported Platforms for Siebel Business Analytics Applications*.

The following environment variables need to be set before you begin the installation process:

- NLS\_LANG (for Oracle). For instructions, see [“To set the NLS\\_LANG environment variable for Oracle databases” on page 58](#).
- DB2CODEPAGE (for DB2). For instructions, see [“To set the DB2CODEPAGE environment variable for DB2 databases” on page 59](#).

The following environment variables need to be set during the configuration process:

- Informatica Server Data Movement. For instructions, see [“To set up the Informatica Server” on page 84](#).
- SiebelUnicodeDB. For instructions on Windows, see [“Setting the SiebelUnicodeDB Environment Variable on Windows” on page 86](#). For instructions on UNIX, see [“To set SiebelUnicodeDB on the Informatica Server if source and target databases are Unicode on UNIX” on page 126](#).
- If the Informatica Server is running on UNIX, then you also need to set the PMREPCODEPAGE environment variable appropriately. For example: PMREPCODEPAGE=MS932.

The following information uses <LANG> = JPN as an example. If you are using a language other than Japanese, replace the code page with the appropriate language.

## Informatica Server and Repository Server Running on Windows and OS <LANG>

Table 26 provides the code pages for the Informatica Server and the Repository Server running on Windows, both with OS <LANG>.

Table 26. Code Pages for Informatica Server and Repository Server on Windows, OS <LANG>

Component Code Page	Code Page
Source code page	MS Windows Japanese, superset of shift JIS
Data warehouse code page	MS Windows Japanese, superset of shift JIS
Informatica Repository code page	MS Windows Japanese, superset of shift JIS
Informatica Server code page	MS Windows Japanese, superset of shift JIS

## Informatica Server and Repository Server Running on UNIX and OS <LANG>

Table 27 provides the code pages for the Informatica Server and the Repository Server running on UNIX, both with OS <LANG>.

Table 27. Code Pages for Informatica Server and Repository Server on Windows, OS <LANG>

Component Code Page	Code Page
Source code page	MS Windows Japanese, superset of shift JIS
Data warehouse code page	MS Windows Japanese, superset of shift JIS
Informatica Repository code page	MS Windows Japanese, superset of shift JIS
Informatica Server code page	MS Windows Japanese, superset of shift JIS

## Informatica Server on UNIX, Repository Server on Windows, Both with OS <LANG>

Table 28 provides the code pages for the Informatica Server running on UNIX and the Repository Server running on Windows, both with OS <LANG>.

Table 28. Code Pages for Informatica Server on UNIX, Repository Server on Windows, OS <LANG>

Component Code Page	Code Page
Source code page	MS Windows Japanese, superset of shift JIS
Data warehouse code page	MS Windows Japanese, superset of shift JIS
Informatica Repository code page	MS Windows Japanese, superset of shift JIS
Informatica Server code page	MS Windows Japanese, superset of shift JIS

## Setting the NLS\_LANG Environment Variable for Oracle Databases

Follow this procedure to set the NLS\_LANG environment variable for Oracle databases.

### To set the NLS\_LANG environment variable for Oracle databases

- Determine the NLS\_LANG value.
  - In the data warehouse database, run the command  

```
SELECT * FROM V$NLS_PARAMETERS
```
  - Make a note of the NLS\_LANG value, which is in the format [NLS\_LANGUAGE]\_[NLS\_TERRITORY].[NLS\_CHARACTERSET].  
For example: Ameri can\_Ameri ca. UTF8
- For Windows:
  - Navigate to Control Panel > System and click the Advanced tab. Click Environment Variables.
  - In System variables section, click New.
  - In the Variable Name field, enter NLS\_LANG.
  - In the Variable Value field, enter the NLS\_LANG value that was returned in [Step 1](#).  
The format for the NLS\_LANG value should be [NLS\_LANGUAGE]\_[NLS\_TERRITORY].[NLS\_CHARACTERSET].  
For example: Ameri can\_Ameri ca. UTF8.
- For UNIX, set the variable as shown below:

```
setenv NLS_LANG <NLS_LANG>
```

For example: `setenv NLS_LANG American_America.UTF8.`

If your data is 7-bit or 8-bit ASCII and the Informatica Server is running on UNIX, then set `NLS_LANG <NLS_LANGUAGE>_<NLS_TERRITORY>.WE8ISO8859P1`

**CAUTION:** Make sure you set the NLS\_LANG variable correctly, as stated in this procedure, or your data will not display correctly.

- 4 Reboot the machine after creating the variable.

## Setting the DB2CODEPAGE Environment Variable for DB2 Databases

Follow this procedure to set the DB2CODEPAGE environment variable for DB2 databases.

### *To set the DB2CODEPAGE environment variable for DB2 databases*

- 1 Determine the DB2CODEPAGE value.
  - a In the data warehouse database, run the command  
`SELECT CODEPAGE FROM SYSCAT.DATATYPES WHERE TYPENAME = 'VARCHAR'`
  - b Make a note of the result.  
For example: 1208
- 2 For Windows:
  - a Navigate to Control Panel > System and click the Advanced tab. Click Environment Variables.
  - b In System variables section, click New.
  - c In the Variable Name field, DB2CODEPAGE.
  - d In the Variable Value field, enter the value that was returned in [Step 1](#).
- 3 For UNIX, set the variable as shown below:  
`setenv DB2CODEPAGE <DB2CODEPAGE value>`  
For example: `setenv 1208.`
- 4 Reboot the machine after creating the variable.



# 5

## Installing and Configuring Analytics Applications on Windows

This chapter provides instructions for installing and configuring the Siebel Business Analytics Applications in the Windows environment. It contains the following main topics:

- [Analytics Applications Installation Overview on page 61](#). Describes the components that are installed during a Siebel Business Analytics Applications installation.
- [Analytics Applications Installation and Configuration Flow on page 63](#). Provides a process flow diagram that shows the installation and configuration steps for Siebel Business Analytics Applications.
- [Analytics Applications Installation and Configuration Process Task List on page 64](#). Provides a sequential list of all the installation and configuration tasks required for Siebel Business Analytics Applications.

### Analytics Applications Installation Overview

A Siebel Business Analytics Applications installation has three main parts. You should perform the installation in the sequence listed below.

#### 1 Siebel Business Analytics Platform

You must install the Siebel Business Analytics platform before you install Siebel Business Analytics Applications. For information about installing the Siebel Business Analytics platform, see *Siebel Business Analytics Platform Installation and Configuration Guide*.

#### 2 Siebel Business Analytics Applications

Instructions for installing Siebel Business Analytics Applications are contained in “[Running the Analytics Applications Installation Wizard \(Windows\)](#)” on page 65. When you run the installation wizard, the following components are installed:

- Prebuilt metadata content  
This metadata content is contained in the Analytics repository file (SiebelAnalytics.rpd).
- Prebuilt reports and dashboard content  
This content is contained in the Analytics Web Catalog file (SiebelAnalytics.webcat).
- Prebuilt Informatica content  
This content includes Extract-Transform-Load (ETL) repository objects, such as mappings, sessions, and workflows, and is contained in the Informatica repository file (Siebel\_DW\_Rep.rep).

- DAC metadata repository files

This content includes repository objects, such as tables, subject areas, execution plans, and tasks, and is contained in XML files.

### 3 Informatica PowerCenter

Instructions for installing Informatica PowerCenter are contained in [“Running the Informatica PowerCenter Installation Wizard \(Windows\)” on page 66](#). When you run the installation wizard, you will be instructed to select the following components for installation:

- PowerCenter Server
- PowerCenter Repository Server
- PowerCenter Client

**NOTE:** The computers on which you install Siebel Business Analytics need to meet the conditions specified in *System Requirements and Supported Platforms for Siebel Analytics Applications on Siebel SupportWeb*.

# Analytics Applications Installation and Configuration Flow

Figure 8 shows the sequence for the Analytics Applications installation and configuration.

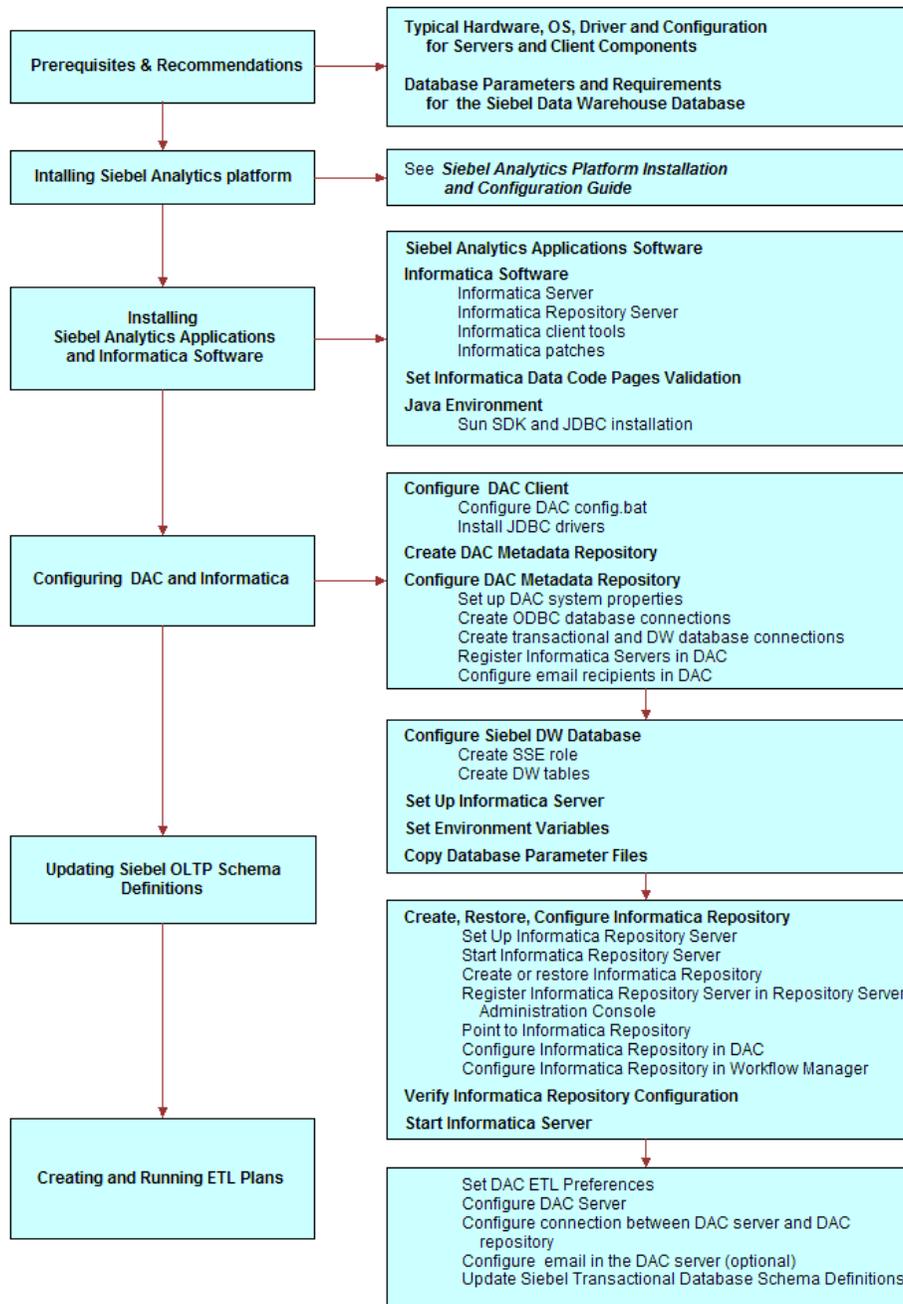


Figure 8. Siebel Business Analytics Applications Installation and Configuration Flow

# Analytics Applications Installation and Configuration Process Task List

The Analytics Applications installation and configuration process consists of the following tasks. Complete each of these tasks in the order listed below.

- 1 Running the Analytics Applications Installation Wizard (Windows) on page 65.
- 2 Running the Informatica PowerCenter Installation Wizard (Windows) on page 66.
- 3 Installing the Informatica Patches on Windows on page 68.
- 4 Setting Informatica Data Code Pages Validation on page 69.
- 5 Installing the Java SDK on page 69.
- 6 Configuring the DAC Client on page 69.
  - a Configuring the DAC Config.bat File on page 69.
  - b Installing JDBC Drivers for DAC Database Connectivity on page 70.
- 7 Creating the DAC Metadata Repository on page 71.
- 8 Configuring the DAC Metadata Repository on page 72.
  - a Setting Up DAC System Properties on page 73.
  - b Creating ODBC Database Connections on page 77.
  - c Creating Transactional and Data Warehouse Database Connections on page 79
  - d Registering Informatica Servers in the DAC Client on page 80.
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## Running the Analytics Applications Installation Wizard (Windows)

**NOTE:** Before you install Siebel Business Analytics Applications, you must first install the Siebel Business Analytics platform. For instructions on installing the Siebel Business Analytics platform, see *Siebel Business Analytics Platform Installation and Configuration Guide*.

### *To install the Analytics Applications on Windows*

- 1 Access the installation files on the installation CD-ROM, and then run the program setup.exe.
- 2 The installation wizard window appears and prompts you through each screen, as shown in the following table.

To continue to the next screen, click Next. To return to a previous screen, click Back.

Screen	Your Action	Notes
Welcome	Click Next.	
License Agreement	Select "I accept..." and click Next.	

Screen	Your Action	Notes
License File	Browse for and select the appropriate XML file, and then click Next.	
Data Warehouse Selection	Select RMW, and then click Next.	
Applications Selection	Select the applications you want to install, and then click Next.	
Summary Information	Click Next.	Analytics Applications will be installed in the same directory where you have the Analytics platform installed.
Summary Information	Click Finish to exit the installation wizard.	

## Running the Informatica PowerCenter Installation Wizard (Windows)

Follow this procedure to install Informatica PowerCenter.

**NOTE:** You must install the Informatica Server on the same machine where the DAC server is installed, because the DAC server requires the Informatica utility pmcmd.

### *To install Informatica PowerCenter on Windows*

- 1 Access the installation files on the installation CD-ROM, and run the program setup.exe.

- 2 The installation wizard window appears and prompts you through each screen, as shown in the following table.

To continue to the next screen, click Next. To return to a previous screen, click Back.

Screen	Your Action	Notes
Welcome	Click Next.	
Customer Information	<p>Enter the user name, company name, and Product license key.</p> <p>Do not enter the Option or Connectivity license key during the product installation.</p>	<p>Informatica provides three different license keys:</p> <ul style="list-style-type: none"> <li>■ <b>Product.</b> Allows you to install the Informatica Server and Repository Server. Enter during the product installation and the procedures <a href="#">“Setting Up the Informatica Server” on page 84</a> and <a href="#">“Pointing to the Informatica Repository” on page 93</a>.</li> <li>■ <b>Connectivity.</b> Allows you to access sources and targets. Enter during the procedures <a href="#">“Setting Up the Informatica Server” on page 84</a> and <a href="#">“Pointing to the Informatica Repository” on page 93</a>.</li> <li>■ <b>Options.</b> Allows you to access specific options, such as Team-Based Development, Server Grid, and Partitioning. Enter during the procedures <a href="#">“Setting Up the Informatica Server” on page 84</a> and <a href="#">“Pointing to the Informatica Repository” on page 93</a>.</li> </ul> <p>For more information about Informatica license keys, see <i>Siebel Business Third-Party Bookshelf</i>.</p>
License Agreement	Select “I accept...” and click Next.	

Screen	Your Action	Notes
Select Components	<ul style="list-style-type: none"> <li>■ Select the following components:                             <ul style="list-style-type: none"> <li>■ Informatica PowerCenter 7.1.2 OEM for Siebel - Client</li> <li>■ Informatica PowerCenter 7.1.2 OEM for Siebel - Server</li> <li>■ Informatica PowerCenter 7.1.2 OEM for Siebel - Repository Server</li> </ul> </li> <li>■ Browse for and select the appropriate destination folder, and then click Next.</li> </ul>	
Program Folder	Select a program folder or accept the default, and then click Next.	<b>NOTE:</b> If you are using a Teradata database, make sure there are no spaces in the Informatica Server directory name or the directory path. The default directory contains spaces that you must remove manually.
Review Settings	Review the selected components and destination directory information, and then click Next.	
Setup Type	<ul style="list-style-type: none"> <li>■ Remove the check marks from the Configure Informatica Server and Configure Informatica Repository Server check boxes.</li> <li>■ (Optional) Select the View Readme check box to view the Read Me file.</li> <li>■ Click Next.</li> </ul>	You will configure the Informatica Server and Repository Server in later steps.
Wizard Complete	Click Finish.	

## Installing the Informatica Patches on Windows

After you install Informatica PowerCenter version 7.1.2, you need to install two Informatica patches.

### *To install the Informatica patches on Windows*

- 1 Access the patch files on the installation CD-ROM.
- 2 Locate the folder named Patch1, and install the patch by following the instructions in the readme file.
- 3 Locate the folder named Patch2, and install the patch by copying the files from the appropriate operating system folder to \Informatica PowerCenter 7.1.2\Server\bin.

## Setting Informatica Data Code Pages Validation

After installing the Informatica Server, Repository Server, and client tools, add the following section to the powmart.ini file located in the Informatica client directory:

```
[Code Pages]
Val idateDataCodePages=No
```

## Installing the Java SDK

You need to install the Java SDK on the machines where both the DAC server and DAC client are installed.

**NOTE:** For information about which version of the Java SDK is supported, see *System Requirements and Supported Platforms for Siebel Analytics Applications* on Siebel SupportWeb.

### *To install Java SDK*

- Download the Java SDK from the Sun Web site, and install it on the machines where both the DAC server and DAC client are installed. Make sure there are no spaces in the directory path. For example on Windows: D:\j2sdk142

## Configuring the DAC Client

This section includes the following topics:

- [Configuring the DAC Config.bat File on page 69](#)
- [Installing JDBC Drivers for DAC Database Connectivity on page 70](#)

## Configuring the DAC Config.bat File

Follow this procedure to configure the DAC config.bat file.

### *To configure the DAC config.bat file*

- 1 In the DAC directory, find and open the config.bat file.  
This directory is usually in the SiebelAnalytics root directory.
- 2 Edit the JAVA\_HOME variable to point to the directory where you installed the Java SDK.  
Make sure there are no spaces in the path reference.  
For example:  

```
set JAVA_HOME=d:\jdk1.4.2
```
- 3 Edit the DAC\_HOME variable to point to the directory where you installed the DAC.  
For example:  

```
set DAC_HOME=d:\SiebelAnalytics\DAC
```

## Installing JDBC Drivers for DAC Database Connectivity

This section provides instructions for installing the appropriate JDBC driver in the DAC\lib directory to enable DAC database connectivity. You need to install the JDBC driver on the machines where both the DAC server and DAC client are installed.

### *To install JDBC drivers in the SiebelAnalytics\DAC\lib directory*

- **Oracle.** If you are using an Oracle database (other than 8.x), find the directory where Oracle is installed. Copy the file named ojdbc14.jar in the jdbc\lib directory and paste it in the SiebelAnalytics\DAC\lib directory.
  - If you are using Oracle 8.x, copy the file named classes12.zip and paste it in the SiebelAnalytics\DAC\lib directory. Also, edit the ORACLELIB setting in the config.bat file as follows:  

```
set ORACLELIB=%DAC_HOME%\lib\classes12.zip
```
- **DB2.** If you are using a DB2 database, find the directory where DB2 is installed. In the Java subdirectory copy the file named db2java.zip and paste it in the SiebelAnalytics\DAC\lib directory.  
**NOTE:** If your source or target database is DB2-UDB, you also need to create Siebel stored procedures to be used during the ETL process. For instructions, see [“Creating Siebel Stored Procedures for DB2-UDB” on page 107](#).
- **MSSQL.** If you are using an MSSQL database, download the SQL Server JDBC drivers from Microsoft’s Web site. Copy the files msbase.jar, mssqlserver.jar, and msutil.jar to the SiebelAnalytics\DAC\lib directory.
- **Teradata.** If you are using a Teradata database, find the directory where Teradata is installed. Copy the files terajdbc4.jar, log4j.jar, and tdgssjava.jar and paste them in the SiebelAnalytics\DAC\lib directory. Depending on the Teradata JDBC version, you may not have log4j.jar and tdgssjava.jar.

# Creating the DAC Metadata Repository

This procedure provides instructions for creating a repository connection and importing seed data.

- To create the DAC metadata repository connection on page 71
- To import seed data into the DAC metadata repository on page 72

**NOTE:** The DAC client can connect to only one DAC repository at a time.

**NOTE:** Before you start this procedure, you need to create a database for the DAC metadata repository. This database can be the same as the data warehouse database.

## To create the DAC metadata repository connection

- 1 Launch the DAC client by double-clicking the icon on your desktop or navigating to the SiebelAnalytics\DAC directory and double-clicking the startclient.bat file.
- 2 In the Login... dialog box, select Configure.
- 3 In the Configuring... dialog box, select Create Connection, and then click Next.
- 4 Enter the appropriate connection details.

Field	Description
Name	A unique database name.
Connection Type	Type of database.
Connection String	<p>If you are using...</p> <ul style="list-style-type: none"> <li>■ Oracle (OCI8) use the tnsnames entry.</li> <li>■ Oracle (Thin) use the instance name.</li> <li>■ SQL Server use the database name.</li> </ul> <p>If you are using dynamic port allocation, see <a href="#">"Connecting from DAC to SQL Server Using Dynamic Port Allocation"</a> on page 45.</p> <ul style="list-style-type: none"> <li>■ DB2-UDB use the connect string as defined in the DB2 configuration.</li> </ul>
Database Host	Machine name where the database resides.
Database Port	The port number where the database listens.

- 5 Test the connection to make sure it works.

If the DAC repository schema does not exist in the database to which you are connecting, the schema will be automatically created. When a repository is created on Oracle or DB2 databases, you have the option of specifying a tablespace. For MSSQL and DB2 databases, you can indicate whether the environment is Unicode.

- 6 (Optional for Oracle or DB2 databases) Specify a tablespace.

- 7 (Optional for MSSQL or DB2 databases) Check the Unicode check box if the environment is Unicode.
- 8 Click Yes when asked if you want to have the repository created automatically.

**NOTE:** The DAC repository is not supported on DB2-390 databases. If your source or target database is DB2-390, you need to use a DB2-UDB, MSSQL, or Oracle database for both the DAC repository and the Informatica repository.

### *To import seed data into the DAC metadata repository*

- 1 From the DAC menu bar, choose Tools > DAC Repository Management > Import.
- 2 Select the appropriate import option, and click OK.

Option	Description
Import All Tables	Imports all database tables.
Import Categories > Logical	Imports all information contained in the DAC Design view and database connection information.
Import Categories > Run Time	Imports all information contained in the DAC Execute view.
Import Categories > System	Imports all information contained in the DAC Setup view, except passwords for servers and database connections.
Import Selected Tables	Allows you to select tables for importing.

- 3 If your source or target database is a DB2-390 database, run DAC\_DB2390\_Source.sql or DAC\_DB2390\_Target.sql immediately after importing the seed data by connecting to the database where the DAC repository resides.

## Configuring the DAC Metadata Repository

This section includes the following topics:

- [Setting Up DAC System Properties on page 73](#)
- [Creating ODBC Database Connections on page 77](#)
- [Registering Informatica Servers in the DAC Client on page 80](#)
- [Configuring Email Recipients in the DAC Client on page 81](#)
- [Activating Join Indices for Teradata Databases on page 81](#)

**NOTE:** You will configure the DAC server to point to this repository later in the installation process, in the procedure “[Configuring the DAC Server](#)” on page 102.

## Setting Up DAC System Properties

Follow this procedure to set up the DAC system properties, which determine the behavior of the DAC server.

### *To set up the DAC system properties*

- 1 Launch the DAC client.
- 2 Click Setup on the DAC toolbar.  
The DAC System Properties tab is active.
- 3 Set up the system properties appropriately.

Property	Description
Analyze Frequency (in days)	For DAC metadata tables, the frequency (in days) the DAC client automatically updates the table and index statistics for the DAC repository. The value must be numerical.
Analyze Tables	For the data warehouse schema tables, indicates whether during the ETL process the DAC server automatically issues analyze table statements when a table is truncated and loaded. Possible values are True and False.
Auto Restart ETL	Possible values are True and False.  When set to True: An ETL that is running when the DAC server abnormally terminates will continue running when the DAC server is restarted.  When set to False: An ETL that is running when the DAC server abnormally terminates will not automatically restart when the DAC server restarts. The ETL status will be updated to Failed. An administrator will have to manually restart the ETL.

Property	Description
CreateQueryIndexesAtTheEnd	<p>Possible values are True and False.</p> <p>During the ETL process, the DAC server automatically drops and creates indices. When set to True, this property groups all indices of the Query type and creates them after the ETL is complete.</p> <p><b>NOTE:</b> The DropAndCreateIndexes property takes precedence over this property. Therefore, if the DropAndCreateIndexes property is set to False, you cannot set the property CreateQueryIndexesAtTheEnd to True to have indices of the Query type created at the end of the ETL process.</p> <p>Also, be aware that when this property is set to True, tables will be analyzed twice.</p> <p>If any indices are marked as Query type indices, and are used by ETL processes, it can adversely affect the performance of the ETL process.</p>
DAC Server Host	<p>Host name of the machine where the DAC server resides. You cannot use an IP address for this property.</p> <p><b>NOTE:</b> The DAC server and a given DAC repository have a one-to-one mapping. That is, you can only run one DAC server against any given DAC repository. Thus, in the repository you must specify the network host name of the machine where the DAC sever is to be run.</p> <p><b>NOTE:</b> This property also takes the value <i>localhost</i>. However, this value is provided for development and testing purposes and should not be used in a production environment.</p>
DAC Server OS	<p>Operating system of the machine where the DAC server resides. Possible values are Windows, Solaris, HP, or AIX.</p> <p><b>NOTE:</b> If you move the DAC server from another operating system to AIX, you need to do the following: change the DAC server host to the appropriate value; restart the DAC client; reenter all the password fields for the Informatica servers and database connections; and reconfigure the DAC server on the AIX machine by running <code>serverSetupPrompt.sh</code>.</p>
DAC Server Port	<p>Network port to which the DAC server binds in order to listen to client requests. The default value is 3141. If this port has been assigned to another process, you can enter any numerical port value greater than 1024.</p>

Property	Description
DropAndCreateIndexes	<p>Possible values are True and False.</p> <p>Indicates whether, during the ETL process, the DAC server automatically drops and creates indices.</p> <p><b>NOTE:</b> This property takes precedence over the <code>CreateQueryIndexesAtTheEnd</code>. Therefore, if the <code>DropAndCreateIndexes</code> property is set to False, you cannot set the property <code>CreateQueryIndexesAtTheEnd</code> to True to have indices of the Query type created at the end of the ETL process.</p>
Dryrun	<p>Possible values are True and False.</p> <p>Indicates whether tasks are executed without invoking Informatica workflows. The following processes are executed: change capture, truncation of tables, drop and creation of indices, and analyze statements. Possible values are True and False.</p> <p><b>NOTE:</b> This option should be used for debugging purposes only and not used in a production environment.</p>
Generic Task Concurrency Limit	<p>Determines how many tasks with execution types other than Informatica can be run concurrently. The value must be numerical.</p> <p>To set this value, you should consider what the external tasks do. For example, if the tasks open connections to a database, you should consider how this would affect the preconfigured tasks.</p>
HeartBeatInterval	<p>Frequency (in seconds) the DAC server checks on the health of the database connections. The value must be numerical. For example, a value of 300 (the default value) indicates the system will perform subsystem diagnostics and recovery procedures every 300 seconds.</p>
Output Redirect	<p>Indicates whether logging information and standard output and errors are redirected to files in the log directory (when property is set to True). The file containing standard output starts with <code>out_</code> and ends with the <code>.log</code> extension. The standard error messages are in the file starting with <code>err_</code> and ending with the <code>.log</code> extension.</p> <p>If this property is set to False, the logging information is directed to the machine's standard output and error files, which typically defaults to the console from which the DAC server was launched if the server was launched in a visible console mode. If the server is launched as a Windows service, the logging information is directed to the service log. If the server is launched with the command shell not visible, all logging information is deleted.</p>

Property	Description
Repository DB Pool Size	<p>Maximum number of connections to the DAC repository the DAC server will maintain. The value must be numerical.</p> <p><b>NOTE:</b> As the DAC server runs, it needs to perform transactions and queries on the DAC repository. In order for it to do so efficiently, it internally maintains a pool of preexisting database connections. This pool of database connections reduces latency and leads to better use of resources through connection sharing. However, you need to specify the maximum size of the connection pool. This setting should be determined in consultation with the database administrator of the database where the DAC repository resides.</p> <p><b>NOTE:</b> This property was deprecated as of version 7.7.1.5.</p>
Repository Name	Unique name for the repository.
Scheduler.Poll.Interval	Frequency (in seconds) the DAC server polls for changes in the schedule configuration.
Script After Every ETL	<p>The name of the script or executable to be run after every execution plan.</p> <p>For more information, see the description of the property Script Before Every ETL.</p>
Script Before Every ETL	<p>The name of the script or executable to be run before every execution plan.</p> <p>For example, before running an execution plan, you might want to run a process or perform certain tasks. These can be contained in a script or executable. This file should be placed in the scripts subdirectory of the DAC server.</p> <p>The execution plan runs only after the external process has finished. Therefore, it is important that the script or executable does not fail.</p>
Server Log Level	Output logging level. Possible values are Finest, Finer, Fine, Config, Info, Warning, and Severe. The Severe value produces minimal log details, and Finest produces the most extensive amount of reporting.
SQL Trace	<p>Possible values are True and False.</p> <p>Indicates whether the SQL statements to the DAC repository and database connections are added to the log file. Possible values are True and False. The True value sends a hint to the database connectivity layer of the DAC server to enable SQL tracing; thus, every SQL statement that is run by the DAC server is spooled to the appropriate output log file.</p> <p>It is recommended that you set this property to False.</p>

Property	Description
Verify and Create Non-Existing Indices	<p>Possible values are True and False.</p> <p>Indicates whether indices defined in the DAC repository will be automatically created in the data warehouse database during an incremental load.</p> <p><b>NOTE:</b> When this system property is set to True, the DAC server verifies whether indices defined in the DAC repository are also defined in the data warehouse database. This verification process can delay the execution of an execution plan.</p>
Drop and Create Change Capture Views Always	<p>Possible values are True and False.</p> <p>When set to True (the default value), the DAC server drops and creates change capture views every time it performs a change capture process, including for both full and incremental loads.</p> <p>Setting this property to True can create system catalog lock up for DB2-UDB and DB2-390 databases. Therefore, by setting the property to False, the DAC server will drop and create views selectively, using the following rules:</p> <ul style="list-style-type: none"> <li>■ In full mode: <ul style="list-style-type: none"> <li>■ During the change capture phase, views will be dropped and created as full views.</li> <li>■ During the change capture sync process, incremental views will be generated.</li> </ul> </li> <li>■ In incremental mode: <ul style="list-style-type: none"> <li>■ If the view exists, it will not be dropped and created.</li> <li>■ If the view does not exist, the incremental view will be created.</li> </ul> </li> </ul>

## Creating ODBC Database Connections

The Informatica Server and Repository Server require native connections to the Siebel Data Warehouse and Siebel transactional database. The Informatica client needs both an ODBC connection and a native connection to the Siebel Data Warehouse and transactional database.

**NOTE:** If the Informatica Server is installed in MSSQL in non-ASCII mode, it will need an ODBC connection to the Siebel Data Warehouse and transactional database.

### *To create database connections for DB2 installations*

- 1 Using the DB2 Client Configuration Assistant, create a database connection to the Siebel Data Warehouse, the Siebel transactional database, and the Informatica repository.

- 2 In Windows, in the System DSN tab of the ODBC Data Source Administrator, create an ODBC connection to the Siebel Data Warehouse and transactional database using an ODBC driver.
- 3 Test the connections to make sure they work.

***To create database connections for Oracle installations***

- 1 Using Net8 Assistant or Oracle Net Service, create a native connect string (net service name) to the Siebel Data Warehouse, the Siebel transactional database, and the Informatica repository.
- 2 In Windows, in the System DSN tab of the ODBC Data Source Administrator, create an ODBC connection to the Siebel Data Warehouse using the Siebel Merant ODBC driver that is supplied with Siebel Enterprise Server.
- 3 In Windows, in the System DSN tab of the ODBC Data Source Administrator, create an ODBC connection to the Siebel Data Warehouse and transactional database using the Informatica-supplied Merant Closed driver. This ODBC driver was installed during the Informatica client installation (the exact name depends on the specific release of Informatica being used).
- 4 Test the connections to make sure they work.

***To create database connections for SQL Server installations***

- 1 In Windows, in the System DSN tab of the ODBC Data Source Administrator, create an ODBC connection to the Siebel Data Warehouse and Siebel transactional database using a SQL Server ODBC driver.
- 2 Test the connections to make sure they work.

***To create database connections for Teradata installations***

- 1 In Windows, in the System DSN tab of the ODBC Data Source Administrator, create an ODBC connection for the Teradata database.
- 2 Set the following parameters:

Field	Enter
DateFormat	AAA
SessionMode	ANSI
NoScan	Yes

- 3 For Unicode environments, in the Teradata ODBC Driver Advanced Options dialog box, set the Character Set parameter to UTF8.

## Creating Transactional and Data Warehouse Database Connections

Follow this procedure to create the transactional and data warehouse database connections.

### *To create transactional and data warehouse database connections*

- 1 Launch the DAC client.
- 2 Click Setup on the toolbar, and then click the Database Connections tab.
- 3 In the Edit subtab, enter the following:

Field	Description
Logical Name	Logical name for the database connection.
Type	Database functional type. Possible values are: <ul style="list-style-type: none"> <li>■ Source</li> <li>■ Warehouse</li> <li>■ Informatica Repository</li> <li>■ DAC Repository</li> <li>■ Other</li> </ul>
Connection Type	Type of database. Possible values are: <ul style="list-style-type: none"> <li>■ Oracle (OCI8)</li> <li>■ Oracle (Thin)</li> <li>■ DB2</li> <li>■ DB2-390</li> <li>■ MSSQL</li> </ul> <p>If you are using dynamic port allocation, see <a href="#">“Connecting from DAC to SQL Server Using Dynamic Port Allocation”</a> on page 45.</p> <ul style="list-style-type: none"> <li>■ Teradata</li> </ul>
Database Name	Name of database.
Table Owner	Valid database user.
Table Owner Password	Valid database user password.
Max Num Connections	Maximum number of database connections this connection pool can contain. <p>For information about determining how to set this value, see <a href="#">“Determining the Number of Transactional and Data Warehouse Database Connections”</a> on page 167.</p>

Field	Description
DB Host	Machine name where the database resides.
Port	Port number where the database listens.

- 4 Click Test Connection to make sure the connection works.

## Registering Informatica Servers in the DAC Client

This section describes registering the Informatica servers in the DAC and specifying the number of workflows that can be executed in parallel. The DAC server automatically load balances across the servers and does not run more than the value specified for each of them.

You need to register at least one Informatica server. You should register one Informatica server for each Informatica repository.

**NOTE:** It is recommended that the Informatica Server be installed on the machine where the DAC server is installed. If a machine is running only the DAC client, it does not need an Informatica server installed.

### *To register Informatica servers in the DAC client*

- 1 Launch the DAC client.
- 2 Click Setup on the DAC toolbar, and then click the Informatica Servers tab.
- 3 Enter the following information:

Field	Enter
Name	Logical name for the Informatica server.
Server Host Name	Informatica server host name or IP address.
Port	Port where the Informatica server connects for requests. (The default port number is 4001. It is recommended that you use the default port number.)
Login	Informatica user name who has appropriate privileges to execute workflows.
Password	Informatica user password.

Field	Enter
Maximum Sessions	<p>Maximum number of workflows that can be executed in parallel on the Informatica server. If the number of sessions is zero or is not specified, the DAC server assigns the default value of five for the DAC Lite version and 10 for the full DAC version. The DAC Lite version cannot run more than five sessions in parallel.</p> <p>For information about how to determine this setting, see <a href="#">“Determining the Informatica Server Maximum Sessions Parameter Setting” on page 166</a>.</p>
Inactive	Indicates whether the Informatica server is active or inactive.

## Configuring Email Recipients in the DAC Client

Follow this procedure to configure email recipients.

### *To configure email recipients in the DAC client*

- 1 Launch the DAC client.
- 2 Click Setup on the DAC toolbar, and then click the Email Recipients tab.
- 3 Enter the following information:

Field	Description
Name	Logical name of the user to be notified.
Email Address	Email address where the notification is sent.
Notification Level	<p>The notification levels are as follows:</p> <ul style="list-style-type: none"> <li>■ 10 -- Notifies recipient of success or failure of each task.</li> <li>■ 5 -- Notifies recipient of success or failure of the entire ETL process.</li> <li>■ 1 -- Notifies recipient that ETL completed successfully.</li> </ul>
Inactive	Indicates whether the record is active or inactive.

## Activating Join Indices for Teradata Databases

For Teradata databases, the preconfigured tasks for creating and dropping join indices are inactive. You need to activate these tasks in order to run ETL processes.

### *To activate join indices for Teradata databases*

- 1 In the DAC, navigate to the Task Definitions tab in the Design view.
- 2 Query for all tasks beginning with Teradata.
- 3 Remove the check from the Inactive check box for all the tasks.
- 4 Click Save.

## Configuring the Siebel Data Warehouse Database

This section includes the following procedures for configuring the Siebel Data Warehouse database:

- [Creating the SSE Role on page 82](#)
- [Creating Data Warehouse Tables on page 82](#)
- [Creating and Dropping Data Warehouse Tables on a Teradata Database on page 83](#)

**NOTE:** Before you start this procedure, you need to create a database for the data warehouse. This database can be the same as the DAC metadata repository database.

### Creating the SSE Role

Follow this procedure to create the SSE role.

#### *To create the SSE Role*

- Create a database role named SSE\_ROLE (SSEROLE for DB2 390 databases) and make sure this role is granted the same privileges as the SSE\_ROLE on the Siebel transactional database. Assign this role to the database user. For instructions on creating roles, see the documentation provided with your database.

**NOTE:** If you are using a Teradata database, you do not need to create the SSE role.

### Creating Data Warehouse Tables

Use this procedure to create the data warehouse tables. Before you perform this procedure make sure the SSE role has been created for the Siebel Data Warehouse and Siebel transactional database and that the database user has been associated with the role.

If you are using a Teradata database, follow the instructions in the section [“Creating and Dropping Data Warehouse Tables on a Teradata Database”](#) on page 83.

**NOTE:** Additional work by the database administrator is required if the data warehouse tables need to be moved to different tablespaces for performance or manageability reasons.

**To create data warehouse tables**

- 1 From the DAC menu bar, click Tools > ETL Management > Configure.
- 2 In the Sources dialog box, select the database platform for the target data warehouse, source transactional database, and the Informatica repository.

The Data Warehouse Configuration Wizard opens.

- 3 Select the Create Siebel Data Warehouse Tables check box, and click Next.

The Data Warehouse tab is active.

- 4 Enter the following information:

Field	Description
Database Type	Type of database.  If the database type is DB2 390, then check the 390 Database check box.
Table Owner	Valid database user.
Password	Valid database user password.
ODBC Data Source	Data Source Name (DSN) for the Siebel Data Warehouse.
Data Area	(Optional) Tablespace where data warehouse tables are created.
Index Area	(Optional) Indexspace where data warehouse indices are created (applicable only to Oracle and DB2 databases).
Is Unicode	Specifies whether the data warehouse database is Unicode.

## Creating and Dropping Data Warehouse Tables on a Teradata Database

This section includes the procedures for creating and dropping data warehouse tables on a Teradata database.

**NOTE:** For Unicode environments, perform these procedures using a login that has the default character set UTF-8.

**To create data warehouse tables on a Teradata database**

- 1 Navigate to SiebelAnalytics\dwrep.
- 2 Copy the script create\_dw\_tera.sql to SQL Assistant and execute it.

**To drop data warehouse tables on a Teradata database**

- 1 Navigate to SiebelAnalytics\dwrep.
- 2 Copy the script drop\_dw\_tera.sql to SQL Assistant and execute it.

## Setting Up the Informatica Server

After the Informatica Server is installed, you must configure it before you can start it. Make note of the settings you enter in the Server tab and Repository tab of the Configure Informatica Service window; you will need to enter the same settings in other configuration steps.

### To set up the Informatica Server

- 1 Navigate to Programs > Informatica PowerCenter 7.1.2 > Informatica PowerCenter 7.1.2 OEM for Siebel - Server > Informatica Server Setup.
- 2 In the Informatica Server Setup Application - Options window, select Configure Informatica Service, and then click Continue.
- 3 In the Server tab, enter the following:

Field	Description
Server Name	A logical name for the Informatica Server. It is recommended that you enter SIEBEL_DW_SERVER.
TCP/IP Host Address	The IP address or name of the machine on which you plan to run the Informatica Server.
Max no. of concurrent sessions	From 1 to 15 sessions but not greater than 15.
Shared Memory	A number not greater than 3000000.

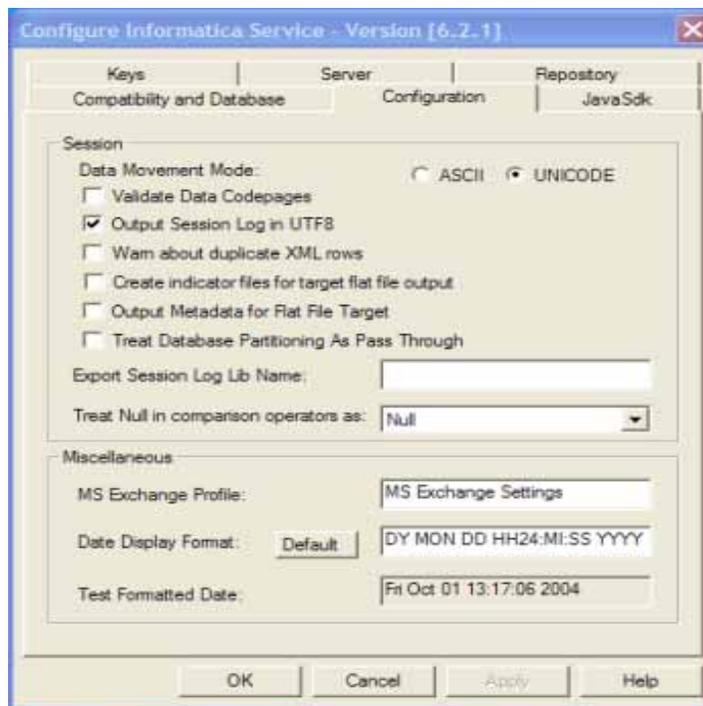
- 4 In the Repository tab, enter the following:

Field	Description
Repository Name	A logical name for the Informatica repository. It is recommended that you enter Siebel_DW_Rep. For Teradata databases, it is recommended that you enter Siebel_DW_Rep_Teradata.
Repository User	The account used to access the repository. It is recommended that you use Administrator as the username.
Repository Password	The password you use to connect to the Repository Server from the Repository Manager. It is recommended that you use Administrator as the password.
Repository Server Host Name	The host machine name where the Informatica Repository Server is installed.
Repository Port Number	The port number the Repository Server uses to connect to repository client applications. By default, this value is 5001. It is recommended that you use the default value.

- 5 In the Licenses tab:
  - a Leave the default License File Name as pm.lic.
  - b If you have an option or connectivity license key, enter it in the “with Key” field, and click Update. Do this for each option and connectivity license key.
- 6 In the Compatibility and Database tab:
  - a Make sure the “Treat CHAR as CHAR on read” option is selected.
  - b Make sure the maximum number of database connections is 100.
- 7 In the Configuration tab, set the Data Movement Mode.

**NOTE:** You must run the Informatica Server in Unicode mode if your source data contains multibyte or ISO 8859-1 (8-bit ASCII) data.

- a Select the ASCII or UNICODE option.
- b If you select the UNICODE option, remove the check from the Validate Data Codepages check box, and check the Output Session Log in UTF8 check box.



- c Leave the default values in the remaining fields.
- 8 In the JavaSdk tab, leave the default values in all fields.
- 9 Click OK in the Configure Informatica Service dialog box to complete the configuration of the Informatica Server service.

**NOTE:** You cannot start the Informatica Server until you have completed the procedures in the section “Creating, Restoring, and Configuring the Informatica Repository” on page 89.

# Setting Environment Variables on Windows

This section includes instructions for setting the following environment variables:

- [Setting the PATH Environment Variable for the Informatica Server on page 86](#)
- [Setting the SiebelUnicodeDB Environment Variable on Windows on page 86](#)
- [Setting the Bulk Load Registry for DB2/390 Databases on page 87](#)

**NOTE:** You need to reboot your machine after setting the environment variables for the change to take effect.

## Setting the PATH Environment Variable for the Informatica Server

The DAC server uses pmcmd to run the Informatica workflows on the Informatica servers. This requires the path to the bin directory for the Informatica server to be added to the Windows system PATH environment variable.

### *To set the PATH environment variable for the Informatica server*

- In the Windows System Properties window, add the path for the Informatica Server bin directory to the PATH environment variable.

## Setting the SiebelUnicodeDB Environment Variable on Windows

If you are using the Unicode character data mode, you need to set the SiebelUnicodeDB environment variable.

### *To set SiebelUnicodeDB for Windows*

- 1 In Windows, click Start > Run.
- 2 In the Open field, enter regedit.
- 3 Navigate to HKEY\_LOCAL\_MACHINE > SYSTEM > CurrentControlSet > Services > PowerMart > Parameters > Configuration.
- 4 On the right window panel, right-click and select New > String Value.
- 5 Rename the new string value SiebelUnicodeDB.
- 6 Double-click SiebelUnicodeDB.
- 7 In the Value data field, enter your [user\_OLTP]@[connectString\_OLTP]  
[user\_OLAP]@[ConnectString\_OLAP].

For example, siebel@db204007 siebel@db204008.

- For Oracle and DB2, leave a space between siebel@db204007 and siebel@db204008.

- For MSSQL, use the system DNS name for [connectString\_OLTP] and [connectString\_OLAP].

**NOTE:** You must enter the user names and connect strings in the same case as you used in the Workflow Manager > Connections > Relational settings.

## Setting the Bulk Load Registry for DB2/390 Databases

DB2/390 databases do not support bulk loading; therefore, you need to disable bulk loading in the Windows registry.

### *To disable bulk loading for DB2/390 databases*

- For DB2/390 databases, enter `Di sabl eDB2Bul kMode = Yes` in the Windows registry.

# Copying Database Parameter Files

Follow this procedure to copy the database parameter files to the Informatica server.

### *To copy the database parameter files to the Informatica Server machine for Siebel Business Applications*

- For Siebel Business Applications, copy the following files:

File	Copy From	Copy To
parameterfileOLTP.txt parameterfileOLTP_UA.txt	The appropriate source database directory in SiebelAnalytics\dwrep\Informatica\ParameterFiles.	The SrcFiles directory on the Informatica Server machine.
parameterfileDW.txt parameterfileDW_UA.txt	The appropriate target database directory in SiebelAnalytics\dwrep\Informatica\ParameterFiles.	The SrcFiles directory on the Informatica Server machine.
AlignmentType.csv ApplicationVariables.csv Day_FiscalCalendar.csv	SiebelAnalytics\dwrep\Informatica\ParameterFiles	The SrcFiles directory on the Informatica Server machine.

**To copy the database parameter files to the Informatica Server machine for Siebel Industry Applications**

■ For Siebel Industry Applications, copy the following files:

File	Copy From	Copy To
parameterfileOLTP.txt parameterfileOLTP_UA.txt sia_parameterfileOLTP.txt sia_parameterfileOLTP_UA.txt	The appropriate source database directory in SiebelAnalytics\dwrep\Informatica\ParameterFiles.	The SrcFiles directory on the Informatica Server machine.
parameterfileDW.txt parameterfileDW_UA.txt sia_parameterfileDW.txt sia_parameterfileDW_UA.txt	The appropriate target database directory in SiebelAnalytics\dwrep\Informatica\ParameterFiles.	The SrcFiles directory on the Informatica Server machine.
AlignmentType.csv ApplicationVariables.csv Day_FiscalCalendar.csv	SiebelAnalytics\dwrep\Informatica\ParameterFiles	The SrcFiles directory on the Informatica Server machine.

**NOTE:** For Teradata databases, the files `sia_parameterfileOLTP.txt` and `sia_parameterfileOLTP_UA.txt` do not exist.

## Copying Teradata Loader Control Files

If you are using a Teradata database, follow this procedure to copy the loader control files to the Informatica Server.

**To copy Teradata loader control files**

- 1 Navigate to the directory `SiebelAnalytics\dwrep\Informatica\teradata_loader_control_files` or `teradata_loader_control_files_UNIX`.
- 2 Copy all of the control files in the directory to the `TgtFiles` directory under the Informatica Server directory.
- 3 Modify the control files to use the appropriate database, login, password, table owner, and directory path for the input data files and loader logs.
- 4 Change the permissions setting on the control files to read only.

# Creating, Restoring, and Configuring the Informatica Repository

This section contains instructions for creating, restoring, and configuring the Informatica repository. It also includes instructions for dropping the Informatica repository, to be used when you want to drop and then restore the repository.

The following topics are included:

- [Setting Up the Informatica Repository Server on page 89](#)
- [Starting the Informatica Repository Server on page 90](#)
- [Creating or Restoring the Informatica Repository on page 90](#)
- [Dropping the Informatica Repository \(Optional\) on page 92](#)
- [Registering the Informatica Repository Server in Repository Server Administration Console on page 93](#)
- [Pointing to the Informatica Repository on page 93](#)
- [Configuring the Informatica Repository in the DAC on page 95](#)
- [Configuring the Informatica Repository in Workflow Manager on page 98](#)

## Setting Up the Informatica Repository Server

After installing the Informatica Repository Server, you must perform the set up step before you can start it.

### *To set up the Informatica Repository Server*

- 1 Navigate to Programs > Informatica PowerCenter 7.1.2 > Informatica PowerCenter 7.1.2 OEM for Siebel - RepServer > Informatica Repository Server Setup.
- 2 In the Configure Repository Server dialog box, enter the following information:

Field	Description
Server Port Number	<b>NOTE:</b> The port number the Repository Server uses to connect to repository client applications. By default, this value is set to 5001. It is recommended that you use the default value. <b>This value must match the value you entered in "Setting Up the Informatica Server" on page 84.</b>
Administrator Password	The password you use to connect to the Repository Server from the Repository Manager. It is recommended that you use Administrator as the password. <b>NOTE:</b> This value must match the value you entered in "Setting Up the Informatica Server" on page 84.

- 3 Leave the default values in the remaining fields, and click OK.

## Starting the Informatica Repository Server

Follow this procedure to start the Informatica Repository Server.

### *To start the Informatica Repository Server*

- 1 Navigate to Start > Settings > Control Panel > Administrative Tools > Services.
- 2 Double-click Informatica Repository Server.
- 3 In the Informatica Repository Server Properties dialog box, click Start.

## Creating or Restoring the Informatica Repository

If you are using an MSSQL, Oracle, or DB2 database, follow this procedure to create or restore the Informatica repository using the DAC.

If you are using a Teradata database, you need to create or restore the Informatica repository using the Informatica Repository Manager. You cannot create or restore the Informatica repository using the DAC. For instructions, see [“To create or restore the Informatica repository for Teradata installations” on page 91](#).

**NOTE:** Before you start this procedure, you need to create a database to contain the Informatica Repository. This database can be the same as the data warehouse database.

### *To create or restore the Informatica repository*

- 1 From the DAC menu bar, click Tools > ETL Management > Configure.
- 2 Select the database platforms for the following:
  - Target data warehouse
  - Source transactional database
  - Informatica repository
- 3 In the Data Warehouse Configuration wizard, select the Create Informatica Repository check box, and then click Next.

The Informatica Repository tab is active.

- 4 Enter the following information:

Field	Description
Database Type	Type of database.
Table Owner	Valid database user.

Field	Description
Database Connection String	<p>If you are using...</p> <ul style="list-style-type: none"> <li>■ Oracle (OCI8) use the tnsnames entry.</li> <li>■ Oracle (Thin) use instance name.</li> <li>■ SQL Server use the database name.</li> <li>■ DB2-UDB/DB2-390 use the connect string as defined in the DB2 configuration.</li> <li>■ Teradata use the database name.</li> </ul>
Host	Applicable only to SQL Server. Machine host name where the server resides.
Database Table Owner	Name of table owner.
Database Password	Password for table owner.
MSSQL Database Name	Applicable to SQL Server only. The database name where you want to restore the repository.
Informatica Administrator Name/Password	<p>Not applicable while restoring the repository. Used only to configure the repository.</p> <p><b>NOTE:</b> These values should match the values you entered in "Setting Up the Informatica Server" on page 84.</p>
Repository Server	<p>Name of machine hosting the Informatica Repository Server.</p> <p><b>NOTE:</b> This value should match the value you entered in "Setting Up the Informatica Server" on page 84.</p>
Repository Server Port	<p>Port number used by Informatica Repository Server to listen to requests.</p> <p><b>NOTE:</b> This value should match the value you entered in "Setting Up the Informatica Server" on page 84.</p>
Email Address	Not applicable while restoring the repository. Used only to configure the repository.

**To create or restore the Informatica repository for Teradata installations**

- 1 Launch the Informatica Repository Manager.
- 2 Register the Informatica Repository Server.
  - a In the left pane, select the Informatica Repository Servers node, which appears under Console Root.
  - b From the menu bar, select Action > New Server Registration.
  - c Enter the host name (the machine where the repository resides).



### To drop the Informatica repository

- 1 From the DAC menu bar, click Tools > ETL Management > Configure.
- 2 Select the Drop Informatica Repository check box.
- 3 In the Informatica Repository tab, enter the appropriate information, and then click Start.

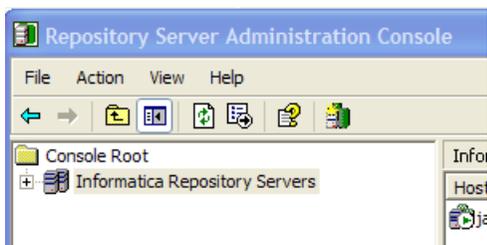
## Registering the Informatica Repository Server in Repository Server Administration Console

Follow this procedure to register the Informatica Repository Server in the Informatica Repository Server Administration Console.

**NOTE:** Make sure the Informatica Repository Server is running before you begin this procedure.

### To register the Informatica Repository Server

- 1 Launch the Repository Server Administration Console.
- 2 In the left pane, select the Informatica Repository Servers node, which appears under Console Root.



- 3 From the menu bar, select Action > New Server Registration.
  - a Enter the host name (the machine where the repository resides).
  - b Accept the default port number 5001 or enter the appropriate port number. Click OK. The Repository Server host name appears in the right pane under Hostname.
  - c Right-click the server name and choose Connect.
  - d In the Connection Information section, enter the Administrator password. Click OK.

These values should match the values you entered in ["Setting Up the Informatica Server" on page 84](#).

## Pointing to the Informatica Repository

Follow this procedure to point to the Informatica repository using the Repository Server Administration Console.

### To point to the Informatica repository

- 1 Launch the Repository Server Administration Console.
- 2 In the left pane, select the Repositories node.
- 3 From the menu bar, select Action > New Repository.  
The New Repository dialog box appears.
- 4 In the General tab, enter the following information:

Field	Description
Repository Name	The name for the Informatica repository. This value should match the value you entered in <a href="#">"Setting Up the Informatica Server" on page 84</a> .
Creation Mode	Select "Do not create any content. A repository already exists under the specified database connection."

- 5 In the Database Connection tab, enter the following information:

Field	Description
DatabaseType	The type of database storing the repository.
CodePage	The code page based on the operating system platform.
ConnectionString	The native connect string the Repository Server uses to access the database containing the repository.  For MSSQL Server databases, use <SERVERNAME@DATABASENAME>.
DBUser	The account used to access the repository. This value should match the value you entered in <a href="#">"Setting Up the Informatica Server" on page 84</a> .
DBPassword	The password for the repository user. This value should match the value you entered in <a href="#">"Setting Up the Informatica Server" on page 84</a> .

- 6 Click the Licenses tab.  
You may see a message stating the license file is empty.
- 7 Click OK to close the message dialog box.
- 8 In the License Key field, enter the Product license key, and then click Update.  
The license key information appears in the lower window of the Licenses tab.
- 9 Repeat the step above for the Option and Connectivity license keys.

10 Click OK to save the configuration options.

11 Select the repository, right-click and then click Start to start the repository.

**NOTE:** The Informatica repository tables need to be analyzed for better performance. This procedure must be done manually by the database administrator.

## Configuring the Informatica Repository in the DAC

Follow this procedure to configure the Informatica repository in the DAC's Data Warehouse Configurator.

If your source or target database is on SQL Server and you have non-ASCII data, you must manually create database connections in the Informatica repository and replace the connections. For instructions, see ["To replace database connections for SQL Server databases that have non-ASCII data" on page 95.](#)

If you are using a Teradata database, you need to configure the source and data warehouse database relational connections in the Informatica Workflow Manager. You cannot use the DAC's Data Warehouse Configurator to configure relational connections. For instructions, see ["To configure the Informatica repository in the Workflow Manager for Teradata installations" on page 97.](#)

### *To configure the Informatica repository in the Data Warehouse Configurator*

- 1 From the DAC menu bar, click Tools > ETL Management > Configure.
- 2 Select the database platform for the target, source, and Informatica repository databases.
- 3 In the Data Warehouse Configurator wizard, check the Configure Informatica Repository check box, and click Next.
- 4 Enter the appropriate information in the Data Warehouse, Transactional Database, and Informatica Repository tabs, and then click Start.

**NOTE:** The Informatica repository cannot be configured using the Data Warehouse Configurator if the source or target database is Unicode. Therefore, make sure the Is Unicode check box is not checked in the Data Warehouse tab and in the Transactional Database tab of the Data Warehouse Configurator. You then need to configure the Informatica repository in the Informatica Workflow Manager to specify the source and target databases as Unicode. For instructions, see ["To set the database connection code page in Workflow Manager" on page 96.](#)

### *To replace database connections for SQL Server databases that have non-ASCII data*

- 1 Launch the Informatica Workflow Manager.
- 2 Connect to the repository.
- 3 Select Connections >Relational.  
A new window appears.
- 4 Click Add, and then select ODBC.

- 5 If your source database is on SQL Server, create a connection using the following values:

Field	Value
Name	ODBC_OLTP
Code Page	UTF-8 encoding of Unicode

- 6 If your target database is on SQL Server, create a connection using the following values:

Field	Value
Name	ODBC_OLAP
Code Page	UTF-8 encoding of Unicode

The connections you created appear in the Replace Connections list.

- 7 Select Connections > Replace.
- 8 Click Add a New Connection Pair.
- 9 If your source database is SQL Server, enter MSSQL\_OLTP in the From field, and ODBC\_OLTP in the To field.
- 10 If your target database is SQL Server, click Add a New Connection Pair, and enter MSSQL\_OLAP in the From field, and ODBC\_OLAP in the To field.
- 11 Click Replace.

The database connection code page also has to be set manually through the Informatica Workflow Manager for Unicode/Non-Latin code pages.

### ***To set the database connection code page in Workflow Manager***

- 1 Launch the Informatica WorkFlow Manager.
- 2 Connect to the repository.
- 3 Select Connections > Relational.  
The Relational Connection Browser window appears.
- 4 Configure the code page for the source connection:
  - a Double-click the appropriate OLTP connection (DB2\_OLTP for DB2, ORA\_OLTP for Oracle, ODBC\_OLTP for MSSQL).  
The Connection Object Definition dialog box opens.
  - b For the Code Page, select UTF-8 encoding of Unicode or the appropriate code page, and click OK.
- 5 Configure the code page for the target connection:
  - a Double-click the appropriate OLAP connection (DB2\_OLAP for DB2, ORA\_OLAP for Oracle, ODBC\_OLAP for MSSQL).

- b** For the Code Page, select UTF-8 encoding of Unicode or the appropriate code page, and click OK.

***To configure the Informatica repository in the Workflow Manager for Teradata installations***

- 1** Launch the Informatica Workflow Manager.
- 2** In the Repositories list, select the Informatica repository. The recommended repository name is Siebel\_DW\_Rep\_Teradata for Teradata databases. This value should match the value you entered in ["Setting Up the Informatica Server" on page 84](#).
- 3** In the menu bar, select Repository > Connect.
- 4** Log in using the username and password you entered in ["Setting Up the Informatica Server" on page 84](#). Click Connect.
- 5** Configure the relational connections.
  - a** In the menu bar, select Connections > Relational.
  - b** In the Objects window, select Olap\_Teradata, and then click Edit.
  - c** Edit the User Name, Password, Database Name, and Data Source Name, and then click OK.
  - d** If you cannot use the existing source connection (the default source connection is for an Oracle database), you need to create a new relational connection and then use the Replace Connections functionality (Connections > Replace) to replace the relational database connection.
  - e** Click Close to close the Relational Connection Browser.
- 6** Configure the external loader connection.
  - a** In the menu bar, select Connections > Loader.
  - b** In the Objects window, select Teradata\_Tpump\_Upsert, and then click Edit.
  - c** Edit the User Name, Password, TDPID, Database Name, and other attributes as necessary.
  - d** Repeat these steps for the following objects:
    - Teradata\_Tpump\_Update
    - Teradata\_Tpump\_Insert
    - Teradata\_Tpump\_Delete
    - Teradata\_FastLoad
  - e** For Unicode environments, append `-c UTF8` to the value for the External Loader Executable attribute for each external loader.

For example:

```
fastload -c UTF8
```

```
tpump -c UTF8
```
  - f** Click Close to close the Relational Connection Browser.

## Configuring the Informatica Repository in Workflow Manager

Follow this procedure to configure the Informatica repository in the Informatica Workflow Manager.

### *To configure the Informatica repository in Workflow Manager*

- 1 Launch the Informatica Workflow Manager.
- 2 In the Repositories list, select the Informatica repository. The recommended repository name is Siebel\_DW\_Rep (Siebel\_DW\_Rep\_Teradata for Teradata databases). This value should match the value you entered in [“Setting Up the Informatica Server” on page 84](#).
- 3 In the menu bar, select Repository > Connect.  
The Connect to Repository window opens.
- 4 Log in using the username and password you entered in [“Setting Up the Informatica Server” on page 84](#). Click Connect.
- 5 Once connected, double-click the icon of the server name (SIEBEL\_DW\_SERVER is the recommended server name) under the repository icon.  
The Server dialog box opens.
- 6 In the Host Name field, enter the computer name (as shown in the Network control panel) of the machine running the Informatica Server.
- 7 Optionally, configure the Code Page setting.
  - If the Informatica Server uses ENU Windows, leave the setting unchanged. For localized environments, choose the appropriate setting.
- 8 Click Advanced to expose the Server Variables list.
- 9 Make sure the \$PMRootDir variable points to the directory where the Informatica Server is installed.  
**NOTE:** If you install the Informatica Server on a machine different from the recommended configuration, make sure to update the \$PMRootDir variable with the new location.
- 10 Close the Server window, and exit from Workflow Manager.

## Setting the Code Page File Property for Unicode Environments on Teradata Databases

If you have a Unicode environment on a Teradata database, you need to set the code page file property of sessions that use the Teradata external loaders to use the code page UTF8. You need to follow this procedure to set the code page file property for each session that uses a Teradata external loader.

*To set the code page file property for a Unicode environment on a Teradata database*

- 1 Launch the Informatica Workflow Manager.
- 2 Open the appropriate session.
- 3 In the Edit Tasks dialog box, select the Targets tab.
- 4 Click Set File Properties.
- 5 In the Flat Files - Targets dialog box, in the File Properties area, click Advanced.
- 6 In the Fixed Width Properties - Targets dialog box, in the Code Page area, select UTF-8 encoding of Unicode.

## Setting Up the HOSTS File for Teradata Installations on Windows

If you are using a Teradata database, you need to set the TDPID parameter on the machine where the Informatica Server is installed by adding an entry in the HOSTS file.

*To set up the HOSTS file for Teradata installations*

- 1 On the machine where the Informatica Server is installed, go to the `\<SystemRoot>\system32\drivers\etc` directory and open the HOSTS file.
- 2 In the HOSTS file, enter a line in the following format:

```
<IP address of remote server> <remote server> <remote server>COP<n>
```

For example:

```
172.20.176.208 tdatsvr tdatsvrCOP1
```

where `tdatsvrCOP1` is the alias for the remote server. The alias must begin with an alphabetic string and end with the `COP n` suffix, where `n` is a number between 1 and the total number of applications processors that are associated with the Teradata communications processor.

- 3 Save the HOSTS file.

For more information about setting the TDPID parameter, see the Teradata documentation.

## Verifying the Informatica Repository Configuration

Follow this procedure to verify the Informatica repository configuration.

*To verify the Informatica repository configuration*

- 1 Launch the Informatica Workflow Manager.

- 2 Double-click the SIEBEL\_DW\_SERVER icon that appears under the Siebel\_DW\_Rep icon.  
The Server dialog box opens.
- 3 Click Advanced to expose the Server Variables list.
- 4 Verify the following settings:
  - Host Name
  - Port
  - Code Page
  - \$PMRootDir
- 5 Close the Server dialog box.
- 6 In the menu bar, select Connections > Relational.  
The Relational Connection Browser window opens.
- 7 Verify the OLAP and OLTP connection settings.

## Starting the Informatica Server

At this point in the installation and configuration process, you can start the Informatica Server. It should now be able to communicate with the Informatica Repository Server and the Informatica repository.

### *To start the Informatica Server*

- 1 Navigate to Start > Settings > Control Panel > Administrative Tools > Services.
- 2 Double-click Informatica.  
The Informatica Properties dialog box opens.
- 3 In the General tab, in the Startup Type drop-down list, select Automatic.
- 4 In the Log On tab, if you plan on using email notification, enter the appropriate username and password. Select System Account if you do not plan on using email notification.  
**NOTE:** If the Informatica Repository Manager and Workflow Manager are not pointing to the Siebel Data Warehouse, the Informatica service cannot start.
- 5 In the General tab, in the Server Status area, click Start.
- 6 Close the Services window.

## Setting DAC ETL Preferences

Follow this procedure to set the appropriate ETL parameters in the DAC.

**To set the DAC ETL Preferences**

- 1 Launch the DAC client.
- 2 From the DAC menu bar, choose Tools > ETL Management Preferences.

The available parameters are described in [Table 29](#).

Table 29. ETL Preferences

Parameter	Description
Analysis Start Date	The start date used to build the day dimension and to flatten exchange rates and costs lists.
Analysis End Date	The end date used to build the day dimension and to flatten exchange rates and costs lists.
Prune Days	<p>The LAST_UPD column in Siebel transactional database tables is used for incremental change capture. This timestamp reflects the actual event time. It is therefore possible for a data row to be committed to the transactional database with a LAST_UPD date that is older than the date on which the last refresh was executed. This will cause the data row to be missed in the subsequent extract (if based purely on LAST_UPD date).</p> <p>However, the LAST_UPD date column still provides an opportunity to improve the change capture process by overlapping the extraction date window by the number of days set in this parameter. The records extracted in the overlapped window are filtered by comparing this information with information in the Image table.</p> <p>The Prune Days setting ensures that the rows that had values in LAST_UPD older than values in LAST_REFRESH_DATE are not missed. This is a parameter that can be set based on experience with processes, such as remote sync, that potentially can cause records to be missed. This parameter cannot be less than 1.</p> <p>For example: Assume the table W_PERSON_D was refreshed on January 15th by querying the table S_CONTACT. And, the Prune Days setting was set to 5. The next time S_CONTACT is queried to load W_PERSON_D, the records that have a LAST_UPD value since January 10 are compared with the ROW_ID of the Image table to cover for any missing records between January 15 and January 10 (the overlap period).</p>
Default OLTP Currency	During the ETL process, if a record’s transaction currency is null, the ETL process uses the currency specified here as the default transaction currency.
DW Currency	The currency to which all financial transaction are converted during the load process.
Default Exchange Rate	The exchange rate used during a data warehouse currency conversion if certain currency exchange rates are not available.

Table 29. ETL Preferences

Parameter	Description
Max Days in a Sales Stage	Applicable to opportunities only. The maximum number of days an opportunity can spend in a sales stage.
Default Language	<p>The language into which columns' display strings are translated.</p> <p><b>NOTE:</b> Language-independent strings are stored in the _l columns. If you do not know what the default language setting is, issue the following query against the transactional database:</p> <pre>select VAL from S_SYS_PREF where SYS_PREF_CD=' ETL Default Language' ;</pre>
Default DW Index Space	<p>Applicable to Oracle databases only. The indexspace where indices are created. The indexspace can be specified at the index level or at the global level (ETL Preferences dialog box). When indices are dropped and created, they are created in the default indexspace for the table if an indexspace is not specified in the indexspace property of the index itself. If you do not want to specify indexspaces for every index, you can specify a default indexspace in the ETL Preferences dialog box.</p> <p><b>NOTE:</b> This indexspace is used only when indices are dropped and created. After the indices are created, changing the value does not move them over.</p>
Alignment Version	<p>Applicable to vertical applications only. Seed data needs to be updated in certain lists of values to make sure that the ETL process correctly populates the alignment type and product category relationships in the Siebel Data Warehouse.</p> <p>Remove the check from this check box if you want to make changes to the existing alignment.</p> <p>Check this check box if you want to create a new alignment version.</p> <p>This setting is used by Siebel Life Sciences to control loading of changes in assignment rules in Siebel Assignment Manager.</p>

## Configuring the DAC Server

This section provides the procedures for configuring the connection between the DAC server and the DAC metadata repository and for setting up email recipients. You must perform this task on the machine hosting the DAC server. There should be one installation of the DAC server for each DAC repository.

This section includes the following procedures:

- [Configuring the Connection between the DAC Server and DAC Repository on page 103](#)
- [Configuring Email in the DAC Server \(Optional\) on page 103](#)

## Configuring the Connection between the DAC Server and DAC Repository

Follow this procedure to configure the connection between the DAC server and the DAC repository.

### *To configure the connection between the DAC server and the DAC repository*

- 1 Launch the DAC client.
- 2 From the menu bar, click Tools > DAC Server Management > DAC Server Setup.  
A confirmation dialog box asks you to confirm that you want to configure the DAC repository connection.
- 3 Click Yes.  
The Server Configuration dialog box appears.
- 4 In the Repository Connection Information tab, enter the appropriate information.
- 5 Click Test Connection to make sure the connection works.

## Configuring Email in the DAC Server (Optional)

Follow this procedure to configure the email administrator account in the DAC.

The DAC server has a built-in login-authentication based email (SMTP) client, so it talks to any SMTP login-authenticating server to send emails. You can set up the DAC server to notify an administrator by email about the status of various on-going activities, such as the status of an ETL execution.

**NOTE:** For the email functionality to work, you must be using an SMTP server in which the SMTP authentication mode LOGIN is enabled. For example, if you are using Microsoft Exchange Server, you must enable the SMTP module and enable authentication in the Basic Mode. The SMTP server outbound email authentication must be turned on for the DAC server to be able to send email notifications.

### *To configure the email administrator account in the DAC server*

- 1 Launch the DAC client.
- 2 From the menu bar, click Tools > DAC Server Management DAC Server Setup.  
A confirmation dialog box asks you to confirm that you want to configure the DAC repository connection.
- 3 Click Yes.  
The Server Configuration dialog box appears.
- 4 In the Email Configuration tab, enter the appropriate information, and click Save.

Once the configuration has been completed, you can start the DAC server.

# Updating Siebel Transactional Database Schema Definitions

The process of updating schema definitions in the Siebel transactional database consists of the following tasks:

- [Backing Up the Siebel Repository on page 104](#)
- [Importing the SIF File into the Siebel Transactional Database on page 104](#)

**NOTE:** This process requires the use of Siebel Tools.

- [Verifying the SIF Patch Application on page 105](#)
- [Creating Delete Triggers on page 106](#)

## Backing Up the Siebel Repository

You need to back up the repository regardless of whether the SIF file is being applied to a development or to a production environment.

### *To back up a repository*

- 1 Open a DOS window and navigate to the siebsrvr\bin directory.
- 2 Run the command `si ebenv` to set the Siebel environment variables.
- 3 Export the repository to a .dat file:

```
repi mexp /a e /u username /p password /c odbc /d table_owner /r repository /f  
dat_file /v y /l logfile
```

## Importing the SIF File into the Siebel Transactional Database

Follow this procedure to import new schema definitions into the Siebel transactional database.

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

- 1 Copy the file named SRW\_OLTP\_78.sif from SiebelAnalytics\dwrep to \tools\objects.
- 2 Open Siebel Tools and point to the development database.
- 3 Lock the projects named Table ETL and Table Nquire.
- 4 In the menu, click Tools > Import from Archive.
- 5 Navigate to the directory containing the SIF files and open SRW\_OLTP\_78.sif.

The Import Wizard—Preview screen appears.

- 6 Click Next.
- 7 Select the option Merge the object definition from the archive file with the definition in the repository, and click Next.

The Import Wizard reviews all the object conflicts between what is in the repository and what is in the SIF file.

- 8 When the Import Wizard process is done, expand the tree under Conflicting Objects to verify the changes being applied from the SIF file to the repository. When you are done, click Next.

- 9 A warning appears:

The operation is going to modify your repository ...

Click Yes.

- 10 When the process is finished, click Finish.

After you import the new schema into Siebel Tools, you need to apply the schema to the physical database.

### *To apply schema definitions to the Siebel transactional database*

- 1 In Siebel Tools, in the Object Explorer, click on the Table tab and query for S\_ETL\_\*.

A list of tables appears.

- 2 Select all the tables in the list and click Apply.

The Apply Schema wizard appears.

- 3 In the Tables drop-down menu, select Current Query. Enter the appropriate connection parameters, and click Apply.

## Verifying the SIF Patch Application

After the SIF import is complete, verify the following tables were created in the Siebel transactional database.

- For Siebel Business Applications:
  - S\_ETL\_R\_IMG\_1 through S\_ETL\_R\_IMG\_88
  - S\_ETL\_I\_IMG\_1 through S\_ETL\_I\_IMG\_88
  - S\_ETL\_D\_IMG\_1 through S\_ETL\_D\_IMG\_88
  - S\_ETL\_R\_IMG\_133 through S\_ETL\_R\_IMG\_147
  - S\_ETL\_I\_IMG\_133 through S\_ETL\_I\_IMG\_147
  - S\_ETL\_D\_IMG\_133 through S\_ETL\_D\_IMG\_147
  - S\_ETL\_PARAM
  - S\_ETL\_PRD\_ATTR

- S\_ETL\_PRD\_REL
- For Siebel Industry Applications:
  - S\_ETL\_R\_IMG\_84 through S\_ETL\_R\_IMG\_132
  - S\_ETL\_I\_IMG\_84 through S\_ETL\_I\_IMG\_132
  - S\_ETL\_D\_IMG\_84 through S\_ETL\_D\_IMG\_132
  - S\_ETL\_R\_IMG\_148 through S\_ETL\_R\_IMG\_151
  - S\_ETL\_I\_IMG\_148 through S\_ETL\_I\_IMG\_151
  - S\_ETL\_D\_IMG\_148 through S\_ETL\_D\_IMG\_151

## Creating Delete Triggers

The change capture process in Siebel Data Warehouse uses delete triggers to capture deleted records. The preconfigured ETL process captures deleted records for tables W\_ORG\_D and W\_PERSON\_D. The source tables for W\_ORG\_D and W\_PERSON\_D are S\_ORG\_EXT, S\_CONTACT, and S\_PRSP\_CONTACT; these tables need to have delete triggers created in the Siebel transactional database in order to track deleted records. Such records are identified by setting the ACTIVE\_FLG column to D.

For vertical applications, the following additional source tables need to have delete triggers created in the Siebel transactional database: S\_MDF\_TXN, S\_ASGN\_GRP\_POSTN, S\_ASGN\_RULE\_ITEM. The preconfigured ETL process captures deleted records for W\_FUND\_F and W\_ALIGNMT\_DH.

In Siebel Data Warehouse, preconfigured visibility tables are inactivated. If your organization is going to use any of the visibility-related data warehouse tables, you need to activate them in the Tables tab of the Design view of the DAC client. If you activate visibility tables, you should also create delete triggers on the optional tables.

The preconfigured SIA Account and Contact visibility tables are activated by default for vertical applications. If your organization is not going to use any of the visibility tables, you need to inactivate them in the Tables tab of the Design view in the DAC client.

When creating delete triggers using the Data Warehouse Configurator, you have the option of including the optional tables for which you want to enable the delete triggers. You also have the option of having the trigger statements be directly executed or being written to a file, which can then be executed by a database administrator.

### *To create a delete trigger*

- 1 From the DAC menu bar, click Tools > ETL Management Configure.
- 2 Select the Create Delete Triggers in Transaction Database check box.  
The Delete Triggers tab is active.
- 3 Select Create Triggers.
- 4 Select the transactional database where the triggers will be created.

- 5 (Optional) Select the Include optional triggers check box to include optional tables.
- 6 Click Start.

## Creating Siebel Stored Procedures for DB2-UDB

The DAC uses siebstat and siebtrun stored procedures when running ETL processes. Typically, these stored procedures will be available in your Siebel transactional database; they may not be available on the data warehouse database.

*To verify the existence of these procedures, follow the steps below.*

- From a DB2 command prompt or control center, issue the following SQL scripts:

```
db2 => create table test_siebproc(id int);  
DB20000I The SQL command completed successfully.
```

```
db2 => insert into test_siebproc(id) values (1);  
DB20000I The SQL command completed successfully.
```

```
db2 => call siebtrun('TEST_SIEBPROC');  
SQL0805N Package "NULLID.SYSSH200" was not found. SQLSTATE=51002
```

**NOTE:** If you get an error message, you do not have the Siebel procedures.

Creating stored procedures must be performed by the database administrator.

### *To create DB2 stored procedures*

- 1 Refer to folder SiebelAnalytics\dwdb\siebproc. It contains compiled Siebel stored procedures for all platforms.
- 2 Copy the stored procedures into the appropriate directory on the DB2 server side, for example, d:\Program Files\SQLLIB\function directory for Windows.

If your DB2 environment is 32-bit, copy siebproc. If it is 64-bit, copy siebproc64 and rename it to siebproc.

This directory also contains the files siebproc.sql and sqlproc.ksh file, which are used to create the function.

Once these procedures are created, you can verify that they exist. After the test is complete, you can drop the table TEST\_SIEBPROC.

## Teradata-Specific Installation and Configuration Checklist (Windows)

Table 30 provides a list of Teradata-specific installation and configuration steps that are performed during the Analytics Applications installation and configuration process. You should review this list to make sure that you have performed all of the required Teradata-specific steps.

Table 30. Teradata-Specific Installation Checklist for Windows

Action	Link to Topic
Review Teradata-specific database guidelines.	<a href="#">Teradata-Specific Database Guidelines for Siebel Data Warehouse on page 48.</a>
Activate join indices.	<a href="#">Activating Join Indices for Teradata Databases on page 81.</a>
Create or drop data warehouse tables.	<a href="#">Creating and Dropping Data Warehouse Tables on a Teradata Database on page 83.</a>
Use recommended name for Informatica repository.	<a href="#">Setting Up the Informatica Server on page 84.</a>
Copy Teradata loader control files.	<a href="#">Copying Teradata Loader Control Files on page 88.</a>
Create or restore the Informatica repository using the Informatica Repository Manager. You cannot create or restore the Informatica repository using the DAC.	<a href="#">To create or restore the Informatica repository for Teradata installations on page 91.</a>
Configure the source and data warehouse database relational connections in the Informatica Workflow Manager. You cannot use the DAC's Data Warehouse Configurator to configure relational connections.	<a href="#">To configure the Informatica repository in the Workflow Manager for Teradata installations on page 97.</a>
Set the Code Page File Property for Unicode Environments.	<a href="#">Setting the Code Page File Property for Unicode Environments on Teradata Databases on page 98.</a>
Set up the HOSTS file.	<a href="#">Setting Up the HOSTS File for Teradata Installations on Windows on page 99.</a>

# 6

## Installing and Configuring Analytics Applications on UNIX

This chapter provides instructions for installing and configuring the Siebel Business Analytics Applications in UNIX environments. It contains the following main topics:

- [Overview of Deploying Analytics Applications on UNIX on page 109](#)
- [Analytics Applications Installation and Configuration Process on UNIX on page 110](#)

**NOTE:** If you are installing Siebel Business Analytics Applications in a UNIX environment, you must use the Unicode character data mode. For more information about Unicode, see [“Deploying Siebel Data Warehouse in Latin-1 General, Unicode and Non-English Environments” on page 48](#)

### Overview of Deploying Analytics Applications on UNIX

Before you begin the installation and configuration process on UNIX, you should review the following:

- [Chapter 4, “Preinstallation Considerations for Analytics Applications”](#)
- [Chapter 5, “Installing and Configuring Analytics Applications on Windows”](#)

Figure 9 shows the deployment configuration for a UNIX installation. Note that the Informatica client tools and the DAC client are installed on Windows only. You will complete some of the configuration tasks in the Windows environment. Table 31 lists each task in the installation and configuration process and tells you in which environment to complete the task.

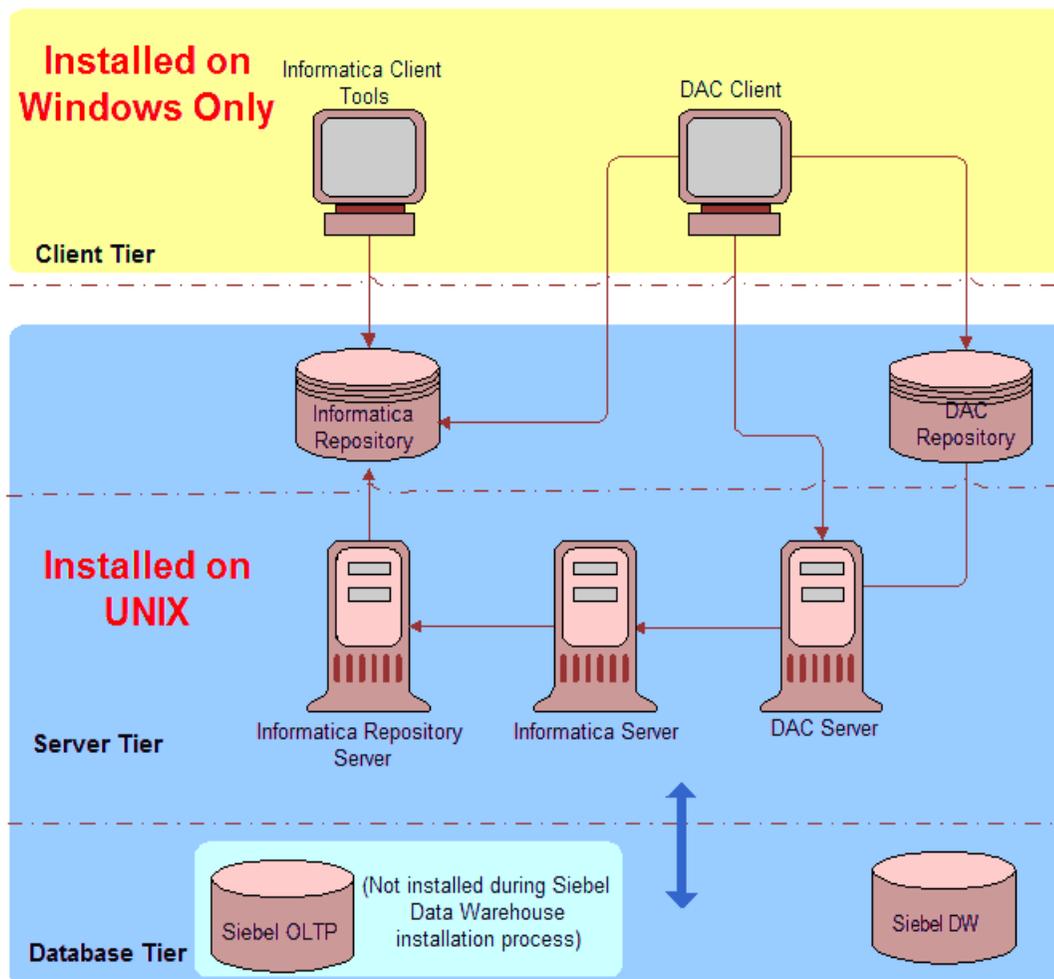


Figure 9. UNIX Installation of Siebel Data Warehouse

## Analytics Applications Installation and Configuration Process on UNIX

The Siebel Business Analytics Applications installation and configuration process on UNIX consists of the following steps. Complete each of the following tasks in the order listed below.

Table 31. UNIX Installation and Configuration Process

Task	Instructions	Environment
1 Install Analytics Applications on Windows.	<a href="#">Running the Analytics Applications Installation Wizard (Windows) on page 65</a>	Windows
2 Install Analytics Applications on UNIX.	<a href="#">Installing Analytics Applications on UNIX on page 114</a>	UNIX
3 Install and Configure the Informatica Repository Server on UNIX.	<a href="#">Installing and Configuring the Informatica Repository Server on UNIX on page 115.</a>	UNIX
4 Install and Configure the Informatica Server on UNIX.	<a href="#">Installing and Configuring the Informatica Server on UNIX on page 117.</a>	UNIX
5 Update the Informatica license files.	<a href="#">Updating the Informatica License Files on UNIX on page 124.</a>	UNIX
6 Install the Informatica patch.	<a href="#">Installing the Informatica Patches on UNIX on page 124</a>	UNIX
7 Set Informatica Data Code Pages Validation.	<a href="#">Setting Informatica Data Code Pages Validation on page 69.</a>	Windows
8 Install the Java SDK on the machines where both the DAC client and DAC server are installed.	<a href="#">Installing the Java SDK on page 69.</a>	<ul style="list-style-type: none"> <li>■ Windows (DAC client)</li> <li>■ UNIX (DAC server)</li> </ul>
9 Configure the DAC config.bat file.	<a href="#">Configuring the DAC Config.bat File on page 69.</a>	Windows
10 Create the DAC Metadata Repository.	<a href="#">Creating the DAC Metadata Repository on page 71.</a>	Windows

Table 31. UNIX Installation and Configuration Process

Task	Instructions	Environment
<b>11</b> Configure the DAC Metadata Repository.	Setting Up DAC System Properties on page 73.	Windows
	Creating ODBC Database Connections on page 77.	Windows
	Creating Transactional and Data Warehouse Database Connections on page 79	Windows
	Creating Database Connections for Teradata Installations on page 124.	UNIX
	Registering Informatica Servers in the DAC Client on page 80.	Windows
	Configuring Email Recipients in the DAC Client on page 81.	Windows
	Activating Join Indices for Teradata Databases on page 81.	Windows
<b>12</b> Configure the Siebel Data Warehouse.	Creating the SSE Role on page 82.	Windows
	Creating Data Warehouse Tables on page 82.	Windows
	Creating and Dropping Data Warehouse Tables on a Teradata Database on page 83.	Windows
<b>13</b> Set environment variables for the Informatica Server.	Setting Environment Variables for the Informatica Server on UNIX on page 125.	UNIX
<b>14</b> Set the Windows PATH environment variable for the Informatica Server.	Setting Environment Variables on Windows on page 86.	Windows
<b>15</b> Copy database parameter files.	Copying Database Parameter Files on page 87.	Windows
<b>16</b> Copy Teradata Loader Control Files.	Creating, Restoring, and Configuring the Informatica Repository on page 89.	Windows

Table 31. UNIX Installation and Configuration Process

Task	Instructions	Environment
<b>17</b> Start the Informatica Repository Server.	<a href="#">Starting the Informatica Repository Server on UNIX on page 127.</a>	UNIX
<b>18</b> Create or restore and configure the Informatica repository.	<a href="#">Creating or Restoring the Informatica Repository on page 90.</a>	Windows
	<a href="#">Dropping the Informatica Repository (Optional) on page 92.</a>	Windows
	<a href="#">Registering the Informatica Repository Server in Repository Server Administration Console on page 93.</a>	Windows
	<a href="#">Pointing to the Informatica Repository on page 93.</a>	Windows
	<a href="#">Configuring the Informatica Repository in the DAC on page 95.</a>	Windows
	<a href="#">Configuring the Informatica Repository in Workflow Manager on page 98.</a>	Windows
<b>19</b> Set the Code Page File Property for Unicode Environments on Teradata Databases.	<a href="#">Setting the Code Page File Property for Unicode Environments on Teradata Databases on page 98</a>	Windows
<b>20</b> Set Up the HOSTS File for Teradata Installations.	<a href="#">Setting Up the HOSTS File for Teradata Installations on UNIX on page 126.</a>	UNIX
<b>21</b> Verify the Informatica Repository configuration.	<a href="#">Verifying the Informatica Repository Configuration on page 99.</a>	Windows
<b>22</b> Start the Informatica Server.	<a href="#">Starting the Informatica Server on UNIX on page 130.</a>	UNIX
<b>23</b> Set the DAC ETL Preferences.	<a href="#">Setting DAC ETL Preferences on page 100.</a>	Windows
<b>24</b> Configure the DAC server.	<a href="#">Configuring the DAC Server on UNIX on page 128.</a>	UNIX

Table 31. UNIX Installation and Configuration Process

Task	Instructions	Environment
25 Update the Siebel transactional database schema definition.	<a href="#">Backing Up the Siebel Repository on page 104.</a>	Windows
	<a href="#">Importing the SIF File into the Siebel Transactional Database on page 104.</a>	Windows
	<a href="#">Verifying the SIF Patch Application on page 105.</a>	Windows
	<a href="#">Creating Delete Triggers on page 106.</a>	Windows

## Installing Analytics Applications on UNIX

Before you install Siebel Business Analytics Applications on UNIX you must first complete the following installations:

- Install the Siebel Business Analytics platform on Windows.  
For instructions, see *Siebel Business Analytics Platform Installation and Configuration Guide*.
- Install the Siebel Business Analytics platform on UNIX.  
For instructions, see *Siebel Business Analytics Platform Installation and Configuration Guide*.
- Install Siebel Business Analytics Applications on Windows.  
For instructions, see [“Installing and Configuring Analytics Applications on Windows” on page 61.](#)

### To install Analytics Applications on UNIX

- 1 Copy the folder SiebelAnalytics\dwrep\Informatica from the Siebel Business Analytics Applications installation directory in the Windows environment to the UNIX environment. Use the same directory structure in the UNIX environment as the Windows environment.

This action copies pmrep, the Informatica repository file (Siebel\_DW\_Rep.rep), and the parameter files to the UNIX environment.

- 2 Copy the following files from the Windows environment into the UNIX environment. Use the same directory structure in the UNIX environment as the Windows environment.

File Type	File Name	File Location
Data warehouse schema	ddlsmc.ctf	SiebelAnalytics\dwrep
SIF files	*.sif	SiebelAnalytics\dwrep
DAC repository	*.*	SiebelAnalytics\DAC\export

File Type	File Name	File Location
DAC application related	*.*	SiebelAnalytics\DAC\CustomSQLs
Delete trigger	DeleteTriggers.list	SiebelAnalytics\DAC\conf
Analytics repository	SiebelAnalytics.rpd	SiebelAnalytics\Repository
Web catalog	SiebelAnalytics.webcat	SiebelAnalyticsData\Web\Catalog
Language	*.*	SiebelAnalyticsData\Web\Res

## Installing and Configuring the Informatica Repository Server on UNIX

If you are using a non-ENU operating system, make sure you have all the required locale files installed.

Install the Informatica software directly from the CD-ROM. If you cannot install the software directly from the CD-ROM, you must use FTP in binary mode; otherwise, the installation will fail. After the FTP process, use the `chmod` command to change the permission setting for all install files to read, write, and execute.

### *To install and configure the Informatica Repository Server*

- 1 Log onto the UNIX machine.
- 2 Change to the appropriate directory and run the installer by typing `./install`.
- 3 Select the language in which you want to perform the installation.
- 4 Enter the Product license key.
- 5 Accept the license agreement.
- 6 Select Informatica Repository Server from the list of components available to install.
- 7 Specify the directory where the Repository Server will be installed.
- 8 Enter the appropriate values for the options listed below.

Option	Required/Optional	Description
Configuration file name	Required	The name of the Repository Server configuration file.
ServerPort	Required	The port number the Repository Server uses for repository client connections. The default is 5001.
AdminPasswd	Required	The administrative password used to access the Repository Server. It is recommended that you use Administrator as the password.

Option	Required/Optional	Description
RaMinPort	Required	The minimum port number the Repository Server can assign to the Repository Agent process. The default is 5002.
RaMaxPort	Required	The maximum port number the Repository Server can assign to the Repository Agent process. The default is 65535.
ConfigDir	Required	The name of the directory in which the Repository Server stores repository configuration information files. You can specify either a relative path or an absolute path. The default is Config.
BackupDir	Required	The name of the directory in which the Repository Server stores repository backup files. You can specify either a relative path or an absolute path. The default is Backup.
PluginDir	Required	The name of the directory in which the Repository Server stores repository plugin files. You can specify either a relative path or an absolute path. The default is Plugin.
ErrorSeverityLevel	Required	<p>The level of error messages written to the Repository Server log. Specify one of the following message levels:</p> <ul style="list-style-type: none"> <li>■ Error. Writes ERROR code messages to the log.</li> <li>■ Warning. Writes WARNING and ERROR code messages to the log.</li> <li>■ Information. Writes INFO, WARNING, and ERROR code messages to the log.</li> <li>■ Tracing. Writes TRACE, INFO, WARNING, and ERROR code messages to the log.</li> <li>■ Debug. Writes DEBUG, TRACE, INFO, WARNING, and ERROR code messages to the log.</li> </ul> <p>The default is Information</p>
LogFileName	Required	The name of the Repository Server log file. The default is pmrepserver.log.

9 Type Y if you want to view the readme file, or N to read it later.

10 Press enter to continue to install the Informatica Server.

Do not exit from the installer. Proceed to [“Installing and Configuring the Informatica Server on UNIX” on page 117.](#)

# Installing and Configuring the Informatica Server on UNIX

The instructions in this section for installing and configuring the Informatica Server are meant to be followed immediately after the Informatica Repository Server installation, without exiting the installer. If you exited the installer after installing the Repository Server, you may want to review [“Installing and Configuring the Informatica Repository Server on UNIX” on page 115](#).

**NOTE:** You can install and configure two Informatica Server instances on the same UNIX machine. This configuration requires two copies of `pmserver.cfg` and `pmrepsrvr.cfg` files. Each file must have a unique name, for example, `pmserverdev.cfg` and `pmserverQA.cfg`. Each config file will define unique ports for each instance of the Informatica Server.

**NOTE:** You must install the Informatica Server on the same machine where the DAC server is installed, because the DAC server requires the Informatica utility `pmcmd`.

## *To install and configure the Informatica Server*

- 1 Select Informatica PowerCenter Server from the list of components available to install.
- 2 Specify the directory where the Informatica Server will be installed.
- 3 Enter the appropriate values for the options listed below.

Option	Required/Optional	Description
Configuration file name	Required	The name of the Informatica Server configuration file.
ServerName	Required	The name of the Informatica Server registered with the repository. It is recommended that you use <code>SIEBEL_DW_SERVER</code> .
RepositoryName	Required	The repository name entered when creating or upgrading a repository. It is recommended that you use <code>Siebel_DW_Rep</code> .
PMUser	Required	The repository user name used to connect to the repository. It is recommended that you use Administrator
PMPassword	Required	The password corresponding to the repository user (PMUser). It is recommended that you use Administrator.
RepServerHostName	Required	The host name of the machine hosting the Repository Server.
RepServerPortNumber	Required	The port number the Repository Server uses to communicate with repository client applications.

Option	Required/ Optional	Description
RepServerTimeout	Required	The maximum number of seconds the Informatica Server tries to establish a connection to the Repository Server.
LogFileNames	Optional	The filename of the Informatica Server log file.
DataMovementMode	Required	Possible values are ASCII and UNICODE. The default data movement mode is ASCII, which passes 7-bit ASCII character data. To pass 8-bit ASCII and multibyte character data from sources to targets, use the Unicode mode.  <b>NOTE:</b> If you use the UNICODE mode, you should set the ValidateDataCodePages option as No and the SessionLogInUTF8 option as Yes.
ValidateDataCodePages	Required	If set to Yes, the Informatica Server enforces data code page compatibility. If set to No, the Informatica Server lifts restrictions for source and target data code page selection, stored procedure and lookup database code page selection, and session sort order selection.  <b>NOTE:</b> If you set the DataMovementMode option to UNICODE, you should set the ValidateDataCodePages option as No.
SessionLogInUTF8	Required	If set to Yes, the Informatica Server writes to the session log using the UTF-8 character set. If set to No, the Informatica Server writes to the session log using the Informatica Server code page.  <b>NOTE:</b> If you set the DataMovementMode option to UNICODE, you should set the SessionLogInUTF8 option as Yes.
MaxSessions	Required	The maximum number of sessions stored in shared memory. This sets the maximum number of sessions the Informatica Server can run in parallel.
LMSharedMem	Required	The amount of shared memory available for use by the Informatica Server Load Manager process. For every 10 sessions in MaxSessions, you need at least 2,000,000 bytes reserved in LMSharedMem. The default is 2,000,000 bytes.
TimeStampWorkflowLogMessages	Optional	Set to Yes if you want to append a time stamp to messages written to the workflow log.

Option	Required/Optional	Description
FailSessionIfMaxSessionsReached	Optional	Set to Yes to have the Informatica Server fail the session if the number of sessions already running is equal to the value configured for MaxSessions. If you set this option to No, the Informatica Server places the session in a ready queue until a session slot becomes available.
ExportSessionLogLibName	Optional	If you want the Informatica Server to write session log messages to an external library, enter the name of the library file.
ErrorSeverityLevel	Optional	<p>The level of error messages written to the Informatica Server log.</p> <p>Specify one of the following message levels:</p> <ul style="list-style-type: none"> <li>■ Error. Writes ERROR code messages to the log.</li> <li>■ Warning. Writes WARNING and ERROR code messages to the log.</li> <li>■ Information. Writes INFO, WARNING, and ERROR code messages to the log.</li> <li>■ Tracing. Writes TRACE, INFO, WARNING, and ERROR code messages to the log.</li> <li>■ Debug. Writes DEBUG, TRACE, INFO, WARNING, and ERROR code messages to the log.</li> </ul>
DateHandling40Compatibility	Optional	<p>Set to Yes if you want the Informatica Server to handle dates as in PowerCenter 1.0/PowerMart 4.0. Set to No if you want the Informatica Server to handle dates as defined in the current version of PowerCenter.</p> <p>Date handling significantly improved in PowerCenter 1.5 and PowerMart 4.5. If you need to revert to PowerCenter 1.0 or PowerMart 4.0 behavior, you can configure the Informatica Server to handle dates as in PowerCenter 1.0 and PowerMart 4.0.</p>

Option	Required/ Optional	Description
PMServer3XCompatibility	Optional	<p>Set to Yes if you want the Informatica Server to handle dates as in PowerCenter 1.0/PowerMart 4.0. Set to No if you want the Informatica Server to handle dates as defined in the current version of PowerCenter.</p> <p>Date handling significantly improved in PowerCenter 1.5 and PowerMart 4.5. If you need to revert to PowerCenter 1.0 or PowerMart 4.0 behavior, you can configure the Informatica Server to handle dates as in PowerCenter 1.0 and PowerMart 4.0.</p>
AggregateTreatNullAsZero	Optional	Set to 1 to have the Informatica Server treat nulls as zero in Aggregator transformations. Set to 0 to have the Informatica Server treat nulls as nulls in aggregate calculations.
AggregateTreatRowAsInsert	Optional	Set to 1 to have the Informatica Server perform aggregate calculations before flagging records for insert, update, delete, or reject in Update Strategy expressions. Set to 0 to have the Informatica Server perform aggregate calculations based on the Update Strategy transformation.
DateDisplayFormat	Required	If specified, the Informatica Server validates the date display format and uses it in session log and server log entries. If the date display format is invalid, the Informatica Server uses the default date display format. The default date display format is DY MON DD HH 24:MI:SS YYYY.
JoinerSourceOrder6xCompatibility	Optional	If set to Yes, the Informatica Server processes master and detail pipelines sequentially as it did in versions prior to 7.0. The Informatica Server processes all data from the master pipeline before starting to process the detail pipeline. Also, if you enable this option, you cannot specify the Transaction level transformation scope for Joiner transformations. If set to No, the Informatica Server processes the master and detail pipelines concurrently.

Option	Required/Optional	Description
TreatNullInComparisonOperatorAs	Required	<p>Determines how the Informatica Server evaluates null values in comparison operations. Specify one of the following options:</p> <ul style="list-style-type: none"> <li>■ Null. The Informatica Server evaluates null values as null in comparison expressions. If either operand is null, the result is null. This is the default behavior.</li> <li>■ High. The Informatica Server evaluates null values as greater than non-null values in comparison expressions. If both operands are null, the Informatica Server evaluates them as equal. When you choose High, comparison expressions never result in null.</li> <li>■ Low. The Informatica Server evaluates null values as less than nonnull values in comparison expressions. If both operands are null, the Informatica Server treats them as equal. When you choose Low, comparison expressions never result in null.</li> </ul>
WriterWaitTimeOut	Optional	<p>In target-based commit mode, the amount of time in seconds the writer remains idle before it issues a commit when the following conditions are true:</p> <ul style="list-style-type: none"> <li>■ The Informatica Server has written data to the target.</li> <li>■ The Informatica Server has not issued a committed.</li> </ul> <p>The Informatica Server may commit to the target before or after the configured commit interval. Default is 60 seconds. If you configure the timeout to be 0 or a negative number, the Informatica Server defaults to 60 seconds.</p>
LoadManagerAllowDebugging	Optional	If set to Yes, you can run the Debugger.
CreateIndicatorFiles	Optional	If set to Yes, the Informatica Server creates indicator files when you run a workflow with a flat file target.
XMLWarnDupRows	Optional	If set to Yes, the Informatica Server writes duplicate row warnings and duplicate rows for XML targets to the session log.

Option	Required/Optional	Description
OutputMetaDataForFF	Optional	If you specify this option, the Informatica Server writes column headers to flat file targets. It writes the target definition port names to the flat file target in the first line, starting with the # symbol. By default, this option is disabled.
MaxLookupSPDBConnections	Optional	<p>Allows you to specify a maximum number of connections to a lookup or stored procedure database when you start a session. If the number of connections needed exceeds this value, session threads must share connections. This can result in a performance loss. If you do not specify a value, the Informatica Server allows an unlimited number of connections to the lookup or stored procedure database.</p> <p>If the Informatica Server allows an unlimited number of connections, but the database user does not have permission for the number of connections required by the session, the session fails.</p>
MaxMSSQLConnections	Optional	Allows you to specify a maximum number of connections to a MSSQL Server database when you start a session. If the number of connections required by the session is greater than this value, the session fails.
NumOfDeadlockRetries	Optional	Allows you to specify the number of times the Informatica Server retries a target write on a database deadlock.
DeadlockSleep	Optional	Allows you to specify the number of seconds before the Informatica Server retries a target write on database deadlock. If set to 0 seconds, the Informatica Server retries the target write immediately.
LicenseFile	Required	<p>The name of the file that contains the license keys. The default file name is pm.lic. It is recommended that you use this file name.</p> <p>During the installation, the product license key is automatically added to this file. After the installation, you must add any additional Option and Connectivity license keys to this file. For instructions, see <a href="#">“Updating the Informatica License Files on UNIX” on page 124</a>.</p>
JVMDllPath	Optional	The absolute path to the JVM library file.

Option	Required/Optional	Description
JVMClassPath	Optional	You can set the CLASSPATH to any JAR files you need to run a session using a web service source, target, or transformation. The Informatica Server appends the values you set to the system CLASSPATH.
JVMMinMemory	Optional	Set this value to increase the minimum amount of memory for JVM to use during an Informatica Server session. The default value is 32 MB.  If the session fails due to a lack of memory, you may want to increase this value.
JVMMaxMemory	Optional	Set this value to increase the maximum amount of memory for JVM to use during an Informatica Server session. The default value is 64 MB.  If the session fails due to a lack of memory, you may want to increase this value.
TrustStore	Optional	Enter the value for TrustStore using the following syntax:  <path>/<filename>
ClientStore	Optional	Enter the value for ClientStore using the following syntax:  <path>/<filename>
JvmOptionName[n]	Optional	You can enter names and values for up to 10 custom VM options. Use the following syntax:  JvmOption[n]=- D<VMOption_prefix>=<VMOption_value>  n can range from 1 to 10 and must be unique for each option.
JCEProvider	Optional	Enter the JCEProvider class name to support NTLM authentication.
HttpProxyServer	Required	Name of the HTTP proxy server.
HttpProxyPort	Required	Port number of the HTTP proxy server. This must be a number.
HttpProxyUser	Optional	Authenticated username for the HTTP proxy server.
HttpProxyPassword	Optional	Password for the authenticated user.
HttpProxyDomain	Optional	Domain for authentication.

- 4 When the installation is complete, proceed to [“Updating the Informatica License Files on UNIX”](#) on page 124.

## Updating the Informatica License Files on UNIX

When you install the Informatica PowerCenter, you enter a product license key. The installation process adds the product license key to a license file called pm.lic. Copies of this license file are stored in the installation directories for the Informatica Server and the Repository Server. You must add to the license file any additional Option and Connectivity license keys you have.

### *To update the Informatica license files*

- 1 Navigate to the Informatica Server installation directory.
- 2 Update the license file with a license key using the following syntax:  

```
pmlic update -key <keystring_to_add>
```

For example, if the license key is AAAA-AAAA-AAAA-AAAA-AAAA, enter the following:  

```
pmlic update -key AAAA-AAAA-AAAA-AAAA-AAAA
```
- 3 Repeat [Step 2](#) for every license key you need to add.
- 4 Navigate to the Repository Server installation directory, and repeat [Step 2](#) for every license key you need to add.

## Installing the Informatica Patches on UNIX

After you install Informatica PowerCenter version 7.1.2, you need to install two Informatica patches.

### *To install the Informatica patches*

- 1 Access the patch files on the installation CD-ROM.
- 2 Locate the folder named Patch1, and install the patch by following the instructions in the readme file.
- 3 Locate the folder named Patch2, and install the patch by copying the files from the appropriate operating system folder to <INFA\_home>/informatica/server.

## Creating Database Connections for Teradata Installations

If you are using a Teradata database, follow this procedure to create database connections.

### *To create database connections for Teradata installations*

1 Using the Teradata ODBC driver, create an ODBC connection for the Teradata database.

2 Set the following variables in the ODBC.INI file:

```
DateFormat=AAA
```

```
Sessi onMode=ANSI
```

```
NoScan=Yes
```

For UNICODE environments, add the following:

```
CharacterSet=UTF8
```

## Setting Environment Variables for the Informatica Server on UNIX

This section includes the following procedures:

- [To add setenv variables to .cshrc on page 125](#)
- [To set the code page for non\\_ENU operating systems on UNIX on page 126](#)
- [To set SiebelUnicodeDB on the Informatica Server if source and target databases are Unicode on UNIX on page 126](#)
- [To disable the bulk loader for DB2/390 databases on page 126](#)

### *To add setenv variables to .cshrc*

Add setenv variables to .cshrc. Otherwise, you have to set the environment variables every time you log into the UNIX machine before configuring, starting, or stopping the Informatica servers.

■ For Solaris, in the root directory, add these command lines to .cshrc:

```
setenv PATH /<INFA_home>/i nformati ca/pm: . : ${PATH}
```

```
setenv LD_LI BRARY_PATH /<INFA_home>/i nformati ca/pm: ${LD_LI BRARY_PATH}
```

```
setenv PATH /<INFA_home>/i nformati ca/reposi toryserver: . : ${PATH}
```

```
setenv LD_LI BRARY_PATH /<INFA_home>/i nformati ca/  
reposi toryserver: ${LD_LI BRARY_PATH}
```

■ For AIX, in the root directory, add these command lines to .cshrc:

```
setenv PATH ${PATH}: /<INFA_home>/i nformati ca/pc: .
```

```
setenv LI BPATH ${LI BPATH}: /<INFA_home>/i nformati ca/pc
```

```
setenv PATH ${PATH}: /<INFA_home>/i nformati ca/reposi toryserver: .
```

```
setenv LI BPATH ${LI BPATH}: /<INFA_home>/i nformati ca/reposi toryserver
```

■ For HP-UX, in the root directory, add these command lines to .cshrc:

```
setenv PATH /<INFA_home>/informatics/pm: : ${PATH}

setenv SHLIB_PATH /<INFA_home>/informatics/pm: ${SHLIB_PATH}

setenv PATH /<INFA_home>/informatics/repositoryserver: : ${PATH}

setenv SHLIB_PATH /<INFA_home>/informatics/repositoryserver: ${SHLIB_PATH}
```

### ***To set the code page for non-ENU operating systems on UNIX***

- If you are using a non-ENU operating system, you must set the environment variable PMREPCODEPAGE appropriately. For example: PMREPCODEPAGE=MS932.

### ***To set SiebelUnicodeDB on the Informatica Server if source and target databases are Unicode on UNIX***

- For all UNIX platforms, if both the transactional and data warehouse data sources are Unicode, add the following line in /<INFA\_home>/informatics/pm/pmserver.cfg file.

```
SiebelUnicodeDB=<OLTP_TB0>@<OLTP_connecting>
<OLAP_TB0>@<OLAP_Connecting>
```

For example:

```
SiebelUnicodeDB=ora16221@sdcdl580i016_qa16b ora16222@sdcdl580i016_qa16b
```

### ***To disable the bulk loader for DB2/390 databases***

- For DB2/390 databases, add the following line in /<INFA\_home>/informatics/pm/pmserver.cfg file.

```
DisableDB2BulkMode = Yes
```

## **Setting Up the HOSTS File for Teradata Installations on UNIX**

If you are using a Teradata database, you need to set the TDPID parameter on the machine where the Informatica Server is installed by adding an entry in the HOSTS file.

### ***To set up the HOSTS file for Teradata installations***

- 1 On the machine where the Informatica Server is installed, go to the /etc directory and open the HOSTS file.
- 2 In the HOSTS file, enter a line in the following format:

<IP address of remote server> <remote server> <remote server>COP<n>

For example:

```
172.20.176.208 tdatsvr tdatsvrCOP1
```

where tdatsvrCOP1 is the alias for the remote server. The alias must begin with an alphabetic string and end with the COP n suffix, where n is a number between 1 and the total number of applications processors that are associated with the Teradata communications processor.

- 3 Save the HOSTS file.

For more information about setting the TDPID parameter, see the Teradata documentation.

## Starting the Informatica Repository Server on UNIX

Follow this procedure to start the Informatica Repository Server on UNIX.

### *To start the Informatica Repository Server*

- Go to /<INFA\_home>/informatica/repositoryserver and enter `./pmrepserver`.

Check the log file to verify the server started. If it started correctly, the log file will state: "Server Initialization Completed."

## Stopping the Informatica Repository Server on UNIX

Follow this procedure to stop the Informatica Repository Server on UNIX.

### *To stop the Informatica Repository Server*

- Go to /<INFA\_home>/informatica/repositoryserver, and enter the following command:

```
pmrepserver -s -h <hostname>: <port number>
```

Check the log file to verify the server stopped.

## Configuring the DAC Server on UNIX

Shell scripts are provided in the \*.sh and \*.csh formats. You must use the appropriate scripts in the appropriate shells, because their syntaxes are different. Table 32 lists the available shell scripts and their usage. These files contain comments that provide information about how to configure the scripts.

Table 32. Siebel Data Warehouse Scripts for Bash and C Shells

Script	Purpose
config.sh config.csh	Configures the environment variables for DAC_HOME and JAVA_HOME.
dacCmdLine.sh dacCmdLine.csh	Invokes DAC commands on the DAC server. See the file for usage information.
dac_env.sh dac_env.csh	Configures environment variables, including Informatica's pmcmd utility, which enables the DAC server to invoke workflows. Other variables included are NLS_LANG and ORA_HOME.
serverSetupPrompt.sh serverSetupPrompt.csh	Configures DAC metadata repository connection information and DAC administrator email account information, which enables the DAC to send email notification upon the success or failure of execution plans.
serverinfo.sh serverinfo.csh	Displays the DAC server version.
startserver.sh startserver.csh	Starts the DAC server on machines running Solaris and HP.
startserver_aix.sh startserver_aix.csh	Starts the DAC server on AIX machines.
stopserver.sh stopserver.csh	Shuts down the DAC server.

**NOTE:** All the files listed in Table 32 need to have read, write, and execute permissions. If the files do not have these permissions, modify them using the chmod command.

### To configure the DAC server on UNIX

- 1 Edit the dac\_env.sh or dac\_env.csh file to add the path of the directories for the Informatica Server and Informatica Repository Server to the appropriate environment variable:
  - For Solaris: LD\_LIBRARY\_PATH
  - For AIX: LIBPATH

- For HP: SHLIB\_PATH

For example:

```
setenv LD_LIBRARY_PATH ${LD_LIBRARY_PATH}:/<INFA_HOME>/informatics621/pm
```

- 2 If you are using an Oracle database and the OCI driver, configure the following variables and uncomment them by removing the # sign at the beginning of the line:
  - TNS\_ADMIN: To set the directory for Oracle to use tnsnames.ora files
  - LD\_LIBRARY\_PATH (Solaris), LIBPATH (AIX), or SHLIB\_PATH (HP): To set the Oracle library path.  
**NOTE:** Informatica does not support 64-bit libraries.
- 3 Edit the config.sh or config.csh file to set the JAVA\_HOME directory.  
**CAUTION:** Do not edit any other parameter in this file.
- 4 Copy the database-specific .jar files to the \$DAC/lib directory:
  - **Oracle.** If you are using an Oracle database (other than 8.x), find the directory where Oracle is installed. Copy the file named ojdbc14.jar in the jdbc/lib directory and paste it in the \$DAC/lib directory.
    - If you are using Oracle 8.x, copy the file named classes12.zip and paste it in the \$DAC/lib directory. Also, edit the ORACLELIB setting in the config.sh or config.csh file as follows:

```
setenv ORACLELIB=$DAC_HOME/lib/classes12.zip
```
  - **DB2.** If you are using a DB2 database, find the directory where DB2 is installed. In the Java subdirectory copy the file named db2java.zip and paste it in the \$DAC/lib directory.  
**NOTE:** If your source or target database is DB2-UDB, you also need to create Siebel stored procedures to be used during the ETL process. For instructions, see [“Creating Siebel Stored Procedures for DB2-UDB” on page 107](#).
  - **MSSQL.** If you are using an MSSQL database, download the SQL Server JDBC drivers from Microsoft’s Web site. Copy the files msbase.jar, mssqlserver.jar, and msutil.jar to the \$DAC/lib directory.
- 5 Run serverSetupPrompt.sh or serverSetupPrompt.csh to set the repository connection information and the email settings:
  - a At the initial prompt, enter 1 to set the repository connection information.
  - b Enter 3 to test the repository connection.
  - c Enter 4 to save the information you entered.
  - d Enter 2 to set up the administrator email account.  
**NOTE:** For the email functionality to work, you must be using an SMTP server in which the SMTP authentication mode LOGIN is enabled. For example, if you are using Microsoft Exchange Server, you must enable the SMTP module and enable authentication in the Basic Mode. The SMTP server outbound email authentication must be turned on for the DAC server to be able to send email notifications.

- e Enter 5 to exit.
- 6 Copy content-specific XML files from the SiebelAnalytics\DAC\CustomSQLs folder in the Windows installation to the SiebelAnalytics/DAC/CustomSQLs directory in the UNIX installation.

## Starting the Informatica Server on UNIX

Follow this procedure to start the Informatica Server.

### Requirements

- From the UNIX machine, make sure you can connect to the Siebel transactional database and to the data warehouse database.
- The Informatica repository must have been configured using the Informatica Workflow Manager.
  - For instructions, see [“Configuring the Informatica Repository in Workflow Manager” on page 98](#).
- The environment variables for the Informatica Server on UNIX must be set.
- The appropriate parameter files should have been copied to the SrcFiles directory.
- For Unicode, the SiebelUnicodeDB variable must be set.

### To start the Informatica Server

- Go to the Informatica Server directory, and enter `./pmserver`.

For Teradata installations, enter `./pmserver ./pmserver.cfg>./pmserver.out`

Check the log file to verify the server started. If it started correctly, the log file will state: “Server Initialization Completed.”

## Stopping the Informatica Server on UNIX

Follow this procedure to stop the Informatica Server on UNIX.

### To stop the Informatica Server

- Go to the Informatica Server directory, and enter the following command:

```
./pmcmd stopserver <repository username> <repository password> <port #>.
```

For example:

```
./pmcmd stopserver Administrator Administrator 4001
```

You can check whether the Informatica Server is running by entering the command `ps -elf |grep pmserver`.

If it lists pmserver process, the server is running. If it lists grep pmserver, that is the process of the ps command.

## Starting the DAC Server on UNIX

Follow this procedure to start the DAC server on UNIX. Before you can start the DAC server, you must have already configured the `config.csh` or `config.sh` and `dac_env.csh` or `dac_env.sh` files.

### *To start the DAC server on UNIX*

- In csh-related shells, issue the following command:

```
./startserver.csh
```

- In bash-related shells, issue the following command:

```
./startserver.sh
```

### *To run the DAC server in the background*

- In csh-related shells, issue the following command:

```
nohup startserver.csh 2>&1 &
```

- In bash-related shells, issue the following command:

```
nohup startserver.sh 2>&1 &
```

The `nohup` command allows the DAC server to run in the background on UNIX even if the DAC client is disconnected.

## Stopping the DAC Server on UNIX

Follow this procedure to stop the DAC server on UNIX.

### *To stop the DAC server on UNIX*

- In csh related shells, issue the following command:

```
./stopserver.csh
```

- In bash-related shells, issue the following command

```
./stopserver.sh
```

**NOTE:** When you execute `./stopserver.csh` or `./stopserver.sh`, the server will issue a warning about the shutdown request. When the server receives the request, it will shut down even if there is an ETL in progress. The statuses for the ETL run will not be set correctly. The next time the DAC server starts, it will set the status to Failed for any uncompleted run.

## Teradata-Specific Installation and Configuration Checklist for UNIX

Table 33 provides a list of Teradata-specific installation and configuration steps that are performed during the Analytics Applications installation and configuration process on UNIX. You should review this list to make sure that you have performed all of the required Teradata-specific steps. You should also review “[Teradata-Specific Installation and Configuration Checklist \(Windows\)](#)” on page 108 for Teradata-specific information related to the Windows environment.

Table 33. Teradata-Specific Installation Checklist for UNIX

Action	Link to Topic
Review Teradata-specific database guidelines	<a href="#">Teradata-Specific Database Guidelines for Siebel Data Warehouse on page 48.</a>
Create database connections	<a href="#">Creating Database Connections for Teradata Installations on page 124.</a>
Set up the HOSTS file	<a href="#">Setting Up the HOSTS File for Teradata Installations on UNIX on page 126.</a>

# 7

## DAC Quick Start

This chapter contains the following topics:

- [DAC Licensing Options in Siebel Data Warehouse 7.7.1 on page 133](#)
- [Navigating the DAC User Interface on page 136](#)
- [Logging In to the DAC on page 145](#)
- [Tailoring Execution Plans for Your Needs on page 145](#)
- [Using the DAC Query Functionality on page 153](#)
- [Executing an ETL with the DAC on page 155](#)
- [Running the DAC Server Automatically on page 155](#)
- [Overview of Command Line Access to the DAC Server on page 156](#)
- [Handling ETL Failures with the DAC on page 160](#)
- [Using the Change Capture Filter on page 162](#)
- [Comparing and Merging DAC Repositories on page 163](#)
- [DAC Common Tasks on page 165](#)

## DAC Licensing Options in Siebel Data Warehouse 7.7.1

Siebel Data Warehouse 7.7.1 includes two licensing options for the Data Warehouse Application Console (DAC).

- The DAC Lite version:
  - Is included with any Analytics application
  - Allows you to build and execute ETL plans
  - Is suitable for small data warehouses with little or no customization
- The DAC version:
  - Is an optional license
  - Is suitable for large data warehouses with multiple customizations
  - Minimizes ETL execution time by using optimization techniques

Table 34 summarizes the differences between the DAC and DAC Lite versions.

Table 34. Differences between DAC and DAC Lite

Feature	DAC Lite	DAC
<b>Develop data warehouse applications</b>		
Manage metadata driven dependencies and relationships	✓	✓
Provide metadata validation checks	✓	✓
Generate additional change capture DWQL scripts		✓
Directly import database and Informatica objects		✓
Additional change capture filtering		✓
<b>Utilize high-performance execution techniques</b>		
Task queue optimization engine		✓
Load balancing across multiple ETL servers		✓
Unlimited ETL session concurrency		✓
Automate full and refresh mode optimization rules	✓	✓
Restart from point of failure	✓	✓
<b>Provide analysis to isolate bottlenecks</b>		
Error monitoring and email alerting		✓
Structured ETL analysis and reporting		✓

**DAC Server Features Not Available with DAC Lite**

The following DAC server features are not available with the DAC Lite version of the Siebel Data Warehouse 7.7.1:

- Email
- Optimized queuing
- Change capture filtering
- Support for multiple Informatica servers.

**NOTE:** The DAC Lite version supports one Informatica server and five tasks running in parallel.

### DAC Client Features Not Available with DAC Lite

The following DAC client features are not available with the DAC Lite version of the Siebel Data Warehouse 7.7.1:

- Output to File (right-click menu)
- Update Rows (right-click menu)
- Output Task Description (right-click menu on Task Definitions tab)
- Generate View Scripts (right-click menu on Tables tab)
- Generate Change Capture SQL (right-click menu on Tables tab)
- Import Database Tables (right-click menu on Task Definitions tab)
- Import Indices (right-click menu on Task Definitions)
- Auto Refresh (right-click menu and toolbar on Current Run tab)
- Analyze Run (right-click menu on Run History tab)
- Get Chart (right-click menu and toolbar on Current Run tab)
- Get Phase Chart (right-click menu and toolbar on Current Run tab)
- Get Graph (right-click menu and toolbar on Current Run tab)
- Import Informatica Sessions dialog box
- Server Log
- Email Configuration tab on Server Configuration dialog box
- Email Recipients tab
- Ability to edit the Priority field on the Task Definitions form
- External Program, SQL File, and Stored Procedure execution types on Task Definitions form
- New and delete buttons on Task Phases dialog box
- Ability to edit the Priority field in the Task Phases dialog box
- Multiple Informatica Server records and sessions
- Index Override

**NOTE:** *Siebel Data Warehouse Installation and Administration Guide, Version 7.7.1, Rev. C* and higher versions document the features of the full DAC version and not the DAC Lite version. The installation instructions in this guide for Windows apply to both the DAC and DAC Lite versions. For installation instructions on UNIX, see the latest revision of *Siebel Analytics Platform Installation and Configuration Guide*.

# Navigating the DAC User Interface

Figure 10 shows the main elements of the DAC window.

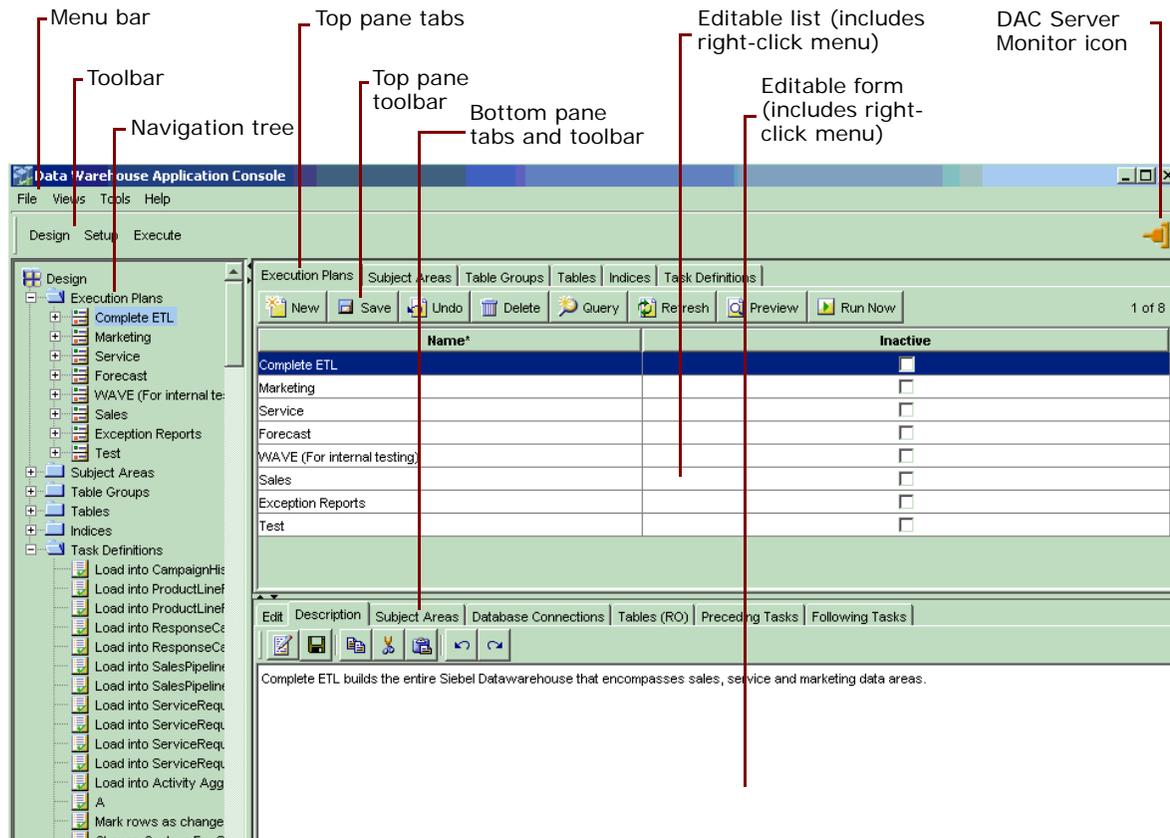


Figure 10. Example of DAC Window

## Main Toolbar of the DAC

The main toolbar of the DAC is located directly under the menu bar. It provides access to the following views:

- **Design.** The Design view provides access to functionality related to creating and managing execution plans. For more information, see ["About the DAC Design View" on page 173](#).
- **Setup.** The Setup View provides access to functionality related to setting up DAC system properties, Informatica servers, database connections, and email notification. For more information, see ["About the DAC Setup View" on page 190](#).
- **Execute.** The Execute view provides access to functionality related to running, monitoring, and scheduling execution plans. For more information, see ["About the DAC Execute View" on page 194](#).

## DAC Toolbars and Right-Click Menu Commands

Table 35 lists commands available in some of the top and bottom pane toolbars and in the right-click menus. The commands that are available depend on the tab that is active.

Table 35. DAC Toolbar and Right-Click Menu Commands

Command	Location in DAC	Description
New	Top and bottom pane toolbars, right-click menu	Creates a placeholder for a new record in the selected list.
Save	Top and bottom pane toolbars, right-click menu	Saves the current record.
Undo	Top and bottom pane toolbars, right-click menu	Undoes changes made to the current record after the last save.
Delete	Top and bottom pane toolbars, right-click menu	Deletes the selected record. If you delete a parent record, the child records are also deleted.
Query	Top and bottom pane toolbars, right-click menu	Opens a blank query.
Refresh	Top and bottom pane toolbars, right-click menu	Retrieves the data from the repository with the last used query.
Preview	Top pane toolbar in Design view tabs: Execution Plans, Subject Areas, and Table Groups	Generates a preview of all tasks and their dependencies.
Edit	Bottom pane toolbar in Design view	Opens a dialog box in which you can add and remove objects associated with the selected repository object.
Details	Bottom pane toolbar in Execute view, Task tab	Provides a list of the task details that are executed when the selected task is run.
Run Now	Top pane toolbar in Design view, Execution Plans tab	Starts a new ETL process.

Table 35. DAC Toolbar and Right-Click Menu Commands

Command	Location in DAC	Description
Start	Top pane toolbar and right-click menu in Execute View tabs: Current Run, Run History	Restarts the selected ETL, after the ETL has failed, stopped, or been aborted.
Stop	Top pane toolbar and right-click menu in Execute View tabs: Current Run, Run History	Stops an ETL in progress. All currently running tasks will complete, and queued tasks will stop. The status of the ETL changes to Stopped.
Abort	Top pane toolbar and right-click menu in Execute View tabs: Current Run, Run History	Causes an ETL in progress to abort. All currently running tasks will be aborted. The status of queued tasks and the ETL itself will change to Stopped.
Auto Refresh	Top pane toolbar and right-click menu in Execute View tabs: Current Run, Run History	Allows you to turn on and off the automatic screen refresh functionality and set the refresh interval.
Copy String	Right-click menu	Copies the contents of a cell (editable and read-only) to the clipboard
Paste String	Right-click menu	Pastes a string from the clipboard into a selected cell that supports a string data type.
Copy Record	Right-click menu	Creates a copy of the selected record, with a unique record ID and (2) appended to its name. The new record is committed to the database when you click the Save button or click outside the cell. In the Design view tabs (except for the Indices tab), Copy Record copies the selected record and the record's child records. In the Design view Indices tab and Setup and Execute views, Copy Record copies only the selected record.
Output to File	Right-click menu	Outputs to a text file in the DAC root folder the contents of the current tab's record list.
Record Info	Right-click menu	Displays the record's unique ID and the timestamp for when it was last updated.

Table 35. DAC Toolbar and Right-Click Menu Commands

Command	Location in DAC	Description
Generate Index Scripts	Right-click menu on Execution Plan and Tables tabs	Generates drop index, create index, and analyze table scripts for all tables that participate in the ETL process. The results are stored in the log\scripts directory.
Generate Change Capture Scripts > Generate Image and Trigger Scripts	Right-click menu on Tables tab	Generates change capture scripts for tables with defined image suffixes. The scripts may include delete triggers, create and drop statements for delete triggers, and image tables and their indices.
Generate Change Capture Scripts > Generate View Scripts	Right-click menu on Tables tab	Generates change capture view scripts for full or incremental mode for tables that participate in the change capture process. This command can be used for unit testing.
Generate Change Capture Scripts > Generate Change Capture SQL	Right-click menu on Tables tab	Generates change capture SQL scripts for full or incremental mode for tables that participate in the change capture process. This command can be used for unit testing.
Update Rows	Right-click menu	For some columns, allows you to update the column value for each row to a single value. When you select this command, a dialog box allows you to select the column, and then a second dialog box allows you to enter a value for the column.
Import Database Tables	Right-click menu	Allows you to import table definitions from a selected database.
Import Indices	Right-click menu	Allows you to import index definitions from the database for one or more tables as listed in the result of the query.
Output Task Description	Right-click menu	Saves to an HTML file the description for a selected task definition or for all task definitions.
Run Now	Right-click menu	Starts a new ETL process.
Go To	Right-click menu	Allows you to drill down to a particular record that is associated with the selected record. Available when the Task Definitions, Indices, Tables, and Table Groups tabs are active (Design View).

Table 35. DAC Toolbar and Right-Click Menu Commands

Command	Location in DAC	Description
Mark as Completed	Right-click menu	Changes the status of a stopped or failed ETL to Completed. In the audit trail for this ETL, the status is Marked as Completed. Use this command with caution; it can cause the data warehouse to be inconsistent.
Requeue Task	Right-click menu	Changes the status of the selected, completed task and its dependents to Queued. Available only for failed ETLs.
Get Run Information > Get Log File	Right-click menu	Fetches the log file for this run from the DAC server and saves it in the ServerLog folder.
Get Run Information > Analyze Run	Right-click menu	Saves a description of the run as an HTML file in the Log/Statistics folder.
Get Run Information > Get Chart	Right-click menu	Displays a chart showing changes in task statuses over time in a separate window.
Get Run Information > Get Graph	Right-click menu	Displays a graph showing changes in task statuses over time in a separate window.

## DAC Tools Menu

The Tools menu provides access to various tools you can use to manage and monitor the DAC repository, DAC server, and ETL process.

Table 36 provides a description of the tools available in the Tools menu.

Table 36. DAC Tools Menu Commands

Tools Menu Command	Description
DAC Repository Management > Export	<p>Allows you to export all or part of the DAC metadata in order to back up the data or to reproduce the environment elsewhere. The seed data is exported in XML format. In the Export dialog box, you can specify a directory in which to store the XML file or accept the default directory, which is DAC\export.</p> <p>In the Export dialog box, you can select the following options:</p> <ul style="list-style-type: none"> <li>■ Export All Tables.</li> <li>■ Export Categories. The Logical option exports all information contained in the Design view and database connection information. The Run Time option exports all information contained in the Execute view. The System option exports all information contained in the Setup view, except passwords for servers and database connections.</li> <li>■ Export Selected Tables. Allows you to select tables for exporting.</li> </ul>
DAC Repository Management > Import	<p>Allows you to import all or part of the DAC metadata. When you import data, any existing data in the repository is overwritten.</p> <p>If you want to import new DAC metadata while still working on the same data warehouse, you must keep the table refresh dates intact.</p> <p>In the Import dialog box, you can specify a directory from which to import the data or accept the default directory, which is DAC\export.</p> <p>In the Import dialog box, you can select the following options:</p> <ul style="list-style-type: none"> <li>■ Import All Tables.</li> <li>■ Import Categories. The Logical option imports all information contained in the Design view and database connection information. The Run Time option imports all information contained in the Execute view. The System option imports all information contained in the Setup view, except passwords for servers and database connections.</li> <li>■ Import Selected Tables. Allows you to select tables for importing.</li> </ul>
DAC Repository Management > Validate Repository	<p>Allows you to start the repository validation process.</p>

Table 36. DAC Tools Menu Commands

Tools Menu Command	Description
DAC Repository Management > Import Informatica Sessions	Allows you to import a list of Informatica workflow names and folders into a staging table in the DAC repository.
DAC Repository Management > Purge Run Details	<p>Allows you to purge completed runs from the run history. You can purge all runs (except the last run) or specify particular runs to be purged. Note: The last run cannot be purged.</p> <p>In the Purging Runs... dialog box, the following options are available:</p> <ul style="list-style-type: none"> <li>■ Entire Run History. Allows you to purge all runs and their related information. The data warehouse must be reset for this option to complete successfully.</li> <li>■ All. Purges all completed runs except for the last run.</li> <li>■ By Execution Plan. Allows you to select an execution plan whose associated runs you want to purge.</li> <li>■ By Run Name. Allows you to select an individual run for purging.</li> <li>■ Before Specified Date. Allows you to select a date before which all runs except the last run will be purged.</li> <li>■ Details Only. Purges all related information about a run but leaves the run header information.</li> </ul>
DAC Repository Management > Analyze Repository Tables	Allows you to run analyze table commands for all the DAC repository tables.
DAC Repository Management > Default Index Properties	Allows you to specify which databases will be associated with newly created indices.
DAC Repository Management > Drop DAC Repository	Allows you to drop all the DAC repository tables. This action deletes all data in the repository.
DAC Server Management > Get Server Log	When the DAC server is running an ETL process, this command opens a text box that displays streaming data related to the process.
DAC Server Management > DAC Server Setup	Allows you to configure the DAC server connections and server email settings. This action should be performed on the machine where the DAC server is running.
ETL Management > Configure	Opens the Data Warehouse Configuration wizard, which you can use to configure an ETL process.
ETL Management > Reset Data Warehouse	Clears the refresh dates for all source and target tables. This action forces a full load to occur.

Table 36. DAC Tools Menu Commands

Tools Menu Command	Description
ETL Management > Preferences	Allows you to configure ETL preferences, such as start and end dates for building the day dimension, currency, language, exchange rate, prune days for disconnected users, maximum number of days an opportunity can spend in a sales stage, and the index space for Oracle databases.
Task Properties > Task Phases	Allows you to add or edit task phases.
Task Properties > Task Folders	Allows you to add or edit task folders.
UI Styles > Windows (MFC)	Changes the user interface to the Windows style.
UI Styles > UNIX (MOTIF)	Changes the user interface to the UNIX style.
UI Styles > Java (METAL)	Changes the user interface to the Java style.

## DAC Server Monitor Icon

The Server Monitor is located in the upper-right corner of the DAC client. Its color and shape change based on the DAC server status. When the DAC client cannot establish a connection to the DAC server, the Server Monitor icon resembles a red electrical plug. When the client is connected to the server and the server is idle, the icon resembles an orange electrical plug in a socket. Finally, if the client is connected to a server that is running an ETL process, the icon resembles a green electrical plug with a lightning sign superimposed on it. In addition, clicking on the icon when there is a connection to the server opens a text box that displays data related to the ETL process.

Table 37. DAC Server Monitor Icons

Icon	Description
	DAC client cannot establish a connection to the DAC server.
	DAC client is connected to the server, and the server is idle.
	DAC client is connected to a server that is running an ETL process.

## DAC Navigation Tree

The navigation tree appears on the left side of the DAC window, as shown in [Figure 11](#). The tree root nodes correspond to the tabs in the top pane of the DAC window. When a plus sign (+) appears before a node, you can expand the node to view the records belonging to the node. You can double-click a record in the tree to have it display in the top pane in a single-record mode (New, Delete, Copy Record, and Query commands are unavailable), and double-click the root node to return to the list mode.

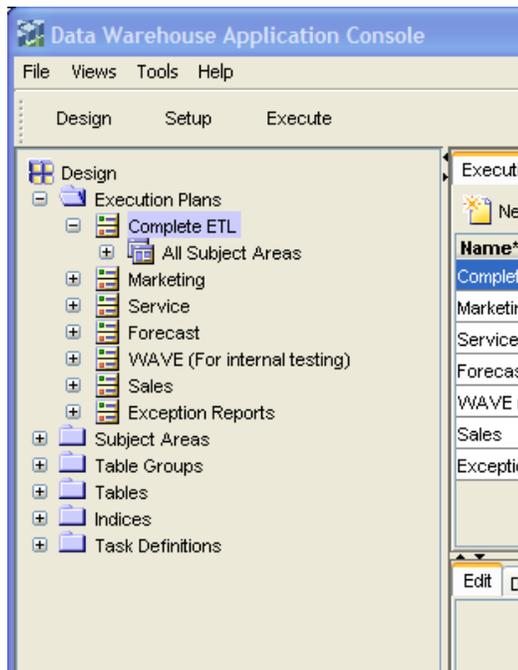


Figure 11. DAC Navigation Tree

## DAC Editable Lists

The top and bottom panes of the DAC window display records in a list format. Some of the columns in the list are editable, and others are read-only. The toolbar at the top of each pane allows you to perform various tasks associated with a selected record in the list. For a description of the toolbar commands, see and [“DAC Toolbars and Right-Click Menu Commands” on page 137](#).

A right-click menu is also accessible from the lists in both the top and bottom panes. For a description of these commands, see [“DAC Tools Menu” on page 140](#).

The list format allows you to do the following:

- Edit the data in place and save the record by either clicking another record in the list or clicking the Save button.
- Reorder the columns.
- Sort the data in the list by clicking on the column name.

- Select predefined values from picklists.
- For fields that refer to values from other entities, use the query functionality in pop-up dialog boxes.
- Use Ctrl+C to copy an editable string to the clipboard (not available for read-only strings).
- Ctrl+V to paste a string from the clipboard into a selected cell that supports a string data type.

## Logging In to the DAC

The DAC application connects to a database called the DAC repository, which contains definitions of DAC application objects. When you log in to the DAC for the first time, you need to configure the database connection to the DAC repository. You can also connect to multiple DAC repositories by configuring multiple database connections, but only one DAC repository is active at a time.

### *To log in to DAC for the first time*

- 1 Double-click the DAC Client icon on the desktop.
- 2 In the Login ... dialog box, select Configure.
- 3 In the Configuring ... dialog box, select Create Connection, and then click Next.
- 4 In the Connection Details area of the Configuring ... dialog box, enter the appropriate information for the database to which you want to connect.
- 5 Click Test Connection to make sure you configured the database correctly.

When you connect to a database for the first time, a DAC repository schema is created if it does not already exist.

### Version Detection

In Siebel Data Warehouse version 7.7.1.4 and higher, if the schema, repository, or seed data are of lower versions than the DAC client or do not exist, you will be prompted to upgrade the DAC repository. This upgrade process is automatic. If the upgrade process is interrupted, it will restart from the point it was last saved the next time you log on to the DAC repository.

Information about the upgrade process is logged in SiebelAnalytics\DAC\log\upgrade.txt.

## Tailoring Execution Plans for Your Needs

Execution plans are groups of subject areas that are used to execute ETL processes. For more information about the repository objects that are the components that make up execution plans, see [“About DAC Repository Objects” on page 27](#). For information about DAC functionality, see [“DAC Functional Reference” on page 173](#). For detailed information about customizing execution plans, see [“Customizing the Siebel Data Warehouse” on page 201](#).

In designing an execution plan, you should consider the following questions:

- **Tables.** Which tables need to be populated for the data warehouse. From which tables does your organization source data?
- **Indices.** Do the target tables have the correct indices defined?
- **Tasks.** Are the tasks that load this table defined?
- **Dependencies.** What does a task require to be run?
- **Table groups.** Do table groups need to be built?
- **Subject areas.** Do the subject areas cover all the relevant table groups?
- **Execution plans.** Which subject areas need to be refreshed and how often and at what time frequency?

When an execution plan is run, the DAC server uses the following logic to identify the tasks that need to be run and their order of execution:

- 1 Initial selection of tables.
  - a Find all the subject areas.
  - b Find all the table groups that belong to the subject areas.
  - c Find all the tables that belong to the table groups.
- 2 Recursive selection of related tables.

Recursively find all the table groups and their tables with the above list of tables. For a description of this process, see [“About the DAC Table Groups Tab” on page 177](#).
- 3 Initial selection of tasks.

Find all the tasks that load into the tables selected above, that is, tasks whose target table is one of the selected tables (the tasks that are non-optional).
- 4 Recursive selection of all tasks.
  - a Depending on the non-optional dependency rules, recursively figure out the prerequisite tasks.
  - b Depending on the optional dependency rules, figure out the optional tasks.
- 5 Filter tasks based on the database connections that will participate in the ETL.
- 6 Selection of dependencies.

Load dependencies to identify the execution order.
- 7 Identify the task details.

Iterate through all the tasks selected and compute the task details based on whether the target table is loaded in full mode or incremental mode.
- 8 Identify the list of source tables for change capture, create tasks for change capture, and sync for Siebel source tables.
- 9 At the end of the ETL process, the DAC server updates refresh timestamps for all source tables (primary or auxiliary) and target tables. The refresh timestamps are the database timestamps. The ETL history timestamps (Start and End timestamps) are the DAC server timestamps.

In the DAC, the Design view allows you to view and modify the relationships among the repository objects discussed above. For more information about the Design view, see [“About the DAC Design View” on page 173](#).

## Pruning Execution Plans in the DAC

The Siebel Data Warehouse includes preconfigured execution plans. The Complete ETL execution plan contains a single subject area, named All Subject Areas, which includes all the table groups of the star type. There are also preconfigured execution plans for marketing, sales, forecast, and service. If none of the preconfigured execution plans meet the needs of your organization, you can define your own subject areas and build stars as needed. You can also modify an existing execution plan to meet your needs by inactivating its child objects.

## Pruning Subject Areas in the DAC

A subject area is a group of table groups (stars). For example, the subject area named Sales Subject Area may consist of the following stars: Order, Opportunity, and Quote. Including a subject area in an execution plan means that all the tables that belong to the table groups and the related table groups will be populated during the ETL process.

You can add and remove table groups from the preconfigured subject areas, or you can remove a table group from a subject area by *inactivating* the table group.

You can also create a new subject area by associating it with the appropriate table groups. You can create a subject area with any kind of table group, but it is recommended that you use table groups of the star type. A star usually consists of a fact table, dimensions, and aggregates (if any).

## Pruning Table Groups in the DAC

A table group is a logical grouping of tables that defines a logical relationship among all the component tables. The table group definition is based on a main table that drives the relationship between itself and the other tables in the group.

A table can be a main table for only one table group. When you design a table group, you associate it with a list of tables that need to be populated whenever the main table participates in an ETL. The tables can be main tables for other table groups; in such cases, when an ETL is run, the DAC server recursively includes all necessary tables. This process in which the tables are recursively populated is called *chaining*.

You can prune a table group by inactivating one or more of the tables associated with it. When designing an execution plan, inspect the table groups that you are interested in. If there are dimensions in a fact table that you are not interested in populating during the ETL process, inactivate them or remove the table association. This might also require you to modify the workflows and dependencies as well. Use the Preview functionality to figure out if your design is correct at the table group, subject area, and execution plan level.

**CAUTION:** If a table is removed from one table group but is still active in others that belong to the execution plan, you will see it appearing in the preview. If the table is not required for the entire ETL, consider inactivating the table. For more information about inactivating tables, see [“The Chaining Process”](#) on page 148.

### The Chaining Process

When multiple target (data warehouse) tables share the same source table, they must be populated together. For example, the Person Fact table group contains the tables listed in [Table 38](#). The main table for this table group is W\_PERSON\_F. When W\_PERSON\_F participates in an ETL, the other tables listed below also participate. W\_PERSON\_D is the main table for the Person Dimension table group; whenever it participates in an ETL, the other tables that are part of the Person Dimension table group also participate in the ETL.

Table 38. Person Fact Table Group Example

Name	Main Table for Group	Relationship Type
W_GEO_D	GEO DIMENSION GROUP	Dimension
W_PERSON_F	PERSON FACT GROUP	Self
W_PERSON_D	PERSON DIMENSION GROUP	Dimension
W_ORG_D	ORGANIZATION DIMENSION GROUP	Dimension
W_DAY_D	DAY DIMENSION GROUP	Dimension
W_INDUSTRY_D	INDUSTRY DIMENSION GROUP	Dimension

A similar kind of chaining concept is used for entities that have parent-child relationships. When a parent table participates in an ETL, its child tables also get populated. For example, the Order Dimension and Order Item Fact tables have a parent-child relationship. When the Order Dimension table is part of a table group that participates in an ETL, the Order Item Fact table will also be populated.

Therefore, when pruning the data warehouse, you should start with the table groups of type star and verify that all the related tables are required. If a table is not required and it is a parent table, you need to disable the link between it and the child tables that you do not want to populate. For information about disabling entities, see [“Disabling DAC Repository Entities”](#) on page 149.

The chaining process is used for the following reasons:

- To maintain data integrity

For example, when the Person Fact table group is built, the Person Dimension group is also populated.

- Two or more data warehouse tables can share the same source table

When multiple data warehouse tables (target tables) share the same source table, they must be populated together. For example, the tables W\_PERSON\_F and W\_PERSON\_D have the same main source table, S\_CONTACT. Suppose you want to populate the Revenue Fact table group, which has W\_REVN\_F as its main table and W\_PERSON\_D as one of the dimension tables.

Whenever the Revenue Fact table group is chosen for an ETL execution, W\_PERSON\_F is also populated because W\_PERSON\_F is chained to W\_PERSON\_D.

- To maintain parent-child relationships

For example, when the Order Dimension table is built, the Order Item Fact table also must be populated, otherwise the data will not be in sync.

## Pruning Tasks and Dependencies in the DAC

A task is a command that is used to populate a certain table or tables. A task can have prerequisite tasks that need to be executed prior to its own execution. These are defined as dependency rules. There are mandatory and optional dependencies. For example, Load into Activity Fact has a mandatory dependency on Extract into Activity Fact, but has optional dependency on all the tasks that load the dimensions. This is because loading of the Activity Fact table cannot be accomplished until its extract is done. However, if the dimension tables are not absolutely necessary, that is, if part of the pruning process eliminates a certain table from the initial list of tables selected, then the load task will not wait for that optional tasks.

## Disabling DAC Repository Entities

You can disable entities at different levels for the sake of pruning.

- If certain tables are not required by a table group, you can remove the tables from the table group or inactivate them. You might also need to review and modify the Informatica workflows.
- If a task that is loading/updating a certain table is deemed not necessary, you can inactivate it.
- If a task is depending on another task, and is deemed not necessary, you can remove the dependency or inactivate the link.
- If a table is not required in the whole of the ETL process, you can disable the table, and none of the tasks that write to it will be chosen for execution.

Once the dependencies are correctly defined, the DAC server will execute them in proper order during ETL execution.

## Using the DAC Preview Functionality to View Tasks and Dependencies

You can verify the design of an execution plan using the Preview functionality, which is accessible from the top pane toolbars of the Execution Plans, Subject Areas, and Table Groups tabs, and in the right-click menu on these tabs.

The Preview functionality generates a preview of all tasks and their dependencies using the DAC server logic described in [“Tailoring Execution Plans for Your Needs” on page 145](#). This process reviews an execution plan’s associated subject areas, table groups, and tables to identify tasks and their dependencies.

The preview shows the approximate order in which tasks will be executed, and a list of source tables, target tables, and tables for which an image will be built. Only the tasks that source or write to database connections as defined in the execution plan will be included. The preview also shows a detailed analysis of the dependencies. By reviewing the preview, you can validate the design of your execution plan without having to run the ETL.

The preview has three parts. The first part is titled, “Initial Selection of Tables going through the related Table Groups.” This part shows the selection of tables to be populated by table group and is created by iterating through the table groups. The selection process starts with the initial, distinct list of all the table groups (iteration 0) and goes through the related table groups (iteration 1, 2, and so on), selecting tables that are not already on the list of chosen tables.

The second part of the preview is titled, “Task Selection Analysis.” This part shows the task program. It starts with the tasks that write to any of the tables selected during the table selection process. The DAC server logic goes through the dependency definitions, selecting all the mandatory (non-optional) tasks and then selecting all the optional tasks. Eventually, the dependencies define the order of execution.

The third part of the preview is titled, “Step Dependency Analysis.” This part shows, for all given tasks, the following information:

- **Depends On.** The immediate tasks that a given task depends on.
- **Dependents.** The tasks that are dependent on a given task.
- **Number of All Depends.** All the Depends On tasks.
- **Number of All Dependents.** All the Dependent tasks.

This part of the preview is useful for understanding how a task relates to all other tasks, which can be helpful for debugging.

Figure 12 shows the dependencies of various tasks: task A depends on tasks B and C, task B depends on tasks D and E, and task D depends on tasks F and G.

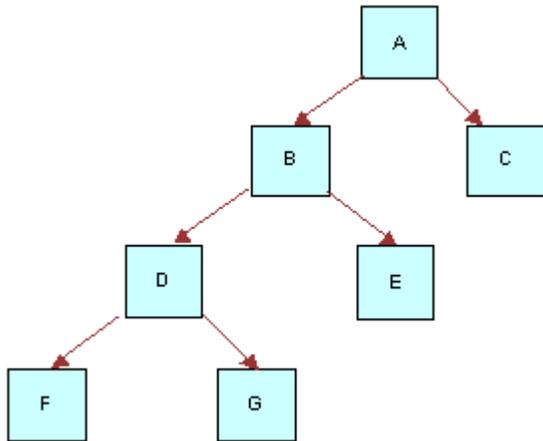


Figure 12. Task Dependencies

In Figure 13 the tasks are shown as grouped by the DAC server based on the level of dependency. (The level of dependency is referred to as a *depth*.) Tasks that have no dependencies are depth 0. Tasks that depend on other tasks of depth 0 are depth 1. Tasks that depend on other tasks of depth 1 or 0 are depth 2, and so on.

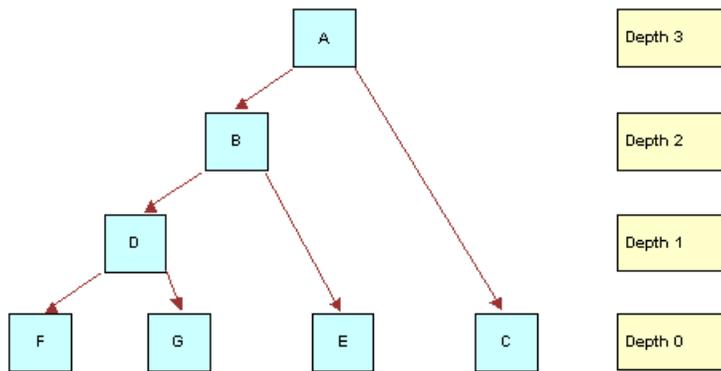


Figure 13. Task Dependencies by Depth

Because the DAC server dynamically prioritizes the tasks that are eligible to run based on the number of resources available, it uses the information generated by the preview to decide which tasks to execute. When more than one task is eligible to be run, a series of prioritization rules is applied.

## Distributing DAC Metadata

Typically, you may have multiple environments, such as development, QA, production, and so on. When you make changes to the development environment, you test it, and then deliver it, exporting the whole environment and distributing it to the other environments. The data is exported as XML files, which are stored in the DAC\export directory on the client machine where the export is done.

To apply changes from the development environment to any other, you copy all of the XML files into the DAC\export folder and then import the data.

### *To distribute DAC metadata from the development environment to another environment*

- 1 In the DAC, select Tools > DAC Repository Management > Export.  
The Export dialog box appears.
- 2 Select one of the following options:
  - **Export All Tables.** Select this option to duplicate the entire environment. All tables in the DAC repository and the information in the Design view associated with them are exported as XML files and stored in the DAC\export folder. Exercise caution when selecting this option, because when you import this data, it replaces all run-time information that exists on the database where the import is performed.
  - **Export Categories.** Select this option to export part of the data from the development environment. The data is stored as XML files in the DAC\export folder. Select one of the following categories:
    - **Logical.** Exports all information contained in the Design view and the database connection information. This option preserves all the run data in the new environment, including refresh dates.
    - **Run Time.** Exports the run-time information but preserves all the logical definitions in the new environment. You may seldom have to select this option.
    - **System.** Exports system preferences, ETL preferences, and email recipient information. Passwords for servers and database connections are not exported.
- 3 Copy the XML files from the DAC\export folder in the development environment to the DAC\export folder on the local machine in the new environment.
- 4 In the DAC, in the new environment, select Tools > DAC Repository Management > Import.  
The Import dialog box appears.
- 5 Select the import option that corresponds to the export option you selected in step 2. The following options are available:
  - **Import All Tables.** For security reasons, this option does not populate the password fields. Make sure you update the passwords before attempting to run an ETL process.
  - **Import Categories.** Select one of the following categories:
    - Logical

- Run Time
- System

## Using the DAC Query Functionality

Querying is a way to locate one or more records that meet your specified criteria. Query functionality is available in every DAC screen. When you enter query mode, the Edit and Description child tabs in the bottom pane are not available.

### DAC Query Commands and Operators

You can use the query commands and operators in [Table 39](#) to define your query criteria.

For Siebel Data Warehouse version 7.7.1.4 and higher, queries are case insensitive.

Table 39. DAC Query Commands and Operators

Operator	Description
=	Placed before a value, returns records containing a value equal to the query value.
<	Placed before a value, returns records containing a value less than the query value.
>	Placed before a value, returns records containing a value greater than the query value.
<>	Placed before a value, returns records containing a value that is not equal to the query value.
<=	Placed before a value, returns records containing a value less than or equal to the query value.
>=	Placed before a value, returns records containing a value greater than or equal to the query value.
*	Wildcard that can be placed in the middle, or at the beginning or end of a text string.
!	Used for negation.
""	Surrounds a string that, unless modified by a wildcard, must be matched exactly.
\	Escape symbol is used when double quotes should not be processed as a special symbol. For example, <code>!("*null text"or(\"*\"))</code> is a value expression for a text field. The query returns values that do not end with a string <code>null text</code> and that are not surrounded by double quotes.
()	Surrounds the values and operators that will be processed first.
NULL	Returns records for which the query field is blank.

Table 39. DAC Query Commands and Operators

Operator	Description
AND	Placed between values, returns only records for which all the given conditions are true. (Not case sensitive.)
OR	Placed between values, returns records for which at least one condition is true. (Not case sensitive.)

## DAC Query Examples

The following examples show different ways you can query on the Name column of the Tasks tab.

- *Extract\** lists all tasks whose name starts with *Extract*.
- *\*Extract\** lists all tasks whose name contains the word *Extract*.
- *!Extract\** lists all tasks whose name does not start with the word *Extract*.
- *!null* lists all tasks whose name is not null.
- *Extract\* or Aggregate\** lists all tasks whose name starts with *Extract* or *Aggregate*.
- *Load\* and \*Aggregate\** lists all tasks whose name starts with *Load* and also contains the word *Aggregate*.
- *"Extract for Wave Dimension" or "Load into Wave Dimension"* lists tasks whose name is either *Extract for Wave Dimension* or *Load into Wave Dimension*.

**NOTE:** When using spaces within strings, you need to surround the string with quotes ("").

## Common DAC Query Procedures

This section includes instructions for common query procedures.

### To create and execute a query in the DAC

- 1 In the top or bottom pane of the DAC, click Query on the toolbar or in right-click menu.  
A blank row in a list appears.
- 2 Enter the query criteria in the appropriate fields.
- 3 Click Run Query on the toolbar.

The query is executed and the records appear.

### To enter a query value in a date field

- 1 In the date field, click the calendar icon on the right side of the cell.  
The Date dialog box appears.

- 2 Enter the date and time for which you want to search, and select the appropriate query condition. You can use the query commands and operators listed in [“DAC Query Commands and Operators.”](#)

## Executing an ETL with the DAC

Execution plans are subject areas that are used to execute ETL processes. Before you attempt to run an ETL, do the following:

- Set ETL preferences. For more information, see [“Setting DAC ETL Preferences”](#) on page 100.
- Set database connections to the Siebel transactional database and the data warehouse. For more information, see [“Creating ODBC Database Connections”](#) on page 77.
- Register the Informatica Servers. For more information see, [“Creating and Dropping Data Warehouse Tables on a Teradata Database”](#) on page 83.

### *To execute an ETL with the DAC*

- 1 Launch the DAC client by double-clicking the startclient.bat file in the DAC directory or by running startclient from a command prompt.
- 2 Navigate to the Execution Plans tab in the Design view.
- 3 Select the execution plan you want to execute.
- 4 Click Run Now.

Once the ETL starts running you can monitor its progress in the Current Run tab of the Execute view. For more information about monitoring an ETL, see [“About the DAC Current Run Tab”](#) on page 194 and [“About the DAC Run History Tab”](#) on page 197.

## Running the DAC Server Automatically

Follow this procedure to set up the DAC server to be run automatically when your machine reboots.

### *To set up the DAC server to run automatically upon rebooting the machine*

- 1 Navigate to Programs > Accessories > System Tools > Scheduled Tasks.
- 2 Double-click Add Scheduled Task.
- 3 In the Scheduled Task Wizard, browse to the startserver.bat file, and click Open.
- 4 Select the option “When my computer starts,” and click Next.
- 5 Enter the domain user account to start the DAC server and a password, and click Finish. The startserver task appears in the Scheduled Task window.
- 6 Right-click the task and select Properties.
- 7 In the Settings tab, remove the check from the “Stop the task if it runs for 72 hours” check box.

### *To start the DAC server as a scheduled task*

- 1 Navigate to Programs > Accessories > System Tools > Scheduled Tasks.
- 2 Right-click startserver, and then click Run.

### *To stop the DAC server as a scheduled task*

- 1 Navigate to Programs > Accessories > System Tools > Scheduled Tasks.
- 2 Right-click startserver, and then click End Task.

### *To check if the DAC server is running*

- 1 Navigate to Programs > Accessories > System Tools > Scheduled Tasks.
- 2 Select the startserver task.
- 3 In the Windows menu bar, select View > Details.

## Overview of Command Line Access to the DAC Server

**NOTE:** This feature is only available if you have installed Siebel Data Warehouse version 7.7.1.1 and higher.

This chapter covers accessing the DAC server through a command line. It includes the following topics:

- [Setting Up Command Line Access to the DAC Server on page 158](#)
- [Using the Command Line to Access the DAC Server on page 159](#)

You can access the Siebel DAC server through a command line to start and stop execution plans and to get status information for servers, databases, and execution plans. This feature allows you to access the DAC server using third-party administration or management tools, without using the DAC client.

### Command Line Operations

The command line feature allows you to start an execution plan and stop the operation of a running execution plan.

### Starting an Execution Plan

When the DAC server receives a request to start an execution plan, it performs a series of checks to verify that the execution plan can be started. It first checks that an execution plan with the requested name exists and that the execution plan is active. Next, it checks the status of the execution plan that last ran. If an execution plan is still running and the DAC server receives a request to start another execution plan, the request will be rejected. If an execution plan failed, a request to run the same execution plan again will be executed; however, a request to run a different execution plan will be rejected. If the execution plan that last ran completed successfully, a request to run a new execution plan will be executed.

When the DAC server receives a request to start an execution plan, it will issue a warning if any of the following conditions are true. (A warning is for informational purposes and does not mean the execution plan will not start.)

- The Generic task concurrency limit (set in the system properties) is not a positive number.
- There are no active Informatica servers in the server list.
- One or more Informatica servers do not have the passwords defined.
- One or more Informatica servers do not have a maximum number of sessions properly set.
- One or more data sources do not have the passwords defined.
- One or more data sources do not have a maximum number of connections properly set.

### Stopping the Operation of a Running Execution Plan

When the DAC server receives a request to stop the operation of a running execution plan, the request will fail in the following cases:

- The name of the execution plan that is running is different from the name in the request.
- There is no execution plan currently running.

### Command Line Status Monitoring Queries

The command line feature allows you to get the following status information:

- Summary of the requested execution plan. If there are multiple instances of the same execution plan, a summary of the instance that last ran is returned. Below is an example of the information contained in the summary.

(c) 2003 Siebel Systems, Inc.

Siebel DAC Server comprising the etl execution-management, scheduler, logger, and network server.

ETL details for the last run:

```
ETL Process Id : 255
ETL Name : Complete ETL
Run Name : DRY RUN OF Complete ETL: ETL Run - 2004-06-17 18:30:13.201
DAC Server : (aqamarD510)
DAC Port : 3141
```

Status: Stopped

Log File Name: Complete\_ETL.255.log

Database Connection(s) Used :

OLTP jdbc:mscrosft:sqlserver://vranganaw8:1433;DatabaseName=OLTP

Data Warehouse jdbc:mscrosft:sqlserver://vranganaw8:1433;DatabaseName=olap

Informatica Server(s) Used :

InformaticaServer4-vranganaw8: (4)

InformaticaServer2-vranganaw8: (2)

InformaticaServer3-vranganaw8: (3)

InformaticaServer1-vranganaw8: (10)

Start Time: 2004-06-17 19:00:06.885

Message: ETL was interrupted

Actual Start Time: 2004-06-17 18:30:13.357

End Time: 2004-06-17 19:05:56.781

Total Time Taken: 35 Minutes

Start Time For This Run: 2004-06-17 19:00:06.885

Total Time Taken For This Run: 5 Minutes

Total steps: 212

Running steps: 0

Complete steps: 142

Failed/Stopped steps: 70

- Summary of connection status to all active databases and Informatica servers.

## Setting Up Command Line Access to the DAC Server

Follow this procedure to set up the command line functionality.

### *To set up command line access to the DAC server*

- 1 Make sure you have installed the supported version of the Java SDK.
- 2 Copy the following files from the SiebelAnalytics\DAC directory to a local directory:
  - DAWSystem.jar
  - dac.properties
  - dacCmdLine.bat
- 3 In the dacCmdLine.bat file, edit the JAVA\_HOME variable to point to the directory where the Java SDK is installed.

Make sure there are no spaces in the path reference.
- 4 Edit the DAC\_HOME variable to point to the directory where DAC-REMOTE is installed.

- 5 In the dac.properties file, edit the following parameter values.

Parameter	Value
ServerHost=	Host name of the DAC server.
ServerPort=	Port of the DAC server. The default is 3141.
RepositoryStampVal=	Repository stamp that appears in the DAC client Login Details screen.  To find this value, in the DAC client navigate to Help > Login Details.

Your dac.properties file should look similar to the following:

```
ServerHost=vranganaw8
ServerPort=3141
RepositoryStampVal =851E0677D5E1F6335242B49FCCd6519
```

## Using the Command Line to Access the DAC Server

Follow this procedure to use the command line to access the DAC server.

### *To use the command line to access the DAC server*

- At the command prompt, enter the following:

`dacCmdLine <method name> <optional execution plan name>`

where `method name` is one of the following:

Method Name	Description
StartETL	Starts an execution plan. You must specify an execution plan name.
StopETL	Stops the operation of an execution plan. You must specify an execution plan name.
ETLStatus	If you do not specify an execution plan name, the status of the execution plan that last ran is returned. If you specify an execution plan name, the status of the specified execution plan is returned.
DatabaseStatus	Verifies whether the DAC server can connect to all active database connections. You do not need to specify an execution plan name.
InformaticaStatus	Verifies whether the DAC server is able to ping all active Informatica servers.

**NOTE:** The method names are case insensitive. Execution plan names are case sensitive. Also, if the execution plan name contains spaces, place beginning and ending double quotes around the name.

For example:

Command Line	Description
<code>dacCmdLine EtlStatus</code>	Returns the status of the execution plan that last ran.
<code>dacCmdLine EtlStatus Forecast</code>	Returns the status of the last instance of the Forecast execution plan.
<code>dacCmdLine StopEtl Forecast</code>	If the execution plan currently running is Forecast, the operation will be terminated. Otherwise, the request is ignored.
<code>dacCmdLine databasestatus</code>	Returns the health status of all the database connections as defined in the DAC repository from the DAC server.
<code>dacCmdLine InformaticaStatus</code>	Returns the health status of all the Informatica server connections as defined in the DAC repository from the DAC server.

## Handling ETL Failures with the DAC

This section includes the following topics:

- [When the Execution of an Execution Plan Fails on page 161](#)
- [Discarding the Current Run Execution Plan on page 161](#)
- [Failure of Aggregator Transformation Tasks with Sorted Input on page 161](#)
- [Performing a Full Load Again on page 162](#)

## When the Execution of an Execution Plan Fails

When an execution plan is executed, if a task fails, the status of the tasks that are dependent on the failed task is changed to Stopped. While tasks are still running, the execution plan's status is Running. When all the tasks have been run, and if one or more tasks have failed, the execution plan's status is changed to Failed.

You can check the tasks that have failed in the Current Run tab of the Execute view, fix the problems, and then requeue the failed tasks by changing the status to Queued. You can then restart the ETL. All the tasks will then be rerun. You can also manually run a task, change its status to Completed, and then restart the ETL. Tasks with a Completed status are skipped.

**CAUTION:** The DAC server does not validate tasks that have been run manually.

To restart a Failed ETL, click Run Now from the Current Run tab of the Execute view.

## In Case of Abnormal Termination of the DAC Server

If the DAC server fails during the execution of the ETL, the status of the ETL execution will remain as Running. When the DAC server is started again, it will automatically run the ETL if the Auto Start ETL system preference is set to True. If the same system preference is set to False, when the server restarts, it will set the correct status as Failed. In order to execute the ETL from the point of failure, submit the request to the server again.

The DAC server will automatically terminate if it loses connection to the DAC repository.

## Discarding the Current Run Execution Plan

You can discard an execution plan that failed by navigating to the Current Run tab, right-clicking on the execution plan and changing its status to Mark as Completed. This will force the run status to be updated as Completed. When you submit a request for another run, the DAC server creates another instance of it.

**CAUTION:** Perform this procedure in a development or testing environment only, since it might leave the data in an inconsistent state, causing you to have to reload all of the data.

## Failure of Aggregator Transformation Tasks with Sorted Input

Tasks that use Informatica Aggregator transformation can fail when the Sorted Input option is active. The tasks SDE\_DTLFORECASTFACT and SDE\_COSTLIST are examples of tasks that can fail in such a situation.

To prevent such tasks from failing, in Informatica Designer, navigate to Mapping Designer, open the corresponding mapping, and in the Aggregator transformation, remove the check from the Sorted Input check box.

## Performing a Full Load Again

In test environments, after running several ETLs, you might want to perform a full load again. You do this by accessing Tools > ETL Management > Reset Data Warehouse.

**CAUTION:** This procedure will cause the DAC server to perform a full load the next time an ETL is run, which will truncate data from the target tables. Therefore, this action should be used only in development and testing environments. You should not perform this procedure in a production environment unless you plan to rebuild the data warehouse in its entirety.

## Using the Change Capture Filter

The change capture filter allows you to selectively load data from the Siebel transactional database into the data warehouse. You can set a condition in the ChangeCaptureFilter.xml file to filter data from specific tables. This file is located in the SiebelAnalytics\DAC\CustomSQLs directory. It provides an XML sample that you can copy and alter to fit your needs. Detailed instructions for using this feature are included at the top of the file.

# Comparing and Merging DAC Repositories

The DAC Repository Merge feature allows you to identify differences between a source DAC repository and a target DAC repository and to move new objects from the source to the target repository. You can use this feature to upgrade repository customizations of prior releases to a new release or to compare and merge two repositories, such as development and production repositories.

The DAC Repository Merge feature identifies the following differences between the source and target repositories. The identified differences are listed in the DAC Repository Difference report. This report is automatically generated during the compare and merge process and saved in the SiebelAnalytics\DAC\diff\html directory.

- **Modified objects.** The row ID and user key of an object type in the source repository is compared with the row ID and user key of the same object type in the target repository. If either the row ID and user key are the same for the two objects or if both the row ID and user key are the same, the objects are considered to be a match, and the any difference between the attributes of these objects will appear in the Difference report.
- **Objects added to the target repository.** Objects that appear in the target repository but do not appear in the source repository.
- **Objects missing from the target repository.** Objects that appear in the source repository but do not appear in the target repository.

Table 40 lists the objects that are compared and the table and user key associated with the object.

When you perform the compare process, using the Compare and Merge Repositories dialog box, you can choose to import from the source repository into the target the objects that are missing. Records that were modified in the source repository cannot be imported into the target. You must enter the modifications manually in the target repository.

Table 40. Objects Compared in DAC Repository Compare Process

Entity	Main Table	User Key
Database Connections (source/target)	W_ETL_DBCONN	NAME
Database Indices	W_ETL_DB_INDEX	W_ETL_DB_INDEX.DB_TYPE, W_ETL_INDEX.NAME
Database Tables	W_ETL_TABLE_DT	W_ETL_DBCONN.NAME, W_ETL_TABLE.NAME
Execution Plan	W_ETL_DEFN	W_ETL_NAME
Execution Plan—Database Connections	W_ETL_DEFN_DB	W_ETL_DBCONN.NAME, W_ETL_DEFN.NAME
Execution Plan—Subject Area	W_ETL_DEFN_SA	W_ETL_DEFN.NAME, W_ETL_SA.NAME

Table 40. Objects Compared in DAC Repository Compare Process

Entity	Main Table	User Key
Execution Plan—Pre-Post Steps	W_ETL_DEFN_STEP	W_ETL_DEFN.NAME, W_ETL_STEP.NAME
Group	W_ETL_GROUP	NAME
Group Tables	W_ETL_GRP_TBL	W_ETL_GROUP.NAME, W_ETL_TABLE.NAME
Index Columns	W_ETL_INDEX_COL	W_ETL_INDEX.NAME, W_ETL_INDEX_COL.NAME
Indices	W_ETL_INDEX	NAME
Informatica Folder	W_ETL_FOLDER	NAME
Tables	W_ETL_TABLE	NAME
Tasks	W_ETL_STEP	NAME
Task Dependencies	W_ETL_STEP_DEP	W_ETL_STEP.NAME, W_ETL_STEP.NAME
Task Phase	W_ETL_PHASE	NAME
Task Tables	W_ETL_STEP_TBL	W_ETL_STEP.NAME, W_ETL_TABLE.NAME
Subject Area	W_ETL_SA	NAME
Subject Area/Group	W_ETL_SA_GROUP	W_ETL_GROUP.NAME, W_ETL_SA.NAME
System Properties	W_ETL_SYSPROP	NAME

**To compare and merge DAC repositories**

- 1 Restore the target DAC repository on a separate database instance.  
If you are upgrading from a previous version, the target repository is the new version.
- 2 Export the source DAC repository to back up the data.
- 3 Set up the database connections for the source and target repositories.
  - a In the DAC, navigate to Setup > Database Connections.
  - b Enter the following:

Field	Enter
Logical Name	A logical name for the connection.
Type	DAC Repository.
Connection Type	Type of database connection.

Field	Enter
Dynamically changes based on Connection Type	<p>If you are using...</p> <ul style="list-style-type: none"> <li>■ Oracle (OCI8) enter the TNS name.</li> <li>■ Oracle (Thin) enter the instance name.</li> <li>■ SQL Server enter the database name.</li> <li>■ DB2-UDB enter the connect string as defined in the DB2 configuration.</li> <li>■ Teradata enter the database name.</li> </ul>
Table Owner	Name of table owner.
Table Owner Password	Password for table owner.
Max Num Connections	The maximum number of connections the DAC server will maintain to the database.
DB Host	Host machine where the database resides. Required for Oracle (Thin) and MSSQL databases. Not required for Oracle (OCI8), DB2, and DB2-390.
Port	Port where the database receives requests. Required for Oracle (Thin) and MSSQL databases. Not required for Oracle (OCI8), DB2, and DB2-390.

- 4 From the DAC toolbar, select Tools > DAC Repository Management > Compare and Merge Repositories.
- 5 In the Compare and Merge Repositories dialog box, select the source and target repositories that you want to compare.
- 6 To import from the source repository into the target the objects that are missing, select the Import Missing Objects check box.

**NOTE:** Modifications made to objects in the source repository must be entered manually in the target repository.

The Difference report is automatically created.

- 7 To view the Difference report, navigate to SiebelAnalytics\DAC\diff\html, and double-click index.html.

## DAC Common Tasks

This section contains the following topics:

- [Replacing an Informatica Workflow with a Custom SQL File on page 166](#)
- [Determining the Informatica Server Maximum Sessions Parameter Setting on page 166](#)
- [Determining the Number of Transactional and Data Warehouse Database Connections on page 167](#)

- [Running Two DAC Servers on the Same Machine on page 168](#)
- [Tracking Deleted Records on page 169](#)
- [Customizing Index and Analyze Table Syntaxes on page 171](#)

## Replacing an Informatica Workflow with a Custom SQL File

You can improve the performance of loads by replacing Informatica workflows with custom SQL files. For Teradata databases, SQL files are provided in the SiebelAnalytics\utility\Teradata directory.

### *To replace an Informatica workflow with a custom SQL file*

- 1 Create a SQL file to be used to load the table, and unit test it.
- 2 Create an XML file with one or more SQL statements in the format that the DAC can understand. For more information about creating an XML file, see [“Using SQL Files as an Execution Type in the DAC” on page 189](#).

You can create one file for a full load and one for an incremental load, or you can use the same file for both full and incremental loads.

- 3 Save the file in the SiebelAnalytics\DAC\CustomSQL directory.
- 4 In the Task Definitions tab of the DAC Design view, query for the task for which you want to replace the Informatica workflow.
- 5 Replace the workflow name in the Command for Incremental Load or Command for Full Load fields with the XML file.
- 6 Change the Execution Type to SQL.

The DAC uses the target database connection to execute these commands.

## Determining the Informatica Server Maximum Sessions Parameter Setting

You set the Maximum Sessions parameter value when performing the procedure [“Registering Informatica Servers in the DAC Client” on page 80](#). This parameter specifies the maximum number of workflows that can be executed in parallel on the Informatica server. If the number of sessions is zero or is not specified, the DAC server assigns the default value of five for the DAC Lite version and 10 for the full DAC version. The DAC Lite version cannot run more than five sessions in parallel.

You should consider the following factors when determining the Maximum Sessions parameter value:

- How powerful the machine is that hosts the Informatica Server.
- How many Informatica Server servers are available.

- The number of Runnable tasks in the queue. A Runnable task is a task for which the Depends On tasks have completed and is ready to be run but is waiting for an Informatica slot to be available. For information about the different task run statuses, see [“About the DAC Current Run Tab” on page 194](#).

For an optimal run, the runnable queue should be at zero or should reach zero in a short time. For example, [Figure 14](#) shows an ideal performance run when 15 sessions were run in parallel. There were many runnable tasks before the process began, but the queue soon reached zero.

You can generate a run analysis such as [Figure 14](#) from the right-click menu (Get Run Information > Get Graph) on the DAC Current Run and Run History tabs. If you find that the runnable curve does not reach zero in a short time, you should increase the Maximum Sessions parameter value to make more Informatica slots available.

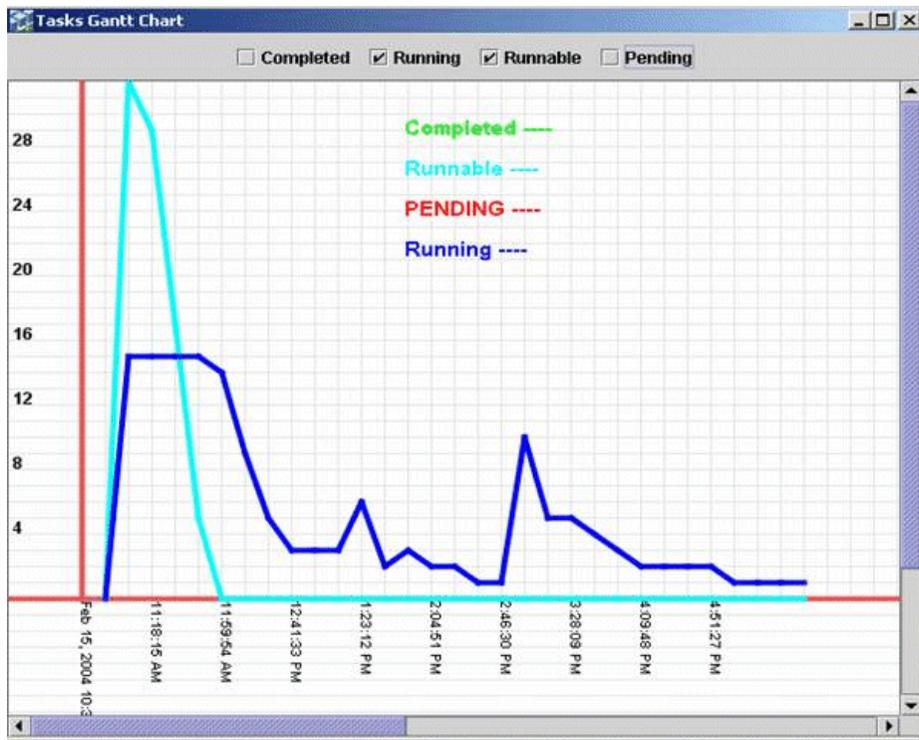


Figure 14. Sample Performance Run

## Determining the Number of Transactional and Data Warehouse Database Connections

This section describes how to determine the maximum number of database connections you need between the DAC server and the transactional database and the DAC server and the data warehouse database. You set the Max Num Connections parameter when performing the procedure, [“Creating Transactional and Data Warehouse Database Connections” on page 79](#).

For the transactional database, the DAC server uses these connections to perform change capture. The number of connections you set for this connection pool determines how many change capture processes can run concurrently. If you have a powerful transactional database server and are going to run ETL processes during off-peak times, you can increase the Max Num Connections setting to 15 or 20 (10 is the default). If you have a less powerful transactional database server, you should not overload the operational system with ETL processes. Therefore, you should set the value below 10.

For the Data Warehouse database, the DAC server uses these connections to perform processes such as truncate tables, drop and create indices, and analyze tables. You should not set the Max Num Connections value higher than the Maximum Sessions parameter value (the maximum number of workflows that can be executed in parallel on the Informatica server) because these values have a one to one relationship.

## Running Two DAC Servers on the Same Machine

You can run two DAC servers on the same machine as long as they are listening on different ports and pointing to two different repositories.

### *To run two DAC servers on the same machine*

- 1** Install two instances of the DAC server in two different directories.  
For installation instructions, see [“Installing and Configuring Analytics Applications on Windows” on page 61](#).
- 2** For each instance, edit the config.bat file to set the DAC\_HOME variable appropriately.  
For instructions, see [“Configuring the DAC Config.bat File” on page 69](#).
- 3** Launch each of the DAC clients by navigating to the DAC directories and double-clicking the startclient.bat file.
- 4** For each instance, configure the DAC repository connection.
  - a** Navigate to Tools > DAC Server Management > DAC Server Setup.  
An informational dialog box states this operation should be performed on the machine running the DAC server. It asks whether you want to continue.
  - b** Click Yes.
  - c** In the Repository Connection Information tab, enter the appropriate information for each instance. The Database Host should be the same for each instance, and the Database Port should be different.
- 5** For each instance, set up the DAC server system properties.
  - a** Navigate to Setup > DAC System Properties.
  - b** Set the DAC Server Host, OS, and Port properties.
- 6** Start each DAC server from its directory.

## Tracking Deleted Records

The Siebel Data Warehouse change capture process uses delete triggers to identify records for deletion on the Siebel transactional database. The deleted records are stored in S\_ETL\_D\_IMG tables. During the change capture process, the DAC server moves the data from the S\_ETL\_D\_IMG tables to the S\_ETL\_I\_IMG tables, where D appears in the OPERATION column to show the records were deleted. During the change capture sync process, the records in the S\_ETL\_D\_IMG tables that were moved to the S\_ETL\_I\_IMG tables are flushed. In the DAC, you can view the SQL that runs during the change capture and change capture sync processes by navigating in the DAC to Design > Task Definitions > Description.

The preconfigured ETL process captures deleted records for the target tables W\_ORG\_D and W\_PERSON\_D, the source tables for which are S\_ORG\_EXT, S\_CONTACT, and S\_PRSP\_CONTACT. These source tables need to have delete triggers created in the Siebel transactional database in order for deleted records to be tracked.

For vertical applications, the preconfigured ETL process captures deleted records for W\_FUND\_F and W\_ALIGNMT\_DH. You need to create delete triggers in the transactional database for the following additional tables: S\_MDF\_TXN, S\_ASGN\_GRP\_POSTN, S\_ASGN\_RULE\_ITEM.

In the Siebel Data Warehouse, preconfigured visibility tables are inactivated. If you activate visibility tables, you should also create delete triggers on the optional tables. You can activate visibility tables in the DAC by navigating to Design > Tables.

The preconfigured SIA Account and Contact visibility tables are activated by default for vertical applications. If your organization is not going to use any of the visibility tables, you need to inactivate them in the Tables tab of the Design view in the DAC client.

On the target tables for which deleted records are tracked, a D appears in the INACTIVE\_FLG column to show the records as deleted when the source records are deleted. This method of flagging a record as deleted is known as a *soft delete*, as compared to a *hard delete* when the record is physically deleted. When deleted records are tracked on visibility-related data warehouse tables, the records are physically deleted. The general rule is that soft deletes should be used for tables that are referenced by other tables. If a table is not referenced by any other table, then you can use hard deletes.

Aggregate tables are rebuilt during each ETL process. Therefore, records can be physically deleted from the base tables without consequence. If you want to use the soft delete method, you should consider changing the aggregate building mappings so that the deleted records are omitted.

**NOTE:** The Analytics Server does not recognize soft deletes. Therefore, you have to modify the .rpd file so that it does not pick up soft-deleted records for reporting.

### *To create delete triggers for preconfigured ETL change capture*

- 1 From the DAC menu bar, click Tools > ETL Management > Configure.
- 2 In the Sources dialog box, select the database platform for the target and transactional databases, and click OK.

- 3 In the Data Warehouse Configuration Wizard, select the Create Delete Triggers in Transaction Database check box, and click Next.

The Delete Triggers tab is active.

- 4 Select one of the following:

Option	Description
Create Triggers	Executes the trigger statements directly.
Write Script to File	Writes the trigger statements to a file, which can be executed by a database administrator.

- 5 Select the database type as defined in the DAC.
- 6 For DB2 zSeries databases, enter the base table owner.
- 7 (Optional) Select the Include Optional Triggers check box to create triggers for the optional tables.
- 8 Click Start.

***To create delete triggers for new source tables***

- 1 In the DAC, navigate to Design > Tables.
- 2 Select the table for which you want to track deleted records.  
Make sure the table has an image suffix.
- 3 Right-click the table and select Change Capture Scripts > Generate Image and Trigger Scripts.
- 4 In the Triggers and Image Tables dialog box, select the database type of the source database.
- 5 Make sure the Generate Image Table Scripts and Generate Trigger Script(s) options are selected.
- 6 Execute the script on the database.

***To track deleted records***

- 1 Make sure the delete triggers are enabled for the appropriate tables.
- 2 Write custom Informatica workflows with a clause WHERE operation = 'D' to the appropriate I\_IMG table to take them across to the dimension and fact tables.
- 3 In the DAC, register the workflows as tasks.
- 4 Define the appropriate dependencies.

For an example of such a workflow, see the preconfigured task SDE\_OrganizationDimension\_LoadDeletedRows.

## Customizing Index and Analyze Table Syntaxes

The customsql.xml file, located in the SiebelAnalytics\DAC\CustomSQLs directory, contains the syntax for dropping and creating indexes and analyzing tables. You can edit the customsql.xml file to change the behavior of these operations.

### To edit the Analyze Table syntax

- 1 Open the customsql.xml file located in the SiebelAnalytics\DAC\CustomSQLs directory.
- 2 Locate the Analyze Table syntax for the appropriate database type.

For example, the syntax for an Oracle database is as follows:

```
<Sql Query name = "ORACLE_ANALYZE_TABLE" STORED_PROCEDURE = "TRUE">
DBMS_STATS.GATHER_TABLE_STATS(ownname => '@TABLEOWNER', tabname => '%1',
estimate_percent => 30, method_opt => 'FOR ALL COLUMNS SIZE AUTO', cascade => true )
</Sql Query>
```

- 3 Edit the syntax.

For example, to gather statistics for only the indexed columns, edit the syntax as follows:

```
<Sql Query name = "ORACLE_ANALYZE_TABLE" STORED_PROCEDURE = "TRUE">
DBMS_STATS.GATHER_TABLE_STATS(ownname => '@TABLEOWNER', tabname => '%1',
estimate_percent => 30, method_opt => 'FOR ALL INDEXED COLUMNS', cascade => true )
</Sql Query>
```

**NOTE:** The variables @TABLEOWNER, %1, %2, and so on, will be substituted appropriately by the DAC when the statement is executed.

### To edit the Create Index syntax

- 1 Open the customsql.xml file located in the SiebelAnalytics\DAC\CustomSQLs directory.
- 2 Locate the Create Index syntax for the appropriate database type, and edit the syntax.



# 8

## DAC Functional Reference

This chapter describes the functionality available in the Siebel Data Warehouse Application Console (DAC). It contains the following topics:

- [About the DAC Design View on page 173](#)
- [About the DAC Setup View on page 190](#)
- [About the DAC Execute View on page 194](#)

### About the DAC Design View

The DAC Design view provides access to functionality related to creating and managing execution plans. The top pane of the Design view contains tabs, each of which represents a component of the execution plan. The bottom pane of the Design view contains subtabs that relate to the tab selected in the top pane. The navigation tree allows you to see the hierarchical relationship among all the DAC repository objects.

This section includes the following topics:

- [About the DAC Execution Plans Tab on page 173](#)
- [About the DAC Subject Areas Tab on page 176](#)
- [About the DAC Table Groups Tab on page 177](#)
- [About the DAC Tables Tab on page 179](#)
- [About the DAC Indices Tab on page 181](#)
- [About the DAC Task Definitions Tab on page 184](#)
- [Using SQL Files as an Execution Type in the DAC on page 189](#)

### About the DAC Execution Plans Tab

The Execution Plans tab displays a list of execution plans in the top pane. This list includes the execution plan name and an Inactive column, which indicates whether the execution plan is active or inactive. Inactive execution plans do not participate in the ETL process.

Table 41 provides a description of the subtabs in the bottom pane.

Table 41. DAC Execution Plans Subtabs

Tab	Description
Edit	Allows you to edit the execution plan selected in the top pane.
Description	Displays a description of the execution plan selected in the top pane.
Subject Areas	Displays a list of subject areas associated with the execution plan selected in the top pane.
Database Connections	Displays a list of database connections associated with the execution plan selected in the top pane. In order for a task to participate in the ETL process, the task's source and target must match the list of database connections displayed here. You can inactivate a database connection by selecting the Inactive check box. If you inactivate a database connection, all tasks that read or write to it are eliminated.
Tables (Read Only)	<p>Displays a read-only list of the initial tables that participate in an ETL. For a complete list of tables participating in the ETL, use the Preview functionality.</p> <p>The list of tables contains the following column headings:</p> <ul style="list-style-type: none"> <li>■ <b>Name.</b> Name of the target table.</li> <li>■ <b>Main Table for Group.</b> If the table is a main table for a table group, the group name is displayed in this column.</li> <li>■ <b>Table Type.</b> Table type as defined in the table properties.</li> </ul>
Preceding Tasks	<p>Displays a list of tasks that must be completed before an ETL is executed.</p> <p>The list of tasks contains the following column headings:</p> <ul style="list-style-type: none"> <li>■ <b>Name.</b> Name of the task.</li> <li>■ <b>Priority.</b> Indicates the order in which the task runs. If two or more tasks have the same priority, the order occurs randomly.</li> <li>■ <b>Inactive.</b> Allows you to inactivate a task by selecting the check box.</li> <li>■ <b>Command.</b> Command associated with the task.</li> </ul>
Following Tasks	<p>Displays a list of tasks that must be completed after an ETL is executed.</p> <p>The list of tasks contains the following column headings:</p> <ul style="list-style-type: none"> <li>■ <b>Name.</b> Name of the task.</li> <li>■ <b>Priority.</b> Indicates the order in which the task runs. If two or more tasks have the same priority, the order occurs randomly.</li> <li>■ <b>Inactive.</b> Allows you to inactivate a task by selecting the check box.</li> <li>■ <b>Command.</b> Command associated with the task.</li> </ul>

## Actions Available

The following actions are available in the top pane toolbar and in the right-click menu when the Executions Plan tab is active.

### Preview Command

This command generates a preview of all tasks and their dependencies by reviewing the subject areas, table groups, tables, and tasks. Information provided includes the approximate order in which tasks are executed, a list of source tables, target tables, and tables for which an image will be built. Only the tasks that source or write to database connections as defined in the execution plan are included. For more information about the Preview functionality, see [“Using the DAC Preview Functionality to View Tasks and Dependencies” on page 150](#).

### Copy Record

This command creates a copy of the selected execution plan and also copies the references to subject areas and database connections.

### Generate Index Scripts Command

This command generates drop index, create index, and analyze table scripts for all the tables that participate in the ETL process. The results are stored in the log\scripts directory. The index scripts are separated by ETL indices and query indices. The DAC server automatically drops and creates indices and analyzes the tables. This option can be turned off by setting the system preferences. It is recommended that this option be turned off only for DB2-390 environments.

### Run Now Command

This command submits a request to the DAC server to execute the execution plan. Inactive execution plans are not included in the process.

When an execution plan is run, the following logic is used to identify the tasks that need to be run and their order of execution.

- 1 Check on the previous run status.
  - a If the previous run executed a different execution plan from the one currently submitted (either manually or through the scheduler), abort the run.
  - b If the previous run executed is the same as the current execution plan and did not complete, continue from where it left off.
  - c If the previous run has completed, create a new run.
- 2 Check resources.
  - a If the DAC server cannot establish connections to the databases defined for that execution plan, abort the run.
  - b If there are no Informatica servers registered, abort the run.
  - c If the Informatica servers are registered and the DAC server is unable to ping them, abort the run.
- 3 Select initial tables.

- a Find all the subject areas.
  - b Find all the table groups that belong the subject areas.
- 4 Recursively find all the table groups and their tables with the above list of tables.
- 5 Select initial tasks: Find all the tasks that load into the above selected tables. (Tasks whose target table is one of the selected tables and that are non-optional.)
- 6 Recursively select all tasks. Depending on the non-optional dependency rules, figure out the prerequisite tasks recursively.
- 7 Select optional tasks (with the tasks already chosen).
- 8 Select dependencies: Load dependencies and compute for each task the number of all Depends On tasks. This number will be decremented for tasks higher up in the hierarchy as each of the tasks complete. When the number of Depends On tasks reaches zero, the task itself will become eligible to be run.
- 9 Identify the task details. Iterate through all the tasks selected, compute the task dependencies.
- 10 Identify the list of source tables for change capture and create tasks for change capture and sync for Siebel sources. Iterate through all the tasks and find the primary or auxiliary tables and group them by source database connection.
- 11 Execute pre-ETL tasks. If there are errors, stop the run.
- 12 Execute the change capture process. If there are errors, stop the process.
- 13 Execute the dependency graph. If there are errors, stop all the tasks that depend on the failed tasks. Continue to execute all others, until there are no more to run, and then stop.
- 14 Execute the change capture sync process. If there are errors, stop the process.
- 15 Execute the post-ETL process. If there are errors, stop the process.
- 16 At the end of the ETL process, the DAC server updates refresh timestamps for all source tables (primary or auxiliary) and target tables. The refresh timestamps are the database timestamps. The ETL history timestamps (Start and End timestamps) are the DAC server timestamps.

## About the DAC Subject Areas Tab

A subject area is a logical grouping of table groups that is related to a particular subject or application context.

The Subject Areas tab displays a list of subject areas in the top pane. This list includes the subject area name and an Inactive column, which indicates whether the subject area is active or inactive. Inactive subject areas do not participate in the ETL process.

Table 42 provides a description of the subtabs in the bottom pane.

Table 42. DAC Subject Areas Subtabs

Tab	Description
Edit	Allows you to edit the subject area selected in the top pane.
Description	Displays a description of the subject area selected in the top pane.
Table Groups	Displays a list of table groups associated with the subject area selected in the top pane. You can inactivate a table group by selecting the Inactive check box.
Tables (Read Only)	<p>Displays a read-only list of the initial tables that participate in an ETL. For a complete list of tables participating in the ETL, use the Preview functionality.</p> <p>The list of tables contains the following column headings:</p> <ul style="list-style-type: none"> <li>■ <b>Name.</b> Name of the target table.</li> <li>■ <b>Main Table for Group.</b> If the table is a main table for a table group, the group name is displayed in this column.</li> <li>■ <b>Table Type.</b> Table type as defined in the table properties.</li> </ul>

### Actions Available

The following actions are available in the top pane toolbar and in the right-click menu when the Subject Areas tab is active.

#### Preview Command

This command generates a preview of all tasks and their dependencies by reviewing the table groups, tables, and tasks. Information provided includes the approximate order in which tasks are executed, a list of source tables, target tables, and tables for which an image will be built. The preview will include all tasks regardless of the source or target. Unlike the preview generated from the Execution Plans tab, this preview includes all the tasks, regardless of the source or target.

#### Copy Record

This command creates a copy of the selected subject area and also copies the references to table groups.

## About the DAC Table Groups Tab

The Table Groups tab displays a list of table groups in the top pane. This list includes the name and type of the table group, the main table of the table group, and an Inactive column, which indicates whether the table group is active or inactive. Inactive table groups do not participate in the ETL process.

Table 43 provides a description of the tabs in the bottom pane.

Table 43. DAC Table Groups Subtab

Tab	Description
Edit	Allows you to edit the table group selected in the top pane.
Description	Displays a description of the table group selected in the top pane.
Tables	<p>Displays a list of the initial tables that participate in an ETL. For a complete list of tables participating in the ETL, use the Preview functionality.</p> <p>The list of tables contains the following column headings:</p> <ul style="list-style-type: none"> <li>■ <b>Name.</b> Name of the target table.</li> <li>■ <b>Main Table for Group.</b> A read-only column showing if the table is a main table for another table group.</li> <li>■ <b>Relationship Type.</b> Relationship type describing how the table relates to the main table. For documentation purposes only.</li> <li>■ <b>Inactive.</b> Indicates whether the table's relationship to the table group is active or inactive.</li> </ul>

## Actions Available

The following actions are available in the top pane toolbar and in the right-click menu when the Table Groups tab is active.

### Copy Record

This command creates a copy of the selected table group and also copies the references to tables.

### Preview Command

This command generates a preview of all tasks and their dependencies by reviewing the tables and tasks. Information provided includes the approximate order in which tasks are executed, a list of source tables, target tables, and tables for which an image will be built. Unlike the preview generated from the Execution Plans tab, this preview includes all the tasks, regardless of the source or target.

## About the DAC Tables Tab

The Tables tab displays a list of tables in the top pane. This list includes the following information shown in [Table 44](#).

Table 44. DAC Tables Tab List Columns

Column	Description
Name	Name of table.
Table Type	Indicates the type of target table. There is no differentiation for source tables.
Image Suffix	Applicable to Siebel source tables only. For more information, see <a href="#">“Generate Image and Trigger Scripts Command” on page 180</a> .
Inactive	Indicates whether a table is active or inactive. Inactive tables do not participate in the ETL process.

[Table 45](#) provides a description of the tabs in the bottom pane.

Table 45. DAC Tables Subtabs

Tab	Description
Edit	Allows you to edit the table selected in the top pane.
Description	Displays a description of the table selected in the top pane.
Database Connections	Displays a list of data sources associated with the table selected in the top pane. The Edit button allows you to add or remove data sources.  The Table Refresh Date column displays the start time of the last ETL process that read from or wrote to the table selected in the top pane. (The time is that of the database server and not the DAC server.)
Indices	Displays a read-only list of indices that belong to the table selected in the top pane.
Source for Tasks	Displays a read-only list of tasks that use the table selected in the top pane as a source.
Target for Tasks	Displays a read-only list of tasks that use the table selected in the top pane as a target.
Conditional for Tasks	Displays a read-only list of tasks that are optional tasks for the table selected in the top pane.

### Actions Available

The following actions are available in the top pane toolbar and in the right-click menu when the Tables tab is active.

### Copy Record

This command creates a copy of the selected table and also copies the references to database connections.

### Generate Index Scripts Command

This command generates drop index, create index, and analyze table scripts for all the tables that participate in the ETL process. You can query for one or more tables, and the command will generate all the scripts for all the tables. The results are stored in the log\scripts directory. Files are generated that provide the following information: drop indices of type ETL, create indices of type ETL, drop indices of type Query, create indices of type Query, and analyze tables.

### Generate Image and Trigger Scripts Command

This command generates change capture scripts for tables with defined image suffixes. The scripts include creation of the image tables to assist in the change capture process and their indices. You can also create the triggers for deletes. However, you should do so with caution because preconfigured tables for the change capture are created by applying SIF files on the Siebel transactional database (OLTP). Triggers for deletes should be used only for new source tables for which you want to use change capture. The scripts will be generated for the selected table or all the tables shown in the list applet. You can narrow down the tables of interest by querying. The results are shown in a text box, which can be supplied to the DBA for executing.

### Generate View Scripts

This command generates change capture view scripts for full or incremental loads for any table that participates in the change capture process. This command can be useful when the change capture fails and you want to run a task manually. It can also be used for unit testing.

### Generate Change Capture SQL

This command generates change capture SQL scripts for full or incremental mode for tables that participate in the change capture process. This command can be useful when the change capture fails and you want to run a task manually. It can also be used for unit testing.

### Import Database Tables Command

This command allows you to import table definitions from a selected database. You will be prompted to choose a database connection from a list that has already been defined in the DAC repository. When this command is executed, a list of tables in the data source is shown in a list applet. Check the Import flag in the list applet to select the tables that you want to import. The tables are then brought into the DAC repository. The default table type associated with the newly imported tables is Other. After you import the tables, change the table type to the appropriate type and associate the table with a database connection.

**Import Indices Command**

This command allows you to import index definitions from the database for one or more tables as listed in the result of the query. You will be prompted to select a data source. The client connects to the database and retrieves the index definitions for the table. The list includes new indices that may have been created in the database, indices whose definitions are modified in the database, or indices that do not exist in the database. To accept the changes, check the Merge? check box. When you select the list to be merged, one of the following actions will take place: If an index definition does not exist in the DAC repository, it will be created; if an index definition exists but the definition is the same, the new definition will be brought in; or if an index as defined in the repository does not exist in the database, it will be inactivated.

**NOTE:** In MSSQL Server databases, when you import indices with columns whose sort order type is "Desc," the sort order type appears in the DAC as "Asc." You have to set the sort order manually to "Desc."

**About the DAC Indices Tab**

The Indices tab displays a list of all the indices of all the data warehouse tables. It is recommended that you do not register any indices for source tables. During the ETL process, when a table is going to be truncated, all the indices as defined in the repository will be dropped before the data is loaded and will be created after the data is loaded automatically. While this improves the ETL performance, the preconfigured workflows have the bulk load option turned on. The bulk load will fail if there are indices on the table. Therefore, it is important to keep the index definitions in sync with the database. For example, if you create an index on the database, and it is not registered in the repository, the index will not be dropped and the load will fail.

For Teradata databases, only secondary indices should be registered in the DAC. You should not register primary indices or the more complex indices, such as single- and multi-table indices, because they cannot be dropped and recreated. You can use SQL commands to drop and create such tasks in the DAC.

The drop-down list to the right of the top pane toolbar allows you to filter the set of displayed indices based on the database type. To display all indices regardless of database type, select the option All.

Table 46 provides a description of the index properties displayed in the list.

Table 46. DAC Indices Tab List Columns

Column	Description
Name	Unique name with which the index is created.
Table Name	Table for which an index is created.
Index Usage	Usage of index: ETL or Query. An ETL index is typically used during the ETL process. A Query index is an index is used only during the reporting process. It is recommended that you have a clear understanding of when and where the index will be used at the time of registering the index.
Databases	Allows you to associate an index with a database type.

Table 46. DAC Indices Tab List Columns

Column	Description
# Unique Columns	For unique indices, the number of columns that will be unique.
Is Unique	Indicates whether the index is unique.
Is Clustered	Indicates whether the index is clustered. There can be only one clustered index per table.
Is Bitmap	Indicates whether the index is of the bitmap type.
Allow Reverse Scan	Applicable only for DB2-UDB databases. The index will be created with the Allow Reverse Scan option.
Always Drop & Create	Indicates whether the index will be dropped and created regardless of whether the table is being loaded using a full load or incremental load.
Table Space Name	Applicable only for Oracle databases. If a tablespace is mentioned, an index is created in that particular tablespace. If all indices go to a tablespace different from the data area, you can define it in the ETL Preferences (Tools > ETL Management> Preferences).
Inactive	Indicates whether an index is active or inactive. Inactive indices do not participate in the ETL process.

Table 47 shows which index properties are available for the different database types that are supported.

Table 47. Index Properties and Database Types Matrix

Column/ Database	Is Unique	Is Clustered	Is Bitmap	Allow Reverse Scan	# Unique Columns
Oracle	X		X		
DB2	X	X		X	X
DB2-390	X				
MSSQL	X	X			

Table 48 provides a description of the tabs in the bottom pane.

Table 48. Indices Subtabs

Tab	Description
Edit	<p>Allows you to edit the table selected in the top pane.</p> <p>The “Display database-specific properties” drop-down list allows you to specify a database type in order to display database-specific properties in the Edit window.</p>
Description	<p>Displays a description of the table selected in the top pane.</p>
Columns	<p>Displays the list of columns the index is made of.</p> <p>The list of columns contains the following column headings:</p> <ul style="list-style-type: none"> <li>■ <b>Name.</b> Name of the column.</li> <li>■ <b>Position.</b> Position of the column in the index.</li> <li>■ <b>Sort Order.</b> Indicates whether the sort order is ascending or descending.</li> <li>■ <b>Inactive.</b> Indicates whether the column is active or inactive.</li> </ul>
Databases	<p>For Siebel Data Warehouse version 7.7.1.3 and lower, indicates whether an index is applicable only to a certain type of database. If no database is indicated, the index will always be created.</p> <p>For Siebel Data Warehouse version 7.7.1.4 and higher, indicates the database types that apply to the index. If no database type is indicated, the index will not be created.</p> <p>The Index Override column allows you to define custom index creation syntax for a particular database type. The DAC server will use the syntax you define instead of generating an index statement based on the metadata. To enter the custom syntax, click in the Index Override column to open the text editor. The Generate Default Index Statement icon on the text editor toolbar allows you to generate the default statement, which you can edit.</p> <p>You can inactivate a database type by checking the Inactive check box.</p>

### Actions Available

The following actions are available in the top pane toolbar and in the right-click menu when the Indices tab is active.

#### Copy Record

This command creates a copy of the selected index.

## Advanced Custom Index Management

The DAC allows you to drop and recreate indices during the load process, which reduces the overall load time during a full load. The DAC drops and recreates indices based on the index definitions stored in the DAC metadata.

**NOTE:** More advanced index management needs to be handled outside of the DAC, such as creating partitioned indices on Oracle databases, which requires specific syntax, and creating single-table and multi-table join indices on Teradata databases. In such cases you can use DAC SQL tasks placed appropriately in the task dependencies, or you can use a pre-session or post-session script in Informatica. You must drop the partitioned index before a task runs to load data using the bulk loader, because the bulk loader may fail if there are indices on the target database.

If you need to modify the preconfigured indices with extra options or syntax, you must inactivate them in the DAC metadata so that the DAC server does not try to drop and recreate them. You can then manage these indices in the same manner as the advanced index management described above.

## About the DAC Task Definitions Tab

The Task Definitions tab displays a list of tasks in the top pane. [Table 49](#) provides a description of the task properties displayed in the list.

Table 49. Task Definitions List Columns

Column	Description
Name	A logical, unique name for the task.
Command for Incremental Load	A table can be loaded in Full Mode or Incremental Mode. Full Mode refers to data loaded for the first time or data that is truncated and then loaded. Incremental Mode refers to new or changed data being added to the existing data.  The DAC maintains a last refresh timestamp whenever a table is changed during the ETL process. (You can view this timestamp under Design > Tables > Database Connections or Setup > Database connections > Tables.) If a table has a timestamp, the command appearing in this column is executed. If a table does not have a timestamp, the command for a full load is executed. If the execution type is Informatica, the workflow name is used as the command.
Command for Full Load	If a table has no last refresh timestamp, this command is executed.
Folder Name	For execution type of Informatica only. The folder in which the workflow resides. Note: The name cannot contain spaces.
Source DB	Source database that is queried.
Target DB	Target database that is populated.

Table 49. Task Definitions List Columns

Column	Description
Task Phase	Task phase of the ETL process. The DAC server uses the task phase to prioritize tasks and to generate a summary of the time taken for each of the phases.
Execution Type	<p>Tasks are executed based on their execution type. The following types are supported:</p> <ul style="list-style-type: none"> <li>■ <b>Informatica.</b> Task is invoked on an Informatica server using pmcmd.</li> <li>■ <b>External Program.</b> Task is an operable program on the operating system where the DAC server is running. This program can be a batch file, shell script, or any other program that can be run like a bulk loader.</li> <li>■ <b>SQL File.</b> Task is a SQL script in .xml or .sql format. For more information, see <a href="#">“Using SQL Files as an Execution Type in the DAC” on page 189.</a></li> <li>■ <b>Stored Procedures.</b> Task is a stored procedure that has been defined on the databases.</li> </ul> <p>In addition, there are several internal execution types that you will not be able to select when creating new tasks. These tasks are categorized as either internal change capture tasks or internal data warehouse tasks; all of these tasks are color-coded in pink in the Task Definitions tab.</p> <ul style="list-style-type: none"> <li>■ <b>IMG_BUILD</b> - internal change capture. If you are using multiple Siebel transactional sources, you cannot change the behavior of the change capture process. This task requires change capture tables to be created on the other sources also. When adding additional Siebel sources, go to Setup &gt; Database Connections and select the appropriate Siebel source, right-click and select Change Capture Tasks. This action generates change capture tasks. Use this same action to disable or delete change capture tasks.</li> <li>■ <b>IMG_SYNC</b> - internal change capture. If you are using multiple Siebel transactional sources, you can create this task for the additional tasks for doing similar change capture sync processes. You cannot change the behavior of the change capture sync process. This task requires change capture tables to be created on the other sources also. This task should be used with discretion for Siebel sources only.</li> </ul>

Table 49. Task Definitions List Columns

Column	Description
Execution Type	<ul style="list-style-type: none"> <li>■ QUERY_INDEX - internal data warehouse. This task allows you to alter when the Query indices are created. The DAC server drops all indices before loading when the CreateQueyIndexesAtTheEnd setting is set to True. When this setting is set to False, all the indices, regardless of the index type, get created as part of the task that does the loading.</li> <li>■ UPDATE_ETL_PARAM - internal data warehouse. This task is used for only to update W_PARAM_G from the DAC server. This task populates the preferences to the W_PARAM_G table in the Data Warehouse by querying values defined in the DAC repository. Because only one Data Warehouse per DAC repository is supported, this execution type should not be chosen for any task.</li> </ul>
Priority	Indicates the order in which the task runs. If two or more tasks have the same priority, the order occurs randomly.
Pre-SQL for Full Load	<p>The SQL script (derived from a SQL or XML file) that is executed before the specified task when the specified task is participating in a full load.</p> <p>For more information, see <a href="#">“Using SQL Files as an Execution Type in the DAC” on page 189</a>.</p>
Pre-SQL for Incremental Load	The SQL script (derived from a SQL or XML file) that is executed before the specified task when the specified task is participating in an incremental load.
Post-SQL for Full Load	The SQL script (derived from a SQL or XML file) that is executed after the specified task when the specified task is participating in a full load.
Post-SQL for Incremental Load	The SQL script (derived from a SQL or XML file) that is executed after the specified task when the specified task is participating in an incremental load.
Build Image	Applicable for Siebel transactional sources only. When this check box is selected, the change capture for the primary/auxiliary source tables executes.
Truncate Always	When this check box is selected, the target tables are truncated regardless of whether a full or incremental load is occurring. Any indices registered for this table are dropped before the command is executed and are recreated after the command completes successfully. When indices are dropped and created, the table is analyzed so that the index statistics are up-to-date.
Truncate for Full Load	When this check box is selected, the target tables are truncated only when a full load is occurring. Any indices registered for this table are dropped before the command is executed and are recreated after the command completes successfully. When indices are dropped and created, the table is analyzed so that the index statistics are up-to-date. When the Truncate Always option is selected, this option is unnecessary.

Table 49. Task Definitions List Columns

Column	Description
Optional	<p>Indicates that a task is optional and will be executed only when the table listed in the Conditional Tables subtab is included in an execution plan.</p> <p>For example, the UpdateRecencyCat in Person Dimension task is optional and is associated with the Order Item fact table, which is listed in the Conditional Tables subtab. The UpdateRecencyCat in Person Dimension task will only be executed when the Order Item fact table is included in an execution plan.</p>
Continue on Error	<p>When this check box is selected, if the command fails, the dependent tasks are not stopped. However, if any auto-generated tasks fail, the dependent tasks are stopped.</p>
Inactive	<p>When this check box is selected, the record is inactive. Inactive tasks do not participate in the ETL process.</p>

Table 50 provides a description of the tabs in the bottom pane.

Table 50. Task Definitions Subtabs

Tab	Description
Edit	<p>Allows you to edit the table selected in the top pane.</p>
Description	<p>Displays a description of the task selected in the top pane.</p>
Source Tables	<p>Displays the list of tables used for getting data for the task selected in the top pane.</p> <p>The list contains the following column headings:</p> <ul style="list-style-type: none"> <li>■ <b>Name.</b> Name of the table.</li> <li>■ <b>Primary.</b> Indicates whether the table is a primary source of data.</li> <li>■ <b>Auxiliary.</b> Indicates whether the table is a secondary source of data.</li> </ul> <p><b>Note:</b> If a table is marked as Primary or Auxiliary and the Build Image property of the task is selected, the change capture process is invoked. There are special tasks that force the base table data to be extracted when data in auxiliary tables change.</p> <p>A table can be neither Primary nor Auxiliary but still be used for getting some attributes to populate a dimension or fact table. The changes in these kinds of source tables are not reflected in the dimension or fact table once the data is populated.</p>

Table 50. Task Definitions Subtabs

Tab	Description
Target Tables	<p>Displays the list of tables where data is loaded for the task selected in the top pane.</p> <p>The list contains the following column headings:</p> <ul style="list-style-type: none"> <li>■ <b>Name.</b> Name of the table.</li> <li>■ <b>Primary.</b> Indicates whether the table is a primary target table. For documentation purposes only.</li> </ul>
Conditional Tables	<p>Displays a list of tables that, if included in an execution plan, cause the optional task selected in the top pane to be executed.</p> <p>For example, the Order Item fact table is a conditional table associated with the optional task called UpdateRecencyCat in Person Dimension. The UpdateRecencyCat in Person Dimension task is executed only when the Order Item fact table is included in an execution plan.</p> <p>The list contains the following column headings:</p> <ul style="list-style-type: none"> <li>■ <b>Name.</b> Name of the conditional table.</li> <li>■ <b>Inactive.</b> Indicates whether the conditional table is inactive.</li> </ul>
Depends On Tasks	<p>Displays a list of tasks that are prerequisite for the execution of the task selected in the top pane. If any of the prerequisite tasks fail, the task selected in the top pane will be marked as Stopped.</p> <p>The list contains the following column headings:</p> <ul style="list-style-type: none"> <li>■ <b>Name.</b> Name of the prerequisite task.</li> <li>■ <b>Task Type.</b> Type of task (read only).</li> <li>■ <b>Optional Flag.</b> When this flag is selected, the prerequisite task optionally depends on the task selected in the top pane. For example, task 1 loads table A, and task 2 loads table B and optionally depends on task 1. If an execution plan requires both tables A and B to be loaded, task 2 will wait for task 1 to successfully complete. If an execution plan requires only table B to be loaded, task 2 will be executed immediately, and task 1 will not be executed.</li> </ul>
Dependent Tasks	<p>Displays a list of tasks that are dependent on the task selected in the top pane. These tasks wait for the successful completion of the current task before they are executed.</p> <p>The list contains the following column headings:</p> <ul style="list-style-type: none"> <li>■ <b>Name.</b> Name of the dependent task.</li> <li>■ <b>Task Type.</b> Type of task (read only).</li> <li>■ <b>Optional Flag.</b> See the description for Depends On Tasks.</li> </ul>

## Actions Available

The following actions are available in the top pane toolbar and in the right-click menu when the Task Definitions tab is active.

### Copy Record

This command creates a copy of the selected task and also copies the references to the tasks it depends on and source and target tables.

## Using SQL Files as an Execution Type in the DAC

There are two types of custom SQL files that can be executed through the DAC: XML formatted .xml files, and plain text .sql files. For examples of XML and SQL files, go to the DAC\CustomSQL folder.

### XML Formatted Files

An XML file consists of a set of SQL statements for which the name, type, and Continue on Fail option are defined using XML attributes. The set of SQL statements is in a CDATA section which allows for special characters (like <, >, \) to be used without breaking the XML structure. A CDATA section looks like the following:

```
<![CDATA[this is a place for a SQL statement]]>
```

An example of an XML file follows:

```
<?xml version="1.0"?>
```

```
<CustomSQLs>
```

```
<sql name="Create Temp" type="SQL" continueOnFail="true">
```

```
<![CDATA[CREATE TABLE w_etl_temp (row_wid varchar(50))]]>
```

```
</sql >
```

```
<!-- This is how a comment section looks in XML -->
```

```
<!-- It will be ignored-->
```

```
<sql name="Update Temp" type="SQL">
```

```
<![CDATA[UPDATE w_etl_temp SET row_wid = 'qwe' WHERE row_wid LIKE '5*']]>
```

```
</sql >
```

```
<sql name="Drop Temp" type="SQL">
```

```
<![CDATA[DROP TABLE w_etl_temp]]>
```

```
</sql >
```

```
</CustomSQLs>
```

This example consists of three SQL statements: Create Temp, Update Temp, and Drop Temp. These names will be used in DAC run task detail description to give details of the errors encountered during execution (if any). In this particular example all three statements are of type SQL. Regular update SQL statements and the Stored Procedure type can also be used.

If the Continue on Fail option is set to True for a given statement, the execution will continue even if the task fails. If the Continue on Fail option is set to False for a given statement, or is omitted, the subsequent statements will not be executed and the Task Run status will be Failed.

## Plain Text SQL Files

Plain text SQL files consist of a set of SQL statements (no stored procedure calls). The SQL statements are separated by a semicolon (;), and comment tags are allowed (//, /\* comment \*/, --). If any of the SQL statements fail, the Task Run status will be Failed.

An example of a plain text SQL file follows:

```
CREATE TABLE w_etl_temp (name varchar(50))
;
UPDATE w_etl_temp
SET name = 'that's right' //this line demonstrates the use of ' in a text area
WHERE name LIKE 'gone fi shi ng%';

/*
*some
*query
*statement
*/
SELECT * FROM w_etl_temp
;
DROP TABLE w_etl_temp
;
/*end of file*/
```

## About the DAC Setup View

The Setup View provides access to functionality related to setting up DAC system properties, Informatica servers, database connections, and email notification.

This section includes the following topics:

- [“About the DAC System Properties Tab” on page 191](#)
- [“About the DAC Informatica Servers Tab” on page 191](#)
- [“About the DAC Database Connections Tab” on page 191](#)
- [“About the DAC Email Recipients Tab” on page 193](#)

## About the DAC System Properties Tab

The DAC System Properties tab allows you to configure various properties that determine the behavior of the DAC server. The top pane displays a list of the properties and their current values. For more information about the DAC system properties, see [“Setting Up DAC System Properties” on page 73](#).

## About the DAC Informatica Servers Tab

The Informatica Servers Tab allows you to register one or more Informatica servers and specify how many workflows can be executed in parallel on each server. The DAC server automatically load balances across the servers. For more information about Informatica server properties, see [“Creating and Dropping Data Warehouse Tables on a Teradata Database” on page 83](#).

### Actions Available

The following actions are available in the top pane toolbar and in the right-click menu when the Informatica Servers tab is active.

#### Test Connection

This command allows you to test whether the Informatica server is running. The DAC client will attempt to delegate the test to the DAC server. If the DAC server is not running, you will be asked whether you want to test the connection on the local client machine. The results of a test on the local client machine may not be true for the DAC server environment.

#### Copy Record

This command creates a copy of the selected record.

## About the DAC Database Connections Tab

This tab provides access to the database connection properties. The top pane Indices tab displays a list of the properties and their current values. You can edit the property values in the top pane by double-clicking in a cell.

Table 51 provides a description of the database connection properties.

Table 51. Database Connection Properties

Property	Description
Name	Logical name for the connection. (The metadata that comes with Siebel Business Analytics has two data sources: OLTP, which points to the Siebel transactional database, and the data warehouse.)
Type	Possible values are: <ul style="list-style-type: none"> <li>■ Source</li> <li>■ Warehouse</li> <li>■ Informatica Repository</li> <li>■ DAC Repository</li> <li>■ Other</li> </ul>
Connection Type	Type of database connection. Possible values are the following: <ul style="list-style-type: none"> <li>■ <b>Oracle (OCI8)</b>. Connect to Oracle using the tnsnames entry.</li> <li>■ <b>Oracle (Thin)</b>. Connect to Oracle using thin driver.</li> <li>■ <b>DB2</b>. DB@ UDB database.</li> <li>■ <b>DB2-390</b>. DB2 390 database.</li> <li>■ <b>MSSQL</b>. Microsoft SQL Server.</li> <li>■ <b>Teradata</b>. Teradata database.</li> </ul>
Connection String	If you are using... <ul style="list-style-type: none"> <li>■ Oracle (OCI8) use the tnsnames entry.</li> <li>■ Oracle (Thin) use instance name.</li> <li>■ SQL server use the database name.</li> <li>■ DB2-UDB/DB2-390 use the connect string as defined in the DB2 configuration.</li> <li>■ Teradata use the database name.</li> </ul>
Table Owner	Name of table owner.
Password	Password for table owner.
Max Num Connections	Maximum number of database connections this connection pool can contain.  For information about determining how to set this value, see <a href="#">“Determining the Number of Transactional and Data Warehouse Database Connections”</a> on page 167

Table 51. Database Connection Properties

Property	Description
DBHost	Host machine where the database resides. This field is mandatory if you are using Oracle (Thin) or MSSQL but is not required if you are using Oracle (OCI8), DB2, or DB2-390.
Port	Port where the database receives requests. Required for Oracle (Thin) and MSSQL databases. Not required for Oracle (OCI8), DB2, or DB2-390 databases.

## Actions Available

The following actions are available in the top pane toolbar and in the right-click menu when the Database Connections tab is active.

### Test Connection

This command allows you to test the connection to the database. The DAC client will attempt to delegate the test to the DAC server. If the DAC server is not running, you will be asked whether you want to test the connection on the local client machine. The results of a test on the local client machine may not be true for the DAC server environment.

### Internal Tasks

This command allows you to manage internal tasks. The following options are available:

- **Source (Change Capture Tasks)**. Generates internal tasks for performing change capture for Siebel sources only.
- **Data Warehouse (W\_PARAM\_G update, Query Index Creation)**. The supported configuration is one data warehouse for each repository; however, you can create aliases for the same database to be able to filter tasks. To do so, create either of the following tasks for the aliases:
  - Update W\_PARAM\_G. This task updates the W\_PARAM\_G table with the ETL preferences defined in the DAC.
  - Create Query Indexes. If the system preference CreateQueryIndexesAtTheEnd is set to True, then this task will hold the details of all the created query indexes.

## About the DAC Email Recipients Tab

This tab allows you to set up a list of email addresses that will be notified about the status of the ETL process. The top pane displays a list of the properties and their current values. You can edit the property values in the top pane by double-clicking in a cell. For more information about the Email Recipients properties, see [“Configuring Email in the DAC Server \(Optional\)” on page 103](#).

## Actions Available

The following actions are available in the top pane toolbar and in the right-click menu when the Email Recipients tab is active.

### Copy Record

This command creates a copy of the selected record.

## About the DAC Execute View

The Execute View provides access to functionality that allows you to run, schedule, and monitor execution plans.

This section includes the following topics:

- [“About the DAC Execution Plans \(Read Only\) Tab” on page 194](#)
- [“About the DAC Current Run Tab” on page 194](#)
- [“About the DAC Run History Tab” on page 197](#)
- [“About the DAC Scheduler Tab” on page 197](#)
- [“About the DAC Validation Tab” on page 199](#)

## About the DAC Execution Plans (Read Only) Tab

The Execution Plans tab in the Execute view displays, in read-only mode, the available execution plans. This information is the same as that displayed in the Execution Plans tab in the Design view. For more information, see [“About the DAC Execution Plans Tab” on page 173](#).

## About the DAC Current Run Tab

This tab displays a list of queued, running, and failed current ETL processes in the top pane. This list includes comprehensive information about each process.

[Table 52](#) provides a description of the information provided in the top pane.

**NOTE:** Once an ETL process completes, it is accessible from the Run History tab.

Table 52. Current Run Tab Columns

Column	Description
Name	Name of the ETL process
Execution Plan Name	The execution plan whose run-time instance is this record. This field is read only.

Table 52. Current Run Tab Columns

Column	Description
Process ID	ID for the process. This value is an integer that is incremented by 1 for every run. This value is stored as ETL_PROC_WID in all the Data Warehouse tables. This field is read only.
Run Status	Status of the run. The possible values are the following: <ul style="list-style-type: none"> <li>■ Queued. Tasks for which the Depends On tasks are not yet completed. Displayed in yellow in the Current Run list.</li> <li>■ Runnable. Tasks for which the Depends On tasks have completed and are ready to be run but are waiting for an Informatica slot to be available.</li> <li>■ Running. Tasks for which the Depends On tasks have been completed, have gotten an Informatica slot, and are being executed. Displayed in blue.</li> <li>■ Failed. Tasks that were executed but encountered a problem. Displayed in red.</li> <li>■ Stopped. Tasks for which one or more Depends On tasks have failed.</li> <li>■ Completed. All tasks have completed without errors. Displayed in green.</li> </ul>
Total Number of Tasks	Total number of tasks for this run. This field is read only.
Number of Failed Tasks	Sum total of tasks that have failed and that have stopped. This field is read only.
Number of Successful Tasks	Number of tasks whose status is completed. This field is read only.
Number of Tasks Still in Queue	Number of tasks whose prerequisite tasks have not completed, and the number of tasks whose prerequisite tasks are completed and are waiting for resources. This field is read only.
Start Timestamp	Start time of the ETL. Reflects the start time of every ETL attempt. For example, if the ETL fails and is run again, it gets a new start timestamp. The history of attempted runs is maintained in the audit trail for the run. This field is read only.
End Timestamp	End time of the ETL. Reflects the end time of every ETL attempt. For example, if the ETL fails and is run again, it gets a new end timestamp when the ETL is complete. The history of attempted runs is maintained in the audit trail for the run. This field is read only.
Duration	A calculated field that shows the difference between start and end time stamps.
Status Description	Displays messages generated during run time. You can add notes to this field for Completed runs.

Table 53 provides a description of the tabs in the bottom pane.

Table 53. Current Run Subtabs

Tab	Description
Edit	Displays the status of the ETL selected in the top pane.
Description	Provides a description of the ETL process, including status and environment information. This description is updated at the beginning of the ETL process and when the process is complete.
Tasks	<p>Displays run-time instances of the tasks. As the execution proceeds, the tasks are executed based on the dependency rules and some prioritization.</p> <p>As tasks complete, the tasks that depend on the completed tasks are notified and once their dependencies are completed, they become eligible to run. If a task fails, the administrator can address the failure and then requeue the task or mark it as completed. The DAC server polls for any changes in the failed task's detail status. If a failed task detail is queued, the task itself gets back into the ready to run queue and all its dependent tasks get into the queued status.</p> <p>The rules of prioritization are as follows:</p> <ul style="list-style-type: none"> <li>■ Tasks with no dependencies are executed first.</li> <li>■ If a task has failed and has been requeued, it gets the maximum priority.</li> <li>■ Tasks with greater phase priorities are executed next. When several tasks of the same phase are eligible to run, the tasks with greater task priorities are executed next.</li> </ul>
Summary (Read Only)	Provides a summary (based on dynamic SQL) of the ETL selected in the top pane. A start and end time for each phase is included.
Task Details	Provides a execution details about each task associated with the ETL selected in the top pane.
Audit Trail (Read Only)	Provides the history of the ETL selected in the top pane.

## Actions Available

The following actions are available in the top pane toolbar and in the right-click menu when the Current Run tab is active.

### Start

This command restarts the selected ETL, after the ETL has failed, stopped, or been aborted.

**Abort**

This command causes an ETL in progress to abort. All currently running tasks will be aborted. The status of queued tasks and the ETL itself will change to Stopped.

**Auto Refresh**

This command allows you to turn on and off the automatic screen refresh functionality and set the refresh interval.

**Get Log File**

This command fetches the log file for this run from the DAC server and saves it in the ServerLog folder.

**Mark as Completed**

This command changes the status of a stopped or failed ETL to Completed. In the audit trail for this ETL, the status is Marked as Completed. Use this command with caution; it can cause the data warehouse to be inconsistent.

**Analyze Run**

This command saves a description of the run as an HTML file in the Log/Statistics folder.

## About the DAC Run History Tab

The Run History tab displays information about completed ETL processes. The information displayed in the top and bottom panes is the same as in the Current Run tab. For a description of the information displayed in the Run History tab and the actions available, see [“About the DAC Current Run Tab” on page 194](#).

## About the DAC Scheduler Tab

The Scheduler tab allows you to schedule ETL processes to be run either once at a later time or periodically. When you schedule an ETL or make changes to a schedule, the DAC server picks up the information from the DAC client. The DAC server polls the DAC repository for changes periodically at a frequency set in the DAC system properties. For information about DAC system properties, see [“Setting Up DAC System Properties” on page 73](#).

The top pane of the Scheduler tab lists ETL processes that have been scheduled. The bottom pane allows you to schedule an ETL process.

Table 54 provides a description of the information displayed in the top pane list.

Table 54. DAC Scheduler Tab List Columns

Column	Description
Name	User defined name of the schedule.
Execution Plan	Execution plan scheduled.
Recurrence	Indicates how often the schedule will be run.
Inactive	Indicates whether the schedule is active or inactive.

## Actions Available

The following actions are available in the top pane toolbar and in the right-click menu when the Scheduler tab is active.

### Copy Record

This command creates a copy of the selected record.

## Scheduling an ETL

Use this procedure to schedule an ETL in the DAC.

### *To schedule an ETL*

- 1 In the DAC, navigate to the Scheduler tab.  
The current list of schedules appears in the top pane.
- 2 Click New in the top pane toolbar.  
The Edit tab in the bottom pane becomes active.
- 3 Enter a name for the schedule.
- 4 Select an execution plan.
- 5 If you want the schedule to run once, select the Run Only Once check box, and then select a start and end date and time.
- 6 To create a periodic schedule, select a recurrence pattern, and enter the appropriate date and time parameters.
- 7 Click Save.

## About the DAC Validation Tab

The Validation tab allows you to view the results of a validation. The following kinds of validation are available:

- **Resource Validation:** Checks to see if the database connections are validated. This will be checked as a first step of the ETL process. If the database connections are not valid, the ETL will abort. This validation is also available on the DAC client through Setup > Database Connections > Test Connection functionality.
- **Table Validation:** Checks to see if the tables do exist in the database. If the tables do not exist, the ETL will fail. This is not checked during the ETL run. The check also includes verifying the existence of image tables where applicable.
- **Index Validation** checks the following:
  - a If all the columns in the index definition exist on the table in the database.
  - b If the index does exist in the database, the validation compares the index definition and points out the differences.
  - c If there are multiple indices with the same definitions (columns in the same order) for a table.
  - d If there are indices with the number of columns greater than 255.
  - e If '# Include columns' is greater than the number of columns provided in the index column list.
  - f Checks to see if the index column has no columns.
  - g If the number of columns is more than 16. Some databases allow for more than 16 columns. However, the user should inspect the warning and verify its validity.
  - h If an index on a table was created on the database but not defined in the repository. This may cause the ETL process to fail, because all the indices need to be dropped prior to the load, otherwise the bulk loaders may fail.
- **Informatica Workflow Validation:** Verify for the task definitions of type Informatica to match the 'Command for Full Load' and 'Command for Incremental Load' do exist in the Informatica repository. For this validation to work, configure the system preferences 'Main Informatica Repository' to point to the database where the Informatica repository resides with the logical name given to the database under Setup-> Database Connections.
- **Check for circular dependencies:** While defining task dependencies, care should be taken to not to define circular dependencies. For example task A depends on task B, and task B depends on task C, and task C depends on task A. Such occurrences will be identified. If these errors do exist, the ETL will fail.



# 9

## Customizing the Siebel Data Warehouse

This chapter describes concepts and techniques for customizing the Siebel Data Warehouse. It also provides an overview of how incremental Siebel application operational data is captured and how it can be used for adding columns and tables to the Siebel Data Warehouse. It also describes customization techniques using extension tables and Informatica mapping templates.

This information applies only to Siebel Business Analytics Applications versions 7.7 and higher.

**NOTE:** Customization should be done only by those experienced in Informatica and Siebel Business Analytics Applications.

This chapter contains the following topics:

- [Siebel Data Warehouse Customization Scenarios on page 201](#)
- [Siebel Data Warehouse ETL Process Concepts on page 203](#)
- [Standard Templates for Siebel Data Warehouse Customizations on page 209](#)
- [Fact Templates for Siebel Data Warehouse Customizations on page 210](#)
- [Customization Steps for Siebel Data on page 210](#)
- [Siebel Data Warehouse Customization Steps for Non-Siebel Data on page 215](#)

### Siebel Data Warehouse Customization Scenarios

In customizing the Siebel Data Warehouse, various scenarios are available to you based on whether the data source is the Siebel transactional database (OLTP) or data from a non-Siebel source. The matrix in [Figure 15](#) shows categories of customization scenarios. The kinds of customizations available for each category are described in [Table 55](#). For instructions on how to perform the customizations, see [“Customization Steps for Siebel Data” on page 210](#) and [“Siebel Data Warehouse Customization Steps for Non-Siebel Data” on page 215.](#)”

For detailed information about ETL processes and tables, see *Siebel Data Warehouse Data Model Reference*.

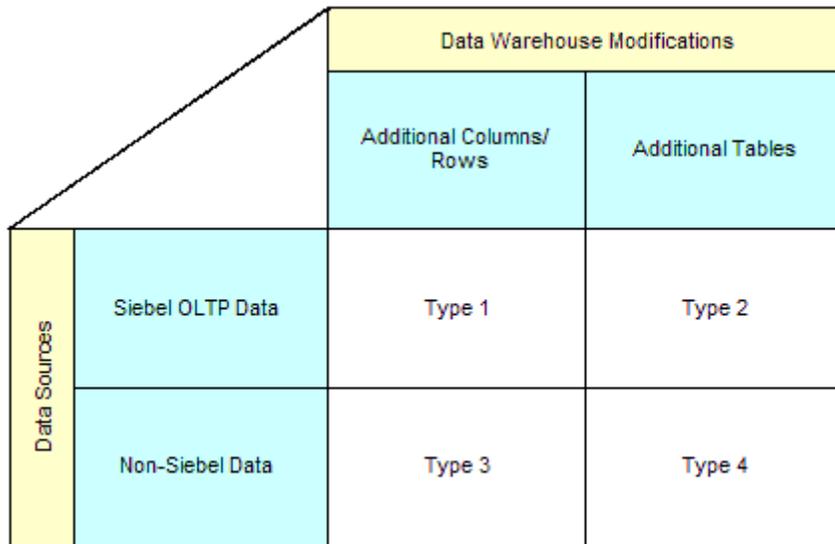


Figure 15. Data Warehouse Customization Scenarios

Table 55. Types of Data Warehouse Customization Scenarios

Type	Modification
Type 1	Add a column to the data warehouse from a primary source table in the Siebel transactional database (OLTP).
	Using Siebel transactional database data, add a column to the data warehouse from a related source table in the transactional database.
	Using Siebel transactional database data, modify an existing column in the data warehouse.
Type 2	Using Siebel transactional database data, add a new dimension table and use it with an existing fact table.
	Using Siebel transactional database data, add a new fact table.
	Using Siebel transactional database data, add a new dimension table for a new fact table.
Type 3	Using non-Siebel data, add new data as a whole row into an existing dimension table.
	Using non-Siebel data, add a column for an existing dimension table.
	Using non-Siebel data, add a column for an existing fact table.

Table 55. Types of Data Warehouse Customization Scenarios

Type	Modification
Type 4	Using non-Siebel data, add a new dimension table.
	Using non-Siebel data, add a new dimension table and use it with an existing fact table.
	Using non-Siebel data, add a new fact table.

## Siebel Data Warehouse ETL Process Concepts

This section includes a detailed description of the ETL process. The following topics are covered:

- [About Siebel Data Warehouse Extension Tables on page 203](#)
- [About the Siebel Data Warehouse DATASRC\\_NUM\\_ID Column on page 205](#)
- [Working with the Custom Folder of the Siebel Data Warehouse on page 205](#)
- [Creating Custom Informatica Workflows on page 205](#)
- [Important Notes About Siebel Data Warehouse Customizations on page 207](#)

### About Siebel Data Warehouse Extension Tables

The extension tables are provided with the Siebel Data Warehouse exclusively to help customize the data warehouse tables.

**CAUTION:** Do not customize existing mappings or the database schema. If you need to customize the standard mappings, create a new mapping that loads the extension table instead.

For every extension table, there is an extension staging table that is populated by the custom SDE process. The custom SIL process sources data from this staging table and populates the final extension table. For information about how to use extension tables, see [“Customization Steps for Siebel Data” on page 210](#) and [“Siebel Data Warehouse Customization Steps for Non-Siebel Data” on page 215](#).

The extension tables have a 1:1 relationship with their corresponding dimension and fact tables.

The data warehouse extension tables are different from the Siebel transactional database extension tables in the following ways:

- Data warehouse extension tables are not maintained by Siebel Tools.
- There is no relationship between data warehouse extension columns and the corresponding transactional database extension columns. For example, attr01 in S\_ORG\_EXT\_X is not the same as attr01 in W\_ORG\_DX.
- Mappings have to be implemented explicitly to populate the extension columns.

## Using the Extension Tables

The extension tables have a 1:1 mapping between the dimension and fact records to the extension records. To insert a record into a dimension or fact table, choose the appropriate column and write a new mapping that uses the ETL server's incremental logic to load the staging table. When populating data from the staging table to the final dimension or fact tables using the INTEGRATION\_ID and the DATASRC\_NUM\_ID, find the primary key of the dimension table and use that as the primary key of the extension table.

## Naming New Extension Tables

When you create a new extension table, use the same naming convention as is used in the Siebel Data Warehouse by adding the prefix WC to the table name, for example, WC\_TABLENAME\_DS. This will simplify future upgrades to the Siebel Data Warehouse.

**NOTE:** If a new table is created, you need to register the table and its indices in the DAC repository. Also, if you modify indices on existing tables, you need to register the indices.

**NOTE:** If you are creating tables on a DB2-UDB database, make sure the Not Logged Initially option is enabled.

## Creating New Dimension or Fact Tables

You can create new tables using the same logic as is used for extension tables.

**CAUTION:** The data in any customized table will face upgrade issues.

If you are creating a new dimension or fact table, use the required system columns that are part of each of the data warehouse tables to maintain consistency and the ability to reference existing table structures. When you create a new table, you need to register the tables and its indices in the DAC repository.

### Required Columns

For main and extension staging tables the following columns are required:

- **INTEGRATION\_ID.** Stores the primary key or the unique identifier of a record as in the source table.
- **DATASRC\_NUM\_ID.** Stores the Data source from which the data is extracted. For example, Siebel OLTP is 1.

For data from any external data source assign a number greater than 1.

For dimension and fact tables, the required columns are the INTEGRATION\_ID and DATASRC\_NUM\_ID columns as well as the following:

- **ROW\_WID.** A sequence number generated during the ETL process, which is used as a unique identifier for the data warehouse.
- **ETL\_PROC\_WID.** Stores the ID of the ETL process information. The details of the ETL process are stored in the S\_ETL\_RUN table on the transactional database (OLTP) side and W\_ETL\_RUN\_S table on the data warehouse side. This is also the Process ID on Current Run/Run History screen in the DAC.

The required columns for dimension and fact extension tables are ROW\_WID and ETL\_PROC\_WID.

## About the Siebel Data Warehouse DATASRC\_NUM\_ID Column

All the tables in the Siebel Data Warehouse schema have DATASRC\_NUM\_ID as part of their unique user key. This means that the rows can be loaded in the same data warehouse tables from different sources if this column is given a different value for each data source.

**NOTE:** The DATASRC\_NUM\_ID value of 1 is reserved for the main Siebel data source and cannot be used for other sources.

## Working with the Custom Folder of the Siebel Data Warehouse

The Siebel Data Warehouse provides a folder within the repository specifically designed for customized changes to an implementation. This folder is named CUSTOM\_DW\_REP. Using the Informatica Designer, make modifications only in the CUSTOM\_DW\_REP folder.

Do not change objects in the SIEBEL\_DW\_REP folder unless it is explicitly mentioned. This folder may be overwritten in future upgrades. All changes should be placed in the CUSTOM\_DW\_REP folder within the Informatica Designer.

The easiest way to modify an object is to copy an existing object from SIEBEL\_DW\_REP into CUSTOM\_DW\_REP and to reuse existing business components, source and target definitions, transformations, mapplets, and mappings before you make any changes.

**NOTE:** If source tables are extended (after copying into the CUSTOM\_DW\_REP folder), then the source tables require manual editing in the Informatica Designer. Do not import the tables from the database, because it changes the source table definitions for the entire Siebel Data Warehouse.

When importing new tables from the database into the CUSTOM\_DW\_REP folder, use the Siebel Data Warehouse and Siebel Transaction Database ODBC database connections to connect to the source and target databases.

After importing new table definitions, change the database type to Oracle in the Informatica repository, regardless of the database platform you are using. This has no effect on the choice of a relational database. This step is very important because in Informatica if the database type of the source tables are not identical, all mappings and workflows that refer to the source tables will be invalid.

## Creating Custom Informatica Workflows

You must create custom workflows for all customized mappings. The general requirements for creating custom workflows are as follows:

- Create the workflow such that each loads only one table. This helps to integrate the workflow with the DAC.
- The workflow name should match a session name that is used inside the workflow. This helps the DAC to collect certain statistics.
- Fail parent if this task fails should be checked for all the sessions within a workflow.
- Fail parent if this task does not run should be checked for all the sessions within a workflow.
- The Stop on Errors parameter should be set to 1 for all sessions with a workflow. This parameter is located in the Error Handling area of the Config Object tab in Informatica Designer.
- Set the appropriate source and target connection values in Informatica Designer.
- If the workflow is going to be used for full load command, you can choose to load in bulk mode (applicable only to Oracle and DB2-UDB databases). If the workflow is going to be used for the full load command in the DAC, then in the Properties tab of Informatica Designer, set the Target Load type to Bulk. This requires that the target table does not have any indices during the load. The DAC will drop the indices automatically; no action is required on your part.
- For all entities, such as dimension and fact tables, create two workflows, one to be used for a full load and the other to be used for an incremental load. This provides an opportunity to tune each of these load scenarios.
- If the workflow is designed for loading a dimension in a full mode, make sure the workflow also includes a session for the unspecified row creation.
- You can decide to truncate the target table in the workflow, but it is necessary that while defining a task in the DAC, you choose appropriate truncate option. This helps the DAC to decide whether to drop and create indices on the table.
- If some sessions have to be run in serial order and if all the sessions need to be rerun upon failure of the workflow, then you should consider designing a single workflow that has sessions run in serial. If upon failure, not all of the sessions need to be run again, then consider designing separate workflows and define dependencies in the DAC.
- Use views created by the DAC as the main source table in all extract processes.
- If a workflow uses a list of values, make it depend on the Fix List Of Values and Copy to OLTP task definition in the DAC.
- If a workflow uses exchange rates, make it depend on the Extract for ExchRate task definition in the DAC.
- If a workflow uses cost lists, make it depend on the Load Cost Lists task definition in the DAC.
- You can import the workflows into the DAC repository's temporary area while defining tasks.

### Customization Categories

There are three categories of customizations:

- **Customizing preconfigured workflows.** Copy the mapping from the Siebel\_DW\_Rep folder into the Custom folder. Modify it as necessary. Create new workflows in the Custom folder. In the DAC, search for the task that executes the workflow and change the folder to the Custom folder. Update the command for full and incremental loads appropriately if the workflow names have been changed.
- **Creating new workflows to populate additional custom entities.** The custom workflows can be plugged into an ETL process by registering them in the DAC. A new task needs to be registered in the DAC, with the appropriate properties set. Also, you must define source and target tables, task definitions, and dependencies. In the Depends On Tasks tab, select the list of tasks that are prerequisite for the current task to execute. In the Dependent Tasks tab, define the tasks that need to wait for the successful completion of this task. Set the Optional flag to True.
- **Pruning preconfigured ETL processes.** Pruning is the process in which you modify a preconfigured execution plan to meet your needs. You can prune an execution plan by using the DAC to inactivate certain components of the execution plan, such as subject areas, table groups, tables, tasks, and dependencies. Inactivating the component means the component does not participate in the ETL process when the execution plan is run. For more information about pruning, see [“Handling ETL Failures with the DAC” on page 160](#).

## Important Notes About Siebel Data Warehouse Customizations

All custom work, unless stated otherwise, must be done in the Custom folder so that the custom work can be preserved during an Informatica repository upgrade. Doing work on the standard folder should be avoided whenever possible. Whenever custom work is done in the standard folder, a careful note of the custom work should be recorded so that the customizations can be reapplied whenever the Informatica repository is upgraded. An upgrade of the Informatica repository overrides any changes to the standard folder.

### Additional Customization Instructions

- **Table definitions in Informatica.** Make sure that the SQL style is set to Oracle while importing the table definitions from external data sources. Even if the actual data source is of another database type, such as DB2 or MSSQL, it does not affect the logic of how data gets loaded.
- **Update strategy.** For loading new fact and dimension tables or loading data into the existing tables, design a custom process on the source side to detect the new and modified records. The SDE process should be designed to load only the changed data (new and modified). If the data is loaded without the incremental process, the data that was previously loaded will be updated again, which is a costly process. For example, the logic in the OTB SIL mappings looks up the destination tables based on the INTEGRATION\_ID and DATASRC\_NUM\_ID and returns the ROW\_WID if the combination exists, in which case it updates the record. If the lookup returns null, it inserts the record instead.
- **ETL process.** When using multiple sources for the data warehouse, you can decide to load from all of them at the same time or at different time frequencies using different execution plans.

- **Truncating target tables.** Truncating should be done through the DAC. A single task has place holders for a full load, and one for an incremental load.
  - For the SDE workflows, the commands for full load and incremental load are the same. They should have Truncate Always flag checked. For these kinds of tasks, the command for full load and incremental load are based on the same mapping.
  - For SIL workflows, the command can be different for full and incremental loads. They should have the Truncate For Full Load option checked. When a table gets truncated, the indices are automatically dropped and created after the data is loaded. And so, the workflow for full load command can have the Bulk Load option turned on, and, therefore, you can have an optimized version of the mapping that does not need to look up for finding if a record needs to be inserted or updated.
  - Auxiliary tasks need to be run only during incremental mode. So, for these tasks, the full load command is empty. No truncate options should be set.

	SDE Sessions	SIL Sessions	Aux Sessions
<b>Truncate Option</b>	Truncate Always	Truncate for Full Load	None

- **ETL\_PROC\_WID.** Use the same ETL\_PROC\_WID in W\_PARAM\_G table in custom mappings. ETL\_PROC\_WID is a reference key to Run History in the DAC. To use the same ETL\_PROC\_WID, copy the reusable lookup (called LKP\_ETL\_PROC\_WID) defined in the Siebel\_DW\_Rep folder. The input to the lookup is a constant (hard coded to 1).
- **DATASRC\_NUM\_ID.** Even though preconfigured mappings look up W\_PARAM\_G for getting this value, for customizations that move data from other sources, you should hard code the value with a number other than 1, which is reserved for the main Siebel transaction database in custom mappings.
- **Creating indices and naming conventions.** Staging tables typically do not require any indices. Use care to determine if indices are required on staging tables. Create indices on all the columns that the ETL will use for dimensions and facts (for example, ROW\_WIDs of Dimensions and Facts, INTEGRATION\_ID and DATASRC\_NUM\_ID, and flags). Carefully consider which columns or combination of columns filter conditions should exist, and define indices to improve query performance. Inspect the OTB objects for guidance. Name all the newly created tables as WC\_. This helps visually isolate the new tables from the OTB tables. Keep good documentation of the customizations done; this helps when upgrading your data warehouse. Once the indices are decided upon, they should be registered in the DAC, either manually or by right-clicking on the certain table and invoking the Import Indices command.
- **Currency.** For currency-related data, populate the table with the base currency and exchange date field (in order to convert the data appropriately). The data for currency conversion should be maintained in the main Siebel data source. (The currency data is maintained by converting all the currency information into a single Base Currency code specified in the DAC ETL preferences.)
- **Day Dimension.** For the data that is related to W\_DAY\_D, use the reusable transformation EXP\_DAY\_DIMENSION\_FK\_RESOLUTION. Note that this transformation will take a date as input and return the foreign key to the Day dimension as output in the appropriate format (YYYYMMDD). Copy the reusable transformation and use it.

- **List Of Values.** This applies in particular to Type 1 and 2. The preconfigured columns that depend on a list of values have a language-dependent column and language-independent column. Use the mapplet MPLT\_LOV\_TRANSLATION to populate the language-dependent and independent columns in the dimension tables. For fact tables, use MPLT\_LOV\_D\_ROW\_WID to create a new foreign key to the LOV dimension. One could also deal with translations directly in SQL overrides to improve performance.

## Standard Templates for Siebel Data Warehouse Customizations

This section describes the standard templates.

### CustomTemplateSDE\_WaveDimension

Using the SDE mapping, the ATTRIB\_02 column of the extension stage table (W\_PERSON\_DSX) is populated with the value from S\_CONTACT.RACE source column. This is a straightforward mapping. The different transformations are the following:

- **SQL\_S\_CONTACT.** The SQL in the SQL override section contains the link to the view created by the DAC so that only the incremental data is captured.
- **EXPTRANS.** The lookup (LKP\_DATASOURCE\_NUM\_ID) obtains the DATASOURCE\_NUM\_ID from the W\_PARAM\_G table. The W\_PARAM\_G is populated in the beginning of the ETL by the DAC. Note that all the system columns are populated in addition to the attrib column. The ATTRIB\_01 column is populated with the string Contact, because the combination of INTEGRATION\_ID, DATASOURCE\_NUM\_ID, and CONTACT\_TYPE is used to look up the ROW\_WID value. In most of the dimensions, only the INTEGRATION\_ID and DATASOURCE\_NUM\_ID values are used for this purpose.

### CustomTemplateSIL\_WaveDimension

Using the SIL mapping, the ATTRIB\_02 column of the final extension table is populated with the person dimension (W\_WAVE\_DX). The different transformations are the following:

- **SQL\_W\_WAVE\_DSX.** There is no SQL in the override. It is a straight query from W\_PERSON\_DSX table that has been populated with incremental rows.
- **LKP\_W\_WAVE\_D.** Looks up the W\_WAVE\_D table to get the ROW\_WID for the row.
- **LKP\_W\_WAVE\_DX.** Looks up the target table to find out whether to insert or update the row. This information is used by the update strategy.
- **EXPTRANS.** Used to get the Insert/Update flag and ETL\_PROC\_WID by using the lookup LKP\_ETL\_PROC\_WID from the W\_PARAM\_G table. This table is populated in the beginning of the Refresh Siebel DW session.
- **FILTRANS.** Passing only those rows that have entry in the parent dimension table.
- **UPDTRANS.** Insert or updates a row based on the flag.

## Fact Templates for Siebel Data Warehouse Customizations

This template shows how to attach an existing dimension (account dimension) to a fact (asset fact).

### CustomTemplateSDE\_AssetFact

Using this SDE mapping, the staging extension table for the Asset fact is populated with incremental data. The different transformations are the following:

- **SO\_S\_ASSET.** Selects the OWNER\_ACCNT\_ID that will ultimately be used to join with the account dimension in the fact. Note the extra *where* clause joining to the incremental image table.
- **EXPTRANS.** Gets DATASOURCE\_NUM\_ID using lookup LKP\_DATA\_SOURCE\_NUM\_ID from table W\_PARAM\_G. This table is populated in the beginning of the session by the DAC server.

Finally, the FK\_01\_ID field of the extension stage table W\_ASSET\_FSX is populated. All the system columns are also populated.

### CustomTemplateSIL\_AssetFact

This SIL map is used to populate the final extension table for the Asset fact. The different transformations are the following:

- **SO\_W\_ASSET\_FSX.** Note the SQL in the override. This joins with the dimension table W\_ACCOUNT\_D to get the ROW\_WID of the dimension row to be populated in the foreign key id column of the extension table.
- **LKP\_W\_ASSET\_F.** Retrieves the ROW\_WID of the parent fact table W\_ASSET\_F.
- **LKP\_W\_ASSET\_FX.** Gets the Insert/Update flag that is used by the update strategy to find out whether to insert or update this row.
- **EXPTRANS.** Gets ETL\_PROC\_WID using the lookup LKP\_ETL\_PROC\_WID from table W\_PARAM\_G. This table gets populated in the beginning of Refresh Siebel DW. Also generates Insert/Update flag based on the previous transform LKP\_W\_ASSET\_FSX.
- **UPDTRAN.** Updates or inserts a row based on the flag.

## Customization Steps for Siebel Data

This section includes information about adding columns and tables to the Siebel Data Warehouse using data from the Siebel transactional database (OLTP). It includes the following topics:

- [“Adding a Column from a Main Source Table in the Siebel Transactional Database” on page 211](#)
- [“Adding a Column from a Related Source Table in the Siebel Transactional Database” on page 211](#)
- [“Including a Source Table for Change Capture Process” on page 212](#)
- [“Modifying an Existing Column in the Siebel Data Warehouse” on page 213](#)

- [“Adding a New Dimension in the Siebel Data Warehouse” on page 213](#)
- [“Adding a New Fact Table in the Siebel Data Warehouse” on page 214](#)
- [“Adding a New Dimension Table for a New Fact Table in the Siebel Data Warehouse” on page 215](#)

## Adding a Column from a Main Source Table in the Siebel Transactional Database

Example:

- Adding *race* in *W\_PERSON\_D* because it is not in the supplied model. The value of *race* is sourced from *S\_CONTACT*, which is already the main source table for *W\_PERSON\_D*.
- Adding measure *XYZ* in *W\_ORDERITEM\_F* because it is not in the supplied model. The value of *XYZ* comes from *S\_ORDERITEM*, which is the main source table for *W\_ORDERITEM\_F*.

### *To add a column from a main source table in the Siebel transactional database*

- 1 Choose one of the following options:
  - Use predefined columns in an existing extension table.
  - Create a new extension table with appropriate columns.
- 2 Create a new map (SDE and SIL) to load the extension table column, based on the provided templates (CustomTemplateSDE\_PersonDimension).
- 3 Create new individual workflows for the new mappings in the Custom folder.
- 4 For extract mappings (SDE), use views as the main source of information.
- 5 Create new tasks in the DAC repository, one for SDE and the other for SIL.
- 6 Make the SDE task depend on any auxiliary workflows, so that it waits for all the auxiliary processing for the base table to complete.
- 7 For the CustomSIL mapping make SDE mapping and the SIL\_PersonDimension as the Depends On tasks. This is because you cannot execute CustomSIL workflow until the CustomExtract is completed. Also, because the primary key lookup has to be performed, this task needs to wait on SIL\_PersonDimension.

## Adding a Column from a Related Source Table in the Siebel Transactional Database

- Adding *ABC* in *W\_PERSON\_D* because it is not in the supplied model. The value of *ABC* is sourced from *S\_CONTACT\_X*, which is not the main source table for *W\_PERSON\_D*.
- Adding measure *XYZ* in *W\_ORDERITEM\_F* because it is not in the supplied model. The value of *XYZ* comes from *S\_DOC\_ORDER*, which is not the main source table for *W\_ORDERITEM\_F*.

*To add a column from a related source table in the Siebel transactional database*

- 1 Choose one of the following options:
  - Use predefined columns in an existing extension table
  - Create a new extension table with appropriate columns.
- 2 Create new mappings and workflows (SDE and SIL) to load the extension table column based on the provided templates. The related table should be joined in the Source Qualifier's SQL. Even though additional information is being extracted from a related table in the SQL override, always use the view created on the base table to extract information.
- 3 If necessary (for the new table), write the auxiliary change capture mappings so that whenever a row changes in the source table for the new column, the corresponding row in the main table is also marked changed, by inserting rows in the Incremental Row Image table.
- 4 Create a new workflow for the new map and register the task in the DAC repository. Create the dependencies.

## Including a Source Table for Change Capture Process

This procedure applies to Siebel source tables only.

*To include a source table for the change capture process*

- 1 Verify whether the source table is registered in the DAC.
  - a If an entry is not in the DAC, create a new record for the table and assign an image suffix to it.
  - b If the table is registered, make sure there is an image suffix assigned for this table.
- 2 If an image suffix does not exist for the source table, assign one.
 

The image suffix should be three characters long. The recommended naming convention is to start with C. For example, use C1, C2, CA1, CA2, and so on.
- 3 Make sure the image suffix is not used by other tables by querying the tables list in the DAC for that image suffix.
 

The DAC client does not validate this information when entering data.
- 4 Create Image tables in the Siebel transactional database (OLTP).
  - a Right-click on the table record in the DAC client, and choose Generate Change Capture Scripts.
 

This will assist you in creating the image tables, necessary indices, and triggers if you plan on tracking deletes on the transactional database.
  - b Execute these scripts on the transactional database if you have the appropriate permission, otherwise ask the OLTP DBA to create it.
- 5 For the task that is created for the extract process, set the Build Image flag to True and select the new table as an auxiliary table or primary table.

**NOTE:** At the end of the change capture process, the DAC creates a view on the actual source table. Use this view as the main source table in all the extract procedures.

## Modifying an Existing Column in the Siebel Data Warehouse

- Modifying *Full Name* in W\_PERSON\_D with a name in a different format.
- Modifying *Tax Total* and *XYZ* in W\_ORDERITEM\_F with different tax calculation logic.

### *To modify an existing column in the data warehouse*

- 1 Do not modify the existing column.
- 2 Use extension table columns for the new value.
- 3 Refer to the steps for adding an extra column.

## Adding a New Dimension in the Siebel Data Warehouse

- Adding a new custom dimension WC\_NEWDIM\_D and linking it to W\_REVN\_F.

Reference:

- SDE and SIL\_WaveDimension, SDE and SIL\_AssetFact

### *To add a new dimension and use it with an existing fact table*

- 1 Create a DDL for the new dimension based on the standard structure (with appropriate system columns). Create a staging table for this dimension.
- 2 Register the new source table (if it does not already exist) in the DAC repository and associate it with the appropriate database connection.
- 3 Assign it an image suffix if you plan on incrementally loading this table.
- 4 Create a new custom map SDE\_XYZ to populate the dimension stage. Instead of the actual source table (for example S\_ABC), use the view that will be generated by the change capture process (for example V\_ABC) in the SQL so that it extracts only the incremental data. Use existing reference maps as examples of how to populate the system columns. Make sure you truncate the stage table in corresponding tasks.
- 5 Create a new custom map SIL\_XYZ to populate the new dimension from the stage table. Use the above referenced map as example for how to populate the system columns.
- 6 Make the following changes to the fact-loading mapping to link the new dimension:

Do one of the following:

- Use the extension table's predefined fact table foreign keys that join to this new dimension. (In the above example, the extension table for W\_REVN\_F must be used to store the foreign key of this new dimension.)
- Create a new extension table for the fact table with predefined structure to hold a new foreign key, if the foreign keys in existing the extension table have been exhausted.

- Create new mappings (SDE and SIL) to populate the extension table columns of the fact extension table.
- 7 Register the new dimension table in the DAC and associate it with the appropriate database connection.  
  
If you are planning to build a new dimension incrementally, assign an image suffix to the source table. For instructions, see [“Adding a Column from a Related Source Table in the Siebel Transactional Database”](#) on page 211.
- 8 Add the new dimension to all the fact groups that may reference it.
- 9 Register the workflows as tasks in the DAC.
- 10 For SDE mapping of the dimension make sure you set the Build Image flag to True, and the Truncate Always option to True. And in the list of source tables, mark the primary/auxiliary source(s) of this dimension.
- 11 For SIL workflows of the dimension make sure you set only Truncate for Full Load option to True.
- 12 Make SIL\_XYZ depend on SDE\_XYZ.
- 13 Make CustomSIL\_RevenueFact depend on load dimension task (SIL\_XYZ) and load base fact task (SIL\_RevenueFact).

## Adding a New Fact Table in the Siebel Data Warehouse

- Creating a new custom WC\_PROJECT\_F by sourcing data from S\_XYZ table.

Reference:

- SDE and SIL\_AssetFact.

### *To add a new fact table*

- 1 Create a DDL for the new fact based on the standard structure (with appropriate system columns). Create a staging table for this fact.
- 2 Register the new source table (if it does not already exist) in the DAC repository and associate it with a database connection.
- 3 Assign it an image suffix.
- 4 Create the change capture tables by right-clicking and selecting Generate Change Capture Scripts. For instructions, see [“Including a Source Table for Change Capture Process”](#) on page 212.
- 5 Create SDE mappings to populate the custom stage table. Use the view created by change capture as the main table in the SQL so that it extracts only the incremental data. Use the reference maps (above) as examples of how to populate the system columns. Be sure to truncate the stage table in corresponding workflows.
- 6 Create SIL mapping to populate the custom fact table. Use reference maps as examples of how to populate the system columns.

- 7 Use lookups or SQL override joins to dimension tables for populating dimension foreign keys (ROW\_WIDS) pointing to the existing dimension.
- 8 In the DAC, register the target tables.
- 9 Because this is a fact table, create a new table group with this fact table as the main table.
- 10 Associate the fact table to the group with the relationship as Self.
- 11 Associate all the dimension tables.
- 12 Add the newly created group to the appropriate subject area.
- 13 Create new tasks for the workflows.
- 14 For the SDE task, make sure you have the Build Image flag set to True, and list all the source tables that it queries from. Choose one or more tables as primary or auxiliary. For the target tables choose the staging table. Set the Truncate Always flag to True.
- 15 For the SIL task, list all the dimensions that will be required under source tables, and make it depend on the SDE task of the custom fact table and SIL tasks of all the dimension tables.

## Adding a New Dimension Table for a New Fact Table in the Siebel Data Warehouse

- Adding a new custom dimension WC\_NEWDIM\_D and linking it to new custom WC\_BKLOG\_F fact table.

The steps for creating a new dimension table are similar to the steps for incremental change capture.

### *To add a new dimension table for a new fact table*

- 1 In the new custom fact loading mapping (SIL), use lookups for getting foreign keys to the new dimension.
- 2 Use existing maps as examples.

## Siebel Data Warehouse Customization Steps for Non-Siebel Data

This section includes information about adding non-Siebel data to the data warehouse. It includes the following topics:

- [“Adding New Data as a Whole Row into the Standard Dimension Table in Siebel Data Warehouse” on page 216](#)
- [“Adding New Data as a Whole Row into the Standard Fact Table in Siebel Data Warehouse” on page 218](#)
- [“Adding a Column in a Standard Dimension Table in Siebel Data Warehouse” on page 223](#)
- [“Adding a Column for a Standard Fact Table in Siebel Data Warehouse” on page 224](#)

- [“Building a Custom Dimension Table from External Sources in Siebel Data Warehouse” on page 225](#)
- [“Linking the Custom Dimension to a Standard Fact Table in Siebel Data Warehouse” on page 225](#)
- [“Building Custom Fact Tables from External Sources in Siebel Data Warehouse” on page 226](#)

## Adding New Data as a Whole Row into the Standard Dimension Table in Siebel Data Warehouse

Example: Loading Contact Data From an External Source

- New DDLs: None
- New Mappings: SDE Mappings for dimensions, SDE and SIL mappings for related fact tables
- Case: Bringing data into dimension tables
- Reference Mappings: SDE and SIL\_WaveDimension mappings

### *To add new data as a whole row into the standard dimension table*

- 1 Identify and understand the existing structure of staging tables. Refer to *Siebel Data Warehouse Data Model Reference* for the table structure. Non-system columns can include the null value.
- 2 Create a custom SDE mapping to load the data into the staging table in the Custom\_DW\_Folder for this purpose. The staging table needs to be populated with incremental data (rows that have been added or changed since the last Refresh ETL process), for performance reasons.
- 3 Populate the INTEGRATION\_ID column with the unique identifier for the record.

The combination of INTEGRATION\_ID and DATASRC\_NUM\_ID is unique. When importing the data, make sure that a unique identifier for the external data source is inserted in the DATASRC\_NUM\_ID column. The DATASRC\_NUM\_ID is set to 1 for mappings that source data from the Siebel transactional database. This is a reserved value and is used in all standard mappings. For example, a value of 2 can be defined for DATASRC\_NUM\_ID in the custom SDE mapping. The standard SDE mappings populate the INTEGRATION\_ID column of the dimension staging table (used for resolving the dimension's Siebel transactional database ROW\_ID value). The custom process must be used to populate the same column with a unique identifier from the external data source.

- 4 After the data is populated in the staging table, use the standard SIL mappings to populate the dimension target tables.
- 5 Use one data source per dimension.

This is a best practice. To consolidate data for a dimension row from multiple data sources, complete that process prior to the custom SDE mapping process. For example, to consolidate contacts from Siebel and Peoplesoft applications, complete the consolidation process (including removing duplicates, cleansing, and so on) before loading the contact list into the Siebel staging table.

- 6 Modify the SDE and SIL mappings of all the related fact tables (fact tables that need to be linked to this dimension).

The custom fact SDE mappings must populate the foreign key column of the changed dimension (using a custom map table process to convert from Siebel's row IDs to the external data source row IDs). The custom SIL mapping should be modified to use the appropriate DATASRC\_NUM\_ID, because the standard SIL mappings assume DATASRC\_NUM\_ID for the dimensions are the same as the fact table's DATASRC\_NUM\_ID.

It is very important to decide when the data is going to be loaded. If it is going to be loaded along with the Siebel source data, you must be careful with how you handle failure recovery. The preconfigured workflows truncate the target staging table prior to loading. Upon failure, when the DAC server restarts the task, all the data is truncated and all the data is loaded again.

If the data from the external source gets loaded into the same staging table, be careful with how you handle this situation, since you cannot use the truncate table functionality. The data migrating into the staging table is not incrementally loaded, and, therefore, should be cleaned up prior to attempting to load this table again.

In such a case, it is recommended that you encapsulate the extract part from both the sources inside an Informatica workflow. Upon failure of either of the extracts, the whole workflow gets rerun. Note that the data from both the sources should be run at the same time, all the time.

If it is decided that the data is going to be loaded at different time frequencies, then the new SDE workflows need not depend on the preconfigured SDE workflows and can use the Truncate Table option for failure recovery. In this case, in the DAC Design view, define a new execution plan in the Execution Plans tab, and define the new data source in the Database Connections subtab. Make sure the shared SIL process depends on the SDE processes from both sources.

Figure 16 provides a graphical representation of this process.

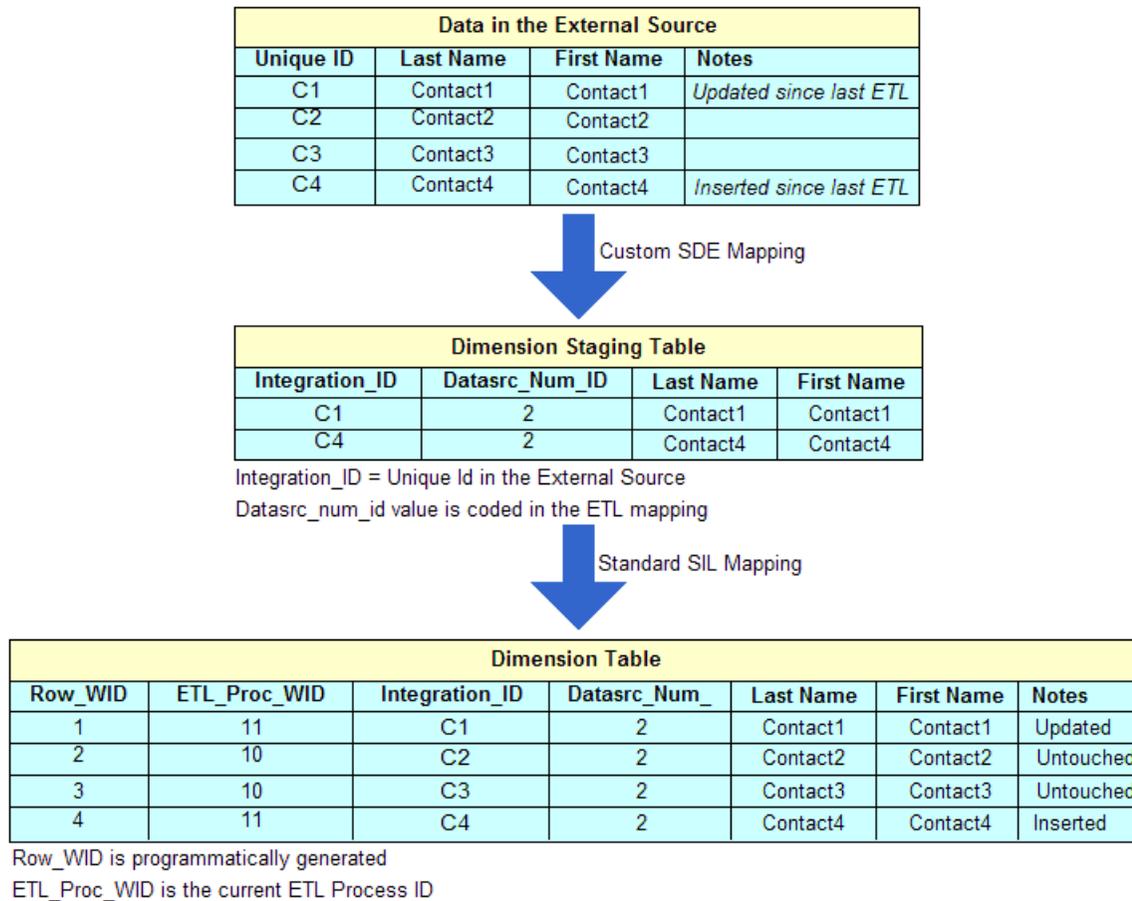


Figure 16. Adding New Data as a Whole Row into the Standard Dimension Table

## Adding New Data as a Whole Row into the Standard Fact Table in Siebel Data Warehouse

Example: Bringing in activity data from external sources.

- New DDLs: None
- New Mappings: SDE and SIL mappings
- Case: Bringing data into fact tables.
- Reference: SDE and SIL\_AssetFact

### *To add new data as a whole row into a standard fact table*

- 1 Identify and understand the existing structure of staging tables. Refer to *Siebel Data Warehouse Data Model Reference* for the table structure.

Fact tables contain foreign keys to existing dimension tables. These dimensional key columns in the fact table need to be populated with the correct ROW\_WID values from the dimension tables. For dimensions that are populated with Siebel data, identify the correct ROW\_WID by looking up the INTEGRATION\_ID in the dimension table. For example, to load Order Item details from SAP, the Order Item Fact staging table has the PROD\_ID column that needs to be resolved from the main Siebel data source. Looking up the ROW\_WID of the S\_PROD\_INT table later resolves the foreign key to product dimension.

- 2 Develop custom SIL mappings to handle the specific situation required. The reference SIL mapping can be copied to the Custom folder and customized for specific requirements. If the SIL mappings were copied as a base from the standard folder, it is possible to leverage the existing logic for ROW\_WID generation, update strategy, and so on. It may be easier to trim an existing SIL mapping than to create a new one. Apply discretion in creating a custom SIL mapping.
- 3 While joining with the dimensions in the SIL process, use the DATASOURCE\_NUM\_ID and INTEGRATION\_ID to resolve foreign key values. Note that for dimensions populated entirely from Siebel, DATASOURCE\_NUM\_ID will be 1.
- 4 For the dimensions populated entirely from other external sources, use the appropriate DATASRC\_NUM\_ID (not 1) and the corresponding INTEGRATION\_ID. This needs to be hard coded in the custom mapping.
- 5 Use an update strategy that would update the existing records and insert new ones. Inspect SDE and SIL mappings provided as reference to understanding the programmatic logic.
  - **Scenario 1.** All the dimensions get data from the external source as the fact table. In this case it is not necessary to change the existing standard SIL mappings. The standard SIL process assumes that the dimension rows that a fact needs to join are from the same data source as the fact rows. (See [Figure 17](#) for an example.)

- **Scenario 2.** Some dimensions are populated from external sources and some from the Siebel transactional database. In this case, standard SIL mappings need to be modified so that the appropriate DATASRC\_NUM\_ID is used when joining to a dimension table. This scenario needs to be custom designed and developed. As in any customization, it will require ongoing maintenance. (See [Figure 18](#) for an example.) Copy the mapping over to the Custom folder and do the modifications. Create a workflow that points to the mapping in the Custom folder. In the DAC repository, search for the task that uses this workflow as a command and change the folder to Custom folder. Change the name as necessary.

**NOTE:** Changing the standard mapping is an exception. It is important to document changes as updates to standard mapping will be lost during the Informatica repository process. Reapply changes to the standard mappings after the upgrade process. Prior to modifying copy the mapping as-is from OTB folder to the Custom folder, and make changes in the Custom folder. In the DAC repository, find the task that is using the workflow name and change the folder to point to the Custom folder. Adding new data as a whole row into the standard Fact table: Scenario 1.

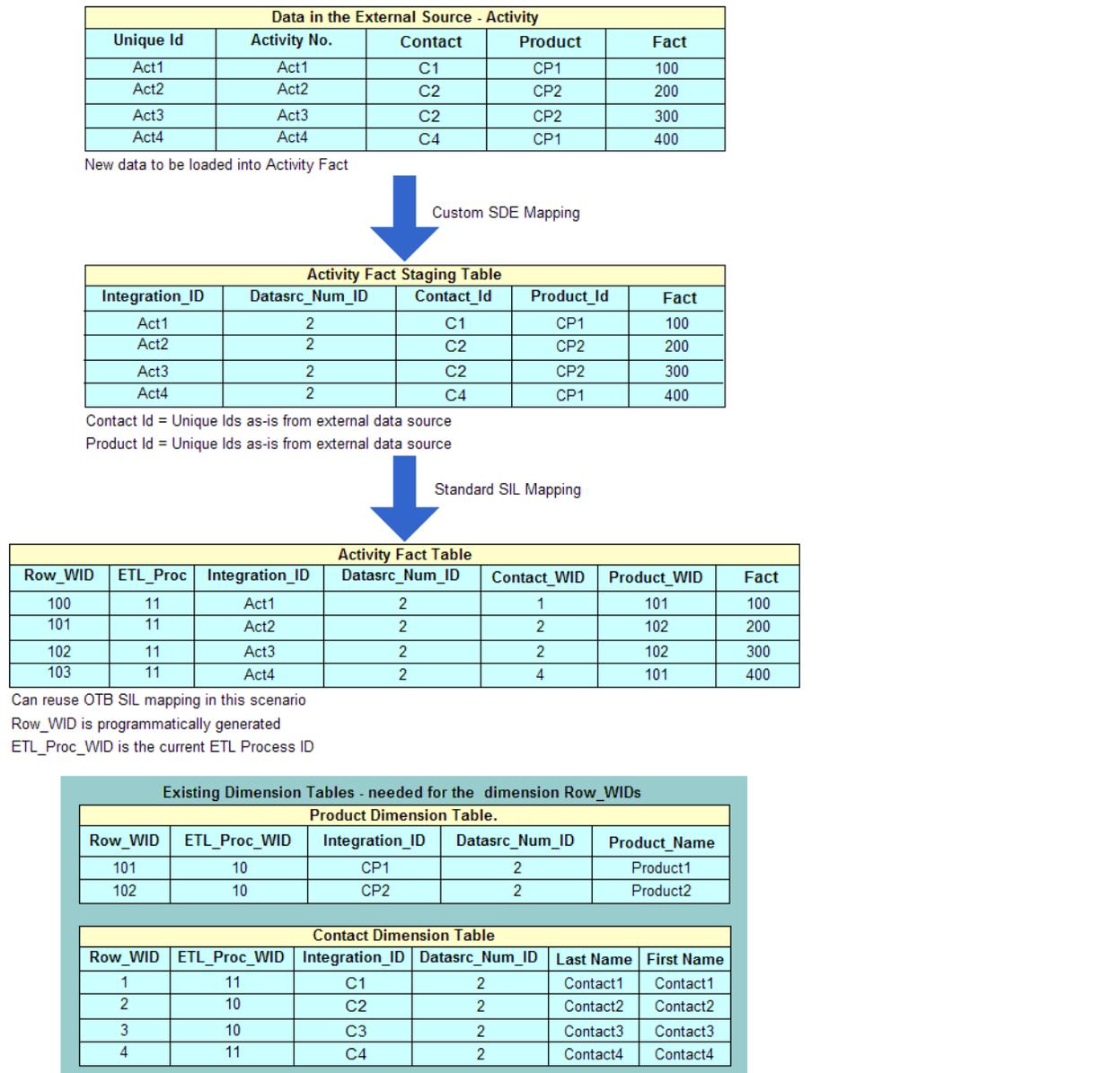


Figure 17. Adding New Data as a Whole Row into the Standard Fact Table - Scenario 1

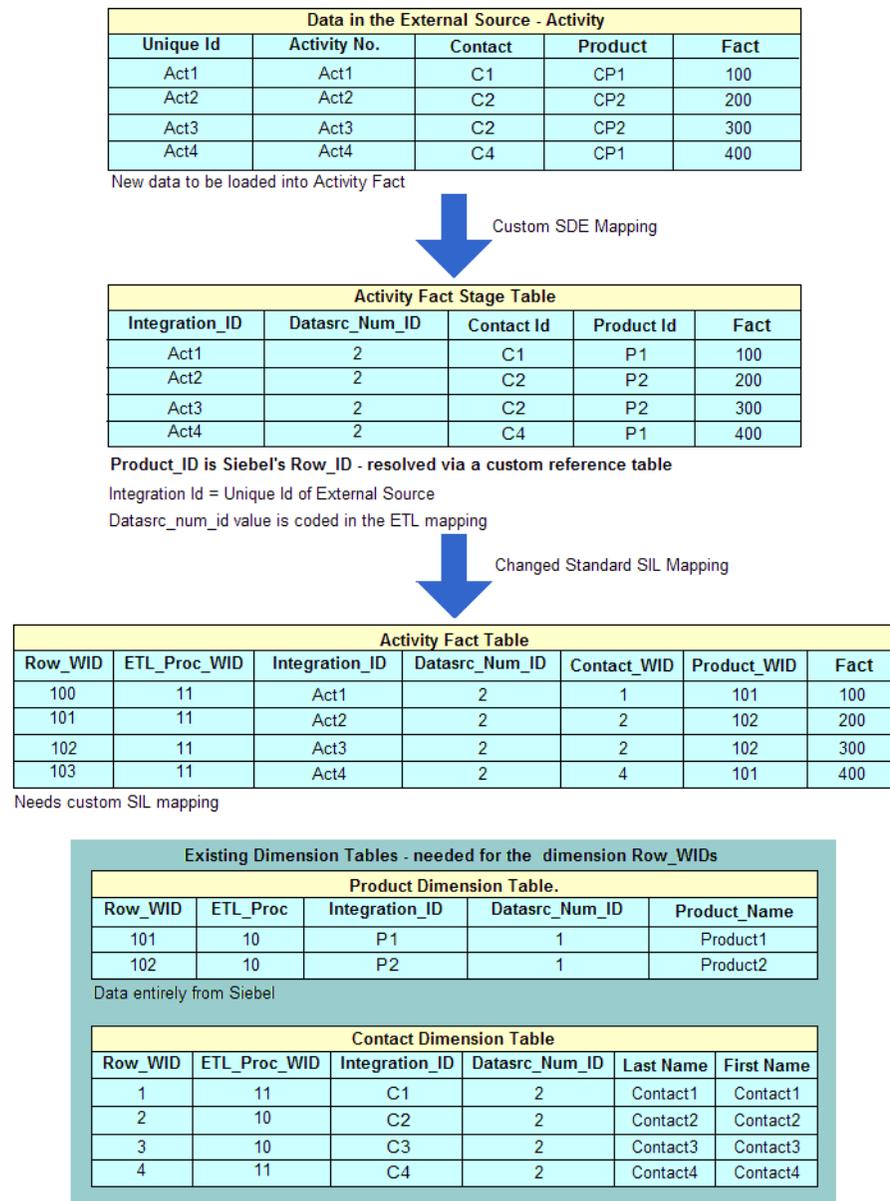


Figure 18. Adding New Data as a Whole Row into the Standard Fact Table - Scenario 2

In [Figure 18](#), because the contact data and product data are from different data sources, it is necessary to modify the SIL session and the SQL override in the following manner:

```
SELECT
    ACT. INTEGRATION_ID,
    P. ROW_WID,
```

```
C. ROW_WID
FROM
  W_ACTIVITY_FS ACT,
  W_CONTACT_DIM C,
  W_PRODUCT_DIM P
WHERE
  ACT.PRODUCT_ID = P.INTEGRATION_ID
  AND P.DATASRC_NUM_ID = 1 /* Product is from Siebel Source having datasrc_num_id
  = 1
In dimension */
  AND ACT.CONTACT_ID = C.INTEGRATION_ID
  AND ACT.DATASRC_NUM_ID = C.DATASRC_NUM_ID
/* The rows in Contact dimension that the fact refer to are from the same external
datasrc, 2 */
```

## Adding a Column in a Standard Dimension Table in Siebel Data Warehouse

Example: Loading an attribute called SKU for existing products that have already been loaded.

- New DDLs: New extension tables or preconfigured extension tables
- New Mappings: SDE and SIL mappings for extension tables
- Case: Bringing data in for dimension tables
- Reference: CustomTemplateSDE and SIL\_WaveDimension in Custom\_DW\_Folder

### *To add a column in a standard dimension table*

- 1 Add a column either in the standard or custom extension tables. There should be a 1:1 relationship with the parent table. Do not modify the standard tables, because doing so will affect upgrades.
- 2 The custom stage table should be populated with incremental data. This is an important performance consideration. It requires a process on the source side that detects new or modified records. This allows custom SDE mappings to process incremental data during each Refresh ETL execution.

- 3 While populating the extension table, design lookups (or write SQL overrides) for the SQL Qualifier Transformation in the Informatica mapping to identify the primary key (ROW\_WID) of the parent row for the additional attribute. The primary key (ROW\_WID) of the parent row is then used as the primary key (ROW\_WID) of the extension table. Template mappings are provided in the CUSTOM\_DW\_REP folder (for example, CustomTemplateSDE\_WaveDimension').
- 4 The custom SDE mappings should populate the stage extension tables (standard or custom). The custom extension table for staging should include the INTEGRATION\_ID and DATASRC\_NUM\_ID. This combination enables the unique identification for each row by the data source. The data for this INTEGRATION\_ID column should be populated by a process that identifies such an ID from the parent data source. The DATASRC\_NUM\_ID column should have the same value of the DATASRC\_NUM\_ID of the parent it is extending.
- 5 Once stage data is populated, a custom SIL mapping can be developed to move data from the extension stage to the extension table (of either the factor dimension table). The process should contain a look up either based on the INTEGRATION\_ID and DATASRC\_NUM\_ID to find the ROW\_WID for the extension table from the parent fact/dimension table. For an example, refer to CustomTemplateSIL\_WaveDimension.
- 6 If there are rows for which there is no matching ROW\_WID in the parent tables, they should be ignored. Use the appropriate update strategy for modifying existing data.
- 7 Make the custom SIL process depend on the custom SDE process and SIL process of the dimension table you are extending, because this mapping will require the borrowing of the foreign key for the link.

## Adding a Column for a Standard Fact Table in Siebel Data Warehouse

Example: Loading shipping order information into the data warehouse.

- New DDLs: Custom or standard extension tables.
- New Mappings: SDE and SIL mappings.
- Case: Bringing data in for fact tables.
- Reference: CustomSDE and SIL\_AssetFact in Custom\_DW\_Folder.

### *To add a column for a standard fact table*

- 1 Follow the steps in [“Adding a Column in a Standard Dimension Table in Siebel Data Warehouse” on page 223](#).
- 2 Use the CustomTemplateSDE\_AssetFact, and CustomTemplateSIL\_AssetFact as examples.  
If the additional columns include foreign keys to dimension tables, consider the following:
  - While joining with the dimensions in the SIL process, use the DATASRC\_NUM\_ID as 1 for the dimensions that have only data from the main Siebel source and join based on INTEGRATION\_ID.

- For the dimensions that have only data from external sources use the appropriate DATASRC\_NUM\_ID and the corresponding INTEGRATION\_ID.
- Use the appropriate update strategy to change and insert rows.
- 3 Quite likely the SDE process for this will not depend on anything else.
- 4 Make the Custom SIL process to depend on its custom SDE process and SIL process of the fact table you are extending.

## Building a Custom Dimension Table from External Sources in Siebel Data Warehouse

- New DDLs: New staging and new dimension tables.
- New Mappings: Dimension SDE and SIL mappings.
- Case: Loading data for custom dimension tables.
- Reference: SDE and SIL\_WaveDimension in Siebel\_DW\_Folder.

### *To build a custom dimension table from external sources*

- 1 Follow the steps in [“Adding a New Dimension Table for a New Fact Table in the Siebel Data Warehouse” on page 215](#). Use a different DATASRC\_NUM\_ID while populating the staging table.
- 2 Populate the custom table with incremental data. This is an important performance consideration that requires a process on the source side that detects new or modified records.
- 3 Make sure the SIL process takes care of the update strategy when loading data incrementally. Look for examples of how it is done by inspecting any of the SIL mappings in the standard repository like SIL\_WaveDimension.
- 4 In the DAC, make the SIL process depend on SDE process for this custom table.
- 5 Register the table.
- 6 Add it to appropriate table groups.

## Linking the Custom Dimension to a Standard Fact Table in Siebel Data Warehouse

- New DDLs: New fact extension tables or standard fact extension tables
- New Mappings: Fact SDE and SIL mappings
- Case: Loading data for fact tables that reference the new custom dimension tables
- Reference: CustomSDE and SIL\_AssetFact in Custom\_DW\_Folder

### *To link the custom dimension to a standard fact table*

- 1 Extend the fact tables by creating or using fact extension tables.
- 2 A custom SDE mapping has to be designed to populate the additional foreign key column in the extension stage table. Make sure that the dimensions ID in the fact staging is the same as the integration of the custom dimension. This may require some preprocessing.
- 3 A custom SIL process loads data from the staging table to the fact extension table.
- 4 Develop the SQL override for populating the fact extension table to extract foreign keys for the new dimension table. Specifically, write the query to extract the ROW\_WID of the custom dimension table using INTEGRATION\_ID and DATASRC\_NUM\_ID of the dimension in combination.
- 5 Ignore the rows for which there is not a matching ROW\_WID value.
- 6 In the DAC, register the SDE and SIL tasks. Make the SIL mapping depend on its corresponding SDE mapping and the SIL mapping of the base fact table.
- 7 Add the custom dimension to the fact table group.

## Building Custom Fact Tables from External Sources in Siebel Data Warehouse

- New DDLs: New staging and new fact tables
- New Mappings: SDE and SIL mappings
- Case: Loading data for new fact tables
- Reference: SDE and SIL\_AssetFact from Siebel\_DW\_Rep Folder

### *To build custom fact tables from external sources*

- 1 Follow the steps in [“Building a Custom Dimension Table from External Sources in Siebel Data Warehouse” on page 225](#).
- 2 In the custom fact SDE process, make sure that fact columns that need to reference standard Siebel dimensions contain ROW\_IDS from the Siebel data source.
- 3 Make sure that the dimension IDs in fact staging table are the same as the INTEGRATION\_ID in the corresponding dimension tables. This may require some preprocessing.
- 4 While creating a custom fact SIL process, make sure the SQL override statement joins with dimension tables. Use DATASRC\_NUM\_ID as 1 for the dimensions that have data from Siebel and join based on INTEGRATION\_ID.
- 5 For the dimensions that use data entirely from external sources, use the appropriate DATASRC\_NUM\_ID and the corresponding INTEGRATION\_ID. Use the appropriate update strategy to add new or change rows.
- 6 In the DAC, register the tasks. Make the SIL task depend on its corresponding SDE workflow and all the SIL tasks of its dimensions.

# 10 Using Siebel Data Warehouse Exception Reports

This chapter covers exception reports, which provide information about the source data used for ETL processes that can lead to erroneous results in the Siebel Data Warehouse or may cause data loss during the ETL process. These reports point out some of the known problematic areas, but they should not be relied upon to find all potential data inconsistencies in the source data.

This chapter includes the following topics:

- [Understanding Siebel Data Warehouse Exceptions on page 227](#)
- [Executing Siebel Data Warehouse Exception Reports on page 230](#)

## Understanding Siebel Data Warehouse Exceptions

Exception reports are defined for the following components:

- **List of Values.** Identifies gaps and overlaps for certain LOV types.
- **Cost Lists.** Identifies products for which the cost lists have not been defined. Identifies the cost lists which define costs for a product in a certain currency for overlapping periods of time.
- **Exchange Rates.** Currency Exchange rates that do not change over a period of time. If exchange rates are not defined for more than 30-day intervals, then they are flagged as an exception.
- **Hierarchies.** Entities that have circular references are flagged as exceptions. The Siebel Data Warehouse supports 10 levels of hierarchies. If there are entities that have more than 10 levels of hierarchies defined, they are flagged as exceptions.

### List of Values Exceptions

List of Values include High and Low values that can be used as bucket values in categories for effective analysis. If these values are not contiguous (such as gaps or overlaps in defined values), the ETL process cannot accurately categorize the values.

An example of List of Values exceptions is shown in [Table 56](#).

Table 56. List of Values Exceptions (Example)

Type	Name	Low	High
MY_TYPE	< 100	10	100
MY_TYPE	80 – 200	80	200

Table 56. List of Values Exceptions (Example)

Type	Name	Low	High
MY_TYPE	250 – 300	250	300
MY_TYPE	350 – 400	350	400

Notice that, in the example for Type MY\_TYPE, there are overlaps and gaps between records. There is an overlap of ranges between the first and second row. There is a gap between second and third row, and between third and fourth rows.

The following LOV types are analyzed for List of Value Exceptions:

- ACCNT\_REVENUE\_SIZE
- ACCNT\_EMP\_SIZE
- LEAD\_AGE\_DAYS
- OPTY\_REVENUE\_SIZE
- OPTY\_UNIT\_SIZE
- ACCNT\_REVENUE
- QUOTE\_AGE\_DAYS
- ACCNT\_REVN\_GROWTH
- APPROVAL\_AUTH\_SIZE
- SR\_CHART\_AGE
- ASSET\_COST\_CATEGORY

## Cost List Exceptions

Cost Lists for specified products and currency should not have overlapping time periods. If multiple cost lists are defined for a product and currency during a given time period, then the cost for the product may not be computed correctly in the Siebel Data Warehouse.

An example of Cost List exceptions is shown in [Table 57](#).

Table 57. Cost List Exceptions (Example)

Cost List	Product Name	Currency	Start Date (MM-DD-YYYY)	End Date (MM-DD-YYYY)	Cost
Cost List 1	Product 1	USD	01-01-2000	12-31-2000	10.00
Cost List 2	Product 1	USD	06-01-2000	06-01-2001	12.00
Cost List 3	Product 1	USD	06-01-2001	06-01-2002	13.00

In the example, Cost List 1 and 2 have definitions of cost overlapping over 06-01-2000 to 12-31-2000.

## Products Without a Cost List

During the ETL process, the costs of the products are calculated based on the Cost List table. If the cost lists are not defined correctly, the cost of the products cannot be calculated correctly in the Siebel Data Warehouse. This exception mapping queries the product table and looks for a minimum of one cost list to be defined. The products with no cost list definition are flagged as exceptions.

## Exchange Rate Exceptions

The Siebel Data Warehouse supports transactions in many different currencies. Siebel Business Analytics converts all currencies in the Siebel Data Warehouse to a single currency for analysis purposes. The ETL Base Exchange Currency parameter in System Preferences, indicates the currency to which all the financial amounts will be converted. The Exchange rates are derived from the Exchange Rate tables in the Siebel transactional database. If the currency exchange rates do not change for a period of 30 days, then Siebel Business Analytics flags it as an exception.

If there are time period gaps in the exchange rate data, the ETL process defaults to the most recent recorded exchange rate. If the actual exchange rate is significantly more or less favorable than what is recorded in the database, the outdated exchange rate distorts the true value of currency amounts in the Siebel Data Warehouse.

**NOTE:** Exchange rates are derived from records that are of type "Daily" in the Siebel transactional database. If any other types have been defined, they are not handled without some customization.

## Invalid Hierarchy Exceptions

Accounts, divisions, products, and opportunities can all have hierarchical relationships. These entities are denormalized within the Siebel Data Warehouse database to a fixed number of levels. Siebel Business Analytics supports up to ten hierarchies levels in the Siebel transactional database. If the depth of hierarchies extends beyond this number, results become inconsistent or incomplete.

## Circular Hierarchy Exceptions

Circular Hierarchies arise when the parent-child relationship has circular references. See [Table 58](#) for an example.

Table 58. Circular Hierarchy Example 1

Child	Parent
A1	A2
A2	A1

Siebel Business Analytics flags exceptions for two levels. Circular references over two hierarchies are not flagged. See [Table 59](#) for an example.

Table 59. Circular Hierarchy Example 2

Child	Parent
A1	A2
A2	A3
A3	A1

These produce infinite levels of hierarchies. The same records will be captured under the Invalid Hierarchy exceptions as their hierarchy depths will increase beyond 10 levels.

## Executing Siebel Data Warehouse Exception Reports

Before loading the Siebel Data Warehouse for the first time and for the subsequent refreshes, you should plan to spend time cleansing your Siebel transactional database data using the exception reports. The process is iterative, and requires coordination with other team members who have responsibility for data in the Siebel transactional database, such as the Siebel database administrator. After the initial cleansing, you should generate the exception reports on a scheduled basis to maintain the integrity of your data.

**NOTE:** Rerunning the exception reports overwrites all data contained in this view.

To cleanse the Siebel transactional database, repeat these actions until the exception report is empty:

- In the DAC, run the Exception Reports execution plan.
- In the Siebel user interface, navigate to Analytics Administration > Exception Reports.

**NOTE:** In Siebel Financial Services, this screen is called DataMart Administration.

- For every line in the ETL Exception Reports list, fix the cause of the problem. For information on fixing problems, see [“Cleansing Data.”](#)

### Cleansing Data

Use a combination of the Exception Reports and the Diagnostic views to assess changes that need to be made external to the Siebel transactional database, and changes to the Siebel transactional database directly.

The ETL Exception Reports list contains one record for each exception flagged in the Siebel transactional database. The ETL Exception Explanation form, located below the ETL Exception Reports list, describes the selected exception, its effect on the Siebel Data Warehouse building process, and offers suggestions for repairing the data.

**To fix an exception**

- 1 Select an exception record.
- 2 Read and understand the text in the ETL Exception Explanation form.
- 3 Click the report link.  
The object's data appears. (For example, if the object is an account, then the Account form appears. If the object is a cost list, then the Cost List list appears.)
- 4 Repair the problem, using the text in the ETL Exception Explanation form as a guide.
- 5 Return to the ETL Exception Reports list and place a check mark in the Fixed column to indicate to others that this exception has now been fixed.

**Using the List of Values View**

Use the List of Values view, shown in Figure 19, to visually compare how the list of values data extracted from the Siebel transactional database coordinates with the values loaded into the Siebel Data Warehouse. The ETL process removes duplicates and overlaps and fills data gaps. Values are extended to span the List of Values (LOV) minimum and maximum values. Duplicates, Range Gaps, and Overlaps are flagged by the exception reports.

Type	Language Independent Code	Display Value	Low	High	Order	Language Name
ABS_COST_FCT_AREA	Field Service	Field Service			1	English-American
ABS_COST_FCT_AREA	Professional Services	Professional Services			2	English-American
ABS_COST_FCT_AREA	Workforce Management	Workforce Management			3	English-American
ABS_COST_FCT_TYPE	Normal	Normal			1	English-American
ABS_COST_FCT_TYPE	Emergency	Emergency			2	English-American
ABS_COST_FCT_VARIABLE	Constraint Violation	Constraint Violation			1	English-American
ABS_COST_FCT_VARIABLE	FSE Overtime	FSE Overtime			2	English-American

Type	Language Independent Code	Display Value	Low	High	Order
ABS_COST_FCT_AREA	Field Service	Field Service	0	9,999,999,999	1
ABS_COST_FCT_AREA	Professional Services	Professional Services	0	9,999,999,999	2
ABS_COST_FCT_AREA	Workforce Management	Workforce Management	0	9,999,999,999	3
ABS_COST_FCT_TYPE	Normal	Normal	0	9,999,999,999	1
ABS_COST_FCT_TYPE	Emergency	Emergency	0	9,999,999,999	2
ABS_COST_FCT_VARIABLE	Constraint Violation	Constraint Violation	0	9,999,999,999	1
ABS_COST_FCT_VARIABLE	FSE Overtime	FSE Overtime	0	9,999,999,999	2

Figure 19. List of Values List

The top List of Values list shows values from the Siebel transactional database and the bottom List of Values (Data Warehouse) list shows the data that is to be used in ETL process. You can edit the Siebel transactional database data directly in this view, but the Siebel Data Warehouse list is read-only.

**NOTE:** The List of Values is extracted into the Siebel Data Warehouse where the language is the same as the ETL Default Language set in the DAC ETL Preferences, or whose translate flag is set to “N,” or those that are active.

## Using the Exchange Rates View

Use the Exchange Rates view to diagnose currency translation issues in the Siebel Data Warehouse. The ETL process removes duplicates, fills gaps, and removes overlaps. The ETL process computes exchange rates based on commutative and associative properties, such as product and reverse rates.

The top Exchange Rates list shows currencies, the middle Exchange Rates list shows the Siebel Data Warehouse values for active currencies and their exchange rates, and the bottom Exchange Rates (Data Warehouse) list shows the values loaded into the Siebel Data Warehouse for the selected currency in the upper Exchange Rates list to the ETL Base Exchange Currency. The Exchange Rates (Data Warehouse) list is read-only.

- The Active Currencies predefined query restricts the list to the active currencies in the Siebel transactional database.
- The exception reports flag any exchange rates to the ETL Base Exchange Currency that have not been defined within a specified period (30 days) in the DAC ETL Preferences.

## Using the Cost List View

Use the Cost List view to display the cost lists from the Siebel transactional database from the point of view of the product, and a read-only view of the values to be loaded into the Siebel Data Warehouse. The ETL process removes duplicates, overlaps, and fills gaps.

The Cost List list (top) shows products, and the Cost List Line Items list (middle) shows the cost lists associated with the selected product. The Cost Lists (Data Warehouse) list (bottom) shows the data as it is transformed for the Siebel Data Warehouse.

- The exception reports flag products that do not appear in the Cost List list or have Cost List time gaps and overlaps.
- The Siebel Data Warehouse contains only one Cost List for a product and a currency at a time.

## Using the ETL History View

After all of the exceptions are corrected, the building of the data warehouse can be initiated. This view lists the history of the ETL processes and their statuses. When each ETL batch starts, the name of the process along with the timestamp is set, the status is set to STARTED. When the batch completes, its status is updated to COMPLETED.

## Additional Exceptions

The above mentioned exceptions are not an exhaustive list of all possible exceptions. Other exceptions are:

- The Analysis start and end date in the DAC ETL Preferences must span the entire period of time during which the transactions have occurred. For example, you may want to choose an early and late date range to cover the entire time period you are analyzing. These dates in the DAC ETL Preferences are crucial for the building of Day Dimension, flattening of Exchange Rates, Cost Lists, and KPI (Key Performance Indicator fact) calculations.

- The DAC ETL Preferences — ETL Date Format, ETL Analysis Start, ETL Analysis End parameters, and the List of Values — ETL\_UNSPEC\_DATE must be defined in the same data format. If one is changed, the others must be changed accordingly.
- List of Values must be defined appropriately. If there is no appropriate entry in List of Values, the strings that depend on List of Values in the Siebel transactional database will not be translated.
- There must be exchange rates defined for the currencies your organization deals with. If the appropriate exchange values are not found, the ETL process uses the ETL Unknown Exchange Rate defined in the DAC ETL Preferences.



# 11 Troubleshooting the Siebel Data Warehouse

This chapter details some common problems related to the Siebel Data Warehouse and suggests possible solutions. It contains the following topics:

- [Siebel Data Warehouse Installation and Initial Configuration Issues on page 235](#)
- [Informatica and Loading Issues on page 236](#)
- [Unicode Issues with Informatica and the Siebel Data Warehouse on page 242](#)
- [UNIX Installation Issues with the Siebel Data Warehouse on page 244](#)
- [Siebel Data Warehouse Application Console \(DAC\) Issues on page 247](#)
- [Siebel Data Warehouse Upgrade Issues on page 251](#)

## Siebel Data Warehouse Installation and Initial Configuration Issues

[Table 60](#) provides information about problems and solutions related to the installation and initial configuration of the Siebel Data Warehouse.

Table 60. Siebel Data Warehouse Installation and Configuration Issues

Symptom/Error Message	Probable Cause/Solution
Cannot connect to the Siebel Data Warehouse running on DB2.	Make sure that the DB2 configuration matches the requirements listed in <a href="#">"IBM DB2 UDB-Specific Database Guidelines for Siebel Data Warehouse" on page 36</a> .
After installing Informatica's ODBC driver (V3.5) on a Windows computer, you cannot open the Query Analyzer, and the Enterprise Manager shows an error message.	The ODBC driver installation replaces the odbcbcp.dll file with an older version. The Informatica documentation contains the procedure for correcting this problem.
Cannot connect to Siebel transactional database from Informatica.	Make sure that the server running the Informatica Server software has an ODBC connection to the Siebel transactional database using a Siebel ODBC driver and an ODBC connection to the Siebel Data Warehouse using the Merant Closed 3.5 32-bit driver.
Error: ORA-12541: TNS:no listener.	Check the Compatibility tab in Informatica service configuration. It should be Oracle 8. If it is not set to Oracle 8, change it and restart the Informatica server.

Table 60. Siebel Data Warehouse Installation and Configuration Issues

Symptom/Error Message	Probable Cause/Solution
Error 2140 (Informatica service failed to start).	The server may not be started or the Informatica Service may not be started. See Informatica's installation and configuration guide on <i>Siebel Business Applications Third-Party Bookshelf</i> for detailed information.
Informatica installation fails with an Unhandled Exception error and displays a message similar to this: "Error Number: 0x80040707. Description: Dll function call crashed: ISRT._DoInstall."	The computer is probably running out of virtual memory. Restart the computer and reinstall Informatica.
After selecting "Warehouse Default Amount (Yen)" as the currency symbol, the dollar sign (\$) is still displayed.	The currencies.xml file must be edited. For instructions, see <a href="#">"Changing the Default Currency in Analytics Applications"</a> on page 272.

## Informatica and Loading Issues

Table 61 provides information about problems and solutions related to issues with Informatica and loading. To view the Informatica log file details, double-click the workflow.

Table 61. Informatica and Loading Issues

Symptom/Error Message	Probable Cause/Solution
Double-clicking the workflow yields a Workflow Manager error message: "The system cannot find the file specified."	The session log files are not set up properly. You also may need to change the text editor.
Using Oracle, some mappings hang while running when performance statistics are switched on.	When running some Informatica mappings for loading the Siebel Data Warehouse, turning on the Performance Statistics can cause the mapping to hang. The only workaround is to increase the values of the LMSharedMemory and MaxSessions variables in Informatica. The risk of increasing the LMSharedMemory too much is that it may start to have a serious effect on overall performance of the machine that the Informatica server is running on.

Table 61. Informatica and Loading Issues

Symptom/Error Message	Probable Cause/Solution
<p>When you execute a workflow on the Informatica Workflow Manager, Informatica returns the following error message:</p> <p>"Request to start workflow (workflow name) on server (server name) not successful."</p>	<p>This can happen due to a server time-out property that is usually set to 20 or 40 seconds. When you try to run a large workflow, every session in that workflow is fetched into the server's memory. If this takes longer than the server time-out property, the server returns a message that the workflow was unable to run. However, the workflow is running, but the server just needs time to complete fetching the sessions into memory. Double-click the workflow to view the log file details.</p>
<p>When running Full_Extract_Siebel_DW or Refresh_Extract_Siebel_DW, Informatica returns errors similar to:</p> <p>TE_7007 Transformation Evaluation Error; current row skipped...</p> <p>TE_7007 [&lt;&lt;Transformation Error&gt;&gt; [to_date]: Date function error to_date('19010101', 'DD-MON-YYYY')]</p>	<p>Incorrect date entry in the SME Date Format field in the System Preferences. The format is YYYYMMDD.</p>
<p>When running Full_Load_Siebel_DW, Informatica returns errors similar to:</p> <p>CMN_1014 Error creating semaphore...</p> <p>TM_6006 Error initializing DTM for session...</p> <p>TM_6006 [s_CR18a1. Load W_PROG_DM_TMP - Program Records]</p>	<p>Insufficient semaphores allocated. Allocate more semaphores on the Data Warehouse Server. The change becomes effective when you reboot.</p>

Table 61. Informatica and Loading Issues

Symptom/Error Message	Probable Cause/Solution
<p>Informatica (RDBMS is DB2) gives the following error message:</p> <p>Error occurred unloading [SDE_ServiceRequestDimension1].</p> <p>An error occurred while accessing the repository[[IBM][CLI Driver][DB2/6000] SQL0955C</p> <p>Sort memory cannot be allocated to process the statement. Reason code = "".</p> <p>SQLSTATE=57011]</p> <p>DB2 Fatal Error[FnName: ExecuteDirect -- SQLSTATE=57011 [IBM][CLI Driver][DB2/6000]</p>	<p>The DB2 parameter "SHEAPTHRES" is too small.</p>
<p>Informatica produces the error "Unable to connect to the server" when running a full load of the Siebel Data Warehouse (Full_Load_Siebel_DW_Dimensions).</p>	<p>The last Designer session was not validated. Part of the development process of working with Designer is to always validate any changes to Informatica mappings definitions and sessions after the change is saved in repository.</p>
<p>When loading the data warehouse, Informatica reports a lock problem.</p>	<p>Either someone has a session open or there is a dead session. Make sure no one has any open sessions. If no sessions are open, then follow the Informatica documentation on removing locks caused by dead sessions.</p>
<p>After changing an Informatica mapping, you may get an error message when trying to execute "Full_Load_Siebel_DW_Facts." The error message is "Unable to connect to the server."</p>	<p>This is due to Informatica mapping objects that have been modified and this does not automatically validate the session objects. You must validate all changes to any existing mappings in the Informatica repository.</p>

Table 61. Informatica and Loading Issues

Symptom/Error Message	Probable Cause/Solution
<p>Session SDE_RecordLoadStart fails due to unique constraint error while executing Full_Load_Siebel_DW_Dimensions or Full_Load_Siebel_DW_Facts.</p>	<p>This could be because the previous full load did not complete successfully. Fix the problem that caused the previous load session to fail. Make sure you start the process from the last entry of Load_RestartNextWorkflow # before the failed session, and restart the workflow process from that point.</p> <p>If you have to re-extract the data from the Siebel transactional database because something had to be fixed in the source database to resolve the load error, then you must restart the ETL process. Truncate S_ETL_INC_STAT in the Siebel transactional database, then enable the Extract and Load workflows and rerun them.</p>
<p>Session SDEINC_RecordExtractStart fails due to unique constraint error while executing a Refresh workflow.</p>	<p>This could be because the previous load or refresh did not complete successfully. Fix the problem that caused the previous refresh session to fail. Make sure you start the process from last entry of %RestartNextWorkflow # before the failed session, and restart the workflow process from that point.</p>
<p>The session fails and you receive the following error code:</p> <p style="padding-left: 40px;">Error "TE_7042 Aggregate Error: File Operation Error</p>	<p>This is due to a disk space limitation. Check the /Informatica/PowerMart/Cache/Check directory for available disk space, also check the limits (ulimit) of the account used to start PowerMart.</p>
<p>Informatica sessions get deadlocked and eventually fail when they try to do a "select" from the repository table OPB_OBJECT_LOCKS. This problem sometimes occurs on MSSQL server databases.</p>	<p>This is possibly caused by a limited number of resources on the MSSQL Database Server. The workaround is to execute the following MSSQL specific SQL command on the Siebel Data Warehouse:</p> <pre style="padding-left: 40px;">DROP INDEX OPB_OBJECT_LOCKS.OPB_OBJ_LOCKS_IDX  DROP INDEX OPB_OBJECT_LOCKS.OPB_OBJ_LOCKS_IDX2  DROP INDEX OPB_OBJECT_LOCKS.OPB_OBJ_LOCKS_IDX3</pre> <p>Upon completion of executing these commands, continue executing the workflow processes to load the Siebel Data Warehouse.</p>

Table 61. Informatica and Loading Issues

Symptom/Error Message	Probable Cause/Solution
<p>An error may occur when trying to send a post session email notification using MS Outlook 2000. Refer to Informatica release notes for further information.</p>	<p>After installing Informatica Server on Windows, copy the file mapi32.dll from winnt\system32 to the bin folder where the Informatica Server is installed, overwriting the existing mapi32.dll in that directory. Start the Informatica Server so that the Informatica Server can use the new mapi32.dll.</p> <p>The Extended MAPI Error. MAPILogonEx failed[2147746065] error indicates that the logon is not configured correctly. Check the following:</p> <ol style="list-style-type: none"> <li>1 Under Services &gt; Informatica &gt; Logon, make sure the login (domain\username) and password are correct.</li> <li>2 Under Control Panel &gt; Mail (it may also be called Mail and Fax or Exchange) &gt; Services &gt; Show Profiles, make sure the mail profile is correct.</li> <li>3 Under Programs &gt; Informatica Server &gt; Informatica Server Setup &gt; Miscellaneous, make sure the MS Exchange profile is correct.</li> </ol>
<p>While creating a custom session, bulk load mode does not work properly with SQL Server.</p>	<p>Change the mode to "normal" in Informatica repository for the session. The "normal" mode must be used everywhere for SQL Server in all of your custom sessions.</p>
<p>When running IMR, you may receive an error message box which states "The evaluation period for this Oracle ODBC driver has expired. Please call Merant to obtain a production version of this Oracle ODBC driver."</p>	<p>This is caused by a down-level ODBC driver license key. Rename or move ivodbc.lic, lvodbc.lic (if it exists), and lvdw.lic (if it exists). Make sure you have only one license file named ivdw.lic in winnt\system32. This eliminates the problem.</p>
<p>Outlook closes when sending out a notification of finishing the ETL process.</p>	<p>Informatica is closing Outlook. This issue is known to Informatica and is scheduled to be resolved in an upcoming release. Until then, create a second profile in Outlook and add that profile name to the Informatica server setup.</p>

Table 61. Informatica and Loading Issues

Symptom/Error Message	Probable Cause/Solution
<p>Oracle 8i sessions running in bulk mode fail and return an error message similar to:</p> <pre>WRITER_1_1_1&gt; CMN_1022 Database driver error... CMN_1022 [ ORA-00600: internal error code, arguments: [kpodmpop_01], [2], [], [], [], [], [], []  Or  MAPPING&gt; TE_7022 TShmWriter: Initialized MAPPING&gt; Sat Jan 26 13:54:45 2002 MAPPING&gt; TE_7001 Internal error: Failed to allocate a target slot. Sat MAPPING&gt; Jan 26 13:54:45 2002 TE_7017 Failed to Initialize Server MAPPING&gt; Transformation BLK_ALL_DATATYPES1 Sat Jan 26 13:54:45 2002MAPPING&gt; TM_6006 Error initializing DTM for session... MAPPING&gt; TM_6020 Session [s_BULK_LONG] completed at [Sat Jan 26 13:54:45 2002]</pre>	<p>This problem is an Oracle 8i defect. It has been resolved in Oracle 9i. The workaround is to run the session in Normal mode. To do so, in Workflow Manager navigate to the Targets window, and change the Target Load type to Normal.</p>
<p>During an ETL execution, when Informatica and DAC servers use DB2 Connect version 7 to talk to DB2/390 version 7 OLTP and data warehouse databases, you receive an error message similar to the following:</p> <pre>SEVERE: [IBM][CLI Driver][DB2] SQL0191N Error occurred because of a fragmented MBCS character. SQLSTATE=22504  103 SEVERE Tue May 11 21:37:29 CDT 2004 [IBM][CLI Driver][DB2] SQL0191N Error occurred because of a fragmented MBCS character. SQLSTATE=22504</pre>	<p>This problem is a DB2 Connect version 7 (IBM) defect related to code page conversion. The problem has been resolved in DB2 Connect version 8.</p> <p>To correct the problem, do the following:</p> <ol style="list-style-type: none"> <li>1 Download the file IBM01140.ucs from    <a href="ftp://ftp.software.ibm.com/ps/products/db2/fixes/english/siebel/siebel7/Conversion_Files">ftp://ftp.software.ibm.com/ps/products/db2/fixes/english/siebel/siebel7/Conversion_Files</a>    to the /sqllib/conv directory.</li> <li>2 Make a copy of the file and rename it to IMB05348.ucs.</li> </ol>

Table 61. Informatica and Loading Issues

Symptom/Error Message	Probable Cause/Solution
<p>When an ETL process is running and tasks fail, Informatica returns an error similar to the following</p> <p>Error while running Workflow Description:                      ERROR : TM_6292 : (3040 4868) Session task instance REP_12400 [Repository Error ([REP_51055] Repository agent connection failed. [System Error (errno = 121): The semaphore timeout period has expired. . (Cannot read message. Read 5824 bytes.)]]]</p>	<p>This issue is related to the network. The workaround is to increase the Timeout parameter values in the Informatica Repository Server Administration Console.</p> <ol style="list-style-type: none"> <li>1 In the left pane of the Repository Server Administration Console window, right click your repository and select Edit Connection.</li> <li>2 In the Network tab, enter 9 as the value for the parameters MessageReceiveTimeout and MessageSendTimeout.</li> <li>3 Stop and start the Informatica Repository Server.</li> <li>4 Start the Informatica Server.</li> </ol>

## Unicode Issues with Informatica and the Siebel Data Warehouse

Table 62 provides information about problems and solutions related to Unicode issues with Informatica and the Siebel Data Warehouse.

Table 62. Unicode Issues with Informatica and Siebel Data Warehouse

Symptom/Error Message	Probable Cause/Solution
<p>Task fails and generates the error message: "TRANSF_1_1_1_1 &gt; TE_7073 Aggregate Error: Expecting keys to be ascending." Tasks known to fail are SDE_DtlForecastFact and SDE_CostList</p>	<p>In Informatica Mapping Designer, open the corresponding mapping and in the Aggregator transformation, remove the check from the Sortedinput check box.</p>
<p>In the Windows 2000 environment, with a double-byte language, such as Japanese, when you try to input the path for the directory where Informatica is installed for the value \$PMRootDir in the Workflow Manager, the double-byte characters are converted to question marks. This causes the ETL to fail because it cannot find the Informatica Server folder and its subdirectories.</p>	<p>Share the folder under a new name with no double-byte characters, and use the network share as the value for \$PMRootDir.</p>

Table 62. Unicode Issues with Informatica and Siebel Data Warehouse

Symptom/Error Message	Probable Cause/Solution
<p>When Configuring the Informatica Server or Informatica Repository Server, there are major truncations in some of the tabs.</p> <p>For example, in the Server tab and the Repository tab in the Configure Informatica Service screen (Start &gt; Programs &gt; Informatica Server &gt; Informatica Server Setup &gt; Configure Informatica Service), the field names are truncated.</p>	<p>Informatica 6.x does not support non-English messages and resources. Delete the following files to display all messages in English.</p> <p>PC/PM client folder\*411.dll</p> <p>PMServer folder\bin\*411.dll</p> <p>PMRepServer folder\bin\*411.dll</p>
<p>Unable to start the Informatica repository with the Informatica Repository Server on UNIX.</p> <p>The Siebel_DW_Rep (MS Windows Japanese and superset of Shift-JIS) is not compatible with that of pmrepagent (UTF-8 encoding of Unicode).</p>	<p>Make sure Japanese locales are installed on the UNIX machine. The environment variables on the UNIX machine are not complete. Set the environment variable PM_CODEPAGENAME to MS932. For other languages, set the variable appropriately.</p>

Table 62. Unicode Issues with Informatica and Siebel Data Warehouse

Symptom/Error Message	Probable Cause/Solution
<p>The database connection code page is incorrect for Unicode/Non-Latin code pages.</p>	<p>The database connection code page has to be set manually through the Informatica Workflow Manager.</p> <ol style="list-style-type: none"> <li>1 Start the Workflow Manager.</li> <li>2 Connect to the Siebel_DW_Rep using Administrator as the user.</li> <li>3 Click Menu Connection &gt; Select Relational.</li> <li>4 Select the appropriate OLTP connection (DB2_OLTP for DB2, ORA_OLTP for Oracle, MSSQL_OLTP or ODBC_OLTP for MSSQL).</li> <li>5 For the code page select the UTF-8 encoding of Unicode or the appropriate code page, and then click OK.</li> <li>6 Select the OLAP connection (DB2_OLAP for DB2, ORA_OLAP for Oracle, MSSQL_OLAP or ODBC_OLTP for MSSQL).</li> <li>7 For the code page select the UTF-8 encoding of Unicode or the appropriate code page, and then click OK.</li> </ol>
<p>Unable to install Informatica PowerMart on non-English UNIX locales (for example, ESN, DEU, FRA, ITA). The following error message appears: "FATAL ERROR during initialization, Invalid language specified, Application terminated."</p>	<p>This error will occur when the locale environment variables are set inconsistently or not at all. These settings are determined by entering the command <code>locale</code> at the UNIX command prompt. Make sure the correct locales are installed on the UNIX machine. Set the environment variable <code>PM_CODEPAGENAME</code> correctly (For example set it to <code>MS932</code> for Japanese).</p>

## UNIX Installation Issues with the Siebel Data Warehouse

Table 63 provides information about issues related to installing the Siebel Data Warehouse on UNIX.

Table 63. UNIX Installation Issues with Siebel Data Warehouse

Symptom/Error Message	Probable Cause/Solution
<p>When starting Informatica in pmsserver.log, the following error messages appear:</p> <p>FATAL ERROR: LM_36023 [Tue Mar 11 23:12:41 2003] : (9968 1) The IP address [172.0.129.141] for this machine did not match the IP address [172.20.94] in the repository for server [SIEBEL_DW_SERVER].</p> <p>FATAL ERROR: SF_34014 [Tue Mar 11 23:13:41 2003] : (9968 1) Server initialization failed.</p> <p>INFO: SF_34014 [Tue Mar 11 23:13:41 2003] : (9968 1) Server shut down.</p>	<p>Launch Workflow Manager, then right-click on SIEBEL_DW_REP and click More. Make sure the Host Name is the machine name where the Informatica Repository Server resides.</p>
<p>When connecting to the Informatica Repository Server from the Repository Administration Console, the following error messages appear:</p> <ul style="list-style-type: none"> <li>■ Oracle databases running on Solaris or HP:                     <p>Database Connection Error: Database driver event...Error occurred loading library [Bad magic number for shared library: /export/home/oracle/9.0.1.3/lib/libclntsh.sl]Database driver event...Error occurred loading library [libpmora8.sl]</p> </li> <li>■ DB2 databases running on AIX:                     <p>(17764 1) Database Connection Error : Database driver event...Error occurred loading library [No such file or directory]Database driver event...Error occurred loading library [libpmdb2.a]</p> </li> </ul>	<p>Use Oracle 32-bit library.</p> <ul style="list-style-type: none"> <li>a Set the environment variable as follows: LD_LIBRARY_PATH=/export/home/oracle/9.0.1.3/lib32</li> <li>b Restart the Informatica Repository Server service.</li> </ul> <ul style="list-style-type: none"> <li>■ DB2 databases running on AIX:                     <p>(17764 1) Database Connection Error : Database driver event...Error occurred loading library [No such file or directory]Database driver event...Error occurred loading library [libpmdb2.a]</p> <p>Set the environment variable as follows:</p> <ul style="list-style-type: none"> <li>■ For DB2 v8:                             <p>setenv LIBPATH \${LIBPATH}: /usr/opt/db2_08_01/lib</p> </li> <li>■ For DB2 v7                             <p>setenv LIBPATH \${LIBPATH}: /usr/lib/db2_07_01/lib</p> </li> </ul> <p>Restart the Informatica Repository Server service, after setting the variable.</p> </li> </ul>

Table 63. UNIX Installation Issues with Siebel Data Warehouse

Symptom/Error Message	Probable Cause/Solution
<p>When restoring the Informatica Repository, the following error message appears in the dwdb.log:</p> <pre>ERROR : OBJM_54543 [Tue Mar 25 17:47:16 2003] : (164 2484) DataBase error: ORA-01461: can bind a LONG value only for insert into a LONG column</pre>	<p>The database is Unicode and the environment variable is needed.</p> <ul style="list-style-type: none"> <li>■ For Unicode UTF8, set the environment variable to Ameri can_Ameri ca. UTF8.</li> <li>■ For Unicode AL32UTF8, set the environment variable to Ameri can_Ameri ca. AL32UTF8.</li> </ul>
<p>When starting pmserver on UNIX, the following error message appears:</p> <pre>INFO : LM_36039 [Thu Mar 27 11:40:29 2003] : (6772 1) The maximum number of sessions that can run simultaneously is [10]. FATAL ERROR : CMN_1011 [Thu Mar 27 11:40:29 2003] : (6772 1) Error allocating system shared memory of [3000000] bytes for [Load Manager Shared Memory]. Error is [0]: [] FATAL ERROR : SF_34004 [Thu Mar 27 11:40:29 2003] : (6772 1) Server initialization failed. INFO : SF_34014 [Thu Mar 27 11:40:29 2003] : (6772 1) Server shut down.</pre>	<p>In the pmserver.cfg file, change MaxSessions to 15 and change LMSharedMem to 3000000.</p> <p><b>NOTE:</b> For each 10 count increase of MaxSessions, increase the LMSharedMem by 2000000 bytes.</p>

Table 63. UNIX Installation Issues with Siebel Data Warehouse

Symptom/Error Message	Probable Cause/Solution
<p>A session fails (any session), and the following error message appears:</p> <p>TM_6227 Error: codepage incompatible in session [SDE_RecordExtractStart]. The source database DB2_OLTP and server SIEBEL_DW_SERVER do not have compatible code pages. (One way compatibility is required).</p>	<p>For Informatica servers running on UNIX, in the pmserver.cfg file, set ValidateDataCodePages to No.</p> <p>For Informatica servers running on Windows, navigate to Informatica Server setup &gt; Configuration, and remove the check from the Validate Data CodePages check box.</p>
<p>When trying to start the Informatica Server, the following error message appears:</p> <pre>sdcb50a125{qouser7a}/&gt; pmserver exec(): 0509-036 Cannot load program pmserver because of the following errors: 0509-150 Dependent module libpmcef.a could not be loaded. 0509-022 Cannot load module libpmcef.a. 0509-026 System error: A file or directory in the path name does not exist.</pre>	<p>Set the environment parameters as follows:</p> <pre>setenv PATH /export/home/i nformati ca/ pm: . : \${PATH} setenv LD_LI BRARY_PATH /export/home/ i nformati ca/ pm: \${LD_LI BRARY_PATH}</pre>

## Siebel Data Warehouse Application Console (DAC) Issues

### Basic Checks

- Make sure that you have installed the supported version of the Java SDK (and not just the JRE).
- Make sure that in the config.bat file for Windows, and the config.sh file for UNIX, JAVA\_HOME is pointing to the JDK (and not the JRE).
- Make sure that the DAC\_HOME variable has been properly set.

Table 64 provides information about problems and solutions related to the DAC.

Table 64. Siebel Data Warehouse DAC Issues

Symptom/Error Message	Probable Cause/Solution
Email notification does not work.	<p>To make sure that email notification works with the DAC server, make sure that the following are true:</p> <ul style="list-style-type: none"> <li>■ To set up the email notification feature, you must bring up the DAC client on the same machine as the DAC server.</li> <li>■ The Email server settings (using the DAC client's server setup) point to a valid SMTP server.</li> <li>■ The SMTP server must be supporting Login Authentication. In the Exchange server, this amounts to enabling the Basic Authentication for SMTP module.</li> </ul>
The DAC server does not start.	<p>When trying to bring up the DAC server, make sure that the following are taken care of:</p> <ul style="list-style-type: none"> <li>■ The DAC System properties contain the name of the DAC Server Host machine. This specifies the machine on which the DAC server will be run. Make sure that this entry is correct, and points to where you are bringing up the DAC server. Furthermore, there is an entry for the DAC Server OS, which should specify the OS where the DAC server is running. Make sure that this entry is correct.</li> <li>■ Make sure that the \$DAC_HOME/lib directory contains the needed JDBC libraries.</li> <li>■ You may want to edit the startserver.bat file temporarily, and run the DAC server in such a way that messages show in the command window. (Use JAVA rather than JAVAW for Windows OS). This will allow you to see a lot of run-time information, as the server boots up.</li> </ul>

Table 64. Siebel Data Warehouse DAC Issues

Symptom/Error Message	Probable Cause/Solution
<p>The DAC server does not start.</p>	<ul style="list-style-type: none"> <li data-bbox="683 401 1417 684">■ In the DAC System properties, there is an entry called Logging Level. You can increase the amount of information logged by decreasing the logging-threshold. In other words, if the value currently is SEVERE, make it INFO. This will show more information. If you still cannot find the cause, you may want to change it to FINE or FINEST. These levels are the standard levels of Java's Logging API. (SEVERE, WARNING, INFO, CONFIG, FINE, FINER, FINEST).</li> <li data-bbox="683 705 1417 957">■ Be aware that as you lower the logging threshold, a lot of run-time information will start getting logged. While this may be advantageous for troubleshooting, you do not want to leave it like this in production mode. Excessive logging will generate large log files quickly and use excessive disk space. There is also a modest performance hit with excessive logging.</li> <li data-bbox="683 978 1417 1125">■ Make sure that there is no DAC server already running on the machine. Only one DAC server instance can exist per machine (and per DAC repository). Some non-visible forms of the DAC server may be running as a background process.</li> <li data-bbox="683 1146 1417 1293">■ Make sure that the DAC repository database instance is actually up and running. The DAC repository database being down or the loss of network connectivity to the database will cause the DAC server not to come up, or to go down if it was running.</li> <li data-bbox="683 1314 1417 1474">■ Make sure that the DAC repository database connection pool size is moderate. In other words, do not try to acquire an excessive number of connections when the database administrator may have put restrictions on how many a single application can request.</li> </ul>

Table 64. Siebel Data Warehouse DAC Issues

Symptom/Error Message	Probable Cause/Solution
<p>When starting the DAC client and server for the first time (after configuring the DAC server by using the DAC client), the DAC client's icon for the Server status stays red. In other words, it suggests the server is down, even though it is running.</p>	<p>This is expected behavior. The first time the DAC server comes up against a repository, it creates a Unique ID for itself, and the repository. Thereafter, when any client is started against the repository, it knows where to expect the DAC server to be, and furthermore, sends a valid identification token containing the Unique ID.</p> <p>Therefore, after bringing up the DAC server the first time, you may want to close the existing open clients, and bring them up again. This problem is specific to bringing up the DAC client and server for the first time. Once Unique ID has been created, the behavior of the Server Monitor icon will be as expected.</p>
<p>When exporting the DAC repository against a DB2 database, failures occur. An error message may appear and the export.log file may have an entry similar to the following: "Error while moving to reading next record."</p>	<p>This problem is specific to DB2 databases and occurs only when the following tables are exported:</p> <ul style="list-style-type: none"> <li>■ WETL_DBCONN</li> <li>■ W_ETL_SYSPROP</li> <li>■ W_ETL_SERVER</li> </ul> <p>This problem tends to occur when the database is under significant load. Therefore, it is recommended that you export these tables individually.</p>
<p>Running the DAC server on AIX machines.</p>	<p>Special care must be taken when bringing up the DAC server on AIX machines. For example, if the repository already contains database connection information entries, and Informatica Server entries, these must be modified if you are moving the DAC server to an AIX machine.</p> <p>In particular, you need to delete all the password fields, and re-enter them. For more information, see <a href="#">"Analytics Applications Installation and Configuration Process on UNIX" on page 110</a>.</p>
<p>The DAC client does not run on machines where PopChart Image Server from Corda Technologies, Inc., is running.</p>	<p>Run the DAC client on a machine that does not have PopChart Image Server from Corda Technologies, Inc., installed.</p>

## Siebel Data Warehouse Upgrade Issues

Table 65 provides information about problems and solutions related to issues with upgrading the Siebel Data Warehouse.

Table 65. Upgrade Issues

Symptom/Error Message	Probable Cause/Solution
<p>When upgrading from Siebel Data Warehouse version 7.5.3 to version 7.7, duplicate rows are inserted into a mini dimension table from the dimension table.</p>	<p>Before upgrading, all leading and trailing spaces need to be removed from the data.</p> <ol style="list-style-type: none"> <li>1 Before running the workflow for the mini dimension that appears in the upgrade folder, modify the data to remove leading and trailing spaces by using the RTRIM and LTRIM functions. For example: <code>set(col)=rtrim(col)</code></li> <li>2 In cases where you find leading and trailing spaces, modify the SQL override for the mini dimension mapping in the main folder as shown in the example below:</li> </ol> <pre> SELECT DISTINCT     CASE WHEN G1.VAL IS NULL THEN RTRIM(LTRIM(DS.AREA)) ELSE G1.VAL END AS AREA,     CASE WHEN G1.NAME IS NULL THEN RTRIM(LTRIM(DS.AREA)) ELSE G1.NAME END AS AREA_I,     CASE WHEN G2.VAL IS NULL THEN RTRIM(LTRIM(DS.SUB_AREA)) ELSE G2.VAL END AS SUB_AREA     CASE WHEN G2.NAME IS NULL THEN RTRIM (LTRIM(DS.SUB_AREA)) ELSE G2.NAME END AS SUB_AREA_I     CASE WHEN G3.VAL IS NULL THEN RTRIM(LTRIM(DS.SEV_CD)) ELSE G3.VAL END AS SEV_CD     CASE WHEN G3.NAME IS NULL THEN RTRIM (LTRIM(DS.SEV_CD)) ELSE G3.NAME END AS SEV_CD_I     CASE WHEN G4.VAL IS NULL THEN RTRIM(LTRIM(DS.PRI_O_CD)) ELSE G4.VAL END AS PRI_O_CD     CASE WHEN G4.NAME IS NULL THEN RTRIM (LTRIM(DS.PRI_O_CD)) ELSE G4.NAME END AS PRI_O_CD_I FROM     W_SRVREQ_DS DS,     W_LOV_G G1,     W_LOV_G G2,     W_LOV_G G3,     W_LOV_G G4 WHERE     W_SRVREQ_DS LEFT OUTER JOIN V_LOV_G G1 ON     DS.AREA = G1.NAMEVAL AND     G1.TYPE = 'SR_AREA' LEFT OUTER JOIN W_LOV_G G2 ON     DS.SUB_AREA = G2.NAMEVAL AND     G2.TYPE = 'SR_AREA' LEFT OUTER JOIN W_LOV_G G3 ON     DS.SEV_CD = G3.NAMEVAL AND     G3.TYPE = 'SR_SEVERITY' LEFT OUTER JOIN W_LOV_G G4 ON     DS.PRI_O_CD = G4.NAMEVAL AND     G4.TYPE = 'SR_PRIORITY' }</pre>





# A

## Analytics Bridge Applications

This appendix describes the Siebel Business Analytics Bridge applications and provides information about setting up the Siebel transactional database for use with the Bridge applications.

This appendix contains the following topics:

- [Overview of Analytics Bridge Applications on page 255](#)
- [Setting Up the Siebel Transactional Database for Analytics Bridge Applications on page 257](#)
- [Files for Siebel Analytics Bridge - 6.3 on page 259](#)
- [Platform Support for Analytics Bridge Applications on page 260](#)

### Overview of Analytics Bridge Applications

Siebel Business Analytics Bridge applications contain pre-built components that are specific to the different versions of source Siebel Business Applications. The Bridge applications allow you to use the newer functionality of Siebel Business Analytics with previous versions of Siebel Business and Industry operational applications. Bridge applications are installed, based on the license file, when you install Siebel Business Analytics Applications.

After you install a Bridge application, you then need to set up the Siebel transactional database for use with the Bridge application. For instructions, see [“Setting Up the Siebel Transactional Database for Analytics Bridge Applications” on page 257](#).

### Versions of Analytics Bridge Applications

[Table 66](#) shows which Siebel Business Analytics Bridge application should be used for the different versions of Siebel Business Applications.

Table 66. Siebel Business Analytics Bridge Applications

Siebel Business Applications Version	Analytics Platform Version	Analytics Applications Version	Analytics Bridge	Relevant DW Schema Version
6.3.x	7.8.2.3 or higher	7.8.4	Siebel Analytics Bridge - 6.3	7.7
7.5.x	7.8.2.3 or higher	7.8.4	Siebel Analytics Bridge - 7.5	7.7
7.7.x	7.8.2.3 or higher	7.8.4	Siebel Analytics Bridge - 7.7	7.7.1

## Analytics Bridge Application Architecture

Figure 20 shows the architecture of Siebel Business Analytics Bridge applications.

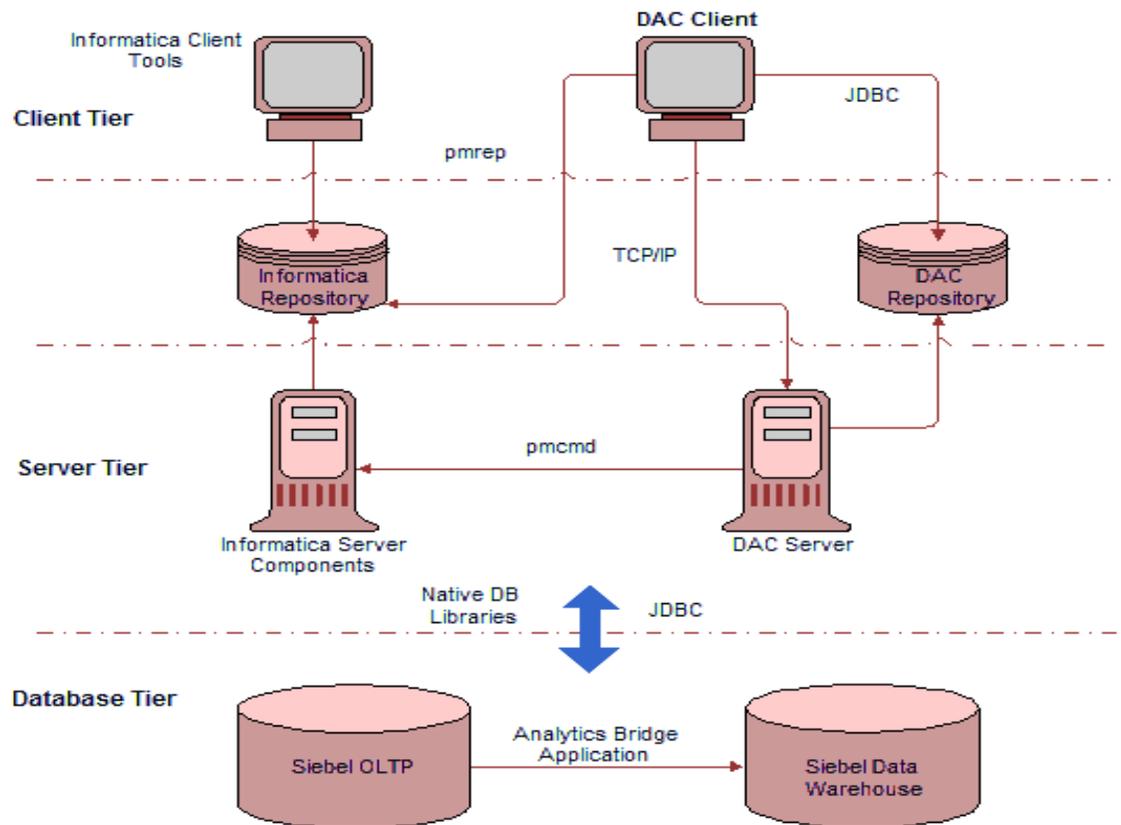


Figure 20. Siebel Business Analytics Bridge Application Architecture

## Siebel Data Warehouse Data Model

The Siebel Business Analytics Bridge applications use the data warehouse as defined in *Siebel Data Warehouse Data Model Reference, Version 7.8.2*.

**CAUTION:** Because of inherent differences in the underlying application schemas, the Siebel Analytics Bridge applications do not perform a complete mapping of all Presentation layer columns in the Analytics repository. This may also affect those dashboard reports built from the columns that are not mapped. See *Technical Note 429*, located on Siebel SupportWeb, for a list of Presentation layer columns and reports known to be affected.

# Setting Up the Siebel Transactional Database for Analytics Bridge Applications

Follow this procedure to set up the Siebel transactional database for use with a Siebel Business Analytics Bridge application.

## To set up the Siebel transactional database

1 Import new transactional database schema definitions:

a Copy the appropriate .sif file for the Analytics Bridge application you installed:

Bridge Application	Copy	From	To
Analytics Bridge - 6.3	SRW_OLTP_63.sif	SiebelAnalytics\dwrep	\tools\objects
Analytics Bridge - 7.5	SRW_OLTP_75.sif	SiebelAnalytics\dwrep	\tools\objects
Analytics Bridge - 7.7	SRW_OLTP_77.sif	SiebelAnalytics\dwrep	\tools\objects

b Open Siebel Tools and point to the development database.

c Lock the appropriate project.

- For Siebel Business Applications, lock the Newtable project
- For Siebel Industry Applications, lock the Table ETL project.

d Navigate to Tools > Import from Archive.

e Select Open.

The Import Wizard—Preview screen appears, listing the Analytics Bridge tables.

f In the Conflict Resolution area, select the option Merge the object definition from the archive file with the definition in the repository, and click Next.

g A dialog box appears, informing you that the operation will modify your repository and asking if you want to proceed. Click Yes.

h The Import Wizard — Summary screen appears, showing a summary of the .sif changes to the repository files. Click Finish.

2 Apply the new schema definitions to the transactional database:

a In Siebel Tools, go to the Table screen and search for the tables S\_ETL\*.

b Select all the S\_ETL\* tables that appear, and click Apply at the top of the screen.

c In the Apply Schema dialog box, under the entry Tables, select Current Query from the drop-down list.

d Under the subsequent entries, enter the connection parameters for the development database. (Your connection information will vary depending on your particular database platform and on the configuration of your particular database environment.)

- e Click Apply.
- 3 Create Image tables:
  - a In the DAC, navigate to Design > Tables.
  - b On the toolbar, click Query.
  - c In the Image Suffix field, enter !Null.
  - d Select a record.
  - e Right-click and select Change Capture Scripts > Generate Image and Trigger Scripts.
  - f In the Trigger and Image Tables dialog box, select All Tables in the List.
  - g Select the appropriate database type, and check the Unicode Database option if the database is Unicode.
  - h Check the Generate Image Table Scripts option, and click OK.  
This process generates a SQL script.
  - i Save the SQL script and pipe it to the transactional database.
- 4 For the Analytics Bridge - 6.3, import language-independent Siebel seed data.

**NOTE:** This step is not required for Analytics Bridge - 7.5 or Analytics Bridge - 7.7.

- a Copy the following files:

Copy	From	To
seed_63_bridge.dat	SiebelAnalytics\dwrep	Local machine
seed_63_bidge_<xxx>.inp (where xxx corresponds to the database platform being used)	SiebelAnalytics\dwrep	Local machine

- b Open a command line, and go to the same directory where you copied the .dat and .inp files.
- c Replace each of the connection parameters with the values appropriate to your database environment, and then run the appropriate import command from the following table.

Database Platform	Run Import Command
DB2UDB	\$SIEBELSERVERROOT\bin\dataimp /u \$UserName /p \$Password /c "\$ODBCDataSource" /d \$DatabaseOwner /f seed_63_bridge.dat /w y /q 100 /h Log /x f /i seed_63_bridge_db2udb.inp /l seed_63_bridge_db2udb.log

Database Platform	Run Import Command
MSSQL	<pre>\$SIEBELSERVERROOT\bin\dataimp /u \$UserName /p \$password /c "\$ODBCDataSource" /d \$DatabaseOwner /f seed_63_bri dge.dat /w y /q 100 /h Log /x f /i seed_63_bri dge_mssql .inp /l seed_63_bri dge_mssql .log</pre>
Oracle	<pre>\$SIEBELSERVERROOT\bin\dataimp /u \$UserName /p \$password /c "\$ODBCDataSource" /d \$DatabaseOwner /f seed_63_bri dge.dat /w y /q 100 /h Log /x f /i seed_63_bri dge_oracle.inp /l seed_63_bri dge_oracle.log</pre>

- Using the DAC, run the Complete ETL execution plan to perform a full load of data into the data warehouse.

For instructions on running an ETL using the DAC, see [“Executing an ETL with the DAC” on page 155](#).

## Files for Siebel Analytics Bridge - 6.3

Table 67 describes the application files for Siebel Analytics Bridge - 6.3.

Table 67. Files for Siebel Analytics Bridge - 6.3

File Name	Purpose of File
SRW_OLTP_<xxx>.sif where xxx is the transactional database version	The Siebel Archive File containing the logical definition of the ETL tables.
seed_<xxx>_bridge.dat where xxx is the transactional database version	The Siebel Seed Data file containing language-independent seed data records for the following tables: <ul style="list-style-type: none"> <li>■ S_LST_OF_VAL</li> <li>■ S_RESP</li> <li>■ S_APP_VIEW</li> <li>■ S_APP_VIEW_RESP</li> </ul>
seed_<xxx>_bridge_<db>.inp where xxx is the transactional database version and <db> is one of: <ul style="list-style-type: none"> <li>■ DB2UDB</li> <li>■ MSSQL</li> <li>■ Oracle</li> </ul>	Import file used to control the import of the seed_<xxx>_bridge.dat file from a Siebel Cross-Industry Application to a particular database platform.

Table 67. Files for Siebel Analytics Bridge - 6.3

File Name	Purpose of File
seed_<xxx>_bridge_<lan>.dat where xxx is the transactional database version	Set of Siebel seed data files containing translations for all the Siebel Business Analytics metadata objects. Each file contains all the translations for a single language. These files place translation-related seed data into the S_MSG table in the Siebel OLTP database.
seed_<xxx>_bridge_<lan>.inp where xxx is the transactional database version	Set of import files used to control the import of the language seed files to the database.

## Platform Support for Analytics Bridge Applications

For information about hardware and software requirements for Siebel Business Analytics Bridge applications, see [“Operating System, Driver, and Connectivity Requirements for Siebel Data Warehouse” on page 33](#).

**NOTE:** The Siebel Analytics Bridge - 7.7 does not support MSSQL Server 7.0.

# B

## Installing the Usage Accelerator

This appendix provides instructions for installing the Usage Accelerator application that is a part of the Siebel Analytics Bridge 7.5 application. For information about this bridge application, see [“Overview of Analytics Bridge Applications” on page 255](#).

**NOTE:** The instructions in this appendix are required only if you are planning to use the Usage Accelerator application that is a part of the Siebel Analytics Bridge 7.5 application. If you licensed the Usage Accelerator application versions 7.7 or 7.7.1, you should follow the installation instructions in *Siebel Business Analytics Platform Installation and Configuration Guide*. No additional steps are required to install these versions of the Usage Accelerator application.

This appendix contains the following topics:

- [Installing the Usage Accelerator on page 261](#)
- [7.7 Usage Accelerator-Analytics Bridge Files on page 267](#)

## Installing the Usage Accelerator

The Usage Accelerator installation process consists of installing the Usage Accelerator application and importing seed data into the transactional database.

You install the Usage Accelerator application using the standard Siebel Business Analytics installer. The installation options that are available to you depend on the license key you enter.

### *To install the Usage Accelerator application*

- 1 In the Analytics installer, click Next in the Welcome screen.
- 2 Accept the terms of the license agreement.
- 3 Browse for the appropriate license key file.
- 4 Select the Usage Accelerator installation option.

The Installer installs the application on your machine.

- 5 Import new transactional database schema definitions required for running the ETL process for the Usage Accelerator.

- a Copy the following file:

Copy	From	To
SRW_OLTP_75.sif	SiebelAnalytics\dwrep	\tools\objects

- b Open Siebel Tools and point to the development database.

- c Navigate to Repository > Import from Archive, and select the file SRW\_OLTP\_75.sif.
- d Click Open.

The Import Wizard—Preview screen appears, listing the Analytics Bridge tables.

- e Click Next.

**NOTE:** All the objects imported in this process should be new to your repository; therefore, there should be no conflict due to an import. In case of conflict, in the Conflict Resolution area, select the option Merge the object definition from the archive file with the definition in the repository.

- f A dialog box appears, informing you that the operation will modify your repository and asking if you want to proceed. Click Yes.
- g The Import Wizard — Summary screen appears, showing a summary of the .sif changes to the repository files. Click Finish.

### 6 Apply the new schema definitions to the transactional database:

- a In Siebel Tools, go to the Table screen. Enter the following search string:

S\_ETL\_PARAM or S\_ETL\_SRC\_TABLE or S\_NQ\_ACCT or S\_NQ\_JOB or S\_ETL\_R\_IMG\_\* or S\_ETL\_D\_IMG\_\* OR S\_ETL\_I\_IMG\_\*

You should see the following tables:

- S\_ETL\_D\_IMG\_1
- S\_ETL\_D\_IMG\_10 to S\_ETL\_D\_IMG\_13
- S\_ETL\_D\_IMG\_133 to S\_ETL\_D\_IMG\_139
- S\_ETL\_D\_IMG\_14
- S\_ETL\_D\_IMG\_140 to S\_ETL\_D\_IMG\_147
- S\_ETL\_D\_IMG\_15 to S\_ETL\_D\_IMG\_19
- S\_ETL\_D\_IMG\_2
- S\_ETL\_D\_IMG\_20 to S\_ETL\_D\_IMG\_29
- S\_ETL\_D\_IMG\_3
- S\_ETL\_D\_IMG\_30 to S\_ETL\_D\_IMG\_39
- S\_ETL\_D\_IMG\_4
- S\_ETL\_D\_IMG\_40 to S\_ETL\_D\_IMG\_49
- S\_ETL\_D\_IMG\_5
- S\_ETL\_D\_IMG\_50 to S\_ETL\_D\_IMG\_59
- S\_ETL\_D\_IMG\_6
- S\_ETL\_D\_IMG\_60 to S\_ETL\_D\_IMG\_69
- S\_ETL\_D\_IMG\_7
- S\_ETL\_D\_IMG\_70 to S\_ETL\_D\_IMG\_79

- ❑ S\_ETL\_D\_IMG\_8
- ❑ S\_ETL\_D\_IMG\_80 to S\_ETL\_D\_IMG\_83
- ❑ S\_ETL\_D\_IMG\_9
- ❑ S\_ETL\_I\_IMG\_1
- ❑ S\_ETL\_I\_IMG\_10 to S\_ETL\_I\_IMG\_13
- ❑ S\_ETL\_I\_IMG\_133 to S\_ETL\_I\_IMG\_139
- ❑ S\_ETL\_I\_IMG\_14
- ❑ S\_ETL\_I\_IMG\_140 to S\_ETL\_I\_IMG\_147
- ❑ S\_ETL\_I\_IMG\_15 to S\_ETL\_I\_IMG\_19
- ❑ S\_ETL\_I\_IMG\_2
- ❑ S\_ETL\_I\_IMG\_20 to S\_ETL\_I\_IMG\_29
- ❑ S\_ETL\_I\_IMG\_3
- ❑ S\_ETL\_I\_IMG\_30 to S\_ETL\_I\_IMG\_39
- ❑ S\_ETL\_I\_IMG\_4
- ❑ S\_ETL\_I\_IMG\_40 to S\_ETL\_I\_IMG\_49
- ❑ S\_ETL\_I\_IMG\_5
- ❑ S\_ETL\_I\_IMG\_50 to S\_ETL\_I\_IMG\_59
- ❑ S\_ETL\_I\_IMG\_6
- ❑ S\_ETL\_I\_IMG\_60 to S\_ETL\_I\_IMG\_69
- ❑ S\_ETL\_I\_IMG\_7
- ❑ S\_ETL\_I\_IMG\_70 to S\_ETL\_I\_IMG\_79
- ❑ S\_ETL\_I\_IMG\_8
- ❑ S\_ETL\_I\_IMG\_80 to S\_ETL\_I\_IMG\_83
- ❑ S\_ETL\_I\_IMG\_9
- ❑ S\_ETL\_R\_IMG\_1
- ❑ S\_ETL\_R\_IMG\_10 to S\_ETL\_R\_IMG\_13
- ❑ S\_ETL\_R\_IMG\_133 to S\_ETL\_R\_IMG\_139
- ❑ S\_ETL\_R\_IMG\_14
- ❑ S\_ETL\_R\_IMG\_140 to S\_ETL\_R\_IMG\_147
- ❑ S\_ETL\_R\_IMG\_15 to S\_ETL\_R\_IMG\_19
- ❑ S\_ETL\_R\_IMG\_2
- ❑ S\_ETL\_R\_IMG\_20 to S\_ETL\_R\_IMG\_29
- ❑ S\_ETL\_R\_IMG\_3

- ❑ S\_ETL\_R\_IMG\_30 to S\_ETL\_R\_IMG\_39
- ❑ S\_ETL\_R\_IMG\_4
- ❑ S\_ETL\_R\_IMG\_40 to S\_ETL\_R\_IMG\_49
- ❑ S\_ETL\_R\_IMG\_5
- ❑ S\_ETL\_R\_IMG\_50 to S\_ETL\_R\_IMG\_59
- ❑ S\_ETL\_R\_IMG\_6
- ❑ S\_ETL\_R\_IMG\_60 to S\_ETL\_R\_IMG\_69
- ❑ S\_ETL\_R\_IMG\_7
- ❑ S\_ETL\_R\_IMG\_70 to S\_ETL\_R\_IMG\_79
- ❑ S\_ETL\_R\_IMG\_8
- ❑ S\_ETL\_R\_IMG\_80 to S\_ETL\_R\_IMG\_83
- ❑ S\_ETL\_R\_IMG\_9
- ❑ S\_ETL\_PARAM
- ❑ S\_ETL\_SRC\_TABLE
- ❑ S\_NO\_ACCT
- ❑ S\_NO\_JOB

**b** Select all these tables, and click Apply at the top of the screen.

**c** In the Apply Schema dialog box, under the entry Tables, select Current Query from the dropdown list.

**d** Under the subsequent entries, enter the connection parameters for the development database. (Your connection information will vary depending on your particular database platform and on the configuration of your particular database environment.)

**e** Click Apply.

### 7 Import repository objects to enable embedded Analytics.

**NOTE:** This step is required only if are planning to use the Usage Accelerator in an integrated environment with a Siebel Business application version 7.5.3.

**a** Lock the following projects:

- ❑ Analytics
- ❑ ERM
- ❑ Siebel Field Service
- ❑ Siebel Marketing Enterprise
- ❑ Siebel Channel
- ❑ Siebel Sales Enterprise
- ❑ Siebel Service Enterprise

- Siebel Universal Agent

- b Copy the following file:

Copy	From	To
SRW_753_77_Plus_UA.sif	SiebelAnalytics\dwrep	\tools\objects

- c In Siebel Tools, navigate to Repository > Import from Archive, and select the file SRW\_753\_77\_Plus\_UA.sif.
- d Click Open.  
The Import Wizard—Preview displays a list of tables.
- e In the Conflict Resolution area, select the option Merge the object definition from the archive file with the definition in the repository, and click Next.  
**NOTE:** Do not select the Overwrite option, because this will delete existing objects in the repository.
- f The Import Wizard—Summary screen displays a summary of the .sif changes to the repository files. Click Finish.

- 8 Recompile the SRF file.

**NOTE:** This step is required only if are planning to use the Usage Accelerator in an integrated environment with a Siebel Business application version 7.5.3.

- a In Windows Explorer, navigate to \tools\objects\enu, and rename the siebel.srf file.
- b In Siebel Tools, navigate to Tools > Compile Projects, and select the Locked Projects radio button.
- c Under Siebel Repository, select the new SRF file you created in [Step a](#), and click Compile.  
To see the Usage Accelerator screen in your application, the new SRF file must replace the siebel.srf file you were using.

- 9 Confirm the Analytics Server name to run Embedded Analytics.

**NOTE:** This step is required only if are planning to use the Usage Accelerator in an integrated environment with a Siebel Business application version 7.5.3.

- a Log in to the Siebel application as the administrator.
- b Navigate to Site Map > Administration - Integration > WI Symbolic URL List.
- c In the Administration - Integration screen, from the visibility filter, select Host Administration.
- d In the Host Administration list, locate the record Name=[AnalyticsServerName].
- e Change [AnalyticsServerName] to the name of the machine hosting your Analytics Server.

- 10 Import language-independent Siebel seed data.

- a Copy the appropriate seed data files:

Copy	From	To
seed_753_77_plus.dat	SiebelAnalytics\dwrep	Local machine
seed_753_77_plus_<xxx>.inp where xxx corresponds to the database platform you are using	SiebelAnalytics\dwrep	Local machine

- b Open a command line, and go to the same directory where you copied the .dat and .inp files.  
 c Replace each of the connection parameters with the values appropriate to your database environment, and then run the appropriate import command from the following table.

Database Platform	Run Import Command
DB2UDB	\$SIEBELSERVERROOT\bin\dataimp /u \$UserName /p \$Password /c "\$ODBCDataSource" /d \$DatabaseOwner /f seed_753_77_plus.dat /w y /q 100 /h Log /x f /i seed_753_77_plus_db2udb.inp /l seed_753_77_plus_db2udb.log
MSSQL	\$SIEBELSERVERROOT\bin\dataimp /u \$UserName /p \$Password /c "\$ODBCDataSource" /d \$DatabaseOwner /f seed_753_77_plus.dat /w y /q 100 /h Log /x f /i seed_753_77_plus_mssql.inp /l seed_753_77_plus_mssql.log
Oracle	\$SIEBELSERVERROOT\bin\dataimp /u \$UserName /p \$Password /c "\$ODBCDataSource" /d \$DatabaseOwner /f seed_753_77_plus.dat /w y /q 100 /h Log /x f /i seed_753_77_plus_oracle.inp /l seed_753_77_plus_oracle.log

- 11 Associate the new Usage Accelerator responsibilities with the users whom you want to see the Usage Accelerator screen.

The Usage Accelerator responsibilities are the following:

- Usage Accelerator Tracking
- Usage Accelerator - Sales Rep
- Usage Accelerator - Sales Manager
- Usage Accelerator - Sales Executive
- Usage Accelerator - Administrator

## 7.7 Usage Accelerator-Analytics Bridge Files

The contents of each of the files included in the Inca\_Horz\_Bridge folder are shown in [Table 68](#).

Table 68. 7.7 Usage Accelerator Files

File Name	Purpose of File
SRW_OLTP_75.sif	Archive file containing schema definitions for tables and indices that support ETL processes and Analytics functionality.
SRW_753_77_Plus_UA.sif	Archive file containing the logical definition of the Usage Accelerator integration objects.
seed_753_77_plus.dat	Siebel Seed Data file containing language-independent seed data records for the following tables: <ul style="list-style-type: none"> <li>■ S_WI_SYMURL</li> <li>■ S_WE_SYMURL_ARG</li> <li>■ S_RESP</li> <li>■ S_APP_VIEW</li> <li>■ S_APP_VIEW_RESP</li> </ul>
<ul style="list-style-type: none"> <li>■ seed_753_77_plus_db2udb.inp</li> <li>■ seed_753_77_plus_mssql.inp</li> <li>■ seed_753_77_plus_oracle.inp</li> </ul>	Import file used to control the import of the seed_inca_bridge.dat file to a particular database platform.



# C

## Localizing Siebel Business Analytics Deployments

Siebel Business Analytics is designed to allow users to dynamically change their preferred language and locale preferences. This chapter contains the following topics on how to configure Siebel Business Analytics Applications for deployment in one or more language environments besides English:

- [Process of Maintaining Translation Tables for Analytics on page 269](#)
- [About Translating Web Catalog Strings on page 277](#)
- [About Installing Siebel Business Analytics Localization Packs on page 278](#)

### Process of Maintaining Translation Tables for Analytics

The Siebel Business Analytics Presentation layer supports multiple translations for any column name. When working with Siebel Answers or rendering a dashboard, English-speaking and French-speaking users see their local language strings in their reports. There are two kinds of application strings requiring translation in Siebel Business Analytics:

- **Metadata**  
Metadata strings are Analytics-created objects in the Siebel Business Analytics repository such as Subject Area, Metrics, and Dimensions.
- **Web Catalog**  
Web Catalog objects are end-user created objects such as Reports, Dashboards, and Pages. Translations for Web catalog strings are stored in the SiebelAnalytics.webcat file. For more information on accessing these strings and changing the translations, see *Siebel Analytics Web Administration Guide*.

This process includes the following tasks:

- [Editing Custom Labels in Siebel Business Analytics Dashboards on page 270](#)
- [Upgrading Siebel Business Analytics Seed Data for Non-English Locales on page 270](#)
- [Importing Siebel Financial Services Metadata Files on page 271](#)
- [Changing the Default Currency in Analytics Applications on page 272](#)
- [Externalizing Metadata Strings on page 273](#)
- [Checking the Execution Order of Initialization Blocks on page 274](#)
- [Adding Custom Translations to S\\_MSG Table on page 274](#)

## Editing Custom Labels in Siebel Business Analytics Dashboards

This topic is part of the [“Process of Maintaining Translation Tables for Analytics.”](#)

Certain reports in the Web Catalog have custom labels for global prompts on prebuilt Siebel Business Analytics application dashboards. These custom labels are not translated at this point, and need to be translated appropriately. Edit the custom labels as described in the following procedure.

**NOTE:** The prompt Edit can be accessed directly by browsing the Catalog through Siebel Answers.

### *To edit the custom labels*

- 1 Log into the dashboard as a user with Administrative privileges (Full Control) on that dashboard.
- 2 In the section containing the prompt, click the Edit button.
- 3 Click on the properties icon (hand symbol) to open the Analytics Request Properties page.
- 4 Click on the Modify Request hyperlink to navigate to Siebel Answers.
- 5 In the prompt definition, edit the string under Label, delete the English (US) string, and add the appropriate translation.

## Upgrading Siebel Business Analytics Seed Data for Non-English Locales

This topic is part of the [“Process of Maintaining Translation Tables for Analytics.”](#)

If Siebel Business Analytics data in your deployment is to be viewed in a language other than English, you must also import Locale seed data into the Siebel transactional (OLTP) database. This data allows the Analytics applications metadata to be viewed in non-English languages. Because this seed data is normally part of the Siebel operational application suite, you would have loaded part of this data when you installed the Siebel operational application. The additional task described in [“Importing Locale Seed Data into the Siebel Transactional Database”](#) updates the seed data and makes it current for the Siebel Business Analytics Applications. This process must be performed once for each language in which your data is to be viewed.

During the Siebel Business Analytics installation, a folder named \$INSTALLDIR\SeedData was created, which contains a subfolder for each language. Within each language subfolder is a .dat file (the data to be imported) and an .inp file (the WHERE clause governing the import). For more information about these files, see the topic [“Importing Siebel Financial Services Metadata Files”](#) on page 271.

### Importing Locale Seed Data into the Siebel Transactional Database

If the primary language being used is not English, you may have to import additional locale seed data (depending on the number of languages you use) as shown in the following procedure.

**NOTE:** This procedure can be performed only by a Siebel Applications Administrator.

### To import Locale seed data into the Siebel transactional database

- 1 Open a command window and navigate to `SI INSTALLDIR\SeedData\bin` folder.
- 2 Run the import command in [Step 3](#) after replacing the connection parameters shown in the following table with the values appropriate to your database environment.

Import parameters:
UserName
Password
ODBCDataSource
DatabaseOwner

- 3 Run the import command:

```
$I NSTALLDIR\SeedData\bin\dataimp /u $UserName /p $Password /c "$ODBCDataSource"  
/d $DatabaseOwner /f $I NSTALLDIR\SeedData\<XX>\analytics_seed_<XXX>.dat /w y /q  
100 /h Log /x f /i  
$I NSTALLDIR\SeedData\<XX>\metadata_upgrade_<XXX>_<DBPlatform>.inp /l  
metadata_upgrade_<XXX>.log
```

**NOTE:** Replace the XX with the Siebel Business Analytics two-letter language code (`_fr`, `_it`) and the XXX with the Siebel Systems three-letter code (FRA, ITA).

- 4 When you have finished importing the Locale seed data into the OLTP database, configure database connectivity to the machine on which the Siebel Analytics Server resides.

Siebel Analytics Server uses the Siebel transactional database in order to read the metadata translations. Configure the database connectivity on the Siebel Analytics Server machine to the OLTP database, so that the server can load the appropriate translations for the languages you are using.

**NOTE:** Unicode connectivity can be used to access databases that do not support Unicode.

## Importing Siebel Financial Services Metadata Files

This topic is part of the [“Process of Maintaining Translation Tables for Analytics.”](#)

There are differences in the metadata terminology between the Siebel Financial Services application and the metadata terminology of other Siebel operational applications. Siebel Financial Services customers running an implementation in ENU (English) must import the seed data as described in [“Importing Locale Seed Data into the Siebel Transactional Database”](#) on page 270.

The files used in the importing of Siebel operational application metadata and seed data are shown in [Table 69](#).

Table 69. Files for Importing Siebel Operational Application Metadata and Seed Data

File Name	Purpose of File
Metadata_upgrade_<XXX>_ora.inp Metadata_upgrade_<XXX>_mssql.inp Metadata_upgrade_<XXX>_db2.inp	Set of import files used to control the import of the analytics_seed_<XXX>.dat file to a particular database platform.  XXX is the Siebel Systems three-letter code. For example: FRA, ITA, DEU.
analytics_seed_<XXX>.dat	Set of Siebel seed data files containing translations for all the Siebel Business Analytics metadata objects. Each file contains all the translations for a single language. These files place translation-related seed data into the S_MSG table in the Siebel transactional database.  XXX is the Siebel Systems three-letter code. For example: FRA, ITA, DEU.

## Changing the Default Currency in Analytics Applications

This topic is part of the [“Process of Maintaining Translation Tables for Analytics.”](#)

In Siebel Business Analytics Applications, you may see a dollar sign used as the default symbol when amounts of money are displayed. In order to change this behavior, you must edit the currencies.xml file using the following procedure. The currencies.xml file is located in the following directories:

■ Windows:

```
$INSTALLDIR\Siebel AnalyticsData\Web\config\
```

■ UNIX:

```
$INSTALLDIR/Siebel Analytics/Data/web/config
```

### To change the default currency in Analytics Applications

- 1 In a text editor, open the currencies.xml file.
- 2 Look for the currency tag for the warehouse default (tag="int:wrhs"):

```
<Currency tag="int:wrhs" type="international" symbol="$" format="$#" digits="2"
displayMessage="kmsgCurrencySiebel Warehouse">
  <negative tag="minus" format="-$#" />
</Currency>
```

- 3 Replace the symbol, format, digits and negative information in the warehouse default with the information from the currency tag you want to use as the default.

For example, if you want the Japanese Yen to be the default, replace the contents of the warehouse default currency tag with the values from the Japanese currency tag (tag="loc:ja-JP"):

```
<Currency tag="loc:ja-JP" type="local" symbol="¥" locale="ja-JP" format="$#"
digits="0">
  <negative tag="minus" format="- $" />
</Currency>
```

When you are finished, the default warehouse currency tag for Japanese should look like the following example:

```
<Currency tag="int:wrhs" type="international" symbol="¥" format="$#" digits="0"
displayMessage="kmsgCurrencySiebel Warehouse">
  <negative tag="minus" format="- $" /> </Currency>
```

- 4 Save and close the currencies.xml file.

## Externalizing Metadata Strings

This topic is part of the [“Process of Maintaining Translation Tables for Analytics.”](#)

Metadata Strings are loaded by the Siebel Analytics Server from a database table. In the case of Siebel Business Analytics applications, this table is S\_MSG in the Siebel transactional database. The initialization block Externalize Metadata Strings loads the strings for the Server. It is recommended that you run a test to make sure that this initialization block runs successfully. An example of the translation table is shown in [Table 70](#).

Table 70. Example of S\_MSG Translation Table

MSG_NUM	MSG_TEXT	LANG_ID
CN_Customer_Satisfaction	Customer Satisfaction	ENU
CN_Customer_Satisfaction	Kundenzufriedenheit	DEU
CN_Customer_Satisfaction	Satisfação do cliente	PTB

By default, the Siebel Business Analytics repository is configured to run in English only. To deploy in any other language, you must externalize the metadata strings, as described in the following procedure.

### *To externalize metadata strings in the Siebel Business Analytics repository*

- 1 Stop the Siebel Analytics Server.
- 2 Open SiebelAnalytics.rpd using the Server Administration Tool in offline mode.
- 3 Select the entire Presentation layer and right-click the mouse to display the menu.

- n From the pop-up menu, select Externalize Display Names. (A check mark appears next to this option the next time you right-click on the Presentation layer.)
- n Unselect the Presentation layer.

**NOTE:** When Externalize Display Names is checked, all metadata strings are read from an external Siebel transactional database, specifically from the S\_MSG table.

- 4 In the Physical layer, select the Externalized Metadata Strings database icon. Expand the tree.
- 5 Double-click Internal System Connection Pool.  
In the Connection Pool window General tab, the field Data source name should point to the Siebel operational application database.
- 6 Click OK and exit the Server Administration Tool.
- 7 Restart the Siebel Analytics Server.

## Checking the Execution Order of Initialization Blocks

This topic is part of the [“Process of Maintaining Translation Tables for Analytics.”](#)

This topic applies to an integrated Siebel Business Analytics environment in which display names are externalized. The language of the metadata in Answers (the Subject Area and column names) depends upon the initialization block LOCALE, which must be executed before the External Metadata Strings initialization block. The following procedure describes how to check the precedence of initialization block execution.

### *To check the execution order of initialization blocks in the Siebel Business Analytics repository*

- 1 Stop the Siebel Analytics Server.
- 2 Open SiebelAnalytics.rpd using the Server Administration Tool in offline mode.
- 3 From the menu, navigate to Manage > Variables > Initialization Blocks and double-click Externalize Metadata Strings.
- 4 Click the Execution Precedence tab.  
Make sure that the LOCALE initialization block is shown as executing before Externalize Metadata Strings.
- 5 Click OK and close Variable Manager, and exit the Server Administration Tool.
- 6 Restart the Siebel Analytics Server.

## Adding Custom Translations to S\_MSG Table

This topic is part of the [“Process of Maintaining Translation Tables for Analytics.”](#)

When you add custom objects to the metadata and choose to externalize these objects (by right-clicking the object and checking the Externalize Display Name option), the Siebel Analytics Server looks for the translations (including those for the native language) in the S\_MSG table.

If you do not externalize the display names, you do not need to perform the following procedures.

**NOTE:** The custom Presentation layer objects show up only in the native language of the metadata (the language in which you added these new objects).

The tasks for adding custom translations to S\_MSG table require the use of Siebel Tools.

- [Adding Lists of Values for Analytics Metadata on page 275](#)
- [Adding String Translations for Analytics Metadata on page 276](#)

### Adding Lists of Values for Analytics Metadata

The S\_MSG table can be populated with translated message strings. Before populating the S\_MSG table, you must use Siebel Tools to add lists of values (LOV) for Siebel Business Analytics (this is a one-time task).

#### *To add LOV values for Siebel Business Analytics metadata*

- 1 Open Siebel Tools and connect to your operational database.
- 2 Navigate to the Screens Menu > System Administration > List of Values.
- 3 Right-click and select New Record from the pop-up menu.
- 4 Depending on your deployment, add a Message Type record with the values shown in the following table.

**NOTE:** As shown in the following table, the values are different for Financial Services and other Siebel operational applications.

Value Name	Enter (Financial Services Only)	Enter (Other Applications)
Type	MESSAGE_TYPE	MESSAGE_TYPE
Display Value	FINS_Metadata	Metadata
Description	Analytics Financial Services Metadata Strings	Analytics Metadata Strings
Language-Independent Code	FINS_Metadata	Metadata
Active	Y [check mark]	Y [check mark]
Language Name	[Choose deployment language]	[Choose deployment language]

All other fields should accept the default settings.

- Depending on your deployment, add a Message Facility record with the values shown in the following table.

**NOTE:** As shown in the following table, the values are different for Financial Services and other Siebel operational applications.

Value Name	Enter (Siebel Financial Services Applications Only)	Enter (Other Applications)
Type	MESSAGE_FACILITY	MESSAGE_FACILITY
Display Value	FIN	HMF
Description	Financial Services Message Facility	Analytics Message Facility
Language-Independent Code	FIN	HMF
Active	Y [check mark]	Y [check mark]
Language Name	[Choose deployment language]	[Choose deployment language]

All other fields should accept the default settings.

- Add a Message Level record with the values shown in the following table.

Value Name	Enter
Type	MESSAGE_LEVEL
Display Value	AnalyticsNew
Description	Diagnostic Message for server side programs
Language-Independent Code	AnalyticsNew
Active	Y [check mark]
Language Name	[Choose deployment language]

## Adding String Translations for Analytics Metadata

The following procedure describes how to add string translations for Siebel Business Analytics metadata to the S\_MSG table. This task occurs in Siebel Tools and in the Server Administration Tool.

### To add string translations for Analytics metadata

- Open Siebel Tools and connect to your database.
- Navigate to Screens Menu > System Administration > Strings.  
Right-click and select New Record from the menu to add a new record.
- Obtain the Message Key from the Server Administration Tool as follows:

- n In the Server Administration Tool, right-click on the new Presentation layer metadata object and select Properties from the menu.
- n The Message key is displayed in the dialog box under Custom Display Name. The Message key is the part that starts with CN\_.

For example, double-click the Pipeline catalog folder in the Presentation layer. The Custom Display name is Valueof(NO\_SESSION.CN\_Pipeline). CN\_Pipeline is the Message Key.

- 4 Select your deployment language.
- 5 Select the Message Type, depending on which one was added in [Step 4](#) of the procedure in “Adding Lists of Values for Analytics Metadata” on page 275.

Application	Display Value	Description
Siebel Operational Applications	Metadata	Analytics Metadata Strings
Siebel Financial Services	FINS_Metadata	Analytics Financial Services Metadata Strings

- 6 Select the Message Level *AnalyticsNew*, then do the following:
  - n In the Message Text column, add the translation of the object.
  - n Check the flags (set to Yes) for the Translate and Active columns.
  - n Set the Error Message # column to 0.
- 7 Select the Message Facility, depending on which one was added in [Step 5](#) of the procedure in “Adding Lists of Values for Analytics Metadata” on page 275.

Application	Display Value	Description
Siebel Operational Applications	HMF	Analytics Message Facility
Siebel Financial Services	FIN	Financial Services Message Facility

- 8 Repeat [Step 3](#) through [Step 7](#) on page 277 for each new metadata object string.
- 9 Exit Siebel Tools, the Server Administration Tool, and restart the Siebel Analytics Server.

## About Translating Web Catalog Strings

The translations for such Web Catalog objects as report and page names are embedded in the SiebelAnalytics.webcat file. In multiple language deployment mode, if you add any additional Web Catalog objects, such as reports and new dashboard pages, you also need to add the appropriate translations. Add these translations using the Catalog Manager tool. For more information on using this utility, see *Siebel Analytics Web Administration Guide*.

## About Installing Siebel Business Analytics Localization Packs

During your Siebel operational application installation, you also should have installed a Siebel operational application language pack. The language pack installation process populates the S\_MSG table from seed data shipped with the Siebel operational application software. The languages available in the S\_MSG table are the same as the language packs that you install. For more information on Siebel operational application language pack installation, see the server installation guide for the operating system you are using.

# D

## Integrating Analytics Dashboards and Operational Applications Data

This appendix describes the additional configuration steps required for you to run a Siebel Business Analytics application with a Siebel CRM (operational) application.

**TIP:** See *Siebel Business Analytics Server Administration Guide* before performing any of the tasks in this section.

The integration of Siebel Business Analytics with a Siebel operational application involves two general processes:

- [Importing Siebel Industry Applications Seed Data on page 280](#)
- [Completing the Initialization in the Siebel Operational Application on page 281](#)

# Importing Siebel Industry Applications Seed Data

Siebel Business Analytics seed data is not installed with Siebel Industry Applications. You must import the seed data into your database after the Siebel Business Analytics installation is completed.

## *To import Analytics seed data into a Siebel transactional database*

- 1 Obtain the required language .inp and .dat files from the Siebel Business Analytics language folder `$INSTALLDIR\SeedData\ I_xx`, where `xx` is the two-letter code for the language you want to import.
- 2 Copy the .dat and corresponding .inp file from the language folder to the Siebel Server installation \bin folder.
- 3 From the command prompt in `siebsrvr\bin`, run the following command:

```
dataimp /u $USERNAME /p $PASSWORD /c "$ODBCDataSource" /d $Tableowner /f  
analytics_seed_<XXX>.dat /i metadata_upgrade_<XXX>_<DBPlatform>.inp /w y
```

Replace the `XXX` with the Siebel Systems three-letter code (FRA, ITA) and the `DBPlatform` with the abbreviation for the database platform being used. For example:

```
dataimp /u sadmin /p sadmin /c JPN_CRMDEV1 /d siebel /f analytics_seed_JPN.dat /i  
metadata_upgrade_JPN_db2.inp /w y
```

For information about merging content into the Siebel Business Analytics Web Catalog, see the topic on Analytics Catalog Manager in *Siebel Business Analytics Web Administration Guide*.

## Completing the Initialization in the Siebel Operational Application

Once you have configured your Siebel Analytics Server and are able to access the dashboards, you need to update the Siebel operational application to view Analytics dashboards from within the Siebel operational application. Completing the initialization in the Siebel operational application involves the following processes:

- Changing the operational application host name to the host name of the machine that runs Siebel Business Analytics Web. See the following topics:
  - [Updating the Siebel Operational Application on page 281](#)
  - [Reapplying Customized Style Sheets on page 282](#)
  - [Process of Configuring Siebel Business Analytics with Siebel Web Extension \(SWE\) on page 283](#)
    - [Creating a Virtual IP Address for the SWE and Analytics Web on page 284](#)
    - [Testing the Virtual IP Configuration for Siebel Business Analytics and the SWE on page 284](#)
  - [Process of Configuring Analytics Action Links on page 285](#)
    - [Configuring Action Links Containing Single Quotation Marks on page 285](#)
    - [Testing Analytics Action Links on page 286](#)
- Customizing the operational application home page, dashboards, or content, or add views to a dashboard. See the following topics:
  - [Process of Integrating Analytics and Siebel Operational Applications on page 286](#)
    - [Accessing Optional Analytics Applications on page 286](#)
    - [Configuring the Browser Settings for Operational Applications on page 288](#)
  - [Process of Customizing Analytics Application Home Page and Dashboards on page 288](#)
    - [Customizing Analytics Content on the Siebel Operational Application Home Page on page 289](#)
    - [Determining the Analytics Report Path Argument on page 290](#)
    - [Adding Views for Custom Analytics Dashboards on page 290](#)
    - [Verifying NQHOST Setup for Pharma Mobile Analytics Client on page 291](#)
    - [Integrating the Pharma Application Home Page with the Pharma Mobile Analytics Client on page 293](#)
    - [Importing Pharma Application Target Lists to the Pharma Mobile Analytics Client on page 294](#)

## Updating the Siebel Operational Application

The following task changes the Siebel operational application host name to the host name of the machine that runs Siebel Business Analytics Web.

### *To update the Siebel operational application*

- 1 Open your Siebel operational application and login as SADMIN.
- 2 Navigate to View > Site Map.
- 3 Click Integration Administration screen.
- 4 Click Host Administration view.
- 5 Query for NQHOST in the Virtual Name column:
  - In Windows, change the host name from *<AnalyticsServerName>* to the host name of the machine that runs Analytics Web.
  - In AIX or Solaris, change the host name from *<AnalyticsServerName>* to the name of the port.

For example, *servername.siebel.com:8080*

**NOTE:** The following additional information is applicable only to UNIX platforms.

You may need to add the domain name suffix to the server name in order to make sure that action links work on the Siebel Business Analytics user interface.

- 6 Log out of the application and log back in.

## Reapplying Customized Style Sheets

For Siebel Business Analytics versions 7.7 and later, new styles have been appended to the following style sheets:

- Go.css
- PortalBanner.css
- PortalContent.css
- Views.css

These new classes are identified in the style sheets. In this version of Siebel Business Analytics, new styles and files must be added to the underlying style sheet (for example, to *s\_Siebel7*). For complete functionality, any custom styles require similar updating. In addition, *views2.css* and some other files have been added to the *s\_* directory. For custom column formatting to work properly, references to font sizes and families should also be removed from the *td* styles in *PortalBanner.css*, *PortalContent.css*, *Views.css*.

Because of these changes to styles, review your deployment's customizations manually, reapply them, and test them thoroughly to ensure that there are no problems.

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 your default views*

- 1 Shut down Siebel Business Analytics Server, Analytics Web and IIS.

- 2 Remove your custom views.css from the directory where it has been installed.

For example:

```
$I NSTALL \Web\App\Res\s_Si ebel 7\b_mozil l a_4
```

or

```
$I NSTALL \Si ebel Anal yti csData\Web.
```

- 3 Clear Analytics Web Server Cache.

In the C:\WINNT\Temp directory, delete the nQs\_\*.temp files.

- 4 Clear the Browser Cache.

From the Internet Explorer menu, navigate to Tools > Internet Options > Settings > View Files, and delete all the files in these folder.

- 5 Restore the default views.css files to the appropriate folder.

- 6 Restart the Analytics Server, Analytics Web and IIS.

## Process of Configuring Siebel Business Analytics with Siebel Web Extension (SWE)

Whenever you run Siebel Business Analytics and Siebel Web Extension (SWE) on separate machines, you must perform additional configuration steps in order for action links and interactive charts to work. If, for example, you plan to run the SWE and Siebel Business Analytics Web on different Web servers, you must use some kind of networking or load balancing mechanism to create a single logical domain (or virtual IP address) for the two machines.

**CAUTION:** When Analytics Web Server and Siebel Web Server are installed on different machines and load balancing software is used to create a single virtual IP address, the action links feature works only if you log onto the Siebel application using a virtual Web browser. Action links fail on a dedicated client if the SWE and Analytics Web servers are on separate machines. Either use a virtual Web browser, or install the Analytics Web Server and Siebel Web Server on the same machine.

When one virtual IP address is created for two machines, the Web browser accesses one IP address and is still routed to different physical machines, based on the port accessed. From the browser, it appears that both servers are running on the same IP address.

You can use any of several physical methods to create a single logical domain, such as running SWE and Siebel Business Analytics Web on a single machine if you are not load balancing the SWE, or using a router to do the mapping, or using load balancing software. Your company must determine the best mechanism to accomplish this routing given the topology being used.

Configuring Siebel Business Analytics to work with Siebel Web Extension includes the following tasks:

- [Creating a Virtual IP Address for the SWE and Analytics Web on page 284](#)
- [Testing the Virtual IP Configuration for Siebel Business Analytics and the SWE on page 284](#)

## Creating a Virtual IP Address for the SWE and Analytics Web

This task is part of the “[Process of Configuring Siebel Business Analytics with Siebel Web Extension \(SWE\)](#).”

You create a virtual IP address for the Siebel Web Engine (SWE) and Analytics Web in order to make it appear that all servers are running on the same virtual machine. The easiest way to do this is to configure Analytics Web to run on a different port (for example, port 84) from SWE (which usually runs on port 80).

For example, SWE is load-balanced across *<machine1>*:port 80 and *<machine2>*: port 80, and Analytics Web is running on *<machine3>*:port 84, and the virtual address is defined as `http://siebel.company.com`. Therefore, the network or load-balancing software should be configured to route requests like `http://siebel.company.com` to *<machine1>* and *<machine2>*, and to route requests like `http://siebel.company.com:84` to *<machine3>*.

### To create a virtual IP address for Siebel Web Engine and Analytics Web

- 1 On the network, set up CSS to direct requests from *<virtual domain>* to *<physical Siebel Web Server Extension machine>*:
  - Where the acronym CSS represents the load-balancer or router used to do the virtual IP configuration.
  - Where *<virtual domain>* is the virtual IP prefix that users enter to navigate to the Siebel applications (in the preceding example, this is `http://siebel.company.com`).
- 2 On the network, set up CSS to direct requests from *<virtual domain>*:84 to *<physical Analytics Web machine>*:84.
- 3 In the Siebel application, using the Siebel Administration screen, set the NQHost parameters for Siebel Business Analytics Symbolic URLs to point to the *<virtual domain>*:84, instead of directly to the Siebel Business Analytics Web server physical machine.

**NOTE:** If you are running Siebel Business Analytics 7.5.3 instead of version 7.7 or later, perform the following additional step.
- 4 In the Siebel application on the Siebel Business Analytics Web machine, locate the registry setting `... \SOFTWARE\Siebel Systems, Inc. \Siebel Analytics\Web\7.5\Charts`.
- 5 Add a new key, `ForceFileBasedPainter`, and enter `TRUE` into the Data string.

## Testing the Virtual IP Configuration for Siebel Business Analytics and the SWE

This task is part of the “[Process of Configuring Siebel Business Analytics with Siebel Web Extension \(SWE\)](#).”

Use a client browser to verify that Siebel Business Analytics and SWE work when accessed directly through a physical machine address, using the following procedure. For *<virtualdomain>*, substitute the Virtual IP address you created in [“Creating a Virtual IP Address for the SWE and Analytics Web” on page 284](#).

### ***To test the Virtual IP configuration with Siebel Business Analytics and SWE***

- 1 In a client browser, type *<virtual domain>*: 84/anal yti cs. The Siebel Business Analytics logon appears.
- 2 In a client browser, type *<virtual domain>/cal l center* (or other Siebel application). The SWE appears.
- 3 Navigate to an Analytics screen within the Siebel application to see if Siebel Business Analytics appears.
- 4 Interact with Siebel Business Analytics charts and action links.

## **Process of Configuring Analytics Action Links**

Siebel Business Analytics applications contain prebuilt action links in reports and dashboards. Action links are a way to navigate from a user's analytics dashboard to a record in a Siebel operational application, such as Siebel Call Center.

For example, you can drill down directly from a Siebel Sales Analytics dashboard to a specific record in a Siebel Sales view. The link is based on the row-ID column contained in a report. You can also create new action links for any existing report. For how to create Siebel Intelligence Dashboards action links, see *Siebel Business Analytics Web Administration Guide*.

Depending on your deployment, you may need to perform additional configuration of your Siebel Business Analytics application in order for the action links feature to work properly. The following tasks are relevant to the configuration of your application for action links:

- [Configuring Action Links Containing Single Quotation Marks on page 285](#)
- [Testing Analytics Action Links on page 286](#)

## **Configuring Action Links Containing Single Quotation Marks**

This task is part of the [“Process of Configuring Analytics Action Links.”](#)

Action links refer to views with simple names, such as All Account List View, which are easily referenced in the parameters for the NQSWENav command used to enable the link. For example, the action link to drill from an Account Record in Siebel Business Analytics to the All Account List View looks like this:

```
<a href="\j avascr ipt: NQSWENav(' All Account Li st Vi ew' , ' Account Li st Appl et' , ' "@' ' ); \ ">"@ " </a>
```

This example works when a view name does not contain any single quotation marks. However, many important Siebel views do contain quotation marks in their names. Simply pasting the view name with the quotation mark results in an error because the Siebel Web Engine cannot interpret the NQSWENav command:

```
<a href="\ javascript: NQSWENav(' Manager' s Account Li st Vi ew' , ' Account Li st Appl et' , '@' ); \ ">"@ " </a>
```

To prevent this problem, use the escape character (or backslash) to reference the single quotation mark in JavaScript. For any single quotation mark, insert two back slashes before the quote, and the Siebel Web Engine is able to process the request correctly. For example:

```
<a href="\ javascript: NQSWENav(' Manager\\' s Account Li st Vi ew' , ' Account Li st Appl et' , '@' ); \ ">"@ " </a>
```

## Testing Analytics Action Links

This task is part of the [“Process of Configuring Analytics Action Links.”](#)

Use the following procedure to make sure that action links you create work correctly.

### *To test a Siebel Business Analytics action link*

- 1 Log on using your system logons. Go to Service Analytics screen > Employee Analytics > To Do List.
- 2 Click the action link on the pie chart in Overdue Activities.  
You should be in Overdue Activities Detail in Analytics.
- 3 Now click any ROW\_ID action link.  
You should be in the Employee screen in Siebel Call Center.

## Process of Integrating Analytics and Siebel Operational Applications

The following tasks are described for the process of integrating your Siebel Business Analytics application with your Siebel operational application:

- [Accessing Optional Analytics Applications on page 286](#)
- [Configuring the Browser Settings for Operational Applications on page 288](#)
- [Process of Customizing Analytics Application Home Page and Dashboards on page 288](#)

## Accessing Optional Analytics Applications

This task is part of [“Process of Integrating Analytics and Siebel Operational Applications.”](#)

Depending on the options you purchased with your Siebel operational application, you must perform additional steps in order to access the corresponding Siebel Business Analytics options. [Table 71](#) shows the additional options for Siebel Business Analytics.

Table 71. Siebel Business Analytics Applications Options

Siebel Application	Options
Sales	Forecasting, Incentive Compensation
Service	Universal Queuing, Email Response, Agreements
Partner	Partner Marketing, Partner ERM, Partner ISS

By default, the dashboards and reports contained in these optional areas are hidden. If, for example, you purchased Sales Incentive Compensation with your Siebel Sales application, you must perform the additional steps shown in the following procedure to access the Incentive Compensation Analytics.

***To turn on options for Incentive Compensation Analytics***

- 1 Log in to Siebel Business Analytics as Administrator.
- 2 Navigate to Answers > Analytics Web Administration and go to Manage Web Groups & Users.
- 3 Locate the Web Group corresponding to your option.

The Web Group options are shown in the following list.

Web Group Option
No Forecasting
No Forecasting Lite
No Universal Queuing
No Email Response
No Service Agreements
No Partner Marketing
No Partner ERM
No Partner ISS

- 4 Click on the Edit icon.
- 5 Under the Group Membership section, click the delete icon (X) to delete Analytics Users from this group.
- 6 Click Finished and log out of the application.
- 7 Log in again to access the additional optional dashboards and reports.

## Configuring the Browser Settings for Operational Applications

**NOTE:** This topic applies only to Siebel Business Analytics version 7.7.1 and Siebel operational applications version 7.7.

This task is part of [“Process of Integrating Analytics and Siebel Operational Applications.”](#)

If the Siebel Server and the Siebel Business Analytics Server URLs are from different domains, you may need to change the browser settings for your Siebel Business Analytics application. Perform the following procedure.

**NOTE:** You do not need to change browser settings if the Siebel Server and the Siebel Business Analytics Server URLs are from the same domain.

### *To change browser settings for Siebel Business Analytics operational applications*

- 1 In your browser, navigate to Tools > Internet options > Security tab.
- 2 Select Internet zone and click Custom Level.
- 3 In the Miscellaneous > Access data sources across domains setting, select the Enable radio button and click OK.
- 4 Select Local Intranet zone and click Custom Level.
- 5 In the Miscellaneous > Access data sources across domains setting, select the Enable radio button and click OK.
- 6 Click OK to exit browser Tools.

## Process of Customizing Analytics Application Home Page and Dashboards

The process of customizing your Siebel Business Analytics application’s home page and dashboards may include the following tasks:

- [Customizing Analytics Content on the Siebel Operational Application Home Page on page 289](#)
- [Determining the Analytics Report Path Argument on page 290](#)
- [Adding Views for Custom Analytics Dashboards on page 290](#)
- [Verifying NQHOST Setup for Pharma Mobile Analytics Client on page 291](#)
- [Integrating the Pharma Application Home Page with the Pharma Mobile Analytics Client on page 293](#)
- [Importing Pharma Application Target Lists to the Pharma Mobile Analytics Client on page 294](#)

## Customizing Analytics Content on the Siebel Operational Application Home Page

This task is part of the [“Process of Customizing Analytics Application Home Page and Dashboards.”](#)

Siebel Business Analytics applications are integrated with Siebel operational applications using the symbolic URL infrastructure. The following task describes how to use symbolic URLs to link a new report to a Siebel operational application home page and how to add new Analytics Dashboards to the Siebel operational application. The symbolic URL specifies how the HTTP request to the external application should be constructed and to defines any arguments and values to be sent as part of the request.

**NOTE:** For more information on the symbolic URL infrastructure, see *Siebel Portal Framework Guide*. This topic assumes that you have successfully built a symbolic URL to link some external content, using the instructions given in *Siebel Portal Framework Guide*.

For each Analytical report on a Siebel operational application home page, there is a symbolic URL record defined that links the home page to the Analytics report. If you have not already done so, you need to create a new home page and set it up to use a symbolic URL.

**NOTE:** For Siebel Pharma Mobile Analytics settings, See the topic [“Verifying NQHOST Setup for Pharma Mobile Analytics Client”](#) on page 291.

### *To configure a new Home Page to use a symbolic URL*

- 1 Make sure the symbolic URL has been set up.
- 2 Launch the Siebel operational application and navigate to the Integration Administration > Symbolic URL Administration view.
- 3 Query for the symbolic URL that has been set up for Analytics.

The name of this symbolic URL should be exactly the same as the calculated value of the field that was added to the Business Component. For example, you may have a symbolic URL named HomePageAnalytics.

- 4 In the URL field, enter the Web URL.  
For example:

`http://NQHOST/Analytics/saw.dll`

For the Host Name, choose the Analytics Server Name from the drop-down list. The following table shows the other parameters for reports.

Parameter	Value
NQHOST	A virtual name in the URL that points to the Analytics Web machine
Fixup Name	Inside Applet
SSO Disposition	Inline
Analytics Web application name	Select from the drop-down list

- 5 Create the appropriate symbolic URL Arguments.

These arguments depend upon the particular Analytics report that you are trying to display. The Argument Values should be the same for any Analytics report you work with, except for the Path Argument Value. Use the procedure in [“Determining the Analytics Report Path Argument” on page 290](#) to determine the path to the Analytics report.

## Determining the Analytics Report Path Argument

This task is part of the [“Process of Customizing Analytics Application Home Page and Dashboards.”](#)

The Path argument tells the symbolic URL the path to the report on the Analytics Web. (For example, /shared/Sales/Pipeline/Overview/Top 10 Deals.) Use the following procedure to determine the path to the Analytics report.

### *To determine the path to the report*

- 1 Log on to your Analytics Web as an Administrator.
- 2 In the Siebel operational application, navigate to Answers > Analytics Web Administration.
- 3 Select Manage Analytics Catalog, and then navigate to your report.
- 4 Add this path name to the Symbolic URL argument.

The following table shows the symbolic URL path arguments for reports.

Name	Type	Path Argument Value	Append	Sequence #
Cmd	Constant	Go	Y	1
Path	Constant	/shared/Sales/Pipeline/Overview/Top 10 Deals	Y	2
Syndicate	Constant	Siebel	Y	3
nQUser	Command	UseSiebelLoginId	Y	4
nQPassword	Command	UseSiebelLoginPassword	Y	5
PostRequest	Command	PostRequest	Y	6

## Adding Views for Custom Analytics Dashboards

This task is part of the [“Process of Customizing Analytics Application Home Page and Dashboards,”](#) and is similar to that of adding Siebel Business Analytics reports to the home page:

- Using Siebel Tools, set up a new view.
- In the Siebel operational application, define a symbolic URL for that view.

For more information on how to set up a view to use Symbolic URLs, see *Siebel Portal Framework Guide*.

*To configure the symbolic URL for Analytics dashboards*

- 1 Define a Symbolic URL.
  - a Navigate to Site Map > Integration Administration > Symbolic URL Administration.
  - b In the Symbolic URL Administration view, add a new record.
- 2 Define Symbolic URL arguments.
  - a Navigate to Symbolic URL Administration.
  - b In the Symbolic URL Administration list, select the Symbolic URL you want to configure.
  - c In the Symbolic URL Arguments list, enter the arguments that need to be sent to the external host.

The following table shows the symbolic URL argument definitions for dashboards.

Parameter	Value
Fixup Name	Default
SSO Disposition	IFrame
Analytics Web application name	Select from the drop-down list.

The following table shows the symbolic URL path arguments for dashboards.

Name	Type	Value	Append	Sequence #
Cmd	Constant	PortalPages	Y	1
PortalPath	Constant	/shared/Executive/_Portal/Executive	Y	2
nQUser	Command	UseSiebelLoginId	Y	3
nQPassword	Command	UseSiebelLoginPassword	Y	4
PostRequest	Command	PostRequest	Y	5

- 3 In Siebel Business Analytics, create the dashboards.
 

**NOTE:** Only an Analytics Web administrator can perform this step.
- 4 In Siebel Business Analytics, set up the dashboards to your requirements.

## Verifying NQHOST Setup for Pharma Mobile Analytics Client

This task is part of the ["Process of Customizing Analytics Application Home Page and Dashboards."](#)

Pharma Mobile Analytics is a prebuilt Mobile Analytics application for Siebel Pharma Sales. When you run Siebel Pharma Mobile Analytics Client, your client application runs against a local instance of the database on your machine. You need to confirm that NQHOST is using the correct port number and DLL files to work with the Pharma Mobile Analytics Client.

***To verify the NQHOST setup***

- 1 Run the Mobile Client application against your local database.
- 2 Log in as Administrator.

You must have access to the following Integration Administration Screen views:

- WI Host Admin View
  - WI Symbolic URL Admin View
- 3 Navigate to Administration – Integration.
  - 4 Click WI Symbolic URL List, and search for NQHOST in Virtual Name field.  
The Host Name value should be localhost:9762.
  - 5 Select the Host Administration View from the drop-down list and choose Symbolic URL Administration.

6 The following table shows Mobile Client symbolic URLs to search for.

For each of the URLs, the URL field is:

`http://NQHOST/Analytics/sawd.dll`

Mobile Client Symbolic URL Name
ePharmaHomePageAnalytics1
ePharmaHomePageAnalytics2
ePharmaHomePageAnalytics3
ePharmaHomePageAnalytics4
SISMLSDistrictManagerDashboard1
SISMLSSalesRepDashboard1
SiebelAnswers
SiebelDelivers

The following table shows the symbolic URL path arguments for SiebelAnswers and SiebelDelivers.

Name	Type	Path Argument Value	Append	Sequence #
Cmd	Constant	Answers for SiebelAnswers	Y	1
		Delivers for SiebelDelivers		
nQUser	Command	UseSiebelLoginId	Y	2
nQPassword	Command	UseSiebelLoginPassword	Y	3

## Integrating the Pharma Application Home Page with the Pharma Mobile Analytics Client

This task is part of the [“Process of Customizing Analytics Application Home Page and Dashboards.”](#)

If you have licensed both the Siebel Pharma operational application and Siebel Pharma Mobile Analytics Client, you must change part of the operational application configuration file in order to access Analytics reports on the LS Analytics Home Page and to allow Create Target List integration.

### *To allow integration of Pharma Analytics Home Page with Pharma Mobile Analytics*

- 1 On the machine where you have installed the Siebel operational application, navigate to `$(INSTALLDIR)\sea77\si_ebsrvr\BIN\ENU\epharma.cfg`.
- 2 Using a text editor, open the file `epharma.cfg`.
- 3 In the Local section, find the parameter `UseCachedExternalContent`.

- 4 The default value for this parameter is TRUE.

**NOTE:** If this parameter remains set to TRUE, Analytics reports on the Home Page return an error.

- 5 Set the UseCachedExternalContent parameter to FALSE.  
Save and close the file.

## Importing Pharma Application Target Lists to the Pharma Mobile Analytics Client

This task is part of the [“Process of Customizing Analytics Application Home Page and Dashboards.”](#)

If you have licensed both the Siebel Pharma operational application and Siebel Pharma Mobile Analytics Client, you must change part of the operational application configuration file in order to allow you to import the contacts from the Pharma Analytics Create Target List function into the Mobile Analytics Client.

### *To allow importation of Target List contacts into Siebel Pharma Mobile Analytics Client*

- 1 On the machine where you have installed the Siebel operational application, navigate to `$INSTALLDIR\sea77\si ebsrvr\BIN\ENU\epharma.cfg`.
- 2 Using a text editor, open the file `epharma.cfg`.
- 3 In the Siebel Client section, find the parameter `EnableFQDN`.
- 4 The default value for this parameter is TRUE.  
**NOTE:** If this parameter remains set to TRUE, the Create Target List functionality is disabled in the Pharma Mobile Analytics Client.
- 5 Set the `EnableFQDN` parameter to FALSE.
- 6 Save and close the file.

# E

## Integrated Security for Analytics Applications

This appendix gives an overview of the configuration of data-level and object-level security groups for areas within Siebel Business Analytics applications integrated with Siebel CRM (operational) applications components. The specific processes for configuring Siebel Business Analytics repositories and Siebel Business Analytics Web Catalogs are described in the *Siebel Analytics Server Administration Guide* and the *Siebel Analytics Web Administration Guide*, respectively.

**NOTE:** This subject assumes you are familiar with *Security Guide for Siebel Business Applications* (on the *Siebel Bookshelf*), especially the topics on user authentication, basic access control, and data-level security.

This appendix includes the following main topics:

- [Types of Security in Analytics on page 295](#)
- [Data-Level Security in Analytics Applications on page 300](#)
- [Implementing Data-Level Security in the Analytics Application Repository on page 302](#)
- [Initialization Blocks and Security-Related Information in Analytics on page 302](#)
- [Filters for Analytics Security Groups on page 303](#)
- [Configuring Analytics Repository Table Joins for Security on page 303](#)
- [Position and Organization Initialization Variables in Analytics Applications on page 304](#)
- [Responsibilities and Data-Level Visibility in Sales Analytics Applications on page 305](#)
- [Responsibilities and Data-Level Visibility in Workforce Analytics Applications on page 307](#)
- [Changing the Security Group from Position-Based to Organization-Based in Analytics on page 309](#)
- [Metadata Object-Level Security in Analytics Applications on page 309](#)
- [Siebel Partner Relationship Management Analytics Security Settings on page 311](#)
- [Consumer Sector Analytics Security Settings on page 318](#)
- [Communications, Media, and Energy \(CME\) Analytics Security Settings on page 319](#)
- [Financial Services Analytics Security Settings on page 320](#)
- [Pharma Sales Analytics Security Settings on page 322](#)
- [Usage Accelerator Analytics Security Settings on page 324](#)

## Types of Security in Analytics

Two different levels of security configuration are supported by Siebel Business Analytics:

- Data-level security

### ■ Object-level security

Siebel Business Analytics applications security is based on Responsibilities and Siebel Business Analytics repository groups. A Repository group and a Web Catalog group are created for each Siebel Business Analytics-specific responsibility defined in the Siebel operational application. The group names are exactly the same as the responsibility name.

In the Siebel operational application, you assign users to the appropriate Analytics responsibilities, and the membership is automatically be reflected in the repository as well as the Web Catalog. The user inherits the appropriate permissions from the responsibilities.

**NOTE:** Users are always created in the Siebel operational application database, never in the Siebel Business Analytics repository.

## User Access and User Responsibilities

Permission and access are always determined by user's memberships in various responsibilities. In this case, the term Responsibility is interchangeable with the terms Repository group and Web Catalog group; they have a one-to-one correspondence.

Siebel Business Analytics come with certain preconfigured responsibilities. [Table 72 on page 297](#) shows these preconfigured responsibilities.

## Checking Analytics Applications User Responsibilities

There are two ways for a Siebel Administrator to check a user's responsibility:

- In the Siebel operational application, go to the Responsibilities view.
- Go to the Analytics Web and click the My Account link.

The group membership for the user is shown near the bottom of the Web page.

## Registering a New User Responsibility in Analytics Applications

When you add a new responsibility to a user in Analytics Web, the change is not immediately reflected in the Analytics environment. In order to register the new user responsibility, both the Siebel Administrator and the user must perform a task:

- The Administrator must reload the Server metadata through Analytics Web.
- After the metadata is reloaded, the user must log out from the Siebel operational application, then log in again.

## Default Security Settings in Analytics Applications

The User Administrator and the Group Administrators are a special user and group that do not have any restrictions and do not go through the Siebel database. The User SADMIN (password SADMIN) is also a special user, similar to Administrator.

**NOTE:** Be sure to change the default password before migrating to production.

The group Siebel Administrator is set up as a member of the supergroup Administrators, so members of this group have no restrictions.

Table 72. Siebel Analytics Applications Preconfigured Responsibilities

Application	Responsibility
Sales	Sales Analytics Administrator
	VP of Sales Analytics
	Sales Manager Analytics
	Sales Representative Analytics
Marketing	Marketing Analytics User
	Marketing Analytics Administrator
Interactive Selling	ISS Analytics User
	ISS Analytics Administrator
Service	Service Analytics VP
	Service Analytics Manager
	Service Analytics Administrator
	Service Analytics Service User
	Service Analytics Call Center User
	Service Analytics eMail User
Partner	Partner Service Rep Analytics User
	Partner Sales Rep Analytics User
	Partner Executive Analytics User
	Partner Operations Analytics User
	Partner Sales Manager Analytics User
	Partner Service Manager Analytics User
	Channel Accounts Manager Analytics User
	Channel Executive Analytics User
	Channel Operations Analytics User
	Channel Marketing Manager Analytics User

Table 72. Siebel Analytics Applications Preconfigured Responsibilities

Application	Responsibility
Employee Relationship Management	ERM Analytics VP
	ERM Analytics Manager
	ERM Analytics HelpDesk Agent
	ERM Analytics HelpDesk
	ERM Analytics User
	ERM Analytics HR
	Executive Analytics User
	Executive Analytics Administrator
Communications, Media, & Energy	CM Marketing Analytics User
	CM Marketing Analytics Administrator
	CM Sales Analytics User
	CM Sales Analytics Administrator
	CM Service Analytics User
	CM Service Analytics Administrator
Financial Services	Finance Analytics User
	Insurance Analytics User
	Financial Services Analytics User
Consumer Goods	CS Analytics VP Sales
	CS Analytics Key Account Manager
	CG Sales Analytics User
	CG Sales Analytics Administrator

Table 72. Siebel Analytics Applications Preconfigured Responsibilities

Application	Responsibility
Pharma sales	LS Administrator
	PH US Sales Analytics User
	PH EMEA Sales Analytics User
	PH Sales Analytics Administrator
	PH US Marketing Analytics User
	PH EMEA Marketing Analytics User
	PH Marketing Analytics Administrator
	PH Mobile Analytics User
	PH Mobile Analytics Admin
	PH Medical Education Analytics User
	PH Medical Education Analytics Admin
	PH US Call Activity Analytics User
	PH EMEA Call Activity Analytics User
	PH Call Activity Analytics Admin
	PH US Executive Analytics User
	PH EMEA Executive Analytics User
PH Executive Analytics Admin	
Automotive	AT Service Analytics User
	AT Service Analytics Administrator
	AT Sales Analytics User
	AT Sales Analytics Administrator
	AT Partner Analytics User
	AT Partner Analytics Administrator

Table 72. Siebel Analytics Applications Preconfigured Responsibilities

Application	Responsibility
<p><b>NOTE:</b> The Usage Accelerator Tracking responsibility is not visible in Siebel Business Analytics. The Administrator must associate this responsibility with each user to be tracked, in the transactional database.</p>	Usage Accelerator Administrator
	Usage Accelerator Sales Executive
	Usage Accelerator Sales Manager
	Usage Accelerator Sales Rep
	Usage Accelerator FINS Administrator
	Usage Accelerator FINS Sales Executive
	Usage Accelerator FINS Sales Manager
	Usage Accelerator FINS Sales Rep
	Usage Accelerator Tracking (transactional database)

## Data-Level Security in Analytics Applications

Data-level security defines what a Siebel CRM (operational) application user sees inside a report. The same report, when run by two different users, can bring up different data. This is similar to how the My Opportunities view in a Siebel operational application displays different data for different users. However, the structure of the report is the same for all users, with one exception. The exception is when a user does not have access to a column within a report. This is a rare case; Siebel Business Analytics handles this situation by returning the report without the column in question.

### Where is Data-Level Security Configured?

Data-level security in Siebel Business Analytics applications is based on the position- and organization-based security model of the Siebel operational applications. Data-level security is configured exclusively through the Analytics repository using Repository groups. It is configured at the logical layer, mostly on dimensions. The Fact tables, other than the most sensitive Revenue facts (Closed Revenue, Opty Revenue and Expected Revenue), are not secured directly. However, dimensions are secured, as shown in [Table 73](#).

The security definition for the dimension decides the general area within which the user operates. The reports can further restrict access to the data within the report. For example, if a report contains a filter such as Employee.Login = valueof (USER), then this restricts the rows returned in the report to those where the user is the owner of the record.

Other data security models such as custom models can be configured in the metadata using similar techniques. This security configuration requires an understanding of the business model setup and filtering mechanisms. See *Siebel Analytics Server Administration Guide* on using variables in the repository.

The process of configuring data-level security is described in the topic [“Implementing Data-Level Security in the Analytics Application Repository”](#) on page 302.

Table 73. Security Configuration by Dimension

Dimensions Secured	Security Based on ...		
	Primary Owner	Primary Position	Organization
Accounts		X	X
Activities	X		
Assets	X	X	X
Campaigns			X
Claims (Financial Services & Life Sciences)		X	
Contacts		X	X
Employee (transactional database)		X	
Revenue Fact		X	
—Closed Revenue		X	X
—Opportunity Revenue		X	X
—Expected Revenue		X	X
Funds (Through Accts) (Consumer Goods)			X
Promotions (Through Accts) (Consumer Goods)			X
Holdings (Financial Services & Life Sciences)		X	
Households			X
Opportunity		X	X
Orders		X	X
Organization (transactional database)		X	
Programs			X
Quotes		X	X
Responses	X		
Review Or Objective (transactional database)		X	
Segment		X	X
Service Requests	X		X
W_ACT_PROD_F (Financial Services & Life Sciences)		X	
W_MED_ED_F (Financial Services & Life Sciences)		X	
W_OBJECTIVE_F (Financial Services & Life Sciences)		X	

Table 73. Security Configuration by Dimension

Dimensions Secured	Security Based on ...		
	Primary Owner	Primary Position	Organization
W_PER_RANK_F (Financial Services & Life Sciences)		X	
W_SYND_DATA_F (Financial Services & Life Sciences)		X	
W_SYND_MKT_F (Financial Services & Life Sciences)		X	

## Implementing Data-Level Security in the Analytics Application Repository

This topic describes the process of configuring data from the Siebel Data Warehouse, and refers only to the Siebel Data Warehouse tables. The setup for the Siebel transactional database data is similar, although the physical schema joins are different.

Data-level security in the Analytics repository is implemented in three major steps:

- 1 Set up initialization blocks that obtain specific security-related information when a user logs in—for example, the user's primary position ID.  
See the topic [“Initialization Blocks and Security-Related Information in Analytics”](#) on page 302.
- 2 Set up the filters for each security group on each logical table that needs to be secured.  
See the topic [“Filters for Analytics Security Groups”](#) on page 303.
- 3 Set up the joins to the appropriate security tables in the metadata physical and logical layers.  
See the topic [“Configuring Analytics Repository Table Joins for Security”](#) on page 303.

## Initialization Blocks and Security-Related Information in Analytics

In the Siebel Business Analytics repository, the initialization blocks have already been set up for obtaining a given user's primary position, primary organization, and the owner ID. There are three initialization blocks:

### ■ Primary Position ID

This initialization block obtains the primary position of the given user, based on the user's login, and populates the variable PRIMARY\_POSTN\_ID. The SQL used by the block is run against the Siebel transactional database, and therefore reflects real-time position ID information.

### ■ Primary Owner ID

This initialization block obtains the owner ID for the given user. It obtains this information from the Siebel transactional database and populates the PR\_OWNER\_ID variable.

### ■ Orgs for Org-based Security

This initialization block obtains the list of organizations that a given user belongs to from the Siebel transactional database. The variable populated is ORGANIZATION.

## Filters for Analytics Security Groups

In addition to initialization blocks that implement data-level security in the Analytics repository, there are preconfigured groups that have been set up with filters on several logical dimensions. The two groups that have filters on them are:

- Primary Position-based Security
- Primary Org-based Security

[Table 73 on page 301](#) shows the logical tables (dimensions) and the kind of security applied to those tables.

An example of how the Opportunity Dimension may be configured is:

```
"W_PARTY_LOGIN (W_OPTY_D)". PARTY_ID = W_OPTY_D.VIS_PR_POS_ID
```

W\_PARTY\_LOGIN is the security table that stores recursive information about a given user's login and the parties (positions and organizations, employees) that report to the user through a hierarchical reporting mechanism. There is an alias setup on W\_PARTY\_LOGIN for each join with a dimension.

## Configuring Analytics Repository Table Joins for Security

You can add security to a new dimension in Siebel Business Analytics. Set up the joins for that table to the appropriate security tables in the metadata physical and logical layers. The following task uses W\_AGREE\_D (Agreements) as an example.

### *To configure the physical table join between W\_AGREE\_D and W\_PARTY\_LOGIN*

- 1 Create an alias on W\_PARTY\_LOGIN specifically to join to W\_AGREE\_D.
- 2 Configure the join in the physical layer.
- 3 Configure a logical table join by adding the appropriate tables in the business layer.

**NOTE:** The columns VIS\_PR\_POS\_ID and VIS\_PR\_BU\_ID in the dimensional tables contain the record's primary owning position and owning organization.

- 4 Configure the filter on the logical tables that restrict the data.
  - To set up a filter, right-click the group and choose Properties.
  - In the Properties dialog box, click the Permissions box and select the Filter tab.

- To add a new filter, click on the ellipsis box and find the business model layer table that needs to be secured.
- Configure the WHERE clause on the table so that the data is filtered.

## Position and Organization Initialization Variables in Analytics Applications

The Siebel Business Analytics repository contains two preconfigured initialization blocks for Position-based and Organization-based security. These initialization blocks populate the variables PRIMARY\_POSTN\_ID and ORGANIZATION.

### About the Row-Wise Initialized Variable ORGANIZATION

Organization-based security has been implemented using the row-wise initialized variable ORGANIZATION. This implementation is slightly different from that of the position-based security, because the number of organizations is usually limited, compared to the number of positions in a given environment. Therefore, using the row-wise initialized variable ORGANIZATION to filter data using a WHERE IN clause is efficient. However, joining the dimension with the W\_PARTY\_LOGIN is more efficient, because the number of positions used for filtering the data can be large.

For more information about security groups and filters as well as on how to set up joins in the repository, see *Siebel Analytics Server Administration Guide*.

### Creating a Row-Wise Initialized Variable Combining All User Positions and Organizations

You can create a similar variable that is a union of all the positions and organizations that the user has access to. There are two methods for creating a union variable, as shown below.

#### *Creating a row-wise initialized union variable using the W\_PARTY\_LOGIN table in the data warehouse*

- Create an additional join between W\_PARTY\_LOGIN and W\_[DimensionName]\_PARTY instead of using the row-wise initialization.

In the case of Opportunities, for example, set up the joins as shown:

```
W_PARTY_LOGIN.LOGIN = val ueof(NQ_SESSION.USER)
```

```
W_OPTY_PARTY.PARTY_ID = W_PARTY_LOGIN.PARTY_ID
```

```
W_OPTY_PARTY.OPTY_ID = W_OPTY_ID.ROW_ID
```

These two joins have the same effect as the row-wise initialization variable solution, but contain an additional table join.

***Creating a row-wise initialized union variable by getting this variable directly from the Siebel transactional database for a real-time list***

- For each user login, the W\_PARTY\_LOGIN table uses a recursive list of all positions and organizations.

The logical equivalent of this setup is:

```
W_PARTY_LOGIN.PARTY_ID = val ueof(NQ_SESSION.POSTN_ORG_UNION)
```

```
W_OPTY_PARTY.PARTY_ID = W_PARTY_LOGIN.PARTY_ID
```

```
W_OPTY_PARTY.OPTY_ID = W_OPTY_ID.ROW_ID
```

For more information about the Siebel data model and security, see *Siebel Data Warehouse Data Model Reference* and *Siebel Data Warehouse Data Model Reference for Industry Applications*.

## Responsibilities and Data-Level Visibility in Sales Analytics Applications

Siebel operational applications include Siebel Sales, Siebel Service, and Siebel Partner Relationship Management. This topic describes the additional security configurations that may be necessary for your Siebel operational applications. It also describes the particular responsibilities associated with the application dashboards.

Siebel Sales Analytics defaults to the following data-level visibility for certain responsibilities, as shown in [Table 74](#).

The visibility restrictions imposed vary by responsibility and by logical subject area, as follows:

- The Sales Manager has different visibility restrictions imposed in the Forecasting subject area than in the Pipeline, Customers, Orders, and Products subject areas.
- In general, users with the VP of Sales Analytics responsibility have no data-level security imposed, while those with the Sales Manager Analytics or Field Sales Representative Analytics responsibilities have primary-position security imposed.
- In primary position security, only those opportunities, orders, or forecasts owned by the user or the user's subordinates are visible to the user.

For a description of data-level security, see [“Types of Security in Analytics” on page 295](#) and *Security Guide for Siebel Business Applications*.

Table 74. Siebel Sales Analytics Default Data-Level Visibility

Responsibility	Subject Area	Default Visibility
VP of Sales Analytics	All	No data-level security is imposed.
Sales Manager Analytics Field Sales Representative Analytics	Forecasting	In addition to the Order, Opportunity, and Forecast dimensions, primary position data-level security is imposed on all facts. This means that these subject areas are visible to the user only for data owned by the user (or the user’s subordinates).
Sales Manager Analytics Field Sales Representative Analytics	Pipeline Orders Customers	Primary position data-level security is imposed on: <ul style="list-style-type: none"> <li>■ Order dimension</li> <li>■ Opportunity dimension</li> <li>■ Account dimension</li> <li>■ Opportunity Revenue, Expected Revenue, and Closed Revenue metrics</li> <li>■ Number of Orders</li> <li>Line Item Order Revenue (000)</li> <li>Line Item Shipped Revenue (000)</li> <li>Order Item Revenue</li> <li>Rollup Total Order Revenue (000)</li> <li>Rollup Average Order Size</li> <li>Total Order Revenue</li> <li>Total Order Revenue (000)</li> <li>Total Shipped Revenue</li> <li>Total Shipped Revenue (000) metrics</li> </ul>

Table 74. Siebel Sales Analytics Default Data-Level Visibility

Responsibility	Subject Area	Default Visibility
TeleMarketing Manager TeleMarketing Representative	All	No specific data-level security.
TeleSales Representative Direct Order Entry Agent	All	No specific data-level security.  However, the primary-position security used for Sales Managers and Representatives can be used for the TeleSales Representative and Direct Order Entry Agent responsibilities as well.  Note that the security model for the TeleMarketing Representative and Manager responsibilities must differ from that used for Sales Managers and Representatives. The security model is based on the CREATED_BY column in the Opportunity data model and not on the primary owner of the opportunity.

To extend these data-level visibility restrictions to other metrics and dimensions, see [Table 73 on page 301](#) and use the metrics and dimensions in [Table 74 on page 306](#) as examples.

## Responsibilities and Data-Level Visibility in Workforce Analytics Applications

Siebel operational applications include Siebel Sales, Siebel Service, and Siebel Partner Relationship Management. This topic describes the additional security configurations that may be necessary for the Siebel operational application Siebel ERM Analytics, which is divided into Workforce, Partner Manager, and Partner Portal Analytics.

Siebel Responsibilities for Workforce Analytics are shown in [Table 75](#).

Table 75 also outlines the symbolic URL names for Workforce Analytics.

Table 75. Siebel Responsibilities for Workforce Analytics

Responsibility	View Name	SSO Symbolic URL Name	Dashboard Name	Viewable Pages	Subject Areas
ERM Analytics VP	SSO ERM Dashboard View	SSO ERM Executive Dashboard	Employee Performance	Organizational Overview	Workforce Summary
				Team Status	Workforce Training
				Training	Workforce Performance
				Performance Management	
				My Performance	
ERM Analytics Manager	SSO ERM Dashboard View	SSO ERM Executive Dashboard	Employee Performance	Team Status	Workforce Summary
				Training	Workforce Training
				Performance Management	Workforce Performance
				My Performance	
ERM Analytics User	SSO ERM Dashboard View	SSO ERM Executive Dashboard	Employee Performance	My Performance	Workforce Summary
					Workforce Training
					Workforce Performance
ERM Analytics HR	SSO ERM HR Dashboard View	SSO ERM HR Dashboard View	Human Resource Analytics	Training	Workforce Summary
				Performance Management	Workforce Training
					Workforce Performance

Table 75. Siebel Responsibilities for Workforce Analytics

Responsibility	View Name	SSO Symbolic URL Name	Dashboard Name	Viewable Pages	Subject Areas
ERM Analytics HelpDesk	SSO ERM HelpDesk Dashboard View	SSO ERM HelpDesk View	HelpDesk Analytics	Overview	Service Request
				Staff Performance	
ERM Analytics HelpDesk Agent	SSO ERM HelpDesk Dashboard View	SSO ERM HelpDesk View	HelpDesk Analytics	Agent Performance	Service Request

## Changing the Security Group from Position-Based to Organization-Based in Analytics

By default in the Siebel PRM Analytics application, the responsibilities Partner Service Representative and Sales Representative have been set up for Primary position-based security. If your deployment requires a security group setup based on Organization, change the security groups using the following procedure.

### *To change the security group from Position-based to Organization-based*

- 1 In the Server Administration Tool, go to Tools > Manage Security.
- 2 Click on Hierarchy.
- 3 Make the two security groups (Partner Service Representative and Partner Sales Representative) members of the Primary Org-Based group.
- 4 Remove the groups from the Primary Position-Based group.
- 5 Exit the Server Administration Tool.

## Metadata Object-Level Security in Analytics Applications

Object-level security controls access to various Analytics objects, primarily metadata and Web Catalog objects.

### Metadata Object-Level Security (Repository Groups)

Repository groups control access to metadata objects such as subject areas, tables and columns.

Metadata object security is configured in the Analytics repository (SiebelAnalytics.rpd) using the Server Administration Tool. The User Group Everyone is denied access to each of the subject areas. Each subject area is configured to give explicit read access to selected related responsibilities. This access can be extended to table and column level.

For more information on object level security, see *Siebel Analytics Server Administration Guide*.

**NOTE:** In the shipped product, only permissions at the subject area level have been configured.

## Metadata Object-Level Security (Web Catalog Groups)

Web Catalog groups control access to dashboards, pages, folders and reports.

Web Catalog groups have the same name as the Siebel responsibilities. The access to dashboards and pages are controlled using the Web Catalog groups. If you log on as a user who belongs to the Web Catalog group Field Sales Representative Analytics, then you see only the Overview, Forecasting, and Details pages within the Pipeline Dashboard. In a similar fashion, you see only dashboards that allow you access to at least one page within that dashboard.

For more information on Web Catalog security, see *Siebel Analytics Web Administration Guide*.

## Where is Repository Groups Security Configured?

Metadata object security is configured in the Analytics repository (SiebelAnalytics.rpd) using the Server Administration Tool. The User Group Everyone is denied access to each of the subject areas. Each subject area is configured to give explicit read access to selected related responsibilities. This access can be extended to table and column level.

**NOTE:** In the shipped product, only permissions at the subject area level have been configured.

The exceptions to the explicit configuration rule are the Communications and Financial Analytics industry applications, where there are tables and columns specific to these two industries scattered throughout the general Siebel operational application subject areas. These industry-specific metadata objects are hidden from other groups.

Siebel Business Analytics supports hierarchies within the groups in the repository. In the Analytics repository there are certain groups that are parent groups, which define the behavior of all the child groups. Inheritance is used to let permissions ripple through to child groups. The parent groups and their purpose are shown in [Table 76](#).

Table 76. Repository Parent Groups

Parent Group	Permissions Inherited by
Finance	All Financial applications groups
Insurance	All Insurance applications groups
CM General	All Communications applications
Consumer Sector	Consumer Sector groups
Pharma	Life Sciences/Pharmaceuticals applications groups

Table 76. Repository Parent Groups

Parent Group	Permissions Inherited by
Channel Managers	All Channel applications groups
Partner Managers	All Partner application groups

## Metadata Object-Level (Web Catalog) Security in Analytics Applications

Web Catalog objects, such as dashboards and pages, are controlled using Web Catalog groups, which have the same name as the Siebel responsibilities. The access to dashboards and pages are controlled using the Web Catalog groups. If you log on as a user who belongs to the Web Catalog group Field Sales Representative Analytics, then you see only the Overview, Forecasting, and Details pages within the Pipeline Dashboard. In a similar fashion, you see only dashboards that allow you access to at least one page within that dashboard. These groups are customized in the Analytics Web interface.

For Siebel Business Analytics integrated with Siebel operational applications, Web Catalog security makes use of the following principles:

- Security in the Web Catalog has been preconfigured for the groups listed in [Table 76](#) for each application.
- Permissions to each dashboard in the Analytics Web Catalog are matched with the permissions of each related Siebel operational application view. In the Siebel operational application, views are controlled through responsibilities. However, in Siebel Business Analytics Web Catalog, access to dashboards for each group is controlled through Web Administration. If the two access setups do not match, both of the following situations can occur:
  - If users have access to a view in the Siebel operational application, but do not have access to the corresponding dashboard, then they receive an error message indicating that they do not have access to the dashboard.
  - If users try to access a dashboard containing reports based on a subject area to which they do not have access, they see a dashboard with no reports.

## Siebel Partner Relationship Management Analytics Security Settings

Siebel operational applications include Siebel Sales, Siebel Service, and Siebel Partner Relationship Management. This topic describes the additional security configurations that may be necessary for the Siebel operational application Siebel ERM Analytics, which is divided into Workforce, Partner Manager, and Partner Portal Analytics.

Siebel PRM Analytics incorporates the concept of role-based analytics. Role-based analytics provides brand owners the ability to display dashboards and pages to users based on their specific roles. For example, a sales manager would have the ability to view dashboards related to pipeline and sales effectiveness, whereas the marketing manager would have the ability to view dashboards related to campaigns. Siebel PRM Analytics also includes flexible security mechanisms to control access to subject areas and to data.

The Analytics roles map to Siebel Responsibilities in the Siebel operational application. This topic describes the roles and associated dashboards and pages for both partner Manager and Partner Portal applications. It also includes subject area and data-level security settings for responsibilities.

### Partner Manager Role-Based Analytics Dashboard Mapping

Table 77 provides the dashboard and page tab mapping for specific responsibilities in the Siebel PRM Partner Manager application.

Table 77. Siebel Responsibilities for PRM Analytics

Responsibility	Dashboard	Page Tab Name
Channel Account Manager Analytics User	Channel Customers	Overview
	Channel Customers	Sales
	Channel Sales	Products
	Channel Sales	Sales
	Channel Service	Products
	Channel Service	Service
	Channel Training	Training Profile
Channel Executive Analytics User	Channel Customers	Customer Profile
	Channel Executive	Customer Satisfaction
	Channel Executive	Pipeline
	Channel Executive	Product
	Channel Executive	Program
	Channel Executive	Revenue
	Channel Executive	Service
	Channel Segmentation	Channel Mix
	Channel Segmentation	Partner Territory
	Channel Segmentation	Partner Tier
	Channel Segmentation	Partner Type

Table 77. Siebel Responsibilities for PRM Analytics

<b>Responsibility</b>	<b>Dashboard</b>	<b>Page Tab Name</b>
Channel Marketing Manager Analytics User	Channel Customers	Overview
	Channel Customers	Sales
	Customer Marketing	Effectiveness
	Customer Marketing	Responses
	Customer Marketing	ROI
Channel Operations Analytics User	Channel Commerce	Orders
	Channel Commerce	Overview
	Channel Commerce	Quotes
	Channel Commerce	Products
	Channel Customers	Overview
	Channel Customers	Sales
	Channel Customers	Service
	Channel Marketing	Effectiveness
	Channel Marketing	Overview
	Channel Sales	Margins
	Channel Sales	Pipeline
	Channel Sales	Revenue
	Channel Sales	Sales Cycle
	Channel Sales	Wins
	Channel Segmentation	Partner Territory
	Channel Segmentation	Partner Tier
	Channel Segmentation	Partner Type
	Channel Service	Customer Satisfaction
	Channel Service	Overview
	Channel Service	Products
	Channel Service	Resolution Time
	Channel Service	Service Requests
Channel Training	Overview	
Channel Training	Performance	

## Siebel Partner Portal Role-Based Analytics Dashboard Mapping

The dashboard and page tab mapping for specific responsibilities in the Siebel PRM Partner Portal application are shown in [Table 78](#).

Table 78. Responsibilities for PRM Partner Portal Analytics

Responsibility	Dashboard	Page Tab Name
Partner Executive Analytics User	Partner Executive	Pipeline
	Partner Executive	Products
	Partner Executive	Sales Effectiveness
	Partner Executive	Service
Partner Operations Analytics User	Partner Commerce	Overview
	Partner Commerce	Products
	Partner Marketing	Overview
	Partner Marketing	ROI
	Partner Sales	Pipeline
	Partner Sales	Revenue
	Partner Service	Customer Sat
	Partner Service	Overview
	Partner Service	Service Requests
	Partner Training	Training
Partner Sales Manager Analytics User	Partner Commerce	Orders
	Partner Commerce	Overview
	Partner Commerce	Quotes
	Partner Sales	Pipeline
	Partner Sales	Revenue
	Partner Sales	Subordinates
	Partner Training	Subordinates

Table 78. Responsibilities for PRM Partner Portal Analytics

Responsibility	Dashboard	Page Tab Name
Partner Sales Rep Analytics User	Partner Commerce	Orders
	Partner Commerce	Overview
	Partner Commerce	Quotes
	Partner Sales	Pipeline
	Partner Sales	Revenue
	Partner Sales	Subordinates
	Partner Training	Subordinates
Partner Service Manager Analytics User	Partner Service	Customer Sat
	Partner Service	Overview
	Partner Service	Service Requests
	Partner Service	Subordinates
	Partner Training	Subordinates
Partner Service Rep Analytics User	Partner Service	Overview
	Partner Service	Service Requests
	Partner Service	Subordinates
	Partner Training	Subordinates

## PRM Analytics Subject Area Mapping

Ad hoc queries in Siebel PRM Analytics are built by the user, depending on user responsibilities and based on columns in subject areas in the Analytics application. By restricting visibility to subject areas based on responsibilities, Siebel PRM Analytics provides brand owners a flexible way to deploy role-based analytics.

The subject area visibility for responsibilities in Partner Manager are shown in [Table 79](#), where a X indicates that subject area is visible for the user holding that responsibility.

Table 79. Responsibilities for PRM Partner Manager Analytics

Subject Area	Channel Executive Analytics User	Channel Operations Analytics User	Channel Account Manager Analytics User	Channel Marketing Manager Analytics User
Activities	X	X	X	X
Assets	X	X	X	
Campaigns	X	X	X	X

Table 79. Responsibilities for PRM Partner Manager Analytics

Subject Area	Channel Executive Analytics User	Channel Operations Analytics User	Channel Account Manager Analytics User	Channel Marketing Manager Analytics User
Consumers	X	X	X	X
Customer Satisfaction	X	X	X	
Customers	X	X	X	X
Orders	X	X	X	X
Partner Training	X	X	X	
Partners	X	X	X	X
Pipeline	X	X	X	X
Pricing	X	X	X	X
Products	X	X	X	X
Real-Time Activity				
Real-Time Assets				
Service Requests	X	X	X	

### PRM Analytics Subject Area Visibility

The subject area visibility for roles in Partner Portal is shown in [Table 80](#), where a X indicates that subject area is visible for the user holding that responsibility.

Table 80. Subject Area Visibility for PRM Partner Portal

Subject Area	Partner Executive Analytics User	Partner Operations Manager Analytics User	Partner Sales Manager Analytics User	Partner Sales Rep Analytics User	Partner Service Manager Analytics User	Partner Service Rep Analytics User
Activities	X	X	X	X	X	X
Assets	X	X			X	X
Campaigns	X	X				
Consumers	X	X				
Customer Satisfaction	X	X			X	X
Customers	X	X	X	X	X	X

Table 80. Subject Area Visibility for PRM Partner Portal

Subject Area	Partner Executive Analytics User	Partner Operations Manager Analytics User	Partner Sales Manager Analytics User	Partner Sales Rep Analytics User	Partner Service Manager Analytics User	Partner Service Rep Analytics User
Orders	X	X	X	X	X	X
Partner Training	X	X	X	X	X	X
Partners	X	X				
Pipeline	X	X	X	X		
Pricing						
Products	X	X	X	X	X	X
Real-Time Activity						
Real-Time Assets						
Service Requests	X	X			X	X

## PRM Analytics Data-Level Visibility

Siebel PRM Analytics also provides brand owners the ability to restrict security based on the user's organization or position. This security mechanism makes sure that one user does not have access to another user's data. It also makes sure that one partner does not have access to another partner's data. Data-level security is administered for responsibilities. Details regarding setting up data-level visibility are provided in the topic [“Implementing Data-Level Security in the Analytics Application Repository” on page 302](#). To change Partner Service Representative and Sales Representative to Organization-based security, follow the procedure shown in the topic [“Changing the Security Group from Position-Based to Organization-Based in Analytics” on page 309](#).

Table 81 shows the data-level security settings included for the responsibilities in Partner Manager and Partner Portal.

Table 81. Siebel PRM Data-Level Security Settings

Responsibility	Data-Level Security	Type	Comments
Channel Executive Analytics User	No	N/A	N/A
Channel Operations Analytics User	No	N/A	N/A
Channel Account Manager Analytics User	No	N/A	N/A
Channel Marketing Manager Analytics User	No	N/A	N/A

Table 81. Siebel PRM Data-Level Security Settings

Responsibility	Data-Level Security	Type	Comments
Partner Executive Analytics User	Yes	Organization	Displayed records should match organization of the user.
Partner Sales Manager Analytics User	Yes	Organization	Displayed records should match organization of the user.
Partner Sales Rep Analytics User	Yes	Position	Displayed records should match position of the user.
Partner Service Manager Analytics User	Yes	Organization	Displayed records should match organization of the user.
Partner Service Rep Analytics User	Yes	Position	Displayed records should match position of the user.

## Consumer Sector Analytics Security Settings

Table 82 describes the consumer sector responsibilities associated with each CS Dashboard.

Table 82. Consumer Sector Responsibilities Associated with Each CS Dashboard

Screen Name	Siebel Responsibility	Dashboard	Pages
Sales Analytics	VP Sales	VP Sales	Business Overview, Product Overview
		Sales Performance	Sales Volume Planning, Hierarchy, Trends, Growth
		Promotion	Plan Year to Date, Corporate
	Key Account Manager	Key Account Manager	Business, Category
		Promotion	Plan year to date, Key account
		Funds	Account
		Retail Audit	Last audit, Trends
		Sales Performance	Sales Volume Planning, Hierarchy, Trends, Growth

## Communications, Media, and Energy (CME) Analytics Security Settings

Siebel Communications, Media, and Energy Analytics applies the Siebel operational applications security model; that is, it uses Siebel operational applications responsibilities (and corresponding repository and Web catalog groups) for controlling access to Siebel operational applications objects (both metadata and Web catalog objects). This security model is described in the topic [“Types of Security in Analytics” on page 295](#).

In addition to responsibilities provided by the Siebel operational applications, Siebel Communications, Media, and Energy (CME) provides additional responsibilities, and responsibility-specific security, as indicated in [Table 83](#).

Table 83. CME Responsibilities Associated with Each CME Dashboard

Screen Name	CME Responsibility	CME Dashboard	Dashboard Pages
Marketing Analytics	CM Marketing Analytics User	Loyalty Management	■ Customer Lifetime Value
	CM Marketing Analytics Administrator		■ Churn Propensity
Sales Analytics	CM Sales Analytics User	Revenue Management	■ Selling Propensity
			■ Financial Risk
	CM Sales Analytics Administrator	Account Management	■ Actual Churn
			■ Sales Portal
CM Service Analytics User	Account Management	■ Service Activations	
		■ Service Modifications	
CM Service Analytics Administrator	Account Management	■ Service Disconnections	
		■ Trouble Tickets	
Service Analytics	CM Service Analytics Administrator	Account Management	■ Customer Satisfaction

# Financial Services Analytics Security Settings

Siebel Finance Analytics, Insurance Analytics, and Healthcare Analytics apply the Siebel operational applications security model. This security model is described in the topic [“Types of Security in Analytics” on page 295](#).

In addition to responsibilities provided by the Siebel operational applications, Siebel Finance Analytics, Insurance Analytics, and Healthcare Analytics provide additional responsibilities, and responsibility-specific security, as indicated in [Table 84 on page 321](#).

For the Financial Services products, the Siebel operational applications security model has been extended in the following ways:

## ■ Finance Analytics User

A finance-specific responsibility (and corresponding repository and Web catalog group) that must be used in conjunction with Siebel operational applications responsibilities and groups to control access to Finance-specific objects in Finance Analytics.

## ■ Insurance Analytics User

An insurance-specific responsibility (and corresponding repository and Web catalog group) that must be used to control access to the Insurance and Healthcare-specific objects in Insurance and Healthcare Analytics.

For example, when you give a salesperson all horizontal Sales responsibilities and also include the finance responsibility Finance Analytics User, this user is able to see, in addition to all horizontal sales objects (Dashboards, Subject Areas, folders in the presentation Layer, and so on), all finance-specific Sales objects. Similarly, in order to see Insurance and Healthcare-specific objects, you need to add the Insurance Analytics User responsibility to this user.

## Parent and Child Group Behavior

Siebel Business Analytics supports hierarchies in the repository groups, and certain groups within the Analytics repository are parent groups that define the behavior of all the child groups. For Financial Services Analytics, the parent groups are the following:

### ■ Finance

Parent group for all Financial applications groups. Finance Analytics User is a child group of Finance group.

### ■ Insurance

Parent group for all Insurance applications groups. Insurance Analytics User is a child group of Insurance group.

Inheritance is used to let permissions ripple through to child groups. The parent groups for Financial Services and their purpose are shown in [Table 84](#).

**NOTE:** A Financial Services Analytics user is provided as a child to both Finance and Insurance. Therefore this user has permissions available to both Finance and Insurance. If you have purchased both Finance Analytics and Insurance Analytics, you should use the Financial Services Analytics user responsibilities to view all relevant dashboards.

[Table 84](#) shows the additional responsibilities, and responsibility-specific security in Siebel Finance Analytics, Insurance Analytics, and Healthcare Analytics.

If you are also deploying Usage Accelerator, Financial Services-specific Usage Accelerator responsibilities are shown in [Table 86 on page 324](#).

Table 84. Financial Services Responsibility Required to View FS Dashboards

FS Responsibilities	Dashboards
Finance Analytics User	Credit
	Credit Card
	Private Banking
	Consumer Banking
	Corporate and Commercial Banking
	Investment Holdings
	Separate Account Management
	Wealth Management
	Institutional Sales
	Investment Banking
	Finance Marketing
	Finance Executive
Insurance Analytics User	Policy Sales
	Policy Service
	Insurance Marketing
	Insurance Executive
	Insurance Claims
	Health Plan Sales
	Health Plan Service
	Health Plan Marketing
	Health Plan Executive
	Insurance Agents / Partners

# Pharma Sales Analytics Security Settings

**NOTE:** Pharma Mobile Analytics is a prebuilt Mobile Analytics application for Siebel Pharma Sales.

Data-level security in Siebel Pharma Analytics is based on Siebel Position ID for all Pharma Analytics responsibilities except PH Executive Analytics. Siebel Position ID is always resolved through the fact table.

Data visibility is unconstrained for administrative roles. For other roles, data visibility is controlled by Position ID. The Siebel Data Warehouse stores the user-to-position relationship in the W\_PARTY\_LOGIN table. A user sees only the data that are available to that user's positions. This security model is enforced for all queries, with the exception of queries that deal exclusively with dimension data only, such as:

- Time Period
- Product
- Invitee Status

Table 85 shows Pharma Analytics Responsibilities and Functions.

Table 85. Pharma Analytics Responsibilities and Functions

Responsibility	Use
LS Administrator	Administrator privileges to all options on Pharma Analytics.
PH Call Activity Analytics Admin	Administrator privileges to Call Activity Analytics option.
PH EMEA Call Activity Analytics User	Enables brick-based metrics to be used in the Web Catalog for Pharma subject areas.  Note that in the 7.7 Analytics Release, all report columns use position-based hierarchies, where in earlier releases, report columns used alignment-based sales hierarchies. All brick-based alignment pages have been removed from the reports. Therefore, if you want to use brick-based position hierarchies, you must reconfigure the reports to maintain the alternate hierarchy.
PH EMEA Executive Analytics User	Enables brick-based metrics to be used in the Web Catalog for Pharma subject areas.  Note that in the 7.7 Analytics Release, all report columns use position-based hierarchies, where in earlier releases, report columns used alignment-based sales hierarchies. All brick-based alignment pages have been removed from the reports. Therefore, if you want to use brick-based position hierarchies, you must reconfigure the reports to maintain the alternate hierarchy.

Table 85. Pharma Analytics Responsibilities and Functions

Responsibility	Use
PH EMEA Marketing Analytics User	<p>Enables brick-based metrics to be used in the Web Catalog for Pharma subject areas.</p> <p>Note that in the 7.7 Analytics Release, all report columns use position-based hierarchies, where in earlier releases, report columns used alignment-based sales hierarchies. All brick-based alignment pages have been removed from the reports. Therefore, if you want to use brick-based position hierarchies, you must reconfigure the reports to maintain the alternate hierarchy.</p>
PH EMEA Sales Analytics User	<p>Enables brick-based metrics to be used in the Web Catalog for Pharma subject areas.</p> <p>Note that in the 7.7 Analytics Release, all report columns use position-based hierarchies, where in earlier releases, report columns used alignment-based sales hierarchies. All brick-based alignment pages have been removed from the reports. Therefore, if you want to use brick-based position hierarchies, you must reconfigure the reports to maintain the alternate hierarchy.</p>
PH Executive Analytics Admin	Unrestricted access to all Pharma Analytics options with ZIP territories.
PH Marketing Analytics Administrator	Administrator privileges to Pharma ROI, Call Activity Profit & Loss Report, Pharma Promotional Effectiveness Subject Area, and Medical Education Effectiveness Subject Area.
PH Medical Education Analytics Admin	Administrator privileges to Medical Education Analytics option.
PH Medical Education Analytics User	Enables access to Medical Education Analytics option.
PH Mobile Analytics Admin	Administrator privileges to the PH Mobile Manager Analytics User and Sales Rep Analytics Dashboards.
PH Mobile Analytics User	Enables the Pharma Mobile Analytics Home Page. Allows access to Sales Rep Dashboard as part of the Sales Rep Analytics option.
PH Mobile Manager Analytics Admin	Administrator privilege to the PH Mobile Manager Analytics User and District Manager Analytics Dashboards.
PH Mobile Manager Analytics User	Enables the Pharma Mobile Analytics Home Page. Allows access to the District Manager Dashboard as part of the Sales Rep Analytics option.
PH Sales Analytics Administrator	Administrator privileges to Rx Sales Analytics option.

Table 85. Pharma Analytics Responsibilities and Functions

Responsibility	Use
PH US Call Activity Analytics User	Enables access to Call Activity Analytics Option for ZIP territory alignments.
PH US Executive Analytics User	Unrestricted access to all Pharma Mobile Analytics options with ZIP-based territories.

## Usage Accelerator Analytics Security Settings

Table 86 describes the additional security configurations that may be necessary and the particular responsibilities associated with the Siebel Usage Accelerator application dashboards.

Table 86. Usage Accelerator Responsibilities and Dashboards

User Responsibility	Data Level Security	Dashboard Name (View)	Dashboard Page
Usage Accelerator–Sales Rep	Primary Position Data Level Security	Score Card	Individual Scorecard
Usage Accelerator–Financial Services Sales Rep		Action Plan	Account Coverage Contact Coverage Opportunity Coverage Financial Account Coverage—Financial Services only Account Completeness Contact Completeness Opportunity Updates

Table 86. Usage Accelerator Responsibilities and Dashboards

User Responsibility	Data Level Security	Dashboard Name (View)	Dashboard Page
Usage Accelerator– Sales Manager	No position-based Security	Score Card	Team Scorecard Individual Scorecard
		Action Plan	Account Coverage (Team) Contact Coverage (Team) Opportunity Coverage (Team) Financial Account Coverage (Team) —Financial Services only Account Completeness (Team) Contact Completeness (Team) Opportunity Updates (Team)
Usage Accelerator– Financial Services Sales Manager		Coverage	Account Coverage Account Coverage (Team) Contact Coverage Opportunity Coverage Financial Account Coverage— Financial Services only
		Completeness	Account Completeness Contact Completeness
		Opportunity Updates	Opportunity Updates
		User Adoption	Active Users Application Usage—excluded for Financial Services Application Usage—Financial Services only*

Table 86. Usage Accelerator Responsibilities and Dashboards

User Responsibility	Data Level Security	Dashboard Name (View)	Dashboard Page
Usage Accelerator–Sales Executive	No position-based Security	Scorecard	Organization Scorecard Individual Scorecard
Usage Accelerator–Financial Services Sales Executive		Action Plan	Account Coverage (Org) Contact Coverage (Org) Opportunity Coverage (Org) Financial Account Coverage (Org)—Financial Services only Account Completeness (Org) Contact Completeness (Org) Opportunity Updates (Org)
Usage Accelerator–Administrator		Coverage	Account Coverage Contact Coverage Opportunity Coverage Financial Account Coverage—Financial Services only
Usage Accelerator–Financial Services Administrator		Completeness	Account Completeness Contact Completeness
		Opportunity Updates	Opportunity Updates
		User Adoption	Active Users Application Usage (excluded for Financial Services) Application Usage—Financial Services only  Although the Application Usage dashboard names appears similar, the Application Usage—Financial Services-only version of this dashboard is different from the other dashboard.

# F

## Configuring Metadata for Analytics Applications

Siebel applications are shipped with certain Siebel Business Analytics metadata. These metadata repositories are included with Siebel operational applications and Siebel Industry Applications. All the rules for security, data modeling, aggregate navigation, caching, and connectivity for the Siebel Data Warehouse are stored in metadata repositories on the Siebel Business Analytics Server.

This appendix describes configuration necessary for the Siebel Business Analytics metadata for Siebel operational applications, specifically those areas that a Siebel administrator may need to adjust for Analytics purposes. These administrative tasks generally cover two subareas:

- Dashboard content of Siebel operational applications Analytics
- Metadata requirements for Siebel operational applications Analytics

This appendix contains the following topics:

- [What Are Siebel Operational Applications? on page 327](#)
- [Updating Finance Analytics Logical Table Sources on page 328](#)
- [Externalizing Financial Services Metadata Translation Strings on page 329](#)
- [Disabling the Finance Analytics Logical Table Sources on page 330](#)
- [Enabling Dashboard Forecasting Charts on page 330](#)
- [Developing and Deploying Predictive Scores on page 331](#)
- [Configuring Siebel Applications for Attribute Analysis on page 332](#)
- [Analytics Metadata Requirements for Siebel Industry Applications on page 332](#)
- [Consumer Goods Dashboards and Pages on page 333](#)
- [Consumer Goods Data Requirements on page 335](#)
- [Siebel CME Analytics on page 336](#)
- [CME Dashboards and Pages on page 337](#)
- [CME Data Requirements on page 339](#)
- [Dimensions Common to All Subject Areas on page 339](#)
- [Dimensions Specific to Pharma Sales Subject Areas on page 341](#)

## What Are Siebel Operational Applications?

The Siebel operational applications are built around a general business function, such as Siebel Sales, Siebel Service, and Siebel Call Center.

Siebel Industry Applications are built around specific industries' business practices:

- Financial Services
- Consumer Sector
- Communications, Media, and Energy (CME)
- Pharma Sales

**NOTE:** You can license one or more Siebel Industry Applications for Analytics. Licensing permits you to restrict user access to particular dashboards, subject areas, and reports.

## Updating Finance Analytics Logical Table Sources

In the Analytics Repository file, logical table sources are set by default to Siebel Finance Analytics, Siebel Healthcare Analytics, and Siebel Insurance Analytics settings. Before using these Financial Services Analytics applications, you must update the logical sources for two tables in the Siebel Business Analytics Repository file. These logical sources must be deactivated in order for Siebel Finance Analytics, Siebel Healthcare Analytics, and Siebel Insurance Analytics reports to point to the correct logical model and retrieve the correct data. Do this by deactivating the sources for the Fact-Asset logical table in the Core subject area and activating the FINS logical sources, as shown in the following procedure.

**NOTE:** Before performing the following procedure, shut down the Siebel Analytics Server.

### *To update Logical Table sources for Finance Analytics*

- 1 Launch Server Administration Tool and open the Analytics Repository (SiebelAnalytics.rpd).  
Go to the Business Model and Mapping window (the logical layer window) and open the Core folder.  
Scroll down to the Fact-Asset logical table and open its Sources folder.
- 2 In the list of logical table sources, right-click W\_ASSET\_F (FINS).  
Select Properties.
- 3 Click the General tab in the Properties window and make sure that the Active check box is checked.  
If it is not, check it.
- 4 In the list of logical table sources, right-click W\_ASSET\_F.  
Select Properties.
- 5 Click the General tab in the Properties window.  
Make sure the Active check box is unchecked. If it is not, uncheck it.  
Click OK and save the repository.

- 6 Restart Siebel Analytics Server.

## Externalizing Financial Services Metadata Translation Strings

The Financial Services applications use a different set of translation strings from other Siebel operational applications.

You must externalize the metadata strings in the Analytics repository.

### *To externalize metadata strings in the Analytics repository*

- 1 Open the SiebelAnalytics.rpd using the Server Administration Tool.
- 2 Select the entire presentation layer and right-click the mouse to display the menu.
- 3 Choose Externalized Metadata Strings.

With this configuration, all metadata strings are read from an external Siebel operational application database, specifically from the table S\_MSG.

- 4 Make sure that the connection pool Externalized Metadata Strings points to the Siebel operational application database and is working correctly.
- 5 Go to the Manage Variables menu and locate the initialization block External Metadata Strings. Double-click on the initialization block to open the Edit window.
- 6 In the Initialization SQL area, change the SQL:

```
from
    select MSG_NUM, MSG_TEXT
    from VALUEOF(TBO).S_MSG
    where MSG_TYPE = 'Metadata' and
    LANG_ID = decode( 'VALUEOF(NQ_SESSI ON. LOCALE)' ... [more]

to
    select MSG_NUM, MSG_TEXT
    from VALUEOF(TBO).S_MSG
    where MSG_TYPE = 'FINS_Metadata' and
    LANG_ID = decode( 'VALUEOF(NQ_SESSI ON. LOCALE)' ... [more]
```

Click OK to commit the changes and save the repository.

- 7 Restart the Siebel Analytics Server.

## Disabling the Finance Analytics Logical Table Sources

In the Analytics Repository file, logical table sources are set by default to Siebel Finance Analytics, Siebel Healthcare Analytics, and Siebel Insurance Analytics settings. If you are using any Siebel Industry application that is *not* Siebel Financial Services Analytics, you must first update the logical table sources in the Analytics Repository file.

These logical table sources must be deactivated in order for your Siebel Industry application Analytics reports to point to the correct logical model and retrieve the correct data. Do this by deactivating the FINS sources for the logical tables in the Core subject area and activating the other logical sources, as shown in the following procedure.

**NOTE:** Before performing the following procedure, shut down the Siebel Analytics Server.

### *To update Logical Table sources for general Siebel Industry Applications Analytics*

- 1 Launch Server Administration Tool and open the Analytics Repository (SiebelAnalytics.rpd).  
Go to Business Model and Mapping window (the logical layer window) and open the Core folder.  
Scroll down to the Fact-Asset logical table and open its Sources folder.
- 2 In the list of logical table sources, right-click W\_ASSET\_F (FINS).  
Select Properties.
- 3 Click the General tab in the Properties window and uncheck the Active check box.
- 4 In the list of logical table sources, right-click W\_ASSET\_F .  
Select Properties.
- 5 Click the General tab in the Properties window.  
Make sure that the Active check box is checked. If it is not, check it.  
Click OK and save the repository.
- 6 Restart Siebel Analytics Server.

## Enabling Dashboard Forecasting Charts

Siebel Sales Analytics provides several forecasting analytics reports preconfigured in both the Pipeline and Sales Effectiveness dashboards. This feature performs real-time and historical analyses of forecast data to help manage each quarter's expectations and results.

To enable the forecasting charts included in these dashboards, the administrator needs to perform several group administration tasks.

### *To enable the dashboard forecasting charts*

- 1 Log in to Siebel Business Analytics as administrator and navigate to the Answers > Analytics Web Administration view.
- 2 Go to Manage Web Groups & Users.
- 3 In the No Forecasting Web group, click Edit (this icon resembles a hand).  
Click the delete icon (X) to delete Authenticated Users from the Group Members section of this group, then click Finished.
- 4 In the No Forecasting Lite group, click Edit.  
Under the Group Membership section, click Add New Member and type the following group name in the Member Name box: Authenticated Users.
- 5 Click Add Member, then click Finished.

Siebel Sales Analytics also provides several preconfigured reports based on Expected Revenue for those customers that do not own Siebel Forecasting. The preconfigured dashboards display these charts by default.

## Developing and Deploying Predictive Scores

The Loyalty Management Dashboard and several Siebel Business Analytics subject areas use customer scores generated from a third-party predictive modeling application. A predictive modeling application uses mathematical models to predict customer behavior. For customer scoring to be made available for analysis in Siebel Business Analytics, CME metadata is provided which maps these customer scores to dashboards and subject areas.

The following procedure describes the process of developing and deploying these predictive scores.

### *To develop and deploy predictive scores*

- 1 Generate predictive scores using any third-party predictive modeling application.  
**NOTE:** This is performed outside of the Siebel operational application.
- 2 Integrate the scores into the Siebel transactional database.  
Once this is completed, scores may be viewed in the Siebel operational application by accessing the Accounts > Profiles > Loyalty Profile view.
- 3 Load the integrated scores into the Siebel Data Warehouse during the extraction, transformation, and loading (ETL) process.
- 4 After the scores are loaded into the Siebel Data Warehouse, map them to the following Siebel Business Analytics metadata fields:
  - Churn Score
  - Customer Lifetime Value Score

- Upsell Score
- Cross-Sell Score
- Financial Risk Score

In conjunction with other associated metadata, these fields are primarily used to populate the Loyalty Management dashboard.

## Configuring Siebel Applications for Attribute Analysis

In order for Attribute Analysis to function properly, the sequence number associated with a class attribute must be set properly. The sequence numbers assigned to the Attributes must be unique. If the sequence number associated with an attribute is not unique, the Siebel Data Warehouse ETL process cannot distinguish between two attributes with the same sequence number, possibly resulting in the ETL process crashing and in flawed analyses.

This configuration is performed in the Siebel operational application.

### *To configure the attribute sequence numbers*

- 1 From the Siebel operational application Site Map, select Application Administration > Class Administration.
- 2 In the Classes form, select the class whose attributes are going to be analyzed.
- 3 Select the Dynamic attributes child level form, and from that menu select columns displayed.
- 4 Display the Analytics Sequence # column.
- 5 For each row in the Dynamic Attributes list, enter a unique sequence number in the Analytics Sequence# column.  
If a sequence number already exists, change the sequence number to a unique value.
- 6 Repeat [Step 2](#) through [Step 5](#) for all the classes whose attributes are to be analyzed.

## Analytics Metadata Requirements for Siebel Industry Applications

Some metadata needs to be set up properly in the Siebel transactional database for it to be displayed accurately in Siebel Business Analytics. The following topics describe the metadata structure for each of the following Siebel Industry Applications:

- [Consumer Goods Dashboards and Pages on page 333](#)
- [Consumer Goods Data Requirements on page 335](#)
- [CME Dashboards and Pages on page 337](#)
- [CME Data Requirements on page 339](#)

- [Siebel CME Analytics on page 336](#)
- [Dimensions Common to All Subject Areas on page 339](#)
- [Dimensions Specific to Pharma Sales Subject Areas on page 341](#)

## Consumer Goods Dashboards and Pages

Siebel Consumer Goods Sales Analytics extends the base Sales Analytics application to include Trade Funds Management Analytics, Trade Promotion Evaluation Analytics, Sales Performance Analytics, and Retail Audit Analytics.

All Consumer Goods specific metadata has been added to a single subject area. In the Server Administration Tool, this metadata is tagged with a red apple icon. The following topic covers each fundamental area of Consumer Goods Analytics and provides tips for data entry for effective analytics.

The Consumer Goods dashboards and pages available to the end user are described in [Table 87](#).

Table 87. Consumer Goods Dashboards and Page Tabs

Dashboard	Page	Function
Retail Audit	Last Audit	Shows the aggregated results of the last audit, defined the last time a product was audited at a specific account and merchandising location. The aggregated metrics can be drilled into to get a list of accounts or products to target future efforts.
	Trends	Displays key metrics captured in a retail audit over time across accounts or product categories.
	Position	Combines account and product performance with the individual representative responsible.
Promotion	Plan Year To Date	Displays both individual promotional performance with cumulative trends to provide overall perspective on meeting promotional targets.
	Key Accounts	Shows post promotion evaluation from a key account perspective across several levels of detail including plan, promotion, or promoted product detail.
	Corporate	Shows post promotion evaluation from a brand managers perspective, by evaluating corporate promotions.
Funds	Summary	Displays the key analyses for a fund manager, including Remaining Amounts which provides a status of all funds relative to all other funds.
	Accounts	Highlights status of funds and funds spent at a specific account and is targeted to assist key account managers in determining how to fund future promotions.

Table 87. Consumer Goods Dashboards and Page Tabs

Dashboard	Page	Function
Sales Performance	Sales Volume Planning	Details the key metrics used in sales volume planning, including incremental, target, shipment and consumption volumes, over time and in comparison to one another. Baseline and estimated incremental volumes are stacked and compared to targets to assist in identifying future progress against targets. This analysis uses a global filter to assist end users in getting to the level of details they want in one selection.
	Hierarchy	Similar in content to Sales Volume Planning, however, this analysis is organized to promote exploration of data, allowing end users to freely drill up or down the account, time, or category product hierarchies. This page should be used to help sales managers identify where sales exceeded expectations.
	Trends	Depicts sales trends across accounts, channels, and categories as well as compares account performance in order to rank them.
	Growth	Displays key sales metrics versus the year ago and charts the rate of growth.
VP Sales	Business Overview	This page focuses on answering key business questions of a sales executive including where are my sales? How effective are my promotions by channel? Which account plans are top and bottom performers? How is my promoted volumes and funds spend trending as compared to last year? What are my top five accounts in each category?
	Product Overview	This page focuses on answering key product questions of a sales executive. For example, What percentage of total sales is in each category? What products are selling where by whom?
Key Account Manager	Account	This page focuses on answering key business questions of a key account manager. For example, How I am performing versus my account plan? What is my promotional forecast accuracy? What funds are available to plan additional retail activity?
	Category	This page focuses on answering key product questions of a key account manager. For example, Which category is best promoted at my accounts? How are my store conditions trending? Are out of stocks preventing me from reaching my targets?

## Consumer Goods Data Requirements

The data requirements for the Consumer Goods–specific portion of the data model are detailed in [Table 88](#). This includes the fund, promotion, performance and retail audit schema.

Table 88. Data Requirements for Consumer Goods Schema

Page	Function
Funds	Trade Fund Management Analytics incorporates the latest Trade fund functionality including aggregation of approved adjustments, transfers, deal allocations, and payments at all statuses.
Promotion	In the transactional database, fund allocations and product movement (incremental volumes) can be assigned to a promotion at the promotion or the promoted product level. The ETL transfers this information at the promoted product level only. If you allocate funds at the promotion level and assign product detail such as shipment quantities at the promoted product level, the fund allocation data needs to be pushed to the promoted product level to be accurately stored in the Siebel Data Warehouse.
Performance	<p>Sales Performance Analytics is used primarily in conjunction with the category product hierarchy as defined by Siebel Sales Volume Planning. To create the category-product hierarchy, the SVP adopt flag must be selected in order to aggregate product data up the category product hierarchy. This flag can be found by navigating to Catalog Administration &gt; SVP Category Details View &gt; Products list.</p> <p>The data warehouse and all prebuilt analyses are built from the end date of a period. To make sure data is accurate, the periods in the Siebel transactional database tables must be of a single duration. If they are different, inaccurate data could be stored in the data warehouse. For example, if a week and a month end on the same date, the actual shipped quantities are combined during the building of the data warehouse.</p>
Retail Audit	<p>The Last Audit Flag is set during the ETL process. The flag is set to Yes for the most recent record for a product at an account and merchandising location. All other audit records for that combination of product, account, and merchandising location are set to No.</p> <p>The observation date is used to sort the retail audit records to determine which is the last audit. The observation date is populated when the status of a retail audit activity is changed to Done. The field observation date does not show up in the Siebel transactional database user interface and does not have to be the same as the activity date.</p>

## Siebel CME Analytics

Siebel Communications, Media and Energy (CME) makes use of order management functionality configured for CME. For Siebel CME Analytics to fully reflect the information collected by CME order management functionality, some extensions to the Siebel CME Analytics application may be required. This topic explains these potential extensions.

Siebel Sales Orders include complex products and simple products.

**Complex Products.** A series of products related by a product hierarchy. The highest product in the hierarchy is the root product, and the lower level products are the child products. In complex products, revenue figures are summed and roll up to the root product using the ROLLUP\_NET\_PRI field. For a complex product, Siebel Business Analytics examines only the root product when computing revenue. Child products are disregarded because their revenue is already reflected in the root.

**Simple Products.** A root product. Siebel Business Analytics examines this root product when computing revenue, and nothing more.

Siebel Communications, Media and Energy order management functionality supports products which have recurring charges over time (for example, \$20 per month for 12 months), one-time charges (for example, one-time purchase price of equipment), and usage charges (for example, 15 cents per minute).

The revenue attributed to a product with recurring charges is valued by taking the product's net price and multiplying it by the number of months that product is anticipated to be active, as represented by the Number of Revenue Occurrences field. This field, contained in Quote Item and Order Item records, is contained in the Siebel Data Warehouse by the following fields:

- W\_QUOTEITEM\_F.NUM\_OCCURRENCE
- W\_ORDERITEM\_F.NUM\_OCCURRENCE

In Siebel CME Analytics, revenue metrics do not automatically account for all recurring charges, and do not consider the NUM\_OCCURRENCE fields. Instead, Siebel CME Analytics revenue metrics incorporate one-time charges, one-month's worth of recurring charges, and no usage charges. To incorporate the anticipated value of all recurring charges, the W\_QUOTEITEM\_F.NUM\_OCCURRENCE and W\_ORDERITEM\_F.NUM\_OCCURRENCE fields may need to be incorporated into revenue calculations made during the Extraction, Transformation and Load (ETL) process for order item and line item records.

Alternatively, these fields in the Siebel transactional database, representing the aggregated recurring and one-time product charges, may be used and incorporated into the ETL processes:

- S\_ORDERITEM.PER\_MTH\_CHG\_SUBTOT
- S\_ORDERITEM.ONETIME\_CHG\_SUBTOT
- S\_QUOTEITEM.PER\_MTH\_CHG\_SUBTOT
- S\_QUOTEITEM.ONETIME\_CHG\_SUBTOT

Each CME Order line item and Quote line item contains an Action Type of Add, Update, or Delete. Because Siebel Business Analytics only looks at root product line items, only the Action Types associated with the root product are considered during analysis. Therefore, while all line items for a complex product may collectively include a combination of various Action Types, only the Action Type for the root product are considered during analysis. This is of special importance if a filter or query criteria in analysis is based on the Action Type field, which it is for most Account Management and Revenue Management dashboard reports.

Similarly, each CME Order line item and Quote line item is associated with a product of a particular Price Type. Because Siebel Business Analytics considers root products only, only the Price Type associated with the root product is considered during analysis. Again, this is important if a filter or query criteria is based on Price Type. Such filter criteria apply to most Account Management and Revenue Management dashboard reports.

**NOTE:** For more information, see release notes documentation for Siebel Communication, Media and Energy Analytics, and Siebel Interactive Selling Suite Analytics.

## CME Dashboards and Pages

Siebel Communications, Media and Energy (CME) Analytics contains corresponding industry-specific metadata. In the Server Administration Tool, industry-specific metadata is flagged with an icon picturing a telephone. Although this icon is visible in the Server Administration Tool, it is neither visible nor included within Siebel Answers. End users employ Siebel Answers to access metadata for building queries and reports. For users of Siebel Answers to view and access CME metadata columns, they must login to Siebel using one of the CME responsibilities listed in Table 89. These responsibilities also determine what subject areas the user may access.

Table 89. Communications, Media and Energy Dashboards and Page Tabs

Dashboard	Page	Function
Loyalty Management	Customer Lifetime Value	Segments customers based upon defined ranges of scores predicting customer lifetime value.
	Churn Propensity	Segments customers based on defined ranges of scores estimating churn propensity.
	Selling Propensity	Segments customers based on defined ranges of scores valuing the potential of up-sell and cross-sell opportunities.
	Financial Risk	Segments customers based on defined ranges of scores predicting financial risk.
	Actual Churn	Shows trending of actual customer churn, and actual customer acquisition, over time.

Table 89. Communications, Media and Energy Dashboards and Page Tabs

Dashboard	Page	Function
Revenue Management	Revenue Trends	Charts trends of order revenue and order volume over time, and identifies top products based on order revenue and volume.
	Service Activations	Charts trends of service activations over time, and indicates top service activations based on order revenue and volume.
	Service Modifications	Charts trends of service modifications over time, and indicates top service modifications based on order revenue and volume.
	Service Disconnections	Charts trends of service disconnections over time, and identifies services with the highest disconnection volume.
Account Management	Sales Portal	Identifies top accounts, and related top products, based upon order revenue and order volume.
	Service Activations	Charts trends of account service activations, and indicates top accounts based on service activation performance metrics.
	Service Modifications	Charts trends of account service modifications, and indicates top accounts based on service modification performance metrics.
	Service Disconnections	Charts trends of account service disconnections, and identifies accounts with the highest volume of disconnections.
	Trouble Tickets	Provides trouble ticket trending charts, and performance indicators, for particular accounts, and for accounts with selected common characteristics.
	Customer Satisfaction	Provides customer satisfaction trending charts, and performance indicators, for particular accounts, and for accounts with selected common characteristics.

## CME Data Requirements

The data requirements for each of the Communications, Media and Energy dashboards are detailed in [Table 90](#).

Table 90. Data Requirements for Communications, Media and Energy Dashboards

Dashboard	Function
Loyalty Management	This dashboard uses customer scores generated from any third-party predictive modeling application offering the following predictive models: Customer Lifetime Value, Churn Propensity, Up-Sell Propensity, Cross-Sell Propensity, and Financial Risk Propensity. Scores must be generated for each Siebel Account, integrated into the Siebel Transaction Database, and then written to the Siebel Data Warehouse. This dashboard uses the Siebel Business Analytics Customers subject area. See the topic <a href="#">“Developing and Deploying Predictive Scores” on page 331</a> for more information.
Revenue Management	This dashboard uses data generated by Siebel Communications, Media and Energy order management and interactive selling functionality. No specific data requirements are required beyond the data generated from these Siebel modules. This dashboard uses the Siebel Business Analytics Orders and Products subject areas.
Account Management	This dashboard uses data generated by Siebel Communications, Media and Energy order management, interactive selling, and service functionality. No specific data requirements are required beyond the data generated from these Siebel modules. This dashboard uses the Siebel Business Analytics Orders, Products, Service Request and Customer Satisfaction subject areas.

## Dimensions Common to All Subject Areas

Although the following dimensions are used in all subject areas, this topic describes the configuration necessary for Pharma Analytics applications.

### Positions Dimension

A sales territory is defined in Group Administration–Positions by a Siebel position. Creating parent positions creates the sales force hierarchy. Up to 10 levels of sales force hierarchy are supported by the application. Employees should be assigned to positions to populate employee hierarchy.

Position Types need to be set up according to compensation type (Rx or sales) only at the sales territory level. A district manager does not need to have a Position Type assigned to it. Sales Allocation needs to be exposed on the list to enter script compensation percentages (Rx or Sales) associated with each territory. For example, if all sales representatives receive 100% of the Rx on a ZIP Code, no action is needed or Position Type = Sales Representative can be assigned to the position.

Seed data on the Position Type list of values has been enhanced to include types for mirror, job share, and swat. Typically, both mirror and job share represent a position that receives less than 100% of the total scripts on a ZIP Code.

## Alignments Dimension

A sales territory alignment is the relationship of ZIP Code-to-territory or brick-to-territory. The alignment relationship is created in Siebel Assignment Manager under Assignment Administration–Territories, as shown in [Table 91](#).

Table 91. Sales Territory Alignment

Relationship	Criteria	Comments
Contact ZIP to Territory	Contact ZIP Code	Use contact primary address ZIP Codes. Do not use ranges of ZIP Codes (that is, enter unique ZIP Codes as low and high values). Do not enter duplicate ZIP Codes.
Account ZIP to Territory	Account ZIP Code	Do not use ranges of ZIP Codes (that is, enter unique ZIP Codes as low and high values). Do not enter duplicate ZIP Codes.
Contact Brick to Territory	Contact Brick	Use contact primary address brick. Do not use ranges of bricks (that is, enter unique bricks as low and high values). Do not enter duplicate ZIP Codes.
Account Brick to Territory	Account Brick	Do not use ranges of bricks (that is, enter unique bricks as low and high values). Do not enter duplicate ZIP Codes.
Account to Territory	Account	Do not enter duplicate accounts.
Contact to Territory	Contact	Do not enter duplicate contacts.

## Products Dimension

The product hierarchy requires customer products (products of the company who licensed the software) to have predefined product types as shown in [Table 92](#).

Table 92. Customer Products Predefined Product Types

Product Level	Product Type	Example
3	Sample	Aracid 400 MG
2	Detail	Aracid
No Level	Sub Market	COPD
1	Market	Asthma

**NOTE:** Competitive products should use the product type Competitor. Competitor product hierarchies are set up using parent product relationships exclusively and should not have product levels assigned to them.

## Product Costs Dimension

Product costs for customer products (that is, products of the company that licensed the software) require population in the Product Administration, Product Form, as shown in [Table 93](#).

Table 93. Product Costs For Customer Products

Product Type	Field to be Populated
Sample	Sample Cost
Detail	Avg. Promo Cost
Promotional Item Cost	Sample Cost

## Dimensions Specific to Pharma Sales Subject Areas

This section discusses the subject areas used by Pharma Analytics.

### Pharma Sales Effectiveness

This subject area is focused on syndicated data analytics.

The specific configuration required for the S\_SYND\_DATA table depends on your data types, and the Analytics application and reports that you have licensed. The Data Loading Matrix table in *Siebel Analytics Applications Installation and Administration Guide* is the basis of prebuilt reports. The syndicated data loading matrix populates both base and derived metrics used in Pharmaceutical Sales Analytics.

## Pharma Product Categories

Siebel Pharma Analytics supports custom and prebuilt product category trees to allow rollup of syndicated data by alternative hierarchies. To populate a custom category, first create a Catalog in Catalogue Administration, and create categories and subcategories as part of the catalogue. [Table 94](#) lists the categories that need to have the Usage Type field populated in the Catalog Admin Category Detail list.

Table 94. Hierarchy Categories to be Populated in Pharma Analytics

Usage Type Code	Hierarchy Category
ATC	Anatomical Therapeutic Class
Chemical	Chemical
Application Form	Product application
USC	User-defined codes and custom hierarchies

## Pharma Promotional Effectiveness

This subject area combines call activity data with syndicated data to analyze effectiveness of call activity.

Call Activity analysis records are derived from submitted call activity records stored in S\_EVT\_ACT in the Siebel transactional database, where they are stamped with the ZIP Code or brick where the activity took place—that is, the Contact primary address's ZIP code/brick or the Account ZIP Code/brick. Allocation of these ZIP Code/brick records should be done by Assignment Manager rules to make sure that they are correctly allocated. Assignment Manager rules must match the Contact or Account primary address ZIP Codes or bricks. Otherwise, data integrity is not maintained.

Only calls that have status Submitted on the Pharma Professional Call Form are brought over from the Siebel transactional database to the Siebel Data Warehouse.

## Pharma Medical Education Effectiveness

This subject area combines measures from MedEd and Syndicated Data to measure effectiveness of medical education events used on Medical Education Analytics.

Only MedEd events with the status Completed on the Pharma ME Event List are extracted from Siebel transactional database to populate the Siebel Data Warehouse.

MedEd Event costs are based on costs of activities in the Pharma ME Event Activity List. Costs are allocated based on MedEd Team cost allocation, and promoted products Cost Allocation on the MedEd event.

Costs are solely based on physician invitees with the status Attended in the Pharma ME Event Professional Invitee Session List.

Control groups are based on physicians who have the same contact ranking as attendee physicians within the same sales territory at the time of the event, but who did not attend the event.

## **Pharma Customer Demographics**

This subject area supplies denormalized tables for contact and account profiling. It is typically loaded from external sources and contains the master contact list. Prebuilt ETL extracts the contact list from Siebel.

## **Pharma Objectives Achievement**

This subject is used to measure achievement and results for pharma call activity and Rx/sales targets. It is based on Pharma Objectives.

Objectives need to have a Unit populated in Retail Objective Form. Actual target numbers per contact and account need to be populated in the Pharma Campaign Target Account List or the Pharma Campaign Target Professional List Toggle.





# Siebel Data Warehouse for Life Sciences Data Considerations

This chapter contains the following topics:

- [What's New for Siebel Pharma Analytics in Version 7.8.3 on page 345](#)
- [Importing Syndicated Data into Siebel Data Warehouse on page 346](#)
- [Life Sciences Data Loading Issues with Siebel Data Warehouse on page 400](#)
- [Incremental Updates in the Siebel Data Warehouse LS Dimension Tables on page 401](#)

## What's New for Siebel Pharma Analytics in Version 7.8.3

This section describes the new features for Oracle's Siebel Pharma Analytics Version 7.8.3.

- New ETL for direct load of syndicated data.

Syndicated data can now be directly loaded into the Siebel Data Warehouse. A new set of prebuilt processes against common external syndicated data types allows direct load of syndicated data, such as physician plan level Rx data, physician level Rx data, indirect sales data, and weekly Rx data.
- New syndicated data staging architecture.
  - Syndicated data is now loaded against a staging architecture. The staging table architecture uses a denormalized time dimension that improves data loading by a factor of how many periods are loaded.
  - A new set of cross-reference files for external key matching are supplied to resolve cross referencing and loading external syndicated data where the accounts, products, territories and contacts IDs are different from the Siebel IDs.
- New single grain syndicated data for the Siebel Data Warehouse schema.
  - New single grain star schemas for power users and operational users.
  - Twelve new base star schemas for power user reporting.
  - Sixteen new operational star schemas for operational reporting.
- New syndicated data MAT (Moving Annual Total) metrics calculated on ETL.

The calculation of rolling period calculations take advantage of the new staging architecture and populate common pharmaceutical time aggregate metrics on the Siebel Data Warehouse. The result is greatly improved reporting performance when using rolling 12-month metrics.
- New ETL for syndicated data market aggregation.

New process to load the market fact tables based on aggregations on the product-market hierarchy. This minimizes the requirement to purchase preaggregated data by market.

- New set of prebuilt aggregation tables for high performance reporting.
  - New aggregation tables for each level of sales geography for each data type.
  - Twenty-four new sales level aggregation tables for product-based syndicated data facts.
  - Twenty-four new sales level aggregation tables for market-based syndicated data facts.
  - Six new call activity aggregation tables for improved reporting performance for reports requiring top-level sales level activities.
  - The syndicated data aggregation tables de-duplicate data when the same contact is assigned to multiple territories at all levels by market, product, position level, and period for all data types.
  - New de-duplication tables to de-duplicate data when the same contact is assigned to multiple territories for the district level for Physician Plan Level Rx data only.
  - Improved reporting performance resulting from the new aggregation strategy.
- New mini dimensions.
  - Account and contact rank mini dimensions.
  - Representative specialty LOV dimensions.
  - W\_POSTN\_CON used only for contact primary address.
- New single grain call activity fact tables. In previous releases, all call activity facts resided on the same table. For Siebel Business Analytics Applications Version 7.8.3, call activities reside in three fact tables, account calls, account-attendee calls, and contact calls.
- New denormalization to improve query performance.
  - Employee name in sales force hierarchy dimension and alignment dimension.
  - Parent account name in Account dimension.

## Importing Syndicated Data into Siebel Data Warehouse

Pharmaceutical companies purchase weekly and monthly sales and prescription data, known as syndicated data, from third-party vendors such as IMS, NDC, and Cegedim. Syndicated data vendors acquire data from drug wholesalers and retailers on a daily, weekly, and monthly basis and compile a master file of customers (wholesalers, pharmacies, hospitals, and doctors) and sales or prescription transactions for customers. Measures include indirect sales, indirect units, and prescriptions and differ by vendor and periodicity. It is used for sales force analysis reporting and customer targeting.

The data is derived from panels of physicians, pharmacies, and so on, and projected nationally. Since the panels may change on a monthly basis, syndicated data suppliers tend to change their projections of sources on a monthly basis leading to full restatements of historical data. Thus, pharmaceutical companies are required to refresh fully the data in their data warehouses. In addition, weekly data requires incremental loading.

After it is delivered by the vendor, the syndicated data must be fully reloaded into the Siebel Pharma data warehouse in a timely manner and made available to users in order for them to make use of sales force analysis reporting.

This section includes the following topics:

- [Syndicated Loading Definitions on page 347](#)
- [Data Types Supported in the Siebel Data Warehouse on page 348](#)
- [Loading Syndicated Data into the Siebel Data Warehouse on page 349](#)

## Syndicated Loading Definitions

Table 95 provides terms and definitions related to syndicated loading.

Table 95. Syndicated Loading Definitions

Term	Definition
Syndicated data	Third-party data from vendors that shows sales and prescription results for client defined markets.
Brick	Micro sales geographic area defined by vendor that contains prescription and sales trends for clients' product groupings or markets. Bricks do not exist in the US where the micro sales geographic area is commonly the postal code or zip code.
NRx	Abbreviation of new prescriptions. A new prescription is defined as dispensed prescriptions given a new number by the pharmacy, not necessarily new therapy for the patient.
TRx	Abbreviation of total prescriptions. $TRx = NRx + Refills$ . After the first time a prescription is filled, when it is refilled, the pharmacy refers back to the previous drug ID number and notes this as a refill.
Indirect sales	Total drug wholesalers product sales values to drug retailers (pharmacies) by brick or zip code. Sales values are calculated as units multiplied by client-selected price, where the price is the warehouse acquisition cost unless the client has chosen to have a different price applied to its direct sales or government depot sales.
Indirect units	Total drug wholesalers product sales units to drug retailers (pharmacies) by brick or zip code. Sales unit quantity is determined by multiplying package factor to obtain unit value (for example, one carton x 24 bottles = 24 units).

## Data Types Supported in the Siebel Data Warehouse

The Siebel Data Warehouse supports multiple data types defined by data source type and periodicity, as described in [Table 96](#).

Table 96. Data Types Supported in Siebel Data Warehouse

Data Type	Description
Prescription data by contact	Monthly NRx and TRx data for client defined markets that include competitor products data by physician.
Indirect sales brick level	Monthly wholesaler sales and unit values data for client defined markets that include competitor products aggregated by brick.
Indirect sales account level	Monthly wholesaler sales and unit values for company products by pharmacy.
Indirect sales zip level	Monthly wholesaler sales and unit values for client defined markets that include competitor products aggregated by postal code.
Direct sales account level	Monthly direct factory sales data and unit values to wholesalers for company's products by wholesaler.
Direct sales brick level	Monthly direct factory sales data and unit values to wholesalers for company's products by brick.
Direct sales zip level	Monthly direct factory sales data and unit values to wholesalers for company's products by postal code.
Weekly prescription data	Weekly NRx and TRx data for client defined markets that include competitor products by physician.
Plan level prescription data	Monthly prescription data by managed care plan for client defined markets that includes competitor products.
Sales market	<b>Incentives.</b> Monthly incentive compensation data sourced from internal incentive compensation systems and loaded as a new data type in the Siebel Data Warehouse.
Sales market	<b>Modified.</b> Monthly incentive compensation data sourced from internal incentive compensation systems and loaded as a new data type in the Siebel Data Warehouse.
Physician plan level Rx data	Monthly prescription data for physicians associated with a managed care plan.
Prescription data by zip code	Monthly prescription data for client defined markets that includes competitor products aggregated by postal code.
Prescription data by brick	Monthly prescription data for client defined markets that include competitor products aggregated by brick.

## Loading Syndicated Data into the Siebel Data Warehouse

The following options are available for loading syndicated data into the Siebel Data Warehouse:

- [Loading From a Flat File Source Using Syndicated Data Staging Tables and Cross-Referencing Tables on page 349](#)
- [Loading the Siebel Data Warehouse from the Siebel Transactional Database \(OLTP\) S\\_SYND\\_DATA Table on page 352](#)
- [Loading From a Flat File Source Using Syndicated Market Staging Tables on page 356](#)

### Loading From a Flat File Source Using Syndicated Data Staging Tables and Cross-Referencing Tables

This option is supported in Siebel Business Analytics Applications Version 7.8.3. To load syndicated data with this option, you have to prepare external data files for syndicated data and cross-reference data as described by the requirements in the following tables: [Table 97 on page 357](#), [Table 98 on page 360](#), [Table 99 on page 364](#), [Table 100 on page 367](#), [Table 101 on page 370](#), [Table 102 on page 374](#), [Table 108 on page 392](#), [Table 104 on page 380](#), [Table 105 on page 383](#), [Table 106 on page 386](#), [Table 107 on page 389](#), and [Table 108 on page 392](#). The ETL process will load syndicated data source files as a full load each time, but cross-reference data files will be loaded incrementally. Cross-reference data files must contain only new and updated information each time to support proper incremental loading. When the cross-reference data files are prepared, the data must be already loaded into the transactional database so the proper Siebel row IDs and the corresponding external source keys are resolved and provided in the data files.

The alignment assignment rule is critical with this option. The external file AlignmentType.csv is installed during the Siebel Business Analytics Applications installation in the Informatica Server\SrcFiles folder. You have to select an alignment item type from the options defined below before running the ETL. You can change the alignment item type only when you choose to run the full ETL load process. The following alignment item types are available:

- Zipcode
- Account/Contact
- Brick

Once the syndicated data and cross-reference source files are prepared, then the data can be loaded directly into Siebel Data Warehouse staging tables. If any invalid data source type is used in the syndicated data files, then the ETL will load as it is. You have to prepare the correct data source type in the data files. Only the data that should not be nullable but is null in data files will be filtered out separately so you can review the rejected data for the next ETL run.

When the syndicated data is loaded from the Siebel Data Warehouse staging tables to target base tables, such as W\_SYNDD\_RX\_F, the external source keys are replaced with Siebel Business Analytics keys and the data is loaded in the normalized format.

Then, based on what you defined as a primary alignment type above, the syndicated data in base target tables is replicated into the proper owner position and loaded into the main target tables at the territory level, such as W\_SYND\_RX\_T\_F, which contains all base table attributes plus ranking and position information.

### Flat File Data Population Rules for Populating TRx Data

This section provides information about various major columns in the W\_SYNDD\_RX\_F table related to populating TRx data.

- INTEGRATION\_ID
  - Data type is varchar(30).
  - Value can be any unique number or combination of values coming from the external file source with the appended postfix -##, such as -1, if the data is corresponding to the first month of bulk syndicated data, and -2 if the data is corresponding to the second month of bulk data, and so on.
  - INTEGRATION\_ID manipulation is done by LS\_EXP\_FLATFILE\_GENERATE\_INTEGRATION\_ID transformation. It is required because the incoming INTEGRATION\_ID in flat file represents 26 different bulk loads in denormalized format. Therefore, the format must be changed to normalized for the Siebel Data Warehouse target table.
- DATASOURCE\_NUM\_ID
  - ETL run specific (a numeric value that indicates the source for the data).
  - Used in standard Siebel mappings to ensure each record carries a value indicating its source.
  - Used in source qualifiers to ensure that lookups on dimension tables when populating fact tables area referencing data that was loaded from a uniform data source.
  - Data source number 1 is reserved for the Siebel transactional database. The external source should use a number other than 1.
  - For syndicated data flat file loads, the external source number (other than 1) is loaded into staging tables. When the data is loaded from the staging tables to target tables and external source keys are matched to Siebel IDs, the data source number is converted as 1 in the target table.
  - Combination of INTEGRATION\_ID and DATASOURCE\_NUM\_ID must be a unique value (mandated by a unique index on both columns).

This means that the system will not accept the same record from the same source with identical unique IDs.
- DATA\_LEVEL\_WID
  - Stores a foreign key in the W\_LOV\_UD table for the record corresponding to that syndicated data source type for the data.
  - Value comes from DATA\_SRC\_CD in the flat file. For example, in the table W\_SYNDD\_RX\_F, the proper data source type defined in flat file must be one of the following:
    - RXPrf
    - RXZip

- RXBrk
- RXSMI
- RXSMM
- The standard mapping uses the incoming DATA\_SRC\_CD code to do a lookup against the W\_LOV\_UD table to secure the ROW\_WID of that data source type and inserts it into the W\_SYNDD\_RX\_F table DATA\_LEVEL\_WID column.
- PAYER\_TYPE\_WID
  - Stores a foreign key in the W\_INS\_PLAN\_D table for the record corresponding to that payer type of the data such as Cash, Total.
  - Value comes from PAYER\_TYPE\_ID in the flat file.
- PERIOD\_TYPE\_WID
  - Stores a foreign key in the W\_LOV\_D table for the record corresponding to the period for the data.
  - Value comes from PERIOD\_CD in the flat file, such as Month, Week.
  - The standard mapping uses the incoming PERIOD\_CD code to do a lookup against the W\_LOV\_D table to secure the ROW\_WID of that period type and inserts it into the W\_SYNDD\_RX\_F table PERIOD\_TYPE\_WID column
- GEO\_WID
  - GEO\_WID is a foreign key to the W\_GEO\_D dimension, which contains a geographical hierarchy based on zip code as the lowest level of detail. It is preconfigured to allow users to roll up a TRx measure to levels such as city, state or province, county, country, and continent.
  - If the flat file source of TRx data load is zip code level, then the ZIPCODE field in the flat file must be provided. Then, the value is performed using the following logic to get loaded in the target GEO\_WID:
    - MPLT\_GEO\_WID\_ZIPCODE takes zip code as the incoming value, and the literal NO\_DUP\_FLG = 'N' ports to do a lookup against W\_GEO\_D for any record where the ZIPCODE column matches the incoming zip code value and the DUP\_ZIPCODE column = 'N'. (Sample data in the W\_GEO\_D table contains multiple city records per zip code, only one of which is marked as DUP\_ZIPCODE = 'N'). The mapping also ensures that even with multiple matches only the first record is retrieved, and with no matches, the data comes back with the appropriate Unspecified code.
- CON\_GEO\_WID
  - CON\_GEO\_WID is a foreign key to the W\_GEO\_D dimension, which contains a geographical hierarchy based on zip code as the lowest level of detail.
  - The following three attributes, city, country, and zip code, are the main keys to determine CON\_GEO\_WID, and are brought from flat file CON\_CITY, CON\_COUNTRY, and CON\_ZIPCODE fields.
  - If the flat file source of TRx data load is contact level, then CON\_CITY, CON\_COUNTRY, and CON\_ZIPCODE fields in flat file must be provided. Then, the value is performed the following logic to get loaded in target CON\_GEO\_WID:

- LS\_EXP\_FLATFILE\_CITY\_COUNTRY\_ZIP\_CHKNULL and LS\_MPLT\_FLATFILE\_GEO\_WID use the combination of city, country, and zip code to retrieve the first available record from W\_GEO\_D even if duplicates exist and regardless of the NO\_DUP\_FLG.

#### ■ ALIGN\_WID

- Depending on your selected alignment item type, the following transformation is performed:

- When alignment item type is Zipcode:

```
IF(DATA_SRC_CD = 'RXPrf', IN_CON_GEO_WID,  
   IF(DATA_SRC_CD = 'RXBrk' OR DATA_SRC_CD = 'RXSMI' OR DATA_SRC_CD = 'RXSMM'  
   OR DATA_SRC_CD = 'RXZi p', IN_GEO_WID,  
      ETL_UNSPEC_NUM))
```

- When alignment item type is Account/Contact:

```
IF(DATA_SRC_CD = 'RXBrk' OR DATA_SRC_CD = 'RXPrf' OR DATA_SRC_CD = 'RXSMI'  
OR DATA_SRC_CD = 'RXSMM' OR DATA_SRC_CD = 'RXZi p', IN_CONTACT_WID,  
   ETL_UNSPEC_NUM)
```

- When alignment item type is Brick:

```
IF(DATA_SRC_CD = 'RXPrf', IN_CON_AREA_WID,  
   IF(DATA_SRC_CD = 'RXBrk' OR DATA_SRC_CD = 'RXSMI' OR DATA_SRC_CD = 'RXSMM'  
   OR DATA_SRC_CD = 'RXZi p', IN_AREA_WID,  
      ETL_UNSPEC_NUM))
```

The resulting value is used to populate the ALIGN\_WID column in the fact table, which should also be found in W\_ALIGNMT\_DH table ALIGN\_WID column.

Based on this ALIGN\_WID column, Siebel Data Warehouse replicates proper territory and populates W\_SYND\_RX\_T\_F table as well.

**NOTE:** This section discusses the W\_SYNDD\_RX\_F table as an example only. In Siebel Business Analytics Applications Version 7.8.3, the table W\_SYND\_DATA\_F is split into the following six new tables due to performance enhancement: W\_SYNDD\_DS\_F, W\_SYNDD\_IDS\_F, W\_SYNDD\_RX\_F, W\_SYNDD\_PT\_F, W\_SYNDD\_XPT\_F, and W\_SYNDD\_W\_F tables.

## Loading the Siebel Data Warehouse from the Siebel Transactional Database (OLTP) S\_SYND\_DATA Table

**NOTE:** This option is only available with Siebel Business Analytics Applications Version 7.8.2 and earlier.

Customers who are already using the EIM process or SQL Loader to load external syndicated data into the Siebel operational system can use data populated in S\_SYND\_DATA as the source to the Siebel Data Warehouse. Existing syndicated data from the Siebel transactional database, stored in the S\_SYND\_DATA table, is extracted, transformed, and loaded by prebuilt routines and populated into the W\_SYND\_DATA\_F and W\_SYND\_MKT\_F fact tables in the Siebel Data Warehouse. W\_SYND\_DATA\_F stores Rx or sales measures by product. W\_SYND\_MKT\_F stores Rx or sales measures by market and allows calculation of market share data.

The data is first copied from external data tapes (or other provided media) into the interface tables for the Siebel Industry Application (SIA), using a native database data loading utility, such as SQL\*Loader, and following the rules in [Table 109 on page 396](#). Using EIM, data is transferred from the Siebel interface tables to predefined destination columns in the base tables of the Siebel Life Sciences database. The application administrator uses SQL\*Loader to populate the ID field with a unique sequential value, a process that provides either full or partial table level extraction.

In order to correctly load the Siebel Data Warehouse, there is a set of population rules that are required to load S\_SYND\_DATA. This will guarantee minimal configuration required on the Analytics side and correct population of the Siebel Data Warehouse.

Once the data is loaded into S\_SYND\_DATA, you can use the LS SYNDICATED FACT GROUP, in the Pharma subject area, to load the syndicated data into the Siebel Data Warehouse.

### **W\_SYND\_DATA\_F Data Population Rules for Populating TRx Data**

This section provides information about various columns in the W\_SYND\_DATA\_F table related to populating TRx data. This option is only available with Siebel Business Analytics Applications Version 7.8.3 and earlier.

#### ■ INTEGRATION\_ID

- Data type is varchar(30).
- Value can be any unique number or combination of values coming in from the external file source. If the data is not already unique, the EXPTRANS transformation will manipulate the value to make it unique.
- Typically, contains the row ID of the source table record in the Siebel transactional database.

#### ■ DATASOURCE\_NUM\_ID

- ETL run specific (a numeric value that indicates the source for the data).
- Used in standard Siebel mappings to ensure each record carries a value indicating its source.
- Used in source qualifiers to ensure that lookups on dimension tables when populating fact tables are referencing data that was loaded from a uniform data source.
- Data source number 1 is reserved for the Siebel transactional database. The external source should use a number other than 1.
- Combination of INTEGRATION\_ID and DATASOURCE\_NUM. Must be a unique value (mandated by a unique index on both columns).

This means that the system will not accept the same record from the same source with identical unique IDs.

#### ■ DATA\_SRC\_CD

Standard Siebel mapping transforms an incoming character data source code value into a numeric range between 1 and 8, using the following formula:

```
DECODE(DATA_SRC_CD
```

```
RXPrf' , 1,  
RXEVM' , 0,  
RXSMI ' , 3,  
RXSMM' , 4,  
RXXPT' , 5,  
RXPT' , 6,  
RXZi p' , 7,  
RXBrk' , 8
```

The resulting numeric value is used to populate the DATA\_TYPE column in the fact table, which is used in the Analytics business models to logically partition data when running different types of reports against the W\_SYND\_DATA table.

#### ■ PREFIX

The following transformation is performed on DATA\_SRC\_CD to populate the PREFIX column:

```
DECODE(DATA_SRC_CD,
```

```
  RXPrf' , ' Prf' ,  
  RXEVM' , ' EVM' ,  
  RXSMI ' , ' SMI ' ,  
  RXSMM' , ' SMM' ,  
  RXXPT' , ' XPT' ,  
  RXPT' , ' PT' ,  
  RXZi p' , ' Zi p' ,  
  RXBrk' , ' Brk' )
```

The resulting three-character code is used to prefix the ROW\_WID of the W\_SYND\_DATA table. Instead of 1, the first record is populated with Prf1 when loading prescriptions by professional. This is done in order to facilitate parallel load streams in Informatica so that ROW\_WIDs of records for different data types do not conflict with each other.

#### ■ PERIOD\_TYPE\_WID

- Stores a foreign key in the W\_LOV\_D table for the record corresponding to the period for the data.
- PERIOD\_CD comes from the S\_SYND\_DATA as Month or Week, and so on.
- The standard mapping uses the code to do a lookup against the W\_LOV\_D table to secure the ROW\_WID of that period type and inserts it into the W\_SYND\_DATA\_F table PERIOD\_TYPE\_WID column.

#### ■ OWNER\_POSTN\_WID

- W\_SYND\_DATA maps each record to a Siebel position using OWNER\_POSTN\_ID. Typically, when the source of the ETL is S\_SYND\_DATA in the transactional database, the field is already populated, but this is not the case when the source is the syndicated data file.
- The W\_ALIGNMT\_DH table in the data warehouse contains information that maps Siebel positions to zip codes, bricks, and accounts. ALIGN\_ITEM\_TYPE contains literal type values for this data, such as zip code, brick or account.

- Since the alignment process could assign a territory to multiple zip codes, the W\_ALIGNMT\_DH table could contain multiple records for the same zip code to position and territory combinations. In such cases, the ALIGN\_TYPE\_FLG column will designate whether the relationship between the territory and the zip code is primary (P), mirror (M), share (S), and so on.
- The Source qualifier in the custom mapping that populates W\_SYND\_DATA\_F then retrieves the correct data warehouse position ID based on the following join criteria:

```

SELECT
  SYND. IMS_NUM,
  SYND. CLIENT_NUM,
  SYND. START_DT,
  SYND. IMS_SPEC_CD,
  SYND. PROD_GRP,
  SYND. ME_NUM,
  SYND. PR_CITY,
  SYND. PR_COUNTRY,
  SYND. ZIPCODE,
  ALIGN.LVL1ANC_POSTN_ID as OWNER_POSTN_ID,
  PER.ROW_WID as MAP_CON_ROW_WID,
  PROD_MKT.ROW_WID as MAP_MKT_ROW_WID,
  PROD.ROW_WID as PROD_ROW_WID,
  PROD.RX_AVG_PRICE,
  POSTN.ROW_WID as POSTN_ROW_WID,
  POSTN.INTEGRATION_ID as OWNER_POSTN_ID,
  SYND. TRX01,
  SYND. TRX02,
  SYND. TRX03,
  SYND. TRX04,
  SYND. TRX05,
  SYND. TRX06,
  SYND. TRX07,
  SYND. TRX08,
  SYND. TRX09,
  SYND. TRX10,
  SYND. TRX11,
  SYND. TRX12,
  SYND. TRX13,
  ALIGN.ALI GN_WID,
  ALIGN.ALI GN_TYPE_FLG,
  PER.INTEGRATI ON_ID,
  PROD_MKT.PROD_NAME,
  PROD.PROD_NAME
from WC_SYND_DATA_FS as SYND,

W_ALIGNMT_DH as ALIGN,
W_PERSON_D as PER,
W_PRODUCT_D as PROD_MKT,
W_PRODUCT_D as PROD,
W_POSITION_D as POST

```

where  
(SYND.ZIPCODE = ALIGN.ALIGN\_ITEM and ALIGN.ALIGN\_ITEM\_TYPE = 'Zipcode' and  
ALIGN.ALIGN\_TYPE\_FLG = 'P') and  
SYND.ME\_NUM = PER.CSN and  
SYND.PHYNTYPE = PROD\_MKT.PROD\_NAME and  
SYND.PROD\_GRP = PROD.PROD\_NAME and  
ALIGN.LVL1ANC\_POSTN\_ID = POSTN.INTEGRATION\_ID

#### ■ GEO\_WID

- In the Siebel Data Warehouse, the GEO\_WID is a foreign key to the W\_GEO\_D dimension, which contains a geographical hierarchy based on zip code as the lowest level of detail. It is preconfigured to allow users to roll up a TRx measure to levels such as city, state or province, county, country, and continent.
- In the standard Siebel mappings that populate W\_SYND\_DATA\_F, the following three attributes are brought directly from the S\_SYND\_DATA table: city, country, and zip code.
- A complex lookup is then performed utilizing two possible logic paths:
  - MPLT\_GEO\_WID\_ZIPCODE (returns IN\_ZIPCODE\_GEO\_WID): Takes in the zip code value, and a literal NO\_DUP\_FLG = 'N' ports do a lookup against W\_GEO\_D for any record where the ZIPCODE column matches the incoming zip code value and the DUP\_ZIPCODE column = 'N'. (Sample data in the W\_GEO\_D table contains multiple city records per zip code, only one of which is marked as DUP\_ZIPCODE = 'N'). The mapping also ensures that even with multiple matches only the first record is retrieved, and with no matches, the data comes back with the appropriate Unspecified code.
  - EXP\_CITY\_COUNTRY\_ZIP\_CHKNULL & MPLT\_GEO\_WID1 (returns IN\_GEO\_WID): Uses the combination of city, country, and zip code to retrieve the first available record from W\_GEO\_D even if duplicates exist and regardless of the NO\_DUP\_FLG.
- Once the two values are brought into the EXPTRANS transformation, the following formula is used:  

```
IF(DATA_SRC_CD = 'RXZi p' OR DATA_SRC_CD = 'RXBrk' OR DATA_SRC_CD = 'SI sDi rBrk'  
OR DATA_SRC_CD = 'SI sDi rZi p' OR DATA_SRC_CD = 'SI sI ndBrk' OR DATA_SRC_CD =  
'SI sI ndZi p', IN_ZI PCODE_GEO_WI D, I N_GEO_WI D)
```

## Loading From a Flat File Source Using Syndicated Market Staging Tables

Siebel Business Analytics Applications Version 7.8.3 supports loading syndicated market data using flat files. You have to prepare flat files of syndicated market data source and cross-referencing data source files as described rules in the following tables: [Table 97 on page 357](#), [Table 98 on page 360](#), [Table 99 on page 364](#), [Table 100 on page 367](#), [Table 101 on page 370](#), [Table 102 on page 374](#), [Table 108 on page 392](#), [Table 104 on page 380](#), [Table 105 on page 383](#), [Table 106 on page 386](#), [Table 107 on page 389](#), and [Table 108 on page 392](#).

By default this option is disabled. To use this feature, you must turn on the option manually in the DAC client. Turning on this option allows the flat file syndicated market data to be loaded directly into the Siebel Data Warehouse staging table W\_SYNDM\_RX\_FS, and then loaded into the target table W\_SYNDM\_RX\_F.

### To load syndicated market data using flat files

- 1 Open the DAC client, and navigate to Design > Task Definitions.
- 2 Enter the following query:  
 LS Load into SyndicatedMarket Fact for\*  
  
 Eleven tasks are returned.
- 3 Inactivate the following tasks, which, by default, are turned on:
  - LS Load into SyndicatedMarket Fact for Calculated Exponent Plantrak
  - LS Load into SyndicatedMarket Fact for Calculated Indirect Sales
  - LS Load into SyndicatedMarket Fact for Calculated Plantrak
  - LS Load into SyndicatedMarket Fact for Calculated Rx
  - LS Load into SyndicatedMarket Fact for Calculated Weekly Early View

**NOTE:** Do not inactivate LS Load into SyndicatedMarket Fact for Calculated Direct Sales.
- 4 Activate the following tasks:
  - LS Load into SyndicatedMarket Fact for Exponent Plantrak
  - LS Load into SyndicatedMarket Fact for Indirect Sales
  - LS Load into SyndicatedMarket Fact for Plantrak
  - LS Load into SyndicatedMarket Fact for Rx
  - LS Load into SyndicatedMarket Fact for Weekly Early View
- 5 Save your work.

### Syndicated Data Flat File for Direct Sales Data

Table 97 provides information about the syndicated data flat file for Direct Sales data.

Table 97. Syndicated Data Flat File - Direct Sales Data

Field Name	Data Type	Field Required	Field Description
DATASOURCE_NUM_ID	NUMBER(10)	NOT NULL	External data source number ID other than 1.
DATA_SRC_CD	VARCHAR2(30)	NOT NULL	Enter the following Siebel data source type code: SisDirAct
INTEGRATION_ID	VARCHAR2(25)	NOT NULL	External integration ID.
START_DT	VARCHAR2(15)	NOT NULL	Syndicate data date format YYYYMMDD.
AMT_DT	VARCHAR2(15)		Exchange date for currency code. Date format YYYYMMDD.

Table 97. Syndicated Data Flat File - Direct Sales Data

Field Name	Data Type	Field Required	Field Description
ACCNT_ID	VARCHAR2(30)		External account ID.  Note: Corresponding Siebel S_ORG_EXT.ROW_ID should be provided in cross-reference file.
ACCNT_AREA_ID	VARCHAR2(30)		External brick ID of account's primary address for account level.  Note: Corresponding Siebel S_REGION_EXT.ROW_ID (S_CON_ADDR.BRICK_ID) should be provided in cross-reference file.
ACCNT_CITY	VARCHAR2(50)		Account city. Initial capital format; for example, Short Hills.
ACCNT_COUNTRY	VARCHAR2(30)		Account country. Initial capital format; for example, France; or abbreviate format, such as USA.
ACCNT_ZIPCODE	VARCHAR2(30)		Account zip code.
AMT_CURCY_CD	VARCHAR2(30)		Currency code for Amount.
PAYER_TYPE_ID	VARCHAR2(30)		External payer type ID. This column is used to define payment type, such as Cash, Government, Third Party, Total, and so on.  Note: Corresponding Siebel S_INS_PLAN.ROW_ID should be provided in cross-reference file.
PERIOD_CD	VARCHAR2(30)		Enter the following Siebel period code: Month
PROD_ID	VARCHAR2(30)		External product ID.  Note: Corresponding Siebel S_PROD_INT.ROW_ID should be provided in cross-reference file.
S_AMT_M01	NUMBER(22,7)		Stores sales amounts of current month data.
S_AMT_M02	NUMBER(22,7)		Stores sales amounts of previous month data.
S_AMT_M03	NUMBER(22,7)		
S_AMT_M04	NUMBER(22,7)		
S_AMT_M05	NUMBER(22,7)		
S_AMT_M06	NUMBER(22,7)		

Table 97. Syndicated Data Flat File - Direct Sales Data

Field Name	Data Type	Field Required	Field Description
S_AMT_M07	NUMBER(22,7)		
S_AMT_M08	NUMBER(22,7)		
S_AMT_M09	NUMBER(22,7)		
S_AMT_M10	NUMBER(22,7)		
S_AMT_M11	NUMBER(22,7)		
S_AMT_M12	NUMBER(22,7)		
S_AMT_M13	NUMBER(22,7)		
S_AMT_M14	NUMBER(22,7)		
S_AMT_M15	NUMBER(22,7)		
S_AMT_M16	NUMBER(22,7)		
S_AMT_M17	NUMBER(22,7)		
S_AMT_M18	NUMBER(22,7)		
S_AMT_M19	NUMBER(22,7)		
S_AMT_M20	NUMBER(22,7)		
S_AMT_M21	NUMBER(22,7)		
S_AMT_M22	NUMBER(22,7)		
S_AMT_M23	NUMBER(22,7)		
S_AMT_M24	NUMBER(22,7)		
S_AMT_M25	NUMBER(22,7)		
S_AMT_M26	NUMBER(22,7)		
S_UNIT_M01	NUMBER(22,7)		Stores sales units of current month data.
S_UNIT_M02	NUMBER(22,7)		Stores sales units of previous month data.
S_UNIT_M03	NUMBER(22,7)		
S_UNIT_M04	NUMBER(22,7)		
S_UNIT_M05	NUMBER(22,7)		
S_UNIT_M06	NUMBER(22,7)		
S_UNIT_M07	NUMBER(22,7)		
S_UNIT_M08	NUMBER(22,7)		
S_UNIT_M09	NUMBER(22,7)		
S_UNIT_M10	NUMBER(22,7)		

Table 97. Syndicated Data Flat File - Direct Sales Data

Field Name	Data Type	Field Required	Field Description
S_UNIT_M11	NUMBER(22,7)		
S_UNIT_M12	NUMBER(22,7)		
S_UNIT_M13	NUMBER(22,7)		
S_UNIT_M14	NUMBER(22,7)		
S_UNIT_M15	NUMBER(22,7)		
S_UNIT_M16	NUMBER(22,7)		
S_UNIT_M17	NUMBER(22,7)		
S_UNIT_M18	NUMBER(22,7)		
S_UNIT_M19	NUMBER(22,7)		
S_UNIT_M20	NUMBER(22,7)		
S_UNIT_M21	NUMBER(22,7)		
S_UNIT_M22	NUMBER(22,7)		
S_UNIT_M23	NUMBER(22,7)		
S_UNIT_M24	NUMBER(22,7)		
S_UNIT_M25	NUMBER(22,7)		
S_UNIT_M26	NUMBER(22,7)		

## Syndicated Data Flat File for Indirect Sales Data

Table 98 provides information about the syndicated data flat file for Indirect Sales data.

Table 98. Syndicated Data Flat File - Indirect Sales Data

Field Name	Data Type	Field Required	Field Description
DATASOURCE_NUM_ID	NUMBER(10)	NOT NULL	External data source number ID other than 1.
DATA_SRC_CD	VARCHAR2(30)	NOT NULL	Enter the following Siebel data source type code: SIsIndAct (Indirect sales account level) SIsIndZip (Indirect sales zip code level) SIsIndBrk (Indirect sales brick level)
INTEGRATION_ID	VARCHAR2(25)	NOT NULL	External integration ID.
START_DT	VARCHAR2(15)	NOT NULL	Syndicate data date format YYYYMMDD.

Table 98. Syndicated Data Flat File - Indirect Sales Data

Field Name	Data Type	Field Required	Field Description
AMT_DT	VARCHAR2(15)		Exchange date for currency code. Date format YYYYMMDD.
ACCNT_ID	VARCHAR2(30)		External account ID.  Note: Corresponding Siebel S_ORG_EXT.ROW_ID should be provided in cross-reference file.
ACCNT_AREA_ID	VARCHAR2(30)		External brick ID of account's primary address for account level.  Note: Corresponding Siebel S_REGION_EXT.ROW_ID (S_CON_ADDR.BRICK_ID) should be provided in cross-reference file.
ACCNT_CITY	VARCHAR2(50)		Account city. Enter value if DATA_SRC_CD is account level.  Initial capital format; for example, Short Hills.
ACCNT_COUNTRY	VARCHAR2(30)		Account country. Enter value if DATA_SRC_CD is account level.  Initial capital format; for example, France; or abbreviate format, such as USA.
ACCNT_ZIPCODE	VARCHAR2(30)		Account zip code. Enter value if DATA_SRC_CD is account level.
AMT_CURCY_CD	VARCHAR2(30)		Applies to syndicated data only.  Currency code for Amount.
AREA_ID	VARCHAR2(30)		External syndicate brick ID. Enter value if DATA_SRC_CD is brick level.  Note: Corresponding Siebel S_REGION.ROW_ID should be provided in cross-reference file.
PAYER_TYPE_ID	VARCHAR2(30)		External payer type ID. This column is used to define payment type, such as Cash, Government, Third Party, Total, and so on.  Note: Corresponding Siebel S_INS_PLAN.ROW_ID should be provided in cross-reference file.
PERIOD_CD	VARCHAR2(30)		Enter the following Siebel period code: Month

Table 98. Syndicated Data Flat File - Indirect Sales Data

Field Name	Data Type	Field Required	Field Description
PROD_ID	VARCHAR2(30)		Applies to syndicated data only. External product ID.  Note: Corresponding Siebel S_PROD_INT.ROW_ID should be provided in cross-reference file.
ZIPCODE	VARCHAR2(30)		Syndicate zip code. Enter value if DATA_SRC_CD is zip code level.
S_AMT_M01	NUMBER(22,7)		Stores sales amounts of current month data.
S_AMT_M02	NUMBER(22,7)		Stores sales amounts of previous month data.
S_AMT_M03	NUMBER(22,7)		Stores sales amounts of 20050101 data.
S_AMT_M04	NUMBER(22,7)		
S_AMT_M05	NUMBER(22,7)		
S_AMT_M06	NUMBER(22,7)		
S_AMT_M07	NUMBER(22,7)		
S_AMT_M08	NUMBER(22,7)		
S_AMT_M09	NUMBER(22,7)		
S_AMT_M10	NUMBER(22,7)		
S_AMT_M11	NUMBER(22,7)		
S_AMT_M12	NUMBER(22,7)		
S_AMT_M13	NUMBER(22,7)		
S_AMT_M14	NUMBER(22,7)		
S_AMT_M15	NUMBER(22,7)		
S_AMT_M16	NUMBER(22,7)		
S_AMT_M17	NUMBER(22,7)		
S_AMT_M18	NUMBER(22,7)		
S_AMT_M19	NUMBER(22,7)		
S_AMT_M20	NUMBER(22,7)		
S_AMT_M21	NUMBER(22,7)		
S_AMT_M22	NUMBER(22,7)		
S_AMT_M23	NUMBER(22,7)		
S_AMT_M24	NUMBER(22,7)		

Table 98. Syndicated Data Flat File - Indirect Sales Data

Field Name	Data Type	Field Required	Field Description
S_AMT_M25	NUMBER(22,7)		
S_AMT_M26	NUMBER(22,7)		
S_UNIT_M01	NUMBER(22,7)		Stores sales units of current month data.
S_UNIT_M02	NUMBER(22,7)		Stores sales units of previous month data.
S_UNIT_M03	NUMBER(22,7)		Stores sales units of 20050101 data.
S_UNIT_M04	NUMBER(22,7)		Stores sales units of current month data.
S_UNIT_M05	NUMBER(22,7)		
S_UNIT_M06	NUMBER(22,7)		
S_UNIT_M07	NUMBER(22,7)		
S_UNIT_M08	NUMBER(22,7)		
S_UNIT_M09	NUMBER(22,7)		
S_UNIT_M10	NUMBER(22,7)		
S_UNIT_M11	NUMBER(22,7)		
S_UNIT_M12	NUMBER(22,7)		
S_UNIT_M13	NUMBER(22,7)		
S_UNIT_M14	NUMBER(22,7)		
S_UNIT_M15	NUMBER(22,7)		
S_UNIT_M16	NUMBER(22,7)		
S_UNIT_M17	NUMBER(22,7)		
S_UNIT_M18	NUMBER(22,7)		
S_UNIT_M19	NUMBER(22,7)		
S_UNIT_M20	NUMBER(22,7)		
S_UNIT_M21	NUMBER(22,7)		
S_UNIT_M22	NUMBER(22,7)		
S_UNIT_M23	NUMBER(22,7)		
S_UNIT_M24	NUMBER(22,7)		
S_UNIT_M25	NUMBER(22,7)		
S_UNIT_M26	NUMBER(22,7)		

## Syndicated Data Flat File for Prescription Data

Table 99 provides information about the syndicated data flat file for Prescription data.

Table 99. Syndicated Data Flat File - Prescription Data

Field Name	Data Type	Field Required	Field Description
DATASOURCE_NUM_ID	NUMBER(10)	NOT NULL	External data source number ID other than 1.
DATA_SRC_CD	VARCHAR2(30)	NOT NULL	
INTEGRATION_ID	VARCHAR2(25)	NOT NULL	External integration ID.
START_DT	VARCHAR2(15)	NOT NULL	Syndicate data date format YYYYMMDD.
AREA_ID	VARCHAR2(30)		External syndicate brick ID. Enter value if DATA_SRC_CD is brick level.  Note: Corresponding Siebel S_REGION.ROW_ID should be provided in cross-reference file.
CONTACT_ID	VARCHAR2(30)		External contact ID.  Note: Corresponding Siebel S_CONTACT.ROW_ID should be provided in cross-reference file.
CON_AREA_ID	VARCHAR2(30)		External syndicate brick ID of contact's primary address. Enter value if DATA_SRC_CD is brick level.  Note: Corresponding Siebel S_REGION.ROW_ID should be provided in cross-reference file.
CON_CITY	VARCHAR2(50)		Contact city. Enter value if DATA_SRC_CD is account level.  Initial capital format; for example, Short Hills
CON_COUNTRY	VARCHAR2(30)		Contact country. Enter value if DATA_SRC_CD is account level.  Initial capital format; for example, France; or abbreviate format, such as USA.
CON_ZIPCODE	VARCHAR2(30)		Contact zip code. Enter value if DATA_SRC_CD is account level.

Table 99. Syndicated Data Flat File - Prescription Data

Field Name	Data Type	Field Required	Field Description
PAYER_TYPE_ID	VARCHAR2(30)		External payer type ID. This column is used to define payment type, such as Cash, Government, Third Party, Total, and so on.  Note: Corresponding Siebel S_INS_PLAN.ROW_ID should be provided in cross-reference file.
PERIOD_CD	VARCHAR2(30)		Enter the following Siebel period code: Month
PROD_ID	VARCHAR2(30)		External product ID.  Note: Corresponding Siebel S_PROD_INT.ROW_ID should be provided in cross-reference file.
ZIPCODE	VARCHAR2(30)		Syndicate zip code. Enter value if DATA_SRC_CD is zip code level.
CONV_FACTOR	NUMBER(22,7)		Applies to Rx data only. Used to convert Rx volume to measurable units which will be used to dollarize the Rx volume.
NRX_M01	NUMBER(22,7)		Stores sales amounts of current month data.
NRX_M02	NUMBER(22,7)		Stores sales amounts of previous month data.
NRX_M03	NUMBER(22,7)		Stores sales amounts of 20050101 data.
NRX_M04	NUMBER(22,7)		
NRX_M05	NUMBER(22,7)		
NRX_M06	NUMBER(22,7)		
NRX_M07	NUMBER(22,7)		
NRX_M08	NUMBER(22,7)		
NRX_M09	NUMBER(22,7)		
NRX_M10	NUMBER(22,7)		
NRX_M11	NUMBER(22,7)		
NRX_M12	NUMBER(22,7)		
NRX_M13	NUMBER(22,7)		
NRX_M14	NUMBER(22,7)		
NRX_M15	NUMBER(22,7)		
NRX_M16	NUMBER(22,7)		

Table 99. Syndicated Data Flat File - Prescription Data

Field Name	Data Type	Field Required	Field Description
NRX_M17	NUMBER(22,7)		
NRX_M18	NUMBER(22,7)		
NRX_M19	NUMBER(22,7)		
NRX_M20	NUMBER(22,7)		
NRX_M21	NUMBER(22,7)		
NRX_M22	NUMBER(22,7)		
NRX_M23	NUMBER(22,7)		
NRX_M24	NUMBER(22,7)		
NRX_M25	NUMBER(22,7)		
NRX_M26	NUMBER(22,7)		
TRX_M01	NUMBER(22,7)		Stores sales units of current month data.
TRX_M02	NUMBER(22,7)		Stores sales units of previous month data.
TRX_M03	NUMBER(22,7)		Stores sales units of 20050101 data.
TRX_M04	NUMBER(22,7)		Stores sales units of current month data.
TRX_M05	NUMBER(22,7)		
TRX_M06	NUMBER(22,7)		
TRX_M07	NUMBER(22,7)		
TRX_M08	NUMBER(22,7)		
TRX_M09	NUMBER(22,7)		
TRX_M10	NUMBER(22,7)		
TRX_M11	NUMBER(22,7)		
TRX_M12	NUMBER(22,7)		
TRX_M13	NUMBER(22,7)		
TRX_M14	NUMBER(22,7)		
TRX_M15	NUMBER(22,7)		
TRX_M16	NUMBER(22,7)		
TRX_M17	NUMBER(22,7)		
TRX_M18	NUMBER(22,7)		
TRX_M19	NUMBER(22,7)		
TRX_M20	NUMBER(22,7)		

Table 99. Syndicated Data Flat File - Prescription Data

Field Name	Data Type	Field Required	Field Description
TRX_M21	NUMBER(22,7)		
TRX_M22	NUMBER(22,7)		
TRX_M23	NUMBER(22,7)		
TRX_M24	NUMBER(22,7)		
TRX_M25	NUMBER(22,7)		
TRX_M26	NUMBER(22,7)		

## Syndicated Data Flat File for Plan Level Rx Data

Table 100 provides information about the syndicated data flat file for Plan Level Rx data.

Table 100. Syndicated Data Flat File - Plan Level Rx Data

Field Name	Data Type	Field Required	Field Description
DATASOURCE_NUM_ID	NUMBER(10)	NOT NULL	External data source number ID other than 1.
DATA_SRC_CD	VARCHAR2(30)	NOT NULL	Enter the following Siebel data source type code: RXPT
INTEGRATION_ID	VARCHAR2(25)	NOT NULL	External integration ID.
START_DT	VARCHAR2(15)	NOT NULL	Syndicate data date format YYYYMMDD.
ACCNT_ID	VARCHAR2(30)		External account and plan ID.  Note: Corresponding Siebel S_ORG_EXT.ROW_ID should be provided in cross-reference file.
ACCNT_AREA_ID	VARCHAR2(30)		External brick ID of account's primary address. Enter value if DATA_SRC_CD is account level.  Note: Corresponding Siebel S_REGION.ROW_ID should be provided in cross-reference file.
ACCNT_CITY	VARCHAR2(50)		Account city. Enter value if DATA_SRC_CD is account level.  Initial capital format; for example, Short Hills

Table 100. Syndicated Data Flat File - Plan Level Rx Data

Field Name	Data Type	Field Required	Field Description
ACCNT_COUNTRY	VARCHAR2(30)		Account country. Enter value if DATA_SRC_CD is account level.  Initial capital format; for example, France; or abbreviate format, such as USA.
ACCNT_ZIPCODE	VARCHAR2(30)		Account zip code. Enter value if DATA_SRC_CD is account level.
PERIOD_CD	VARCHAR2(30)		Enter the following Siebel period code: Month
PROD_ID	VARCHAR2(30)		Applies to syndicated data only.  External product ID.  Note: Corresponding Siebel S_PROD_INT.ROW_ID should be provided in cross-reference file.
CONV_FACTOR	NUMBER(22,7)		Applies to Rx data only. Used to convert Rx volume to measurable units which will be used to dollarize the Rx volume.
NRX_M01	NUMBER(22,7)		Stores sales amounts of current month data.
NRX_M02	NUMBER(22,7)		Stores sales amounts of previous month data.
NRX_M03	NUMBER(22,7)		Stores sales amounts of 20050101 data.
NRX_M04	NUMBER(22,7)		
NRX_M05	NUMBER(22,7)		
NRX_M06	NUMBER(22,7)		
NRX_M07	NUMBER(22,7)		
NRX_M08	NUMBER(22,7)		
NRX_M09	NUMBER(22,7)		
NRX_M10	NUMBER(22,7)		
NRX_M11	NUMBER(22,7)		
NRX_M12	NUMBER(22,7)		
NRX_M13	NUMBER(22,7)		
NRX_M14	NUMBER(22,7)		
NRX_M15	NUMBER(22,7)		
NRX_M16	NUMBER(22,7)		
NRX_M17	NUMBER(22,7)		

Table 100. Syndicated Data Flat File - Plan Level Rx Data

Field Name	Data Type	Field Required	Field Description
NRX_M18	NUMBER(22,7)		
NRX_M19	NUMBER(22,7)		
NRX_M20	NUMBER(22,7)		
NRX_M21	NUMBER(22,7)		
NRX_M22	NUMBER(22,7)		
NRX_M23	NUMBER(22,7)		
NRX_M24	NUMBER(22,7)		
NRX_M25	NUMBER(22,7)		
NRX_M26	NUMBER(22,7)		
TRX_M01	NUMBER(22,7)		Stores sales units of current month data.
TRX_M02	NUMBER(22,7)		Stores sales units of previous month data.
TRX_M03	NUMBER(22,7)		Stores sales units of 20050101 data.
TRX_M04	NUMBER(22,7)		Stores sales units of current month data.
TRX_M05	NUMBER(22,7)		
TRX_M06	NUMBER(22,7)		
TRX_M07	NUMBER(22,7)		
TRX_M08	NUMBER(22,7)		
TRX_M09	NUMBER(22,7)		
TRX_M10	NUMBER(22,7)		
TRX_M11	NUMBER(22,7)		
TRX_M12	NUMBER(22,7)		
TRX_M13	NUMBER(22,7)		
TRX_M14	NUMBER(22,7)		
TRX_M15	NUMBER(22,7)		
TRX_M16	NUMBER(22,7)		
TRX_M17	NUMBER(22,7)		
TRX_M18	NUMBER(22,7)		
TRX_M19	NUMBER(22,7)		
TRX_M20	NUMBER(22,7)		
TRX_M21	NUMBER(22,7)		

Table 100. Syndicated Data Flat File - Plan Level Rx Data

Field Name	Data Type	Field Required	Field Description
TRX_M22	NUMBER(22,7)		
TRX_M23	NUMBER(22,7)		
TRX_M24	NUMBER(22,7)		
TRX_M25	NUMBER(22,7)		
TRX_M26	NUMBER(22,7)		

### Syndicated Data Flat File for Physician Plan Level Rx Data

Table 101 provides information about the syndicated data flat file for Physician Plan Level Rx data.

Table 101. Syndicated Data Flat File - Physician Plan Level Rx Data

Field Name	Data Type	Field Required	Field Description
DATASOURCE_NUM_ID	NUMBER(10)	NOT NULL	External data source number ID other than 1.
DATA_SRC_CD	VARCHAR2(30)	NOT NULL	Enter the following Siebel data source type code: RXXPT
INTEGRATION_ID	VARCHAR2(25)	NOT NULL	External integration ID.
START_DT	VARCHAR2(15)	NOT NULL	Syndicate data date format YYYYMMDD.
ACCNT_ID	VARCHAR2(30)		External account ID.  Note: Corresponding Siebel S_ORG_EXT.ROW_ID should be provided in cross-reference file.
ACCNT_AREA_ID	VARCHAR2(30)		External brick ID of account's primary address. Enter value if DATA_SRC_CD is brick level.  Note: Corresponding Siebel S_REGION.ROW_ID should be provided in cross-reference file.
ACCNT_CITY	VARCHAR2(50)		Account city. Enter a value if DATA_SRC_CD is account level.  Initial capital format; for example, Short Hills

Table 101. Syndicated Data Flat File - Physician Plan Level Rx Data

Field Name	Data Type	Field Required	Field Description
ACCNT_COUNTRY	VARCHAR2(30)		Account country. Enter value if DATA_SRC_CD is account level.  Initial capital format; for example, France; or abbreviate format, such as USA.
ACCNT_ZIPCODE	VARCHAR2(30)		Account zip code. Enter value if DATA_SRC_CD is account level.
CONTACT_ID	VARCHAR2(30)		External contact ID.  Note: Corresponding Siebel S_CONTACT.ROW_ID should be provided in cross-reference file.
CON_AREA_ID	VARCHAR2(30)		External brick ID of contact's primary address. Enter value if DATA_SRC_CD is contact level.  Note: Corresponding Siebel S_REGION.ROW_ID should be provided in cross-reference file.
CON_CITY	VARCHAR2(50)		Contact city. Enter value if DATA_SRC_CD is contact level.  Initial capital format; for example, Short Hills
CON_COUNTRY	VARCHAR2(30)		Contact country. Enter value if DATA_SRC_CD is contact level.  Initial capital format; for example, France; or abbreviate format, such as USA.
CON_ZIPCODE	VARCHAR2(30)		Contact zip code. Enter value if DATA_SRC_CD is contact level.
PERIOD_CD	VARCHAR2(30)		Enter the following Siebel period code: Month
PROD_ID	VARCHAR2(30)		Applies to syndicated data only.  External product ID.  Note: Corresponding Siebel S_PROD_INT.ROW_ID should be provided in cross-reference file.
CONV_FACTOR	NUMBER(22,7)		Applies to Rx data only. Used to convert Rx volume to measurable units which will be used to dollarize the Rx volume.

Table 101. Syndicated Data Flat File - Physician Plan Level Rx Data

Field Name	Data Type	Field Required	Field Description
NRX_M01	NUMBER(22,7)		Stores sales amounts of current month data.
NRX_M02	NUMBER(22,7)		Stores sales amounts of previous month data.
NRX_M03	NUMBER(22,7)		Stores sales amounts of 20050101 data.
NRX_M04	NUMBER(22,7)		
NRX_M05	NUMBER(22,7)		
NRX_M06	NUMBER(22,7)		
NRX_M07	NUMBER(22,7)		
NRX_M08	NUMBER(22,7)		
NRX_M09	NUMBER(22,7)		
NRX_M10	NUMBER(22,7)		
NRX_M11	NUMBER(22,7)		
NRX_M12	NUMBER(22,7)		
NRX_M13	NUMBER(22,7)		
NRX_M14	NUMBER(22,7)		
NRX_M15	NUMBER(22,7)		
NRX_M16	NUMBER(22,7)		
NRX_M17	NUMBER(22,7)		
NRX_M18	NUMBER(22,7)		
NRX_M19	NUMBER(22,7)		
NRX_M20	NUMBER(22,7)		
NRX_M21	NUMBER(22,7)		
NRX_M22	NUMBER(22,7)		
NRX_M23	NUMBER(22,7)		
NRX_M24	NUMBER(22,7)		
NRX_M25	NUMBER(22,7)		
NRX_M26	NUMBER(22,7)		
TRX_M01	NUMBER(22,7)		Stores sales units of current month data.
TRX_M02	NUMBER(22,7)		Stores sales units of previous month data.
TRX_M03	NUMBER(22,7)		Stores sales units of 20050101 data.
TRX_M04	NUMBER(22,7)		Stores sales units of current month data.

Table 101. Syndicated Data Flat File - Physician Plan Level Rx Data

Field Name	Data Type	Field Required	Field Description
TRX_M05	NUMBER(22,7)		
TRX_M06	NUMBER(22,7)		
TRX_M07	NUMBER(22,7)		
TRX_M08	NUMBER(22,7)		
TRX_M09	NUMBER(22,7)		
TRX_M10	NUMBER(22,7)		
TRX_M11	NUMBER(22,7)		
TRX_M12	NUMBER(22,7)		
TRX_M13	NUMBER(22,7)		
TRX_M14	NUMBER(22,7)		
TRX_M15	NUMBER(22,7)		
TRX_M16	NUMBER(22,7)		
TRX_M17	NUMBER(22,7)		
TRX_M18	NUMBER(22,7)		
TRX_M19	NUMBER(22,7)		
TRX_M20	NUMBER(22,7)		
TRX_M21	NUMBER(22,7)		
TRX_M22	NUMBER(22,7)		
TRX_M23	NUMBER(22,7)		
TRX_M24	NUMBER(22,7)		
TRX_M25	NUMBER(22,7)		
TRX_M26	NUMBER(22,7)		

### Syndicated Data Flat File for Weekly Early View Data

Table 102 provides information about the syndicated data flat file for Weekly Early View data.

Table 102. Syndicated Data Flat File - Weekly Early View Data

Field Name	Data Type	Field Required	Field Description
DATASOURCE_NUM_ID	NUMBER(10)	NOT NULL	External data source number ID other than 1.
DATA_SRC_CD	VARCHAR2(30)	NOT NULL	Enter the following Siebel data source type code: RXEVM
INTEGRATION_ID	VARCHAR2(25)	NOT NULL	External integration ID.
START_DT	VARCHAR2(15)	NOT NULL	Syndicate data date format YYYYMMDD.
CONTACT_ID	VARCHAR2(30)		External contact ID.  Note: Corresponding Siebel S_CONTACT.ROW_ID should be provided in cross-reference file.
CON_AREA_ID	VARCHAR2(30)		External brick ID of contact's primary address. Enter value if DATA_SRC_CD is brick level.  Note: Corresponding Siebel S_REGION.ROW_ID should be provided in cross-reference file.
CON_CITY	VARCHAR2(50)		Contact city. Enter a value if DATA_SRC_CD is account level.  Initial capital format; for example, Short Hills
CON_COUNTRY	VARCHAR2(30)		Contact country. Enter value if DATA_SRC_CD is account level.  Initial capital format; for example, France; or abbreviate format, such as USA.
CON_ZIPCODE	VARCHAR2(30)		Contact zip code. Enter value if DATA_SRC_CD is account level.
MARKET_ID	VARCHAR2(30)		Applies to syndicated market only.  External market ID for product.  Note: Corresponding Siebel S_PROD_INT.ROW_ID should be provided in cross-reference file.

Table 102. Syndicated Data Flat File - Weekly Early View Data

Field Name	Data Type	Field Required	Field Description
PAYER_TYPE_ID	VARCHAR2(30)		External payer type ID. This column is used to define payment type, such as Cash, Government, Third Party, Total, and so on.  Note: Corresponding Siebel S_INS_PLAN.ROW_ID should be provided in cross-reference file.
PERIOD_CD	VARCHAR2(30)		Enter the following Siebel period code: Week
PROD_ID	VARCHAR2(30)		Applies to syndicated data only.  External product ID.  Note: Corresponding Siebel S_PROD_INT.ROW_ID should be provided in cross-reference file.
CONV_FACTOR	NUMBER(22,7)		Applies to Rx data only. Used to convert Rx volume to measurable units which will be used to dollarize the Rx volume.
NRX_W01	NUMBER(22,7)		Stores sales amounts of current month data.
NRX_W02	NUMBER(22,7)		Stores sales amounts of previous month data.
NRX_W03	NUMBER(22,7)		Stores sales amounts of 20050101 data.
NRX_W04	NUMBER(22,7)		
NRX_W05	NUMBER(22,7)		
NRX_W06	NUMBER(22,7)		
NRX_W07	NUMBER(22,7)		
NRX_WM08	NUMBER(22,7)		
NRX_W09	NUMBER(22,7)		
NRX_W10	NUMBER(22,7)		
NRX_W11	NUMBER(22,7)		
NRX_W12	NUMBER(22,7)		
NRX_W13	NUMBER(22,7)		
NRX_W14	NUMBER(22,7)		
TRX_W01	NUMBER(22,7)		Stores sales units of current month data.
TRX_W02	NUMBER(22,7)		Stores sales units of previous month data.
TRX_W03	NUMBER(22,7)		Stores sales units of 20050101 data.

Table 102. Syndicated Data Flat File - Weekly Early View Data

Field Name	Data Type	Field Required	Field Description
TRX_W04	NUMBER(22,7)		Stores sales units of current month data.
TRX_W05	NUMBER(22,7)		
TRX_WM06	NUMBER(22,7)		
TRX_W07	NUMBER(22,7)		
TRX_W08	NUMBER(22,7)		
TRX_W09	NUMBER(22,7)		
TRX_W10	NUMBER(22,7)		
TRX_W11	NUMBER(22,7)		
TRX_W12	NUMBER(22,7)		
TRX_W13	NUMBER(22,7)		

## Syndicated Market Flat File for Indirect Sales Data

Table 103 provides information about the syndicated market flat file for Indirect Sales data.

Table 103. Syndicated Market Flat File - Indirect Sales Data

Field Name	Data Type	Field Required	Field Description
DATASOURCE_NUM_ID	NUMBER(10)	NOT NULL	External data source number ID other than 1.
DATA_SRC_CD	VARCHAR2(30)	NOT NULL	Enter the following Siebel data source type code: SIsIndAct (Indirect sales account level) SIsIndZip (Indirect sales zip code level) SIsIndBrk (Indirect sales brick level)
INTEGRATION_ID	VARCHAR2(25)	NOT NULL	External integration ID.
START_DT	VARCHAR2(15)	NOT NULL	Syndicate data date format YYYYMMDD.
MKT_AMT_DT	VARCHAR2(15)		Exchange date for currency code. Date format YYYYMMDD.
ACCNT_ID	VARCHAR2(30)		External account ID.  Note: Corresponding Siebel S_ORG_EXT.ROW_ID should be provided in cross-reference file.

Table 103. Syndicated Market Flat File - Indirect Sales Data

Field Name	Data Type	Field Required	Field Description
ACCNT_AREA_ID	VARCHAR2(30)		External brick ID of account's primary address for account level.  Note: Corresponding Siebel S_REGION_EXT.ROW_ID (S_CON_ADDR.BRICK_ID) should be provided in cross-reference file.
ACCNT_CITY	VARCHAR2(50)		Account city. Enter value if DATA_SRC_CD is account level.  Initial capital format; for example, Short Hills.
ACCNT_COUNTRY	VARCHAR2(30)		Account country. Enter value if DATA_SRC_CD is account level.  Initial capital format; for example, France; or abbreviate format, such as USA.
ACCNT_ZIPCODE	VARCHAR2(30)		Account zip code. Enter value if DATA_SRC_CD is account level.
AREA_ID	VARCHAR2(30)		External syndicate brick ID. Enter value if DATA_SRC_CD is brick level.  Note: Corresponding Siebel S_REGION.ROW_ID should be provided in cross-reference file.
MARKET_ID	VARCHAR2(30)		External market ID for the product.  Note: Corresponding Siebel S_PROD_INT.ROW_ID should be provided in cross-reference file.
MKT_AMT_CURCY_CD	VARCHAR2(30)		Currency code for Amount.
PAYER_TYPE_ID	VARCHAR2(30)		External payer type ID. This column is used to define payment type, such as Cash, Government, Third Party, Total, and so on.  Note: Corresponding Siebel S_INS_PLAN.ROW_ID should be provided in cross-reference file.
PERIOD_CD	VARCHAR2(30)		Enter the following Siebel period code: Month

Table 103. Syndicated Market Flat File - Indirect Sales Data

Field Name	Data Type	Field Required	Field Description
PROD_ID	VARCHAR2(30)		Applies to syndicated data only. External product ID. Note: Corresponding Siebel S_PROD_INT.ROW_ID should be provided in cross-reference file.
ZIPCODE	VARCHAR2(30)		Syndicate zip code. Enter value if DATA_SRC_CD is zip code level.
MKT_S_AMT_M01	NUMBER(22,7)		Stores sales amounts of current month data.
MKT_S_AMT_M02	NUMBER(22,7)		Stores sales amounts of previous month data.
MKT_S_AMT_M03	NUMBER(22,7)		Stores sales amounts of 20050101 data.
MKT_S_AMT_M04	NUMBER(22,7)		
MKT_S_AMT_M05	NUMBER(22,7)		
MKT_S_AMT_M06	NUMBER(22,7)		
MKT_S_AMT_M07	NUMBER(22,7)		
MKT_S_AMT_M08	NUMBER(22,7)		
MKT_S_AMT_M09	NUMBER(22,7)		
MKT_S_AMT_M10	NUMBER(22,7)		
MKT_S_AMT_M11	NUMBER(22,7)		
MKT_S_AMT_M12	NUMBER(22,7)		
MKT_S_AMT_M13	NUMBER(22,7)		
MKT_S_AMT_M14	NUMBER(22,7)		
MKT_S_AMT_M15	NUMBER(22,7)		
MKT_S_AMT_M16	NUMBER(22,7)		
MKT_S_AMT_M17	NUMBER(22,7)		
MKT_S_AMT_M18	NUMBER(22,7)		
MKT_S_AMT_M19	NUMBER(22,7)		
MKT_S_AMT_M20	NUMBER(22,7)		
MKT_S_AMT_M21	NUMBER(22,7)		
MKT_S_AMT_M22	NUMBER(22,7)		
MKT_S_AMT_M23	NUMBER(22,7)		
MKT_S_AMT_M24	NUMBER(22,7)		

Table 103. Syndicated Market Flat File - Indirect Sales Data

Field Name	Data Type	Field Required	Field Description
MKT_S_AMT_M25	NUMBER(22,7)		
MKT_S_AMT_M26	NUMBER(22,7)		
MKT_S_UNIT_M01	NUMBER(22,7)		Stores sales units of current month data.
MKT_S_UNIT_M02	NUMBER(22,7)		Stores sales units of previous month data.
MKT_S_UNIT_M03	NUMBER(22,7)		Stores sales units of 20050101 data.
MKT_S_UNIT_M04	NUMBER(22,7)		Stores sales units of current month data.
MKT_S_UNIT_M05	NUMBER(22,7)		
MKT_S_UNIT_M06	NUMBER(22,7)		
MKT_S_UNIT_M07	NUMBER(22,7)		
MKT_S_UNIT_M08	NUMBER(22,7)		
MKT_S_UNIT_M09	NUMBER(22,7)		
MKT_S_UNIT_M10	NUMBER(22,7)		
MKT_S_UNIT_M11	NUMBER(22,7)		
MKT_S_UNIT_M12	NUMBER(22,7)		
MKT_S_UNIT_M13	NUMBER(22,7)		
MKT_S_UNIT_M14	NUMBER(22,7)		
MKT_S_UNIT_M15	NUMBER(22,7)		
MKT_S_UNIT_M16	NUMBER(22,7)		
MKT_S_UNIT_M17	NUMBER(22,7)		
MKT_S_UNIT_M18	NUMBER(22,7)		
MKT_S_UNIT_M19	NUMBER(22,7)		
MKT_S_UNIT_M20	NUMBER(22,7)		
MKT_S_UNIT_M21	NUMBER(22,7)		
MKT_S_UNIT_M22	NUMBER(22,7)		
MKT_S_UNIT_M23	NUMBER(22,7)		
MKT_S_UNIT_M24	NUMBER(22,7)		
MKT_S_UNIT_M25	NUMBER(22,7)		
MKT_S_UNIT_M26	NUMBER(22,7)		

## Syndicated Market Flat File for Prescription Data

Table 104 provides information about the syndicated market flat file for Prescription data.

Table 104. Syndicated Market Flat File - Prescription Data

Field Name	Data Type	Field Required	Field Description
DATASOURCE_NUM_ID	NUMBER(10)	NOT NULL	External data source number ID other than 1.
DATA_SRC_CD	VARCHAR2(30)	NOT NULL	
INTEGRATION_ID	VARCHAR2(25)	NOT NULL	External integration ID.
START_DT	VARCHAR2(15)	NOT NULL	Syndicate data date format YYYYMMDD.
AREA_ID	VARCHAR2(30)		External syndicate brick ID. Enter value if DATA_SRC_CD is brick level.  Note: Corresponding Siebel S_REGION.ROW_ID should be provided in cross-reference file.
CONTACT_ID	VARCHAR2(30)		External contact ID.  Note: Corresponding Siebel S_CONTACT.ROW_ID should be provided in cross-reference file.
CON_AREA_ID	VARCHAR2(30)		External syndicate brick ID of contact's primary address. Enter value if DATA_SRC_CD is brick level.  Note: Corresponding Siebel S_REGION.ROW_ID should be provided in cross-reference file.
CON_CITY	VARCHAR2(50)		Contact city. Enter value if DATA_SRC_CD is account level.  Initial capital format; for example, Short Hills
CON_COUNTRY	VARCHAR2(30)		Contact country. Enter value if DATA_SRC_CD is account level.  Initial capital format; for example, France; or abbreviate format, such as USA.
CON_ZIPCODE	VARCHAR2(30)		Contact zip code. Enter value if DATA_SRC_CD is account level.

Table 104. Syndicated Market Flat File - Prescription Data

Field Name	Data Type	Field Required	Field Description
MARKET_ID	VARCHAR2(30)		External market ID for the product.  Note: Corresponding Siebel S_PROD_INT.ROW_ID should be provided in cross-reference file.
PAYER_TYPE_ID	VARCHAR2(30)		External payer type ID. This column is used to define payment type, such as Cash, Government, Third Party, Total, and so on.  Note: Corresponding Siebel S_INS_PLAN.ROW_ID should be provided in cross-reference file.
PERIOD_CD	VARCHAR2(30)		Enter the following Siebel period code: Month
ZIPCODE	VARCHAR2(30)		Syndicate zip code. Enter value if DATA_SRC_CD is zip code level.
CONV_FACTOR	NUMBER(22,7)		Applies to Rx data only. Used to convert Rx volume to measurable units which will be used to dollarize the Rx volume.
MKT_NRX_M01	NUMBER(22,7)		Stores sales amounts of current month data.
MKT_NRX_M02	NUMBER(22,7)		Stores sales amounts of previous month data.
MKT_NRX_M03	NUMBER(22,7)		Stores sales amounts of 20050101 data.
MKT_NRX_M04	NUMBER(22,7)		
MKT_NRX_M05	NUMBER(22,7)		
MKT_NRX_M06	NUMBER(22,7)		
MKT_NRX_M07	NUMBER(22,7)		
MKT_NRX_M08	NUMBER(22,7)		
MKT_NRX_M09	NUMBER(22,7)		
MKT_NRX_M10	NUMBER(22,7)		
MKT_NRX_M11	NUMBER(22,7)		
MKT_NRX_M12	NUMBER(22,7)		
MKT_NRX_M13	NUMBER(22,7)		
MKT_NRX_M14	NUMBER(22,7)		
MKT_NRX_M15	NUMBER(22,7)		
MKT_NRX_M16	NUMBER(22,7)		

Table 104. Syndicated Market Flat File - Prescription Data

Field Name	Data Type	Field Required	Field Description
MKT_NRX_M17	NUMBER(22,7)		
MKT_NRX_M18	NUMBER(22,7)		
MKT_NRX_M19	NUMBER(22,7)		
MKT_NRX_M20	NUMBER(22,7)		
MKT_NRX_M21	NUMBER(22,7)		
MKT_NRX_M22	NUMBER(22,7)		
MKT_NRX_M23	NUMBER(22,7)		
MKT_NRX_M24	NUMBER(22,7)		
MKT_NRX_M25	NUMBER(22,7)		
MKT_NRX_M26	NUMBER(22,7)		
MKT_TRX_M01	NUMBER(22,7)		Stores sales units of current month data.
MKT_TRX_M02	NUMBER(22,7)		Stores sales units of previous month data.
MKT_TRX_M03	NUMBER(22,7)		Stores sales units of 20050101 data.
MKT_TRX_M04	NUMBER(22,7)		Stores sales units of current month data.
MKT_TRX_M05	NUMBER(22,7)		
MKT_TRX_M06	NUMBER(22,7)		
MKT_TRX_M07	NUMBER(22,7)		
MKT_TRX_M08	NUMBER(22,7)		
MKT_TRX_M09	NUMBER(22,7)		
MKT_TRX_M10	NUMBER(22,7)		
MKT_TRX_M11	NUMBER(22,7)		
MKT_TRX_M12	NUMBER(22,7)		
MKT_TRX_M13	NUMBER(22,7)		
MKT_TRX_M14	NUMBER(22,7)		
MKT_TRX_M15	NUMBER(22,7)		
MKT_TRX_M16	NUMBER(22,7)		
MKT_TRX_M17	NUMBER(22,7)		
MKT_TRX_M18	NUMBER(22,7)		
MKT_TRX_M19	NUMBER(22,7)		
MKT_TRX_M20	NUMBER(22,7)		

Table 104. Syndicated Market Flat File - Prescription Data

Field Name	Data Type	Field Required	Field Description
MKT_TRX_M21	NUMBER(22,7)		
MKT_TRX_M22	NUMBER(22,7)		
MKT_TRX_M23	NUMBER(22,7)		
MKT_TRX_M24	NUMBER(22,7)		
MKT_TRX_M25	NUMBER(22,7)		
MKT_TRX_M26	NUMBER(22,7)		

## Syndicated Market Flat File for Plan Level Rx Data

Table 105 provides information about the syndicated market flat file for Plan Level Rx data.

Table 105. Syndicated Market Flat File - Plan Level Rx Data

Field Name	Data Type	Field Required	Field Description
DATASOURCE_NUM_ID	NUMBER(10)	NOT NULL	External data source number ID other than 1.
DATA_SRC_CD	VARCHAR2(30)	NOT NULL	Enter the following Siebel data source type code: RXPT
INTEGRATION_ID	VARCHAR2(25)	NOT NULL	External integration ID.
START_DT	VARCHAR2(15)	NOT NULL	Syndicate data date format YYYYMMDD.
ACCNT_ID	VARCHAR2(30)		External account and plan ID.  Note: Corresponding Siebel S_ORG_EXT.ROW_ID should be provided in cross-reference file.
ACCNT_AREA_ID	VARCHAR2(30)		External brick ID of account's primary address. Enter value if DATA_SRC_CD is account level.  Note: Corresponding Siebel S_REGION.ROW_ID should be provided in cross-reference file.
ACCNT_CITY	VARCHAR2(50)		Account city. Enter value if DATA_SRC_CD is account level.  Initial capital format; for example, Short Hills

Table 105. Syndicated Market Flat File - Plan Level Rx Data

Field Name	Data Type	Field Required	Field Description
ACCNT_COUNTRY	VARCHAR2(30)		Account country. Enter value if DATA_SRC_CD is account level.  Initial capital format; for example, France; or abbreviate format, such as USA.
ACCNT_ZIPCODE	VARCHAR2(30)		Account zip code. Enter value if DATA_SRC_CD is account level.
MARKET_ID	VARCHAR2(30)		External market ID for the product.  Note: Corresponding Siebel S_PROD_INT.ROW_ID should be provided in cross-reference file.
PERIOD_CD	VARCHAR2(30)		Enter the following Siebel period code: Month
CONV_FACTOR	NUMBER(22,7)		Applies to Rx data only. Used to convert Rx volume to measurable units which will be used to dollarize the Rx volume.
MKT_NRX_M01	NUMBER(22,7)		Stores sales amounts of current month data.
MKT_NRX_M02	NUMBER(22,7)		Stores sales amounts of previous month data.
MKT_NRX_M03	NUMBER(22,7)		Stores sales amounts of 20050101 data.
MKT_NRX_M04	NUMBER(22,7)		
MKT_NRX_M05	NUMBER(22,7)		
MKT_NRX_M06	NUMBER(22,7)		
MKT_NRX_M07	NUMBER(22,7)		
MKT_NRX_M08	NUMBER(22,7)		
MKT_NRX_M09	NUMBER(22,7)		
MKT_NRX_M10	NUMBER(22,7)		
MKT_NRX_M11	NUMBER(22,7)		
MKT_NRX_M12	NUMBER(22,7)		
MKT_NRX_M13	NUMBER(22,7)		
MKT_NRX_M14	NUMBER(22,7)		
MKT_NRX_M15	NUMBER(22,7)		
MKT_NRX_M16	NUMBER(22,7)		
MKT_NRX_M17	NUMBER(22,7)		
MKT_NRX_M18	NUMBER(22,7)		

Table 105. Syndicated Market Flat File - Plan Level Rx Data

Field Name	Data Type	Field Required	Field Description
MKT_NRX_M19	NUMBER(22,7)		
MKT_NRX_M20	NUMBER(22,7)		
MKT_NRX_M21	NUMBER(22,7)		
MKT_NRX_M22	NUMBER(22,7)		
MKT_NRX_M23	NUMBER(22,7)		
MKT_NRX_M24	NUMBER(22,7)		
MKT_NRX_M25	NUMBER(22,7)		
MKT_NRX_M26	NUMBER(22,7)		
MKT_TRX_M01	NUMBER(22,7)		Stores sales units of current month data.
MKT_TRX_M02	NUMBER(22,7)		Stores sales units of previous month data.
MKT_TRX_M03	NUMBER(22,7)		Stores sales units of 20050101 data.
MKT_TRX_M04	NUMBER(22,7)		Stores sales units of current month data.
MKT_TRX_M05	NUMBER(22,7)		
MKT_TRX_M06	NUMBER(22,7)		
MKT_TRX_M07	NUMBER(22,7)		
MKT_TRX_M08	NUMBER(22,7)		
MKT_TRX_M09	NUMBER(22,7)		
MKT_TRX_M10	NUMBER(22,7)		
MKT_TRX_M11	NUMBER(22,7)		
MKT_TRX_M12	NUMBER(22,7)		
MKT_TRX_M13	NUMBER(22,7)		
MKT_TRX_M14	NUMBER(22,7)		
MKT_TRX_M15	NUMBER(22,7)		
MKT_TRX_M16	NUMBER(22,7)		
MKT_TRX_M17	NUMBER(22,7)		
MKT_TRX_M18	NUMBER(22,7)		
MKT_TRX_M19	NUMBER(22,7)		
MKT_TRX_M20	NUMBER(22,7)		
MKT_TRX_M21	NUMBER(22,7)		
MKT_TRX_M22	NUMBER(22,7)		

Table 105. Syndicated Market Flat File - Plan Level Rx Data

Field Name	Data Type	Field Required	Field Description
MKT_TRX_M23	NUMBER(22,7)		
MKT_TRX_M24	NUMBER(22,7)		
MKT_TRX_M25	NUMBER(22,7)		
MKT_TRX_M26	NUMBER(22,7)		

## Syndicated Market Flat File for Physician Plan Level Rx Data

Table 106 provides information about the syndicated market flat file for Physician Plan Level Rx data.

Table 106. Syndicated Market Flat File - Physician Plan Level Rx Data

Field Name	Data Type	Field Required	Field Description
DATASOURCE_NUM_ID	NUMBER(10)	NOT NULL	External data source number ID other than 1.
DATA_SRC_CD	VARCHAR2(30)	NOT NULL	Enter the following Siebel data source type code: RXXPT
INTEGRATION_ID	VARCHAR2(25)	NOT NULL	External integration ID.
START_DT	VARCHAR2(15)	NOT NULL	Syndicate data date format YYYYMMDD.
ACCNT_ID	VARCHAR2(30)		External account ID.  Note: Corresponding Siebel S_ORG_EXT.ROW_ID should be provided in cross-reference file.
ACCNT_AREA_ID	VARCHAR2(30)		External brick ID of account's primary address. Enter value if DATA_SRC_CD is brick level.  Note: Corresponding Siebel S_REGION.ROW_ID should be provided in cross-reference file.
ACCNT_CITY	VARCHAR2(50)		Account city. Enter a value if DATA_SRC_CD is account level.  Initial capital format; for example, Short Hills

Table 106. Syndicated Market Flat File - Physician Plan Level Rx Data

Field Name	Data Type	Field Required	Field Description
ACCNT_COUNTRY	VARCHAR2(30)		Account country. Enter value if DATA_SRC_CD is account level.  Initial capital format; for example, France; or abbreviate format, such as USA.
ACCNT_ZIPCODE	VARCHAR2(30)		Account zip code. Enter value if DATA_SRC_CD is account level.
CONTACT_ID	VARCHAR2(30)		External contact ID.  Note: Corresponding Siebel S_CONTACT.ROW_ID should be provided in cross-reference file.
CON_AREA_ID	VARCHAR2(30)		External brick ID of contact's primary address. Enter value if DATA_SRC_CD is contact level.  Note: Corresponding Siebel S_REGION.ROW_ID should be provided in cross-reference file.
CON_CITY	VARCHAR2(50)		Contact city. Enter value if DATA_SRC_CD is contact level.  Initial capital format; for example, Short Hills
CON_COUNTRY	VARCHAR2(30)		Contact country. Enter value if DATA_SRC_CD is contact level.  Initial capital format; for example, France; or abbreviate format, such as USA.
CON_ZIPCODE	VARCHAR2(30)		Contact zip code. Enter value if DATA_SRC_CD is contact level.
MARKET_ID	VARCHAR2(30)		External market ID for product.  Note: Corresponding Siebel S_PROD_INT.ROW_ID should be provided in cross-reference file.
PERIOD_CD	VARCHAR2(30)		Enter the following Siebel period code: Month
CONV_FACTOR	NUMBER(22,7)		Applies to Rx data only. Used to convert Rx volume to measurable units which will be used to dollarize the Rx volume.
MKT_NRX_M01	NUMBER(22,7)		Stores sales amounts of current month data.
MKT_NRX_M02	NUMBER(22,7)		Stores sales amounts of previous month data.

Table 106. Syndicated Market Flat File - Physician Plan Level Rx Data

Field Name	Data Type	Field Required	Field Description
MKT_NRX_M03	NUMBER(22,7)		Stores sales amounts of 20050101 data.
MKT_NRX_M04	NUMBER(22,7)		
MKT_NRX_M05	NUMBER(22,7)		
MKT_NRX_M06	NUMBER(22,7)		
MKT_NRX_M07	NUMBER(22,7)		
MKT_NRX_M08	NUMBER(22,7)		
MKT_NRX_M09	NUMBER(22,7)		
MKT_NRX_M10	NUMBER(22,7)		
MKT_NRX_M11	NUMBER(22,7)		
MKT_NRX_M12	NUMBER(22,7)		
MKT_NRX_M13	NUMBER(22,7)		
MKT_NRX_M14	NUMBER(22,7)		
MKT_NRX_M15	NUMBER(22,7)		
MKT_NRX_M16	NUMBER(22,7)		
MKT_NRX_M17	NUMBER(22,7)		
MKT_NRX_M18	NUMBER(22,7)		
MKT_NRX_M19	NUMBER(22,7)		
MKT_NRX_M20	NUMBER(22,7)		
MKT_NRX_M21	NUMBER(22,7)		
MKT_NRX_M22	NUMBER(22,7)		
MKT_NRX_M23	NUMBER(22,7)		
MKT_NRX_M24	NUMBER(22,7)		
MKT_NRX_M25	NUMBER(22,7)		
MKT_NRX_M26	NUMBER(22,7)		
MKT_TRX_M01	NUMBER(22,7)		Stores sales units of current month data.
MKT_TRX_M02	NUMBER(22,7)		Stores sales units of previous month data.
MKT_TRX_M03	NUMBER(22,7)		Stores sales units of 20050101 data.
MKT_TRX_M04	NUMBER(22,7)		Stores sales units of current month data.
MKT_TRX_M05	NUMBER(22,7)		
MKT_TRX_M06	NUMBER(22,7)		

Table 106. Syndicated Market Flat File - Physician Plan Level Rx Data

Field Name	Data Type	Field Required	Field Description
MKT_TRX_M07	NUMBER(22,7)		
MKT_TRX_M08	NUMBER(22,7)		
MKT_TRX_M09	NUMBER(22,7)		
MKT_TRX_M10	NUMBER(22,7)		
MKT_TRX_M11	NUMBER(22,7)		
MKT_TRX_M12	NUMBER(22,7)		
MKT_TRX_M13	NUMBER(22,7)		
MKT_TRX_M14	NUMBER(22,7)		
MKT_TRX_M15	NUMBER(22,7)		
MKT_TRX_M16	NUMBER(22,7)		
MKT_TRX_M17	NUMBER(22,7)		
MKT_TRX_M18	NUMBER(22,7)		
MKT_TRX_M19	NUMBER(22,7)		
MKT_TRX_M20	NUMBER(22,7)		
MKT_TRX_M21	NUMBER(22,7)		
MKT_TRX_M22	NUMBER(22,7)		
MKT_TRX_M23	NUMBER(22,7)		
MKT_TRX_M24	NUMBER(22,7)		
MKT_TRX_M25	NUMBER(22,7)		
MKT_TRX_M26	NUMBER(22,7)		

### Syndicated Market Flat File for Weekly Early View Data

Table 107 provides information about the syndicated market flat file for Weekly Early View data.

Table 107. Syndicated Market Flat File - Weekly Early View Data

Field Name	Data Type	Field Required	Field Description
DATASOURCE_NUM_ID	NUMBER(10)	NOT NULL	External data source number ID other than 1.
DATA_SRC_CD	VARCHAR2(30)	NOT NULL	Enter the following Siebel data source type code: RXEVM

Table 107. Syndicated Market Flat File - Weekly Early View Data

Field Name	Data Type	Field Required	Field Description
INTEGRATION_ID	VARCHAR2(25)	NOT NULL	External integration ID.
START_DT	VARCHAR2(15)	NOT NULL	Syndicate data date format YYYYMMDD.
CONTACT_ID	VARCHAR2(30)		External contact ID.  Note: Corresponding Siebel S_CONTACT.ROW_ID should be provided in cross-reference file.
CON_AREA_ID	VARCHAR2(30)		External brick ID of contact's primary address. Enter value if DATA_SRC_CD is brick level.  Note: Corresponding Siebel S_REGION.ROW_ID should be provided in cross-reference file.
CON_CITY	VARCHAR2(50)		Contact city. Enter a value if DATA_SRC_CD is account level.  Initial capital format; for example, Short Hills
CON_COUNTRY	VARCHAR2(30)		Contact country. Enter value if DATA_SRC_CD is account level.  Initial capital format; for example, France; or abbreviate format, such as USA.
CON_ZIPCODE	VARCHAR2(30)		Contact zip code. Enter value if DATA_SRC_CD is account level.
MARKET_ID	VARCHAR2(30)		External market ID for product.  Note: Corresponding Siebel S_PROD_INT.ROW_ID should be provided in cross-reference file.
PAYER_TYPE_ID	VARCHAR2(30)		External payer type ID. This column is used to define payment type, such as Cash, Government, Third Party, Total, and so on.  Note: Corresponding Siebel S_INS_PLAN.ROW_ID should be provided in cross-reference file.
PERIOD_CD	VARCHAR2(30)		Enter the following Siebel period code: Week
CONV_FACTOR	NUMBER(22,7)		Applies to Rx data only. Used to convert Rx volume to measurable units which will be used to dollarize the Rx volume.

Table 107. Syndicated Market Flat File - Weekly Early View Data

Field Name	Data Type	Field Required	Field Description
MKT_NRX_W01	NUMBER(22,7)		Stores sales amounts of current month data.
MKT_NRX_W02	NUMBER(22,7)		Stores sales amounts of previous month data.
MKT_NRX_W03	NUMBER(22,7)		Stores sales amounts of 20050101 data.
MKT_NRX_W04	NUMBER(22,7)		
MKT_NRX_W05	NUMBER(22,7)		
MKT_NRX_W06	NUMBER(22,7)		
MKT_NRX_W07	NUMBER(22,7)		
MKT_NRX_WM08	NUMBER(22,7)		
MKT_NRX_W09	NUMBER(22,7)		
MKT_NRX_W10	NUMBER(22,7)		
MKT_NRX_W11	NUMBER(22,7)		
MKT_NRX_W12	NUMBER(22,7)		
MKT_NRX_W13	NUMBER(22,7)		
MKT_NRX_W14	NUMBER(22,7)		
MKT_TRX_W01	NUMBER(22,7)		Stores sales units of current month data.
MKT_TRX_W02	NUMBER(22,7)		Stores sales units of previous month data.
MKT_TRX_W03	NUMBER(22,7)		Stores sales units of 20050101 data.
MKT_TRX_W04	NUMBER(22,7)		Stores sales units of current month data.
MKT_TRX_W05	NUMBER(22,7)		
MKT_TRX_WM06	NUMBER(22,7)		
MKT_TRX_W07	NUMBER(22,7)		
MKT_TRX_W08	NUMBER(22,7)		
MKT_TRX_W09	NUMBER(22,7)		
MKT_TRX_W10	NUMBER(22,7)		
MKT_TRX_W11	NUMBER(22,7)		
MKT_TRX_W12	NUMBER(22,7)		
MKT_TRX_W13	NUMBER(22,7)		

## Flat File Cross-Reference Data Population Rules

Table 108 provides information about flat file cross-reference data population rules for the following data types: Area (Brick), Account and Plan, Payer Type, and Contact.

Table 108. Flat File Cross-Reference Data Population Rules

Field Name	Data Type	Field Required	Field Description
<b>Area (Brick) Data</b>			
EXT_DATASRC_NUM_ID	NUMBER(10)	NOT NULL	External data source number ID other than 1.
EXT_INTEGRATION_ID	VARCHAR2(30)	NOT NULL	External area (brick) ID.  Note: This same ID should be used in ACCNT_AREA_ID, AREA_ID, AND CON_AREA_ID syndicated data and syndicated market flat files.
EXT_AREA_NAME	VARCHAR2(50)		Area name.  Note: The same value should already be loaded in Siebel S_REGION.NAME.
EXT_PROVINCE	VARCHAR2(50)		Area province.  Note: The same value should already be loaded in Siebel S_REGION.PROVINCE.
EXT_STATE	VARCHAR2(50)		Area state.  Note: The same value should already be loaded in Siebel S_REGION.STATE. Use the format all capitals and abbreviated, such as NJ.
EXT_COUNTRY	VARCHAR2(30)		Area country.  Note: The same value should already be loaded in Siebel S_REGION.COUNTRY. Use the initial capital format; for example, France.
INTEGRATION_ID	VARCHAR2(30)	NOT NULL	Siebel area (brick) ID.  Note: This value should come from Siebel S_REGION.ROW_ID.
<b>Account and Plan Data</b>			
EXT_DATASRC_NUM_ID	NUMBER(10)	NOT NULL	External data source number ID other than 1.  Note: The same value should be used in the DATASOURCE_NUM_ID field of the syndicated data and syndicated market flat files.

Table 108. Flat File Cross-Reference Data Population Rules

Field Name	Data Type	Field Required	Field Description
EXT_INTEGRATION_ID	VARCHAR2(30)	NOT NULL	External account and plan ID.  Note: The same ID should be used in ACCNT_AREA_ID, AREA_ID, AND CON_AREA_ID syndicated data and syndicated market flat files.
EXT_ACCNT_NAME	VARCHAR2(100)		Account and plan name.  Note: The same value should already be loaded in Siebel S_ORG_EXT.NAME.
EXT_ACCNT_NUM	VARCHAR2(30)		Account outlet number.
INTEGRATION_ID	VARCHAR2(30)	NOT NULL	Siebel account ID.  Note: This value should come from Siebel S_REGION.ROW_ID.
<b>Payer Type Data</b>			
EXT_DATASRC_NUM_ID	NUMBER(10)	NOT NULL	External data source number ID other than 1.  Note: The same value should be used in the DATASOURCE_NUM_ID field of the syndicated data and syndicated market flat files.
EXT_INTEGRATION_ID	VARCHAR2(30)	NOT NULL	External payer ID.  Note: The same value should be used in the PAYER_TYPE_ID field of the syndicated data and syndicated market flat files.
EXT_PLAN_TYPE	VARCHAR2(30)		Plan type, such as Payer, Plan, and so on.  Note: The same value should already be loaded in Siebel S_INS_PLAN.PLAN_TYPE.
EXT_PAYER_NAME	VARCHAR2(100)		Payer type, such as Cash, Government, Third Party, Total, and so on.  Note: The same value should already be loaded in Siebel S_INS_PLAN.NAME.
INTEGRATION_ID	VARCHAR2(30)	NOT NULL	Siebel payer ID.  Note: This value should come from Siebel S_REGION.ROW_ID.

Table 108. Flat File Cross-Reference Data Population Rules

Field Name	Data Type	Field Required	Field Description
<b>Contact Data</b>			
EXT_DATASRC_NUM_ID	NUMBER(10)	NOT NULL	External data source number ID other than 1. Note: The same value should be used in the DATASOURCE_NUM_ID field of the syndicated data and syndicated market flat files.
EXT_INTEGRATION_ID	VARCHAR2(30)	NOT NULL	External contact ID. Note: The same value should be used in the CONTACT_ID field of the syndicated data and syndicated market flat files.
EXT_CON_FULL_NAME	VARCHAR2(102)		Contact name. Note: The same value should already be loaded in Siebel S_CONTACT.LAST_NAME and S_CONTACT.FST_NAME.
EXT_ME_NUM	VARCHAR2(50)		Contact ME number. Note: The same value should already be loaded in Siebel S_CONTACT.CSN.
INTEGRATION_ID	VARCHAR2(30)	NOT NULL	Siebel contact ID. Note: This value should come from Siebel S_CONTACT.ROW_ID.
<b>Product and Market Data</b>			
EXT_DATASRC_NUM_ID	NUMBER(10)	NOT NULL	External data source number ID other than 1. Note: The same value should be used in the DATASOURCE_NUM_ID field of the syndicated data and syndicated market flat files.
EXT_INTEGRATION_ID	VARCHAR2(30)	NOT NULL	External product and market ID. Note: The same value should be used in the PAYER_TYPE_ID field of the syndicated data and syndicated market flat files.
EXT_PROD_TYPE	VARCHAR2(30)		Product and market type. Note: The same value should already be loaded in Siebel S_PROD_INT.

Table 108. Flat File Cross-Reference Data Population Rules

Field Name	Data Type	Field Required	Field Description
EXT_PROD_NAME	VARCHAR2(50)		Product and market name. Note: The same value should already be loaded in Siebel PROD_INT.NAME.
INTEGRATION_ID	VARCHAR2(30)	NOT NULL	Siebel product ID. Note: This value should come from Siebel S_PROD_INT.ROW_ID.

## S\_SYND\_DATA Data Population Rules

Table 109 provides the data population rules for S\_SYND\_DATA.

Table 109. S\_SYND\_DATA Data Population Rules

Required Codes	Data Types	Required fields (x) and data population rules for correct rollup in Siebel Analytics														
		Territory ID TERR_ID	Period ID PERIOD_ID	Position ID POSITION_ID	Postal Code ZIPCODE	Account ID OU_EXT_ID	Contact ID CON_ID	Brick ID AREA_ID	Payor Level PLAN_ID Foreign Key to S_INS_PLAN	Product Level PRDINT_ID (always try to populate data at the lowest level - form strength)	Market Level MARKET_ID	Attribute 1 (Attrib_01)	Attribute 1 (Attrib_02)	Attribute 1 (Attrib_03)	Attribute 1 (Attrib_04)	Siebel Pharma Analytics Business Model Data Source Codes
RXPrf	Prescription data by Contact		x	x			x		Total	Form Strength	x	NRx	TRx	Market NRx	Market TRx	1
SlsIndBrk	Indirect Sales Brick Level		x	x				x	Total	Form Strength	x	Product Sales \$	Product Sales Units	Market Sales \$	Market Sales Units	22
SlsIndAct	Indirect Sales Account Level		x	x		x			Total	Form Strength	x	Product Sales \$	Product Sales Units	Market Sales \$	Market Sales Units	21

Table 109. S\_SYND\_DATA Data Population Rules

Required Codes	Data Types	Required fields (x) and data population rules for correct rollup in Siebel Analytics														
		Territory ID TERR_ID	Period ID PERIOD_ID	Position ID POSITION_ID	Postal Code ZIPCODE	Account ID OU_EXT_ID	Contact ID CON_ID	Brick ID AREA_ID	Payor Level PLAN_ID Foreign Key to S_INS_PLAN	Product Level PRDINT_ID (always try to populate data at the lowest level - form strength)	Market Level MARKET_ID	Attribute 1 (Attrib_01)	Attribute 1 (Attrib_02)	Attribute 1 (Attrib_03)	Attribute 1 (Attrib_04)	Siebel Pharma Analytics Business Model Data Source Codes
SlsIndZip	Indirect Sales Zip Level		x	x	x				Total	Form Strength	x	Product Sales \$	Product Sales Units	Market Sales \$	Market Sales Units	23
SlsDirAct	Direct Sales Account Level		x	x		x			Total	Form Strength	x	Product Sales \$	Product Sales Units			11
SlsDirBrk	Direct Sales Brick Level		x	x			x		Total	Form Strength	x	Product Sales \$	Product Sales Units			12
SlsDirZip	Direct Sales Zip Level		x	x	x				Total	Form Strength	x	Product Sales \$	Product Sales Units			13

Table 109. S\_SYND\_DATA Data Population Rules

Require d Codes	Data Types	Required fields (x) and data population rules for correct rollup in Siebel Analytics														
		Territory ID TERR_ID	Period ID PERIOD_ID	Position ID POSITION_ID	Postal Code ZIPCODE	Account ID OU_EXT_ID	Contact ID CON_ID	Brick ID AREA_ID	Payor Level PLAN_ID Foreign Key to S_INS_PLAN	Product Level PRDINT_ID (always try to populate data at the lowest level - form strength)	Market Level MARKET_ID	Attribute 1 (Attrib_01)	Attribute 1 (Attrib_02)	Attribute 1 (Attrib_03)	Attribute 1 (Attrib_04)	Siebel Pharma Analytics Business Model Data Source Codes
RXEVM	Weekly RX Data by Contact		x	x			x		Total	Form Strength	x	Product NRx	Product TRx	Market NRx	Market TRx	0
RXPT	Plan Level Rx Data		x	x					Plan	Form Strength	x	Product NRx	Product TRx	Market NRx	Market TRx	6
RXSMI	Sales Market - Incentives		x	x	x				Total	Form Strength	x	Product NRx	Product TRx	Market NRx	Market TRx	3
RXSMM	Sales Market - Modified		x	x	x				Total	Form Strength	x	Product NRx	Product TRx	Market NRx	Market TRx	4
RXXPT	Plan Level Physician Rx Data		x	x			x		Plan	Form Strength	x	Product NRx	Product TRx	Market NRx	Market TRx	5

Table 109. S\_SYND\_DATA Data Population Rules

Required Codes	Data Types	Required fields (x) and data population rules for correct rollup in Siebel Analytics														
		Territory ID TERR_ID	Period ID PERIOD_ID	Position ID POSITION_ID	Postal Code ZIPCODE	Account ID OU_EXT_ID	Contact ID CON_ID	Brick ID AREA_ID	Payor Level PLAN_ID Foreign Key to S_INS_PLAN	Product Level PRDINT_ID (always try to populate data at the lowest level - form strength)	Market Level MARKET_ID	Attribute 1 (Attrib_01)	Attribute 1 (Attrib_02)	Attribute 1 (Attrib_03)	Attribute 1 (Attrib_04)	Siebel Pharma Analytics Business Model Data Source Codes
RXZip	Prescription data by Zipcode		x	x	x				Total	Form Strength	x	Product NRx	Product TRx	Market NRx	Market TRx	7
RXBrk	Prescription data by Brick		x	x				x	Total	Form Strength	x	Product NRx	Product TRx	Market NRx	Market TRx	8

# Life Sciences Data Loading Issues with Siebel Data Warehouse

This issue is specific to Analytics for Life Sciences and does not affect other products.

Siebel Data Warehouse for Life Sciences updates the Siebel Data Warehouse with a full refresh or using incremental updates. In the DAC, you can run a full load by selecting Tools > ETL Management > Reset Data Warehouse. This procedure is usually only used for the initial build. If you run the same execution plan without confirming the Reset Data Warehouse again, then the ETL incrementally updates the Siebel Data Warehouse.

Running a full refresh load by confirming the Reset Data Warehouse feature deletes all existing information stored in the fact and dimension tables. The following types of incremental update rules are supported on the fact tables.

- **Account Call Fact.** Adds new records (call activity for account) to the fact table.
- **Attendee Call Fact.** Adds new records (call activity for attendee) to the fact table.
- **Contact Call Fact.** Adds new records (call activity for contact) to the fact table
- **Syndicated Data - Base Direct Sales Fact, Territory Direct Sales Fact, Base Indirect Sales Fact, Territory Indirect Sales Fact, District Indirect Sales Fact, Base Physician Rx Fact, Territory Physician Rx Fact, Base Rx Plan Fact, Territory Rx Plan Fact, Base Weekly Physician Rx Fact, Territory Weekly Physician Rx Fact, Base Physician Rx Plan Fact, Territory Physician Rx Plan Fact.** ETL does not support incremental updates. When running the full refresh ETL, all records in the fact and dimension tables are deleted. To maintain a history in the dimension tables (such as multiple alignments), use the incremental ETL. If you need to incrementally update the syndicates data fact tables for incremental syndicated data loading, use one of the following strategies:
  - **For incremental insert.** Prepare flat file source data that has new data with the new INTEGRATION\_ID. Load the data directly into the staging table and modify the session not to truncate the fact tables. Then use the existing ETL to load data into fact tables.
  - **For incremental update.** Create new mappings that do a lookup against the fact tables and run the update. Make sure that INTEGRATION\_ID used in the flat file source and in the target tables are not identical. Because the incoming syndicated data in the flat file going to the target tables is in the normalized format, the INTEGRATION\_ID must be manipulated properly. However, the constant rule is applied when the INTEGRATION\_ID is manipulated during the ETL load. The syndicated data during the first bulk load has the "original in-coming INTEGRATION\_ID" || "-1"; the 26th bulk load has the "original in-coming INTEGRATION\_ID" || "-26".

## Known Issues with the Syndicated Data Fact Tables

The following are known issues with creation of aggregate measure columns in the Syndicated Data fact tables.

- With large volumes of syndicated data, the creation of aggregate measures in the Siebel Data Warehouse can take four times the amount of time needed to load the fact table. This may be unacceptable under circumstances when there are large amounts of syndicated data.

- In Siebel Business Analytics Applications Version 7.8.3, MAT aggregate measures are handled by the ETL process, not by metadata. All other aggregate measures are handled by metadata.

## Incremental Updates in the Siebel Data Warehouse LS Dimension Tables

This issue is specific to Analytics for Life Sciences and does not affect other products. In the LS dimension tables, the following incremental updates are supported. Some dimensions have more than one set of attributes.

### W\_ALIGNMT\_DH

#### Base Dimensional Hierarchy Table.

**Attribute.** Zip code, Brick, or Account/Contact Hierarchy depends on what alignment item type is selected.

**Description.** Contains the current version of alignment only.

### W\_ALIGNVER\_DH

#### Slowly Changing Dimension Type. 2

**Attribute.** Historical Zip code, Brick, or Account/Contact Hierarchy depends on what alignment item type is selected.

**Description.** Tracks historical alignments.

- In Siebel Business Analytics Applications Version 7.8.3:
  - Depending on what alignment item type is selected in AlignmentType.csv, only the selected alignment rule is extracted and loaded into the Siebel Data Warehouse. You can change the alignment item type only when you run full refresh ETL.
  - When the alignment rule is loaded into Oracle's Siebel Data Warehouse, the current alignment rule is stored in the W\_ALIGNMT\_DH base table and the existing historical alignment rules are stored in W\_ALIGNVER\_DH table.
- If ETL Alignment Version is set to N, ETL makes changes to existing alignment if there is a change on an assignment rule.
- If ETL Alignment Version is set to Y, it creates a new alignment version. Any existing alignment moves to the W\_ALIGNVER\_DH table as history. The W\_ALIGNVER\_DH table is used only when the ETL Alignment Version is set to Y

The dimension has these characteristics:

- The first alignment after Full load is 1.
- A new version is created when a new assignment rule (new position or position relationship) or an assignment criteria is modified (change in postal code, brick, contact, or account) if ETL Alignment Version is set to Y.
- Assignment criteria:

- Contact ZIP Code or Account ZIP Code cannot use ZIP Code ranges. Each ZIP Code assigned to a territory needs to be on a separate row, so the same value needs to be entered for both ZIP Code Low and ZIP Code High.  
For example, if ZIP Code 09654 is assigned to a territory, the value for both ZIP Code High and ZIP Code Low should be 09654. Also, the same ZIP Code should not be assigned twice to the same territory and a ZIP Code should be unique to a territory when using assignment criteria for Contact ZIP Code or Account ZIP Code.
- Contact Brick or Account Brick require unique bricks assigned to a territory.
- Every new version increases the counter by one and is a sequential number. Any pre-existing history version alignment data moves to W\_ALIGNVER\_DH historical alignment table whenever a new version is created. That is, the W\_ALIGNMT\_DH table always maintains the latest version while the W\_ALIGNVER\_DH table maintains the rest of the historical version if the ETL Alignment Version is set to Y. So, when the historical alignment dimension table gets too large, your administrator can create a SQL query to delete all attributes for version numbers from the W\_ALIGNVER\_DH table.
- Effective date of the alignment is assignment activation date.

## W\_ORG\_D

### Slowly Changing Dimension Type. 3

**Attributes.** ACCNT\_TYPE\_CD, ACCNT\_TYPE\_CD1, ACCNT\_TYPE\_CD2, ACCNT\_TYPE\_CD3

**Description.** Tracks three past account types. If the account type changes a fourth time, the first change is deleted and only the past three changes are maintained. Effective date is ETL run date to each group of attributes.

**Attributes.** NAME, NAME1, NAME2, NAME3

**Description.** Tracks three past account names. If the account name changes a fourth time, the first change is deleted and only the past three changes are maintained. Effective date is ETL run date.

**Attributes.** NUMB\_OF\_BEDS, NUMB\_OF\_BEDS1, NUMB\_OF\_BEDS2, NUMB\_OF\_BEDS3

**Description.** For an account type of hospital and clinic, tracks three past quantities. If the number of beds changes a fourth time, the first change is deleted and only the past three changes are maintained. Effective date is ETL run date.

**Attributes.** PAR\_INTEGRATION\_ID, PAR\_ITGR\_ID1, PAR\_ITGR\_ID2, PAR\_ITGR\_ID3

**Description.** Tracks three past parent accounts. If the parent account changes a fourth time, the first change is deleted and only the past three changes are maintained. Effective date is ETL run date.

### W\_POSTN\_CON\_D

**Slowly Changing Dimension Type.** 3

**Attributes.** STATUS, STATUS1, STATUS2, STATUS3

**Description.** Tracks three past contact statuses. If the contact status changes a fourth time, the first change is deleted and only the past three changes are maintained. Effective date is ETL run date.

### W\_POSITION\_D

**Slowly Changing Dimension Type.** 3

**Attributes.** EMP\_FST\_NAME, EMP\_MID\_NAME, EMP\_LAST\_NAME, EMP\_FST\_NAME\_H1, EMP\_MID\_NAME\_H1, EMP\_LAST\_NAME\_H1, EMP\_FST\_NAME\_H2, EMP\_MID\_NAME\_H2, EMP\_LAST\_NAME\_H2, EMP\_FST\_NAME\_H3, EMP\_MID\_NAME\_H3, EMP\_LAST\_NAME\_H3

**Description.** Tracks three past employee names assigned to a position. If the employee name changes a fourth time, the first change is deleted and only the past three changes are maintained. Effective date is ETL run date.

### W\_ACCNT\_RNK\_D/W\_ACCNT\_RNK\_SCD

**Slowly Changing Dimension Type.** 3 and 2 respectively

**Attributes.** RANKING, RANKING1, RANKING2, RANKING3

**Description.** Keep three previous rankings to allow restatement in W\_ACCNT\_RNK\_D table. In addition, the historical account ranking is all maintained in W\_ACCNT\_RNK\_SCD. Effective date is ETL run date.

**Attributes.** RATING, RATING1, RATING2, RATING3

**Description.** Keep three previous ratings to allow restatement in W\_ACCNT\_RNK\_D table. In addition, the historical account ratings are all maintained in W\_ACCNT\_RNK\_SCD. Effective date is ETL run date.

### W\_CON\_RNK\_D/W\_CON\_RNK\_SCD

**Slowly Changing Dimension Type.** 3 and 2 respectively

**Attributes.** RANKING, RANKING1, RANKING2, RANKING3

**Description.** Keep three previous rankings to allow restatement in W\_CON\_RNK\_D table. In addition, the historical contact rankings are all maintained in W\_CON\_RNK\_SCD. Effective date is ETL run date.

**Attributes.** RATING, RATING1, RATING2, RATING3

**Description.** Keep three previous ratings to allow restatement in W\_CON\_RNK\_D table. In addition, the historical contact ratings are all maintained in W\_CON\_RNK\_SCD. Effective date is ETL run date.

## **W\_PRODUCT\_D**

**Slowly Changing Dimension Type.** 3

**Attributes.** VENDOR\_LOC, VENDOR\_LOC1, VENDOR\_LOC2, VENDOR\_LOC3

**Description.** Tracks three past vendor locations. If the vendor location changes a fourth time, the first change is deleted and only the past three changes are maintained. Effective date is ETL run date.

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Informatica Server Manager, probable  
cause 237

Server Manager error message, probable  
cause 236

