

Planning a Successful Upgrade to Siebel 8.x

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Agenda

- Siebel 8.0 Update
- Siebel 8.0 and Recent Upgrade Experiences From the Field.
- Upgrade Planning and Estimation
- Upgrade Overview
- Questions & Answers

Siebel 8.0 Update

- GA in January 2007.
- Siebel 7.5 customers are main group with upgrade projects underway.
- Some QF have been published including QF003 that anyone with eScript will want.
- 8.0.0.1 MR released on 7/19 and includes many fixes as well as support for IE7.
- Unlike 7.7->7.8 where the versions seemed almost identical there is a learning curve for developers coming from 7.8 and prior.
- Everyone we know who has seen both 7.8 and 8.0 see noticeable differences and like 8.0 much better.

Siebel 8.0 Update – Continued

- New 8.0 certification available including a delta track if you are already 7.7 certified.
- 8.0 Training available from Oracle – Some of which is free!
- Some customers have actually already completed their upgrade and are live on 8.0 and really happy with it!

Siebel 8.0 and Recent Upgrades

- Entertainment company live on 8.0
- Financial 7.5 -> 8.0 upgrade project
- Retail 6.2 -> 8.0 upgrade project
- Pharma recent 7.8 upgrade go-live
- Some other upgrade projects we are concerned about

Entertainment Company Live on 8.0

- Intended to feature this upgrade as our special guest speaker but were not able to work out certain details.
- Oracle has asked this customer to present their story at OOW in November so hopefully you can hear it firsthand there.
- Siebel 7.8 -> 8.0 upgrade
- Using certain new 8.0 features such the new FAST search
- CMM-I Level 4 or 5 with regard to Siebel upgrade.
- “Normal” Siebel implementation with customizations.

Entertainment Company Live on 8.0

- Surprising to many but not to us this customer completed the upgrade on their own with just two additional consultants brought in to help.
 - Shows if you really know the upgrade process the Siebel upgrade is a reasonable project and that an army of consultants is not needed
 - Most customers should not attempt this as they should have someone highly experienced guide them
- Customer was on 7.8 but saw enough benefit in 8.0 to upgrade.
- End users and IT all very happy with 8.0.

Financial 7.5 -> 8.0 upgrade project

- Upgrade going along very well with everything on schedule for a go-live later this year.
- We guided customer thru the dev upgrade process, troubleshoot difficult problems and performed production upgrade tuning.
- Found errors in existing eScript code base they did not know about until the upgrade.
- Level of effort in development very reasonable.
- Initial estimates of work tasks and durations turning out to be accurate.
- Customer did not underestimate or try to achieve unrealistic goals.
- Where is the drama, crisis, etc.? Luckily there is none!

Retail 6.2 -> 8.0 upgrade project

- One of the most complex 6->7/8 upgrades performed
- Started upgrade project with 7.8 at about the same time that 8.0 was released and later upgraded to 8.0.
- Converted VB to eScript. Nearly ½ million lines of code.
- Migrated from Windows to Solaris app servers
 - Lessons learned with hardware selection and other.
- Large code body means this customer has found just about any issue with the ST engine you might imagine.
- Very large database size. Initial production test upgrade ran for 200 + 300 = 500 hours but after tuning is down to a small fraction of that.
- Massive automation and correct use of offshore model.
- Development wrapping up and testing about to begin.
- Only four consultants engaged on full time basis.

Pharma recent 7.8 upgrade go-live

- Called in to fix production issues on Monday after 7.8 upgrade over the weekend.
- Call center was being impacted seriously
- Experiencing production crashes and run away threads.
- By Wednesday AM all issues fixed and things running smoothly.
- Demonstrates how any issues with a Siebel upgrade can have a huge impact on a company's business.
- Also demonstrates that being proactive on upgrade go-lives is a really good idea.
 - Need to have right team ready to deal with any issues instead of only relying on Tech Support.
 - Can you read an FDR file, stack trace and OM log and figure out what the problem is?

Upgrades We Are Concerned About

- Four week dev upprep.
- Recent Siebel 6->7.7 upgrade.
- Check references and don't rush.
- Staffing with the least expensive consultant available.
 - Lower hourly rates don't necessarily = lower total cost.
- 10 open slots / too many cooks in the kitchen.
 - Having too many people on your upgrade project.
- Not using the Siebel upgrade at all for 7.5->8.0 project
 - “Merge” existing data into vanilla 8.0 will be difficult.
- Siebel reimplementation being called and upgrade.
 - Full analysis and design. Not an upgrade at all but is very large and expensive.

If We Just Had One Slide

- Spend Time Planning
- Do a Proof of Concept Upgrade
- Upgrade – Don't Reimplement
- Upgrade a Copy of Production
- Do Practice Production Runs Until Results are Repeatable
- Get Help From Someone Experienced with Upgrades and Siebel 8.0
- Read and Follow the Siebel Upgrade Guide Carefully.
- Don't Commit During the Wide Part of the Upgrade Cone of Uncertainty
- If Possible Keep Team Size Small
- Don't Add Too Much Beyond a Pure Technical Upgrade to Your Project

Estimating Upgrade Projects

- Estimate vs. Target vs. Commitment
- Developer's estimate = best case estimate
- What is the probability of your estimate?
 - Good estimates should provide a range and not a single point.
- Estimates unfortunately often = the minimum about of time for which you can't prove completing your project is impossible.
- Your last upgrade is your best input to estimate your Siebel 8.0 upgrade.
- Need to do an upgrade assessment and determine upgrade goals and objectives before providing upgrade estimate.

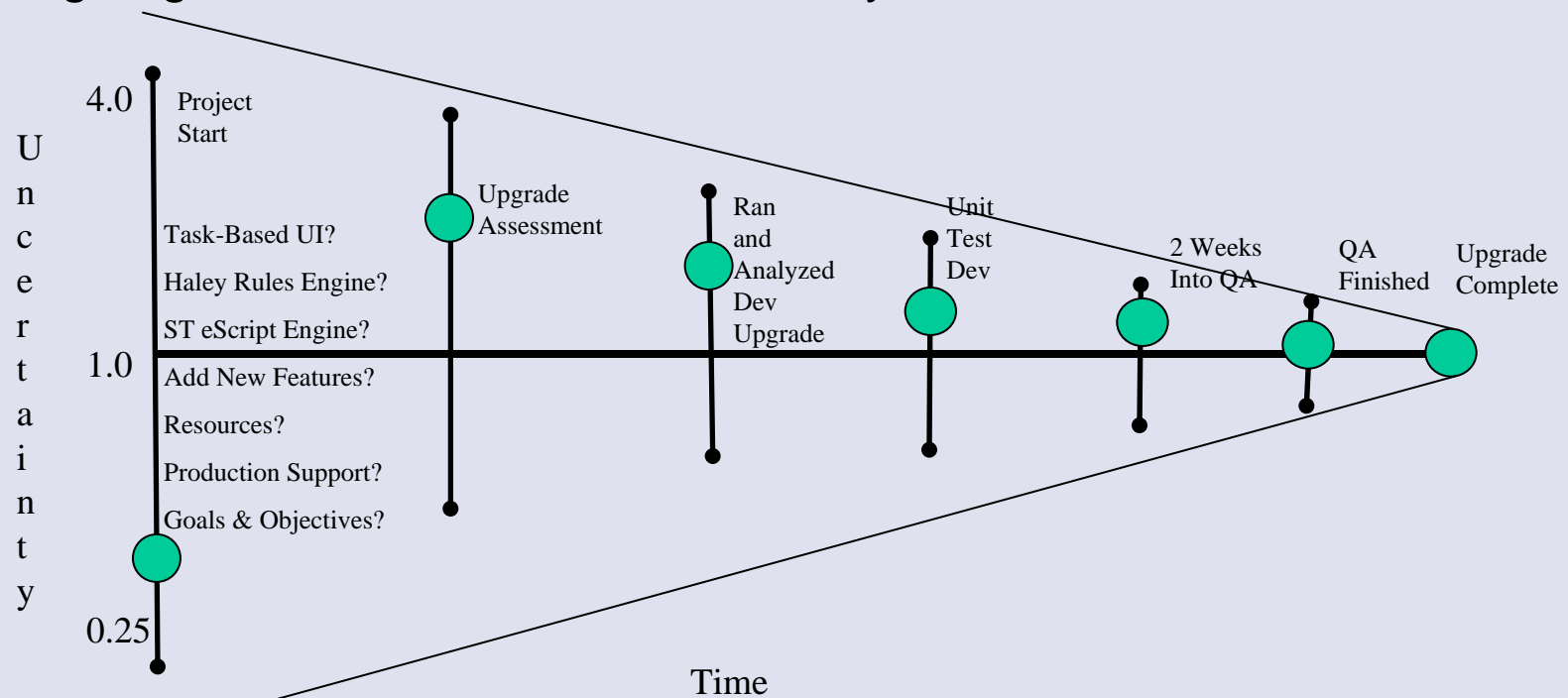
Estimating Upgrade Projects

- Two main factors:
 - Complexity of upgrade
 - Organizational ability to execute: 10 to 1 differences
- Understanding diseconomies of scale and large upgrade teams.
- Parkinson's Law – overestimated project will expand to fill all allocated time.
- Price of underestimating is even more severe so ideally need accurate estimate
- Counting vs. computing vs. judgment

Adapted from Steve McConnell's Software Estimation – Demystifying the Black Art

Upgrade Cone of Uncertainty

- The further out we estimate the less accurate our estimate is going to be. Don't commit too early.



Adapted from Steve McConnell's Software Estimation – Demystifying the Black Art

So How Long Will My Siebel 8.0 Upgrade Take?

- The answer is: it depends.
- Depends mainly on what “league” your upgrade is in.
 - We classify your upgrade’s degree of difficulty by the technical and other challenges you will face and the ability of you and your organization to deal with these challenges.
- Also depends on what your upgrade goals and objectives are and what other tasks beyond a pure technical upgrade are to be accomplished within the upgrade project.
- Safe to say your upgrade can not be accomplished in less than four (4) months unless it is a special simple case.
 - Any estimate less than four months is in the “impossible” zone.

What League Is Your Upgrade In?

Complexity 

Special Case

- Simple scenarios that allow upgrade to be performed very fast
- Dev 7.8 to 8.0
- Demo Systems

Normal

- Normal Siebel implementation without any really complicated challenges
- Hundreds of users
- Weekend of downtime available.

Extreme Challenges

- Faces one or more really complicated issues
- 6.x with large code body
- Limited downtime
- Very large data volumes
- Organizational issues
- Thousands of users
- Huge impact to business if anything goes wrong
- Etc... There are lots of others

Timeline:

Days or weeks

4+ Months

6-12+ Months

Two Nearly Identical Upgrades – Two Vastly Different Timelines

Attribute	Upgrade 1	Upgrade 2
Timeline (plan 2 prod)	4 Months	9 Months
Approximate Cost	X	3X
Version	6 -> 7.7	6 -> 7.8
Customization	Highly complex, eScript, interfaces, reports, etc.	Same complexity
Theme	Limited budget and limited time	Upgrade, this is our only chance to fix things, but still save time and \$
Fix existing bugs, return to OOTB and add new features?	No way – are you kidding? Those are change requests for Phase II.	Fixed existing bugs, returned to selected OOTB, added new features

- Both were phenomenally successful but in very different ways.
- What is your upgrade objective going to be???

What Is The Siebel Upgrade?

Different Views of the Same Thing

- An exercise in how well you can read and follow the Siebel Upgrade Guide.
- A set of manual and automated steps that:
 - Upgrades your database to Siebel 8.0.
 - Merges your Tools configuration changes with version 8.0 Siebel to produce a customized version of the Siebel 8.0 application.
- A test to see how well you and your team can overcome challenges you may never have faced before.
- An opportunity to impress or disappoint your end users depending on how well you execute the upgrade project.
- A Siebel upgrade is definitely not just a MR patch.
- Different from your original implementation in that you want to skip analysis, design and construction and instead plan, upgrade and fix.

Siebel Upgrade Overview – Two Main Things Happen

- Upgrades your existing schema to the latest Siebel schema.
 - In place and mostly additive upgrade.
 - New tables, indexes and columns added.
 - Where needed data moved from old tables to new tables.
- Merges your Siebel Tools customizations with the latest Siebel version.
 - Customized repository merged with prior and current Siebel OOTB repositories to produce new customized repository.
 - Only OOTB objects get three-way merged but all objects including totally custom objects can be changed in the upgrade process.
- Note: Siebel upgrade runs in all environments including dev, test and production.

Siebel Upgrade Steps – Manual and Automated

- A combination of automated and manual steps.
 - The Siebel 8.0 Upgrade Guide lists 78 steps for the development upgrade.
 - Siebel 7.7 Upgrade Guide lists 144 steps for a 6.x development upgrade
- Normally best procedure is to follow the Upgrade Guide to the letter with just a few exceptions.
 - Two-step upgrade which is not documented requires a few changes.
 - There aren't many but there are a few places where the Upgrade Guide is not always correct in all situations.
- Don't invent steps you think the Upgrade Guide might have missed.

High Level Siebel Upgrade Phases

- Upgrade planning and assessment
- Install new Siebel version and optionally acquire new hardware
- Development upgrade, testing and fixing
- QA upgrade and testing
- Optional upgrade tuning and downtime minimization
- Train users on new system
- Production upgrade and deployment

Dev Upgrade According to the 8.0 Siebel Database Upgrade Guide

- Check SupportWeb
- Upgrade the Servers
- Upgrade Third Party Software
- Upgrade RDBMS
- Pre-Upgrade Tasks for the Database
- Pre-Upgrade Tasks for DB2 / Oracle / SQLServer
- Pre-Upgrade Tasks for Application Data
- Preparing Developer's for the Upgrade
- **Upgrade the Database Schema (upgrep)**
- Prepare for Repository Merge
- **Repository Merge**
- **Upgrade Custom Database Schema (upgphys)**
- Initialize and Extract Developer's Local Databases
- Review the User Interface
- Postmerge Development Tasks
- Upgrade Tasks for File System and Database
- Postupgrade Tasks for Application Configuration
- System Tests
- Prepare for Transition to Production Test (QA)

Things You Might Not Have Known About The Siebel Upgrade

- Many Siebel upgrades take longer and cost more than they should.
 - Our goal here today is to educate you so yours won't be one of them.
- System performance is not always better across the board with the new version of Siebel (until you work on it).
- Removing customization and returning to OOTB Siebel can sometimes have a price tag so we want to pick and choose or opportunities to return to OOTB.
- Upgrades often include optional items such as adding new features and functionality that probably should be performed as a separate project.
- Upgrades find and fix a fair amount of issues (25%+) that were present in the current production system but not discovered or not reported until the intensive testing performed as part of the upgrade.

Upgrade or Reimplement?

- Some people may tell you to reimplement instead of upgrade.
- We have yet to see a single case where reimplementing was not a mistake and consider this practice an antipattern.
- Ignores the fact that most customers really do need their customizations and simply can not run Siebel OOTB for all customizations.
- Often customers feel like their original implementation could have been better so they like the idea of being able have a second chance at doing it better than the first time.
- Even if you are going back to OOTB best to let Siebel upgrade migrate your data instead of attempting EIM.

Selectively Going Back To OOTB and New Free Features

- Actual examples where OOTB features replaced customizations:
 - Replaced eScript Audit trail with Siebel audit trail.
 - Replaced complex 35k line eScript assignment manager with Siebel 7.8 Assignment Manager (20% of upgrade budget).
- Compare to features like 7.7+ native browser back/forward buttons, screen homepages, automatic saving of file attachments and others that come for free with the new Siebel version.
- During planning when you look for opportunities to return to OOTB don't be surprised when you can't identify tons of places where you can actually remove your customizations - but you should find some.

Project Planning: How To Make Your Upgrade Deadline Commitment

- Perform upgrade and get essential functionality to go live accomplished first.
- Put all enhancements on hold until you are sure you have time to fit them in and make sure it is understood that enhancements will only be done if time allows.
- Put opportunities to return to OOTB such as X_ADDR_LINE_2 in the parking lot and only do them if your timeline allows toward the end of the project.
- Put things that have nothing to do with the upgrade (that really should be done anyway) in the same parking lot and only do them if your timeline allows.
- Need a project manager overseeing these decisions since left to their own devices developers will “always” do the last two items even if it means they might jeopardize the project timeline.

Development Upgrade Expectations

- Application may not launch after upgrade due to one or more configuration errors which will have to be fixed.
- Extensively modified OOTB applets will be mangled.
- Screen/view layout will require touchups.
- BusComp links and joins will require fixes.
- SQL errors will be seen until buscomps/tables are straightened out.
- Scripting may require changes even on Siebel 7 -> 8.0 upgrades.
- EIM tables may have new required columns and old IF tables don't exist anymore.
- Integration objects might have different XML schemas until they are touched up.
- Actuate reports will need to be recompiled but custom Actuate VB can require a lot more work.
- Most existing customers don't like 7.7-8.0 removal of page tabs from main screen list views (aggregate view require drilldowns to see tabs).

Other Tasks To Consider

- Implementing new modules like 7.8 Order Management can be a very large project in itself.
- Migration from Siebel 6.x or SEA to SIA requires two steps.
- Pick the right version. 7.8 or 8.0?
- Migrate to new ST eScript engine or stay with old T engine?
- Migrate database to UNICODE?
- Migrate to UTC date / times?
- Change database vendors?

How To Prepare For a Successful Siebel 8.0 Upgrade

- Determine upgrade goals and upgrade strategy.
- Read and understand the Siebel Upgrade Guide and supporting information from Support Web.
- Be sure to check System Requirements and Supported Platforms.
- Do at least one Siebel 8.0 dev upgrade during your planning phase so that you will understand what you are doing and have some experience doing it.
- Engage someone who knows the Siebel upgrade and knows the version of Siebel you are upgrading to.
- Do careful and detailed planning as part of your upgrade assessment to develop roadmap and staffing plan for upgrade project.

Questions and Answers

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<http://www.ponderproserve.com/support.html>