



Streamline test data management and deliver reliable application upgrades and enhancements

IBM **Information Management** software

## IBM Optim Test Data Management Solution for Siebel Customer Relationship Management

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### Highlights

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- **Extract subsets of Siebel® data to build realistic, “right-sized” test databases**
- **Speed iterative testing tasks with reusable processing definitions to ensure consistency**
- **De-identify test data to comply with privacy policies and regulations**
- **Extract subsets of data consistently and accurately across the extensive Siebel data model**
- **Edit test cases to force error and boundary conditions that verify exception handling**
- **Automate test result comparisons to identify differences and anomalies**

### How can you deliver reliable Siebel enhancements at a lower cost?

Your business users depend on the accuracy, reliability and quality of your Siebel® CRM applications to drive your corporate initiatives and revenue goals. Siebel sites are striving to speed the deployment of application upgrades and enhancements, while staying within tight budgets. So how can you improve application testing processes and reduce costs, without sacrificing quality?

The IBM® Optim™ Test Data Management Solution for Siebel® Customer Relationship Management offers proven technology to optimize and automate processes that extract and manage test data. Developers and quality assurance testers can create realistic, “right-sized” Siebel test databases, mask sensitive data to protect privacy, edit test data to force error conditions and compare “before” and “after” test results with

speed and accuracy. You can save valuable processing time and ensure a consistent test environment.

### Create realistic Siebel test environments

Creating a realistic and consistent Siebel development and testing environments is the first step in delivering reliable enhancements and upgrades. One approach is to clone the entire production database, but cloning is costly and time consuming. A more effective alternative is to create referentially intact subsets of related Siebel test data to provide coverage for all application paths.

Optim’s test data management capabilities allow you to accurately capture the Siebel data you need for testing. You can choose data from specific business objects, like invoices, service requests and marketing campaigns. Create referentially intact subsets of complex relational data with

ease – even with the most complex Siebel applications and underlying data model. You define the precise sets of object data to extract using simple or complex selection criteria and save the data to a reusable files. For example, it is easy to populate a test environment with related information on customer accounts, orders and service requests within a specific geographic location. Depending on data volumes, you can select insert or load options to efficiently populate or refresh test databases.

### **Protect data privacy**

Optim also offers a variety of methods for de-identifying test data to protect privacy and support regulatory compliance initiatives. Siebel sites can choose the most appropriate methods for their needs. Customer identification numbers can be masked by simply applying a random or sequential number function, or replacing customer names with a predefined string of text. Training organizations or offshore development groups can consistently protect data privacy for accounts, contacts and households. With key propagation capabilities, Optim preserves the referential integrity of information, allowing Siebel sites to use realistic test data and produce valid test results, while complying with privacy regulations.

Optim's more sophisticated capabilities include built-in lookup tables for masking names and addresses, as well as a Transformation Library™ for masking Social Security numbers, credit card numbers and e-mail addresses. You can also incorporate site-specific data transformation routines, integrating the processing logic from multiple related applications and databases. Implementing Optim enables Siebel sites to deploy a single data masking solution across applications, databases and platforms, to help protect all enterprise data.

### **Force error conditions**

Another way to optimize your testing environment is to create targeted test scenarios designed to trigger error conditions. A simplistic, one-dimensional view of your test data is insufficient. Optim provides comprehensive capabilities for editing test data from multiple tables. The ability to browse and edit data in its relational context offers a better understanding of the database structure and the associated data.

Practical, intuitive commands simplify editing and preserve data integrity. A powerful undo capability allows you to reverse an unlimited number of

changes. A sophisticated audit facility tracks changes and saves details for review by authorized users. Optim respects all database-defined security and provides for additional restrictions as required. You can even use Optim to maintain the accuracy of your production data, while remaining in complete control.

### **Automate data comparisons to analyze test results**

The ability to analyze and validate test results is critical for ensuring application quality. The database size and complexity significantly increase the effort involved in examining test results. After a test run, Optim analyzes the “before” and “after” images of the test data, automatically detects any differences and presents the results in a concise report. You can browse comparison results in a highlighted display for easy analysis – saving countless hours.

Optim improves all phases of application testing. An intuitive, online interface and full-function browse utility eliminate time-consuming and error-prone table-by-table comparisons. Optim not only identifies the expected database changes, but also uncovers differences that might otherwise go

undetected. Those application issues that are hidden or difficult to trace can be identified quickly and resolved at a fraction of the cost.

### **Manage custom Siebel data relationships**

Optim's Relationship Engine™ represents proven technology that identifies, navigates and intelligently processes Siebel data relationships, making it easy to define, retrieve and manipulate complex, referentially intact sets of data from multiple tables. Optim supports the relationships and database structure as defined in the Siebel Repository. Optim also provides the unique capability to define Siebel custom extension tables/relationships, providing more flexibility for incorporating application logic into your testing processes.

### **Implement a single, scalable solution**

Optim provides a consistent data management methodology that scales to meet your application development and testing needs. Optim streamlines Siebel testing processes for faster deployment of new upgrades and enhancements. Now it takes less time to deliver superior Siebel application performance and reliability, while lowering costs throughout the

application lifecycle. These benefits quickly translate into maximum business value from your Siebel investment.

Optim supports the leading databases and platforms used at Siebel sites: IBM DB2®, Oracle®, Microsoft® SQL Server®, Microsoft Windows® and UNIX®. Expanding from Siebel across the enterprise, Optim supports additional databases and platforms, including Sybase®, IBM Informix®, IBM IMS™, IBM VSAM®, IBM z/OS® and Linux®. And it supports the key packaged ERP and CRM applications in use today: Oracle® E-Business Suite, PeopleSoft® Enterprise, JD Edwards® EnterpriseOne and Amdocs® CRM, as well as your custom and packaged applications.

### **Speed time to value**

Optim is designed to promote a successful implementation, helping you quickly achieve measurable benefits. IBM's experienced Professional Services staff provides hands-on technical training, knowledge transfer and real-world examples to help you realize immediate benefits from implementing Optim. Define your objectives related to testing Siebel enhancements and upgrades and then quickly apply Optim test data management processes and technology.

You can take advantage of IBM's ongoing training and Optim's advanced capabilities to fine-tune your deployment.

### **About IBM Optim**

IBM® Optim™ enterprise data management solutions focus on critical business issues, such as data growth management, data privacy compliance, test data management, e-discovery, application upgrades, migrations and retirements. Optim aligns application data management with business objectives to help optimize performance, mitigate risk and control costs, while delivering capabilities that scale across enterprise applications, databases and platforms. Today, Optim helps companies across industries worldwide capitalize on the business value of their enterprise applications and databases, with the power to manage enterprise application data through every stage of its lifecycle.

### **For more information**

To learn more about IBM Optim enterprise data management solutions, contact your IBM sales representative or visit: [www.optimsolution.com](http://www.optimsolution.com).



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