Rational. SA/ERP Metadata Explorer

IBM

SA/ERP for Siebel User Guide

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Table of Contents

Chapter

1

Introduction

Introduces the SA/ERP for Siebel Extractor and explains how it works

Welcome to the SA/ERP for Siebel Extractor, the add-on to the SA/ERP metadata exploration tool, that enables extraction of metadata for the Siebel environment.

This manual describes how to install the Siebel Extractor, how it interacts with the main SA/ERP product and describes the product features in detail.

What is the SA/ERP for Siebel Extractor?

The SA/ERP for Siebel Extractor is an optional add-on to the SA/ERP metadata exploration tool. The application is used to extract metadata from a Siebel database for storage in the SA/ERP repository.

The Siebel Extractor reads the required metadata from a group of Siebel database tables. These tables contain the metadata that describes the full set of tables found in the Siebel system. The extracted metadata is then written to the SA/ERP repository. Once this extraction and loading process has completed, the standard SA/ERP product can be used to explore the Siebel data structures.

The Siebel Extractor reads the metadata for Tables (e.g. 'EIM' and 'S_' tables), Columns, Relationships, Indexes and the associated Siebel Business Objects and Business Components.

Once the metadata is extracted and stored in the SA/ERP repository, then the full range of SA/ERP features for browsing, sub-setting and exporting to third-party tools are available.

Installation

Describes how to install and configure the software

Before you can use SA/ERP for Siebel Extractor, the SA/ERP product proper must be installed and configured. The Siebel Extractor should be installed on the same computer as SA/ERP itself.

If SA/ERP is not already installed, please see the 'SA/ERP Getting Started Guide' for details of how to achieve these tasks.

When configuring SA/ERP, select the Source System Type in Step 3 of the Repository Wizard to 'Other' (see the 'SA/ERP Getting Started Guide', page 10 for more information on configuring SA/ERP).

Siebel Extractor system requirements

Before installing, ensure the computer where the Siebel Extractor is being installed meets the minimum requirements: -

- 256 Megabytes of RAM

- 2 Megabytes of hard disk space for the Siebel Extractor Software

Installing the Siebel Extractor

The Siebel Extractor Set-up program (SETUP.EXE) controls the installation process. The other installation steps described below must be completed before running the Siebel Extractor

To install Siebel Extractor

Locate the Siebel Extractor setup.exe file and run this program.

Follow the instructions of the setup program through installation.

Configuring SA/ERP to work with the Siebel Extractor

Before using the Siebel Extractor, it is necessary to establish the connections to the two databases used to perform an extraction:

- The 'source' Siebel database. This is the location of the metadata that is to be extracted and loaded into the SA/ERP repository.

- The 'target' SA/ERP database. This is the database that will store the extracted Siebel metadata.

Both of these database connections need to be specified within the SA/ERP environment itself *before* the Siebel Extractor can be used. The Siebel Extractor uses the specified settings to connect to each database. A connection to the 'target' database (the SA/ERP Repository) will already have been configured when SA/ERP was installed. See 'Installing SA/ERP' in the 'SA/ERP Getting Started Guide' for more details. A connection to the Siebel database will also need to be configured before attempting the extraction.

The Siebel Extractor will need 'select' access rights to the following Siebel tables in order to perform the extraction of metadata:

S_REPOSITORY	S_FIELD
S_COLUMN	S_JOIN
S_TABLE	S_APPLICATION
S_BUSOBJ	S_SCREEN
S_BOCOMP	S_SCR_MENU_ITEM
S_BUSCOMP	S_SCREEN_VIEW
S_INDEX	S_VIEW
S_INDEX_COLUMN	

As with the connection to the SA/ERP database, connection to the Siebel database is achieved using Microsoft ADO (ActiveX Data Objects). If the Siebel database is not an Oracle or a SQL Server database, it will also be necessary to use the ODBC Data Source Administrator to configure an ODBC connection to the database.

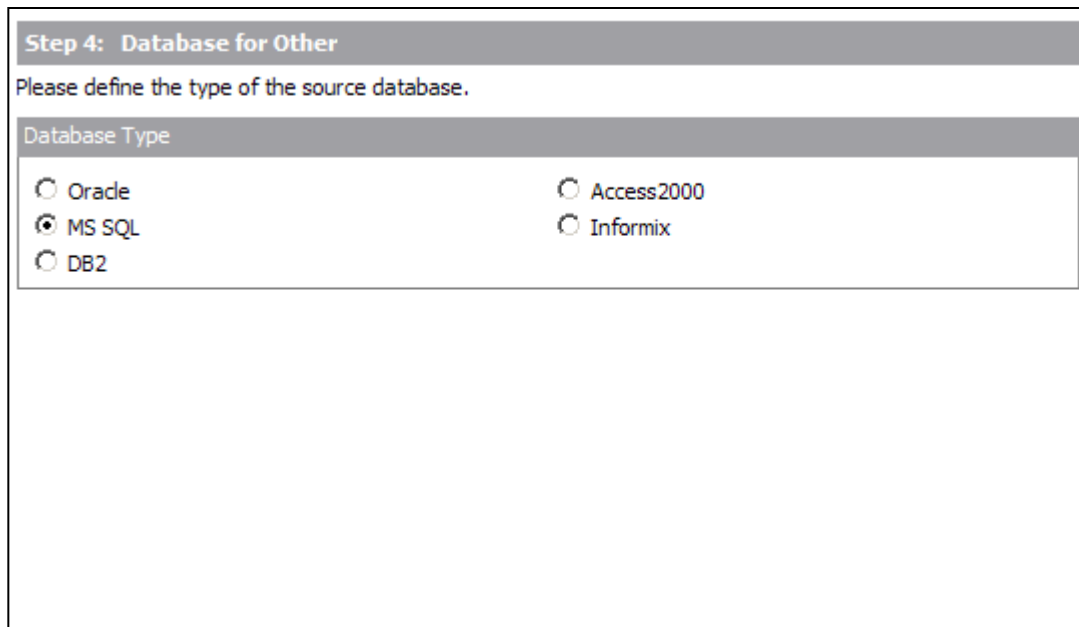## Configuring SA/ERP to connect to the Siebel Database

The SA/ERP 'Getting Started Guide' describes the steps for installing and configuring SA/ERP. This section describes the Siebel-specific steps you need to perform to complete the configuration.

Before performing these steps ensure that:

- SA/ERP has been installed (see 'Getting Started Guide', page 5)

- The SA/ERP Repository database has been created and the SA/ERP software has been configured to communicate with the Repository database (see 'Getting Started Guide', page 8 and onwards)

- That the 'Source System Type' on Step 3 of the Repository Wizard has been set to 'Other'

Choosing the Siebel database type

Now navigate to Step 4 of the SA/ERP Repository Wizard. This is where you record the Database type being used by the Siebel database.

Repository Wizard – Step 4 – specifying the Siebel database type

Select the radio button which corresponds to the database type on which the Siebel system has been installed.

Click the 'Next' button.

Entering the Siebel database connection settings

Step 5 of the Repository Wizard records the information required for SA/ERP to connect to the Siebel database.

Step 5: Other Database Connection

Please define and test the database connection of the source system.

Database Connection

|	
Database Alias:	SIEBELSOURCE ▼ New Edit
Database Username:	sa
Database Password:	
Table Owner:	dbo

Test Connection

Repository Wizard – Step 5 – Siebel Database Connection

1. The Database Alias dropdown list shows all the existing ADO connections previously configured. If this is a new SA/ERP installation, it will be necessary to create a new connection to the Siebel database. Click on the 'New' button to the right of the drop down to begin this process.

2. The 'Edit Connection Definition' form is now displayed. Enter an appropriate name for the connection in the 'Connection Definition name' field and click the 'OK' button. The ADO Data Link Properties form is then displayed.
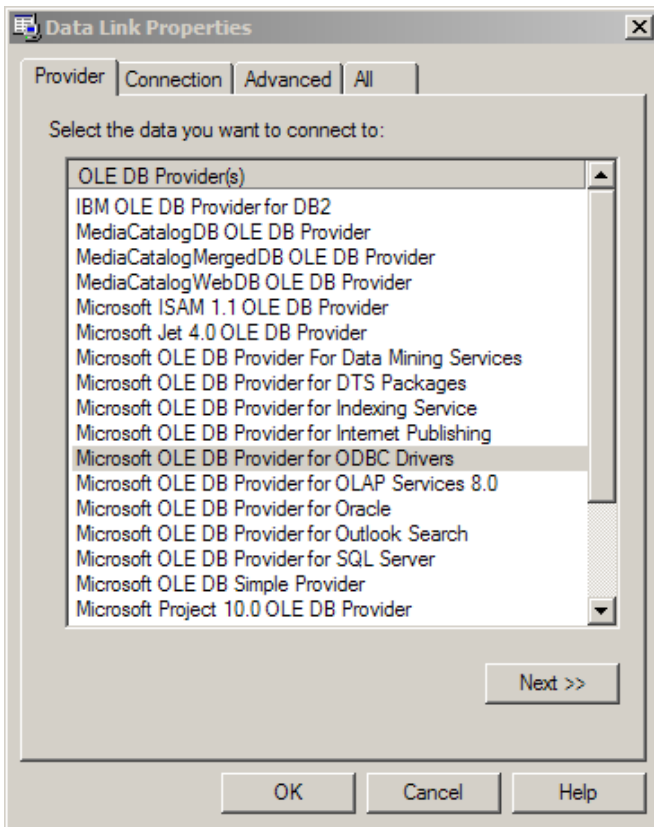
ADO Data Link Properties Form

3. If the database connection being created is Oracle, select 'Oracle Provider for OLE DB' from the list of Providers. If the database connection being created is SQL Server, select 'Microsoft OLE DB Provider for SQL Server'. For other database types select the 'Microsoft OLE DB Provider for ODBC Drivers' from the list of Providers. Now click the 'Next' button.

4. The Data Link Properties Connection tab is now displayed. The available fields on this tab will be dependant on the chosen Provider. The layouts for ODBC, Oracle and SQL Server are shown below.
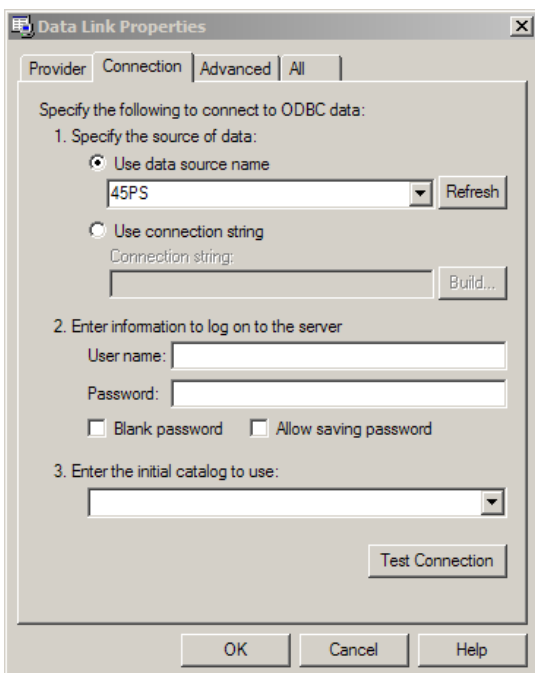
Data Link Properties 'Connection' tab for ODBC
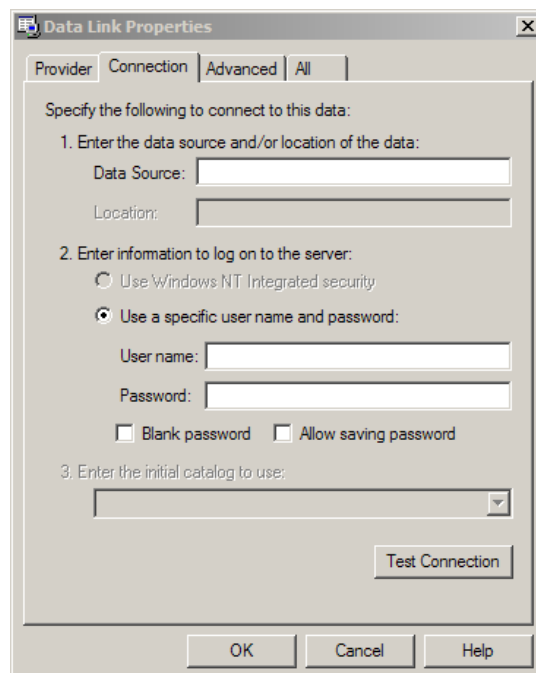
…for Oracle…
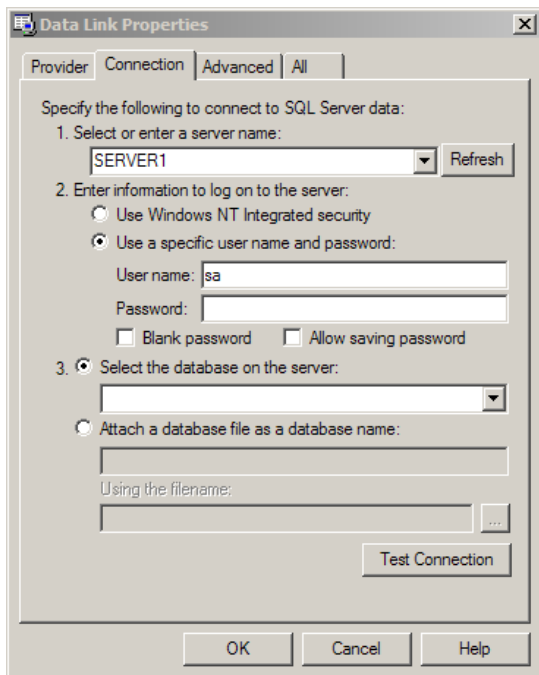
…and for SQL Server

5. For ODBC databases, from the 'Use data source name' drop down list, select the previously created ODBC connection for the Siebel database. For an Oracle database, in the 'Data Source' field, enter the connection string for connecting to the Oracle database. This will normally be the string used in the TNSNAMES file for connection to the database. For a SQL Server database, in the 'Select or enter a server name' field, enter or select the name of the Server where the database is located.

6. Enter a User name and Password. The User Name is a valid database User-id with 'select' access rights to the Siebel database. Alternatively, leave these fields blank and enter the User Name and Password in the Repository Wizard form. (Note: this is a database Username and Password – not a Siebel Application User Name and Password).

7. If a User name and Password were entered in the previous step, test the connection to the database by clicking the 'Test Connection' button.. If the connection is successful, click 'OK' to return to the Repository Wizard. (Note: this is a database Username and Password – not a Siebel Application Username and Password).

8. If not previously entered in the ADO configuration, enter a username and password for the database

9. If necessary, enter the Siebel Table Owner

Click the 'Test Connection' button to have SA/ERP check that the database can be accessed using the supplied information.

Click the 'Save' button to save all the settings entered during the Repository Wizard session. The SA/ERP configuration tasks are now complete. SA/ERP can now be closed down.   The next step is to use the SA/ERP for Siebel Extractor to perform the extraction of metadata from Siebel into the SA/ERP Repository. This is described in the next section.

Running the Siebel Extractor

When the SA/ERP for Siebel Extractor is started, the following form is displayed:
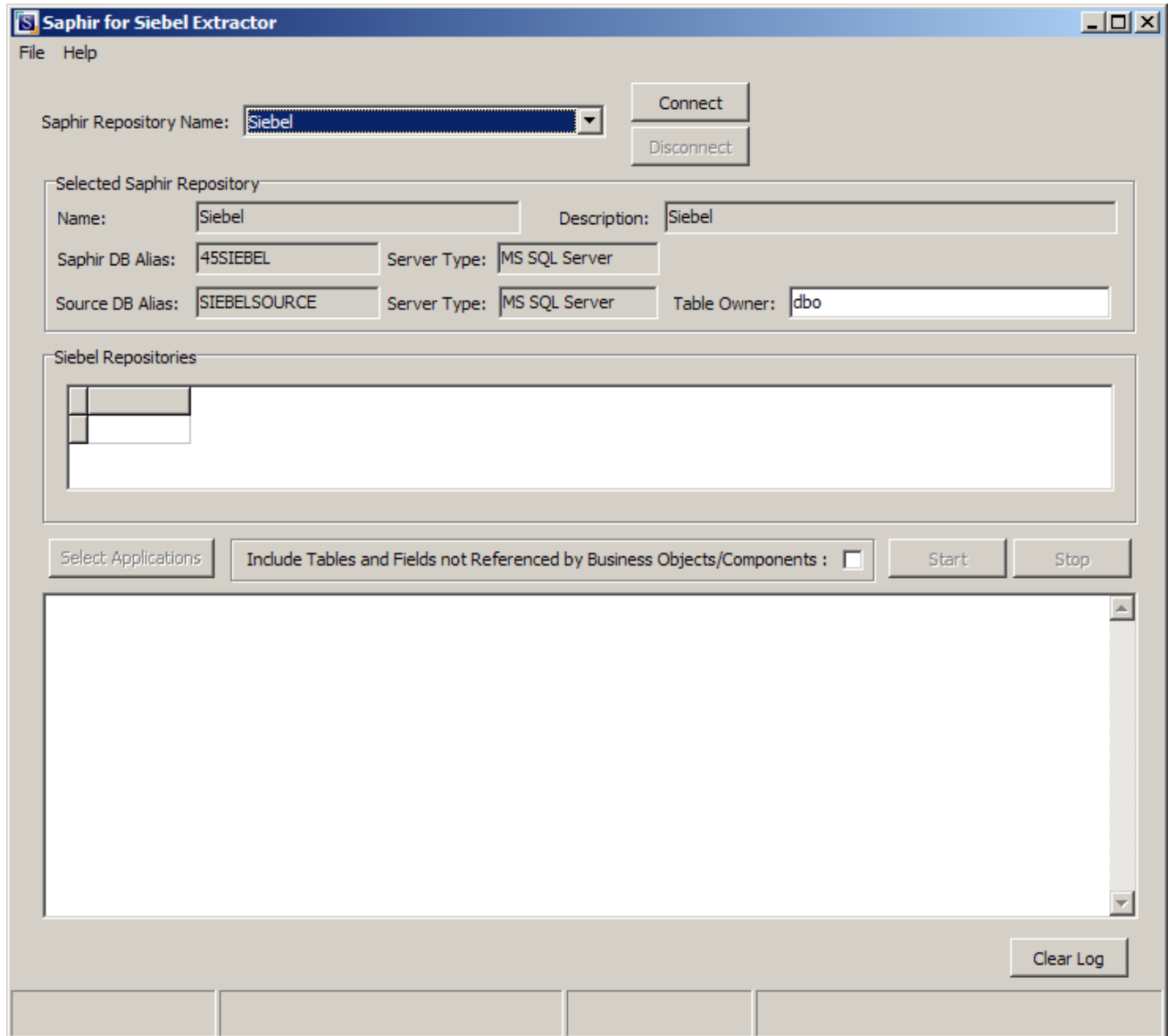
The Siebel Extractor form

1. Use the 'SA/ERP Repository Name' drop down list to choose the appropriate SA/ERP Repository and Siebel system. The drop down presents all Repositories of type 'Other' previously configured in SA/ERP.

2. Click the 'Connect' button to connect to the chosen system. When prompted, enter the appropriate user-id and password for each database to perform the connections.

After the connections have been established, details of the SA/ERP Repository database connection and the Siebel database connection are displayed for confirmation purposes.

Starting the metadata extraction process

After successfully connecting to the Siebel and SA/ERP databases, a list of available Siebel Repositories is displayed in the 'Siebel Repositories' grid. Each Siebel Repository describes a separate Siebel system and there may be one or more in the Siebel database.

Part of Siebel Extractor form after successful connection

Choose the Siebel Repository to be extracted by selecting the appropriate entry in the Siebel Repositories grid.

Options for influencing the Siebel metadata to be extracted

There are two options that can be used to influence the level of metadata extracted from Siebel:

Selection of Siebel Applications

A Siebel system is composed of a number of 'Applications' (e.g. Siebel Automotive, Siebel Consumer Sector…). Clicking the 'Select Applications' button displays the 'Select Siebel Applications' form which can be used to select those Siebel Applications to be shown in the SA/ERP Repository.

The form is displayed with a scrollable list of all the Siebel Applications available in the selected Siebel Repository. Use the Ctrl key and mouse click to select the applications to be included in the extraction.

Other form controls are:

- Cancel Selection: Cancel any selection of applications already made and return to the previous form

- Select All: Select All the available applications

- Clear Selection: Clear the application selections made so far

- Proceed with Selected Applications: Return to the previous form, ready to extract from Siebel
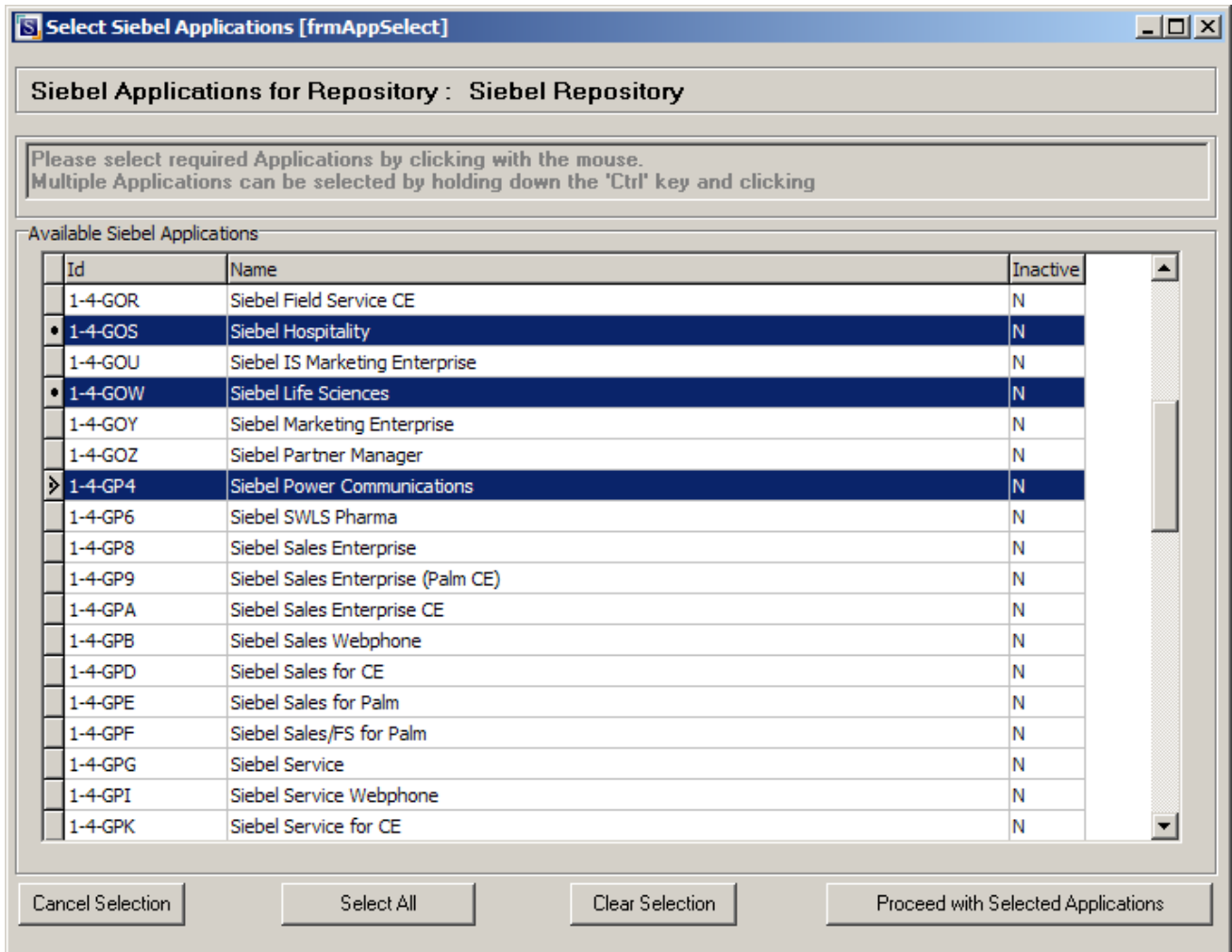
Siebel Application Selection Form

Inclusion/Exclusion of Tables and Fields not referenced by Business Objects

The Siebel Business Object and Business Component layer is a Siebel concept that insulates the User Interface (screens, applets, etc) from the Data Objects Layer (tables, columns, etc).

The check box 'Include Tables and Fields not Referenced by Business Objects/Components' can be used to exclude any base tables and fields that exist in the selected repository but are not actually used by any of the Business Components in the selected Siebel Repository.

The default state of this checkbox is 'off', meaning that, by default, only those Tables and Columns referenced by Business Components will appear in the extracted Siebel metadata.

Changing the state of the checkbox to being checked will mean that all Tables and Columns will appear in the extracted metadata.

Note that using the Siebel Application Selection feature described above will cause the 'Include Tables and Fields…' check box to be greyed out. This is because the selection of Applications will automatically exclude any tables/columns not referenced.

Running the Extraction

To start the actual extraction process:

1. Click the 'Start' button

2. A series of status messages are then displayed in the 'log' area of the Siebel Extractor screen.   The final message, 'Process Complete', shows that the extraction process has finished.

3. Close down the SA/ERP for Siebel Extractor and start SA/ERP in order to view the results of the extraction.

Viewing the metadata in SA/ERP

Explains how to use SA/ERP to explore the Siebel extracted metadata

T
he Siebel Extractor performs a series of SQL queries on the Siebel database to extract the metadata and then populate the SA/ERP repository.

Once the Siebel Extractor has been run to extract from a Siebel instance, the application can be closed. The SA/ERP product is then the vehicle for browsing the results. This chapter describes how to view the Siebel metadata in SA/ERP. Whilst this chapter is concerned with using SA/ERP to explore Siebel metadata, it is not a detailed description of the SA/ERP functionality. See the 'SA/ERP User Guide' for full details of the features outlined here.

Using the Model Overview to inspect Siebel metadata

Viewing Siebel metadata with the SA/ERP 'Model Overview' is exactly the same as viewing SA/ERP metadata for any other data source (e.g. SAP, PeopleSoft).

The normal SA/ERP features for drilling into a table structure, showing related tables, searching for tables or fields and building submodels are all available Please see the 'SA/ERP User Guide' for full details of these features.

Table Name △	Text	Table Class	SQL Table	Child Tabs	Parent Tabs
S_ACT_SKILL	Required Skill Type for Activity Assignment	TRANSP	S_ACT_SKILL	1	3
S_ACT_SKILL_IT	Required Activity Skill Detail	TRANSP	S_ACT_SKILL_IT	0	3
S_ACT_STEP	Recommended/Performed Steps for Activity	TRANSP	S_ACT_STEP	0	4
S_ACT_STEP_TYPE	Activity Step Type	TRANSP	S_ACT_STEP_TY	1	2
S_ACT_TIMESTAMP	Activity Work Time	TRANSP	S_ACT_TIMESTA	1	3
S_ACTION_ARG	Workflow Manager: Action Arguments	TRANSP	S_ACTION_ARG	0	3
S_ACTION_DEFN	Workflow Manager: Action Definitions	TRANSP	S_ACTION_DEFl	2	2
S_ACTIVITY_ATT	Activity File Attachment	TRANSP	S_ACTIVITY_AT	1	3
S_ACTIVITY_IF	Activities Interface Table	TRANSP	S_ACTIVITY_IF	0	0
S_ACTIVITY1_IF	Activities Interface Table #1	TRANSP	S_ACTIVITY1_IF	0	0
S_ACTIVITY2_IF	Activities Interface Table #2	TRANSP	S_ACTIVITY2_IF	0	0
S_ACTPART_MVMT	Part Movements for an Activity	TRANSP	S_ACTPART_MV	2	7

Siebel tables in the SA/ERP Model Overview

Viewing Siebel Business Components

Business Components are an important element of the Siebel metadata. Details of these Business Components are extracted from the Siebel database and stored in the SA/ERP repository as 'Views'.
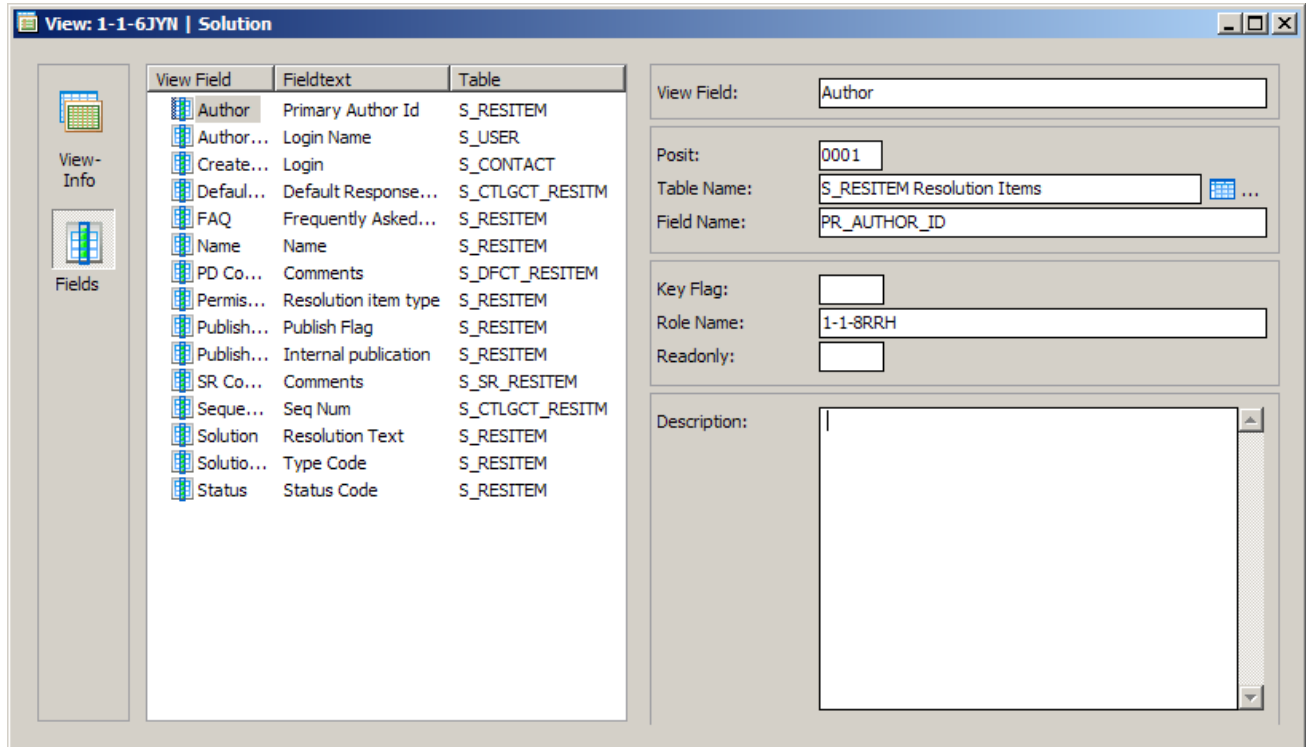

A Siebel Business Component displayed in SA/ERP

For each Business Component field, the following is shown:

View Field   The Field name of the Business Component field

Fieldtext   The Base table column 'logical' name that the Field maps onto

Table   The Base table for the column referenced under 'Fieldtext'

Understanding the Application Hierarchy

The SA/ERP Application Hierarchy presents the Siebel Applications and Business Objects extracted from the Siebel instance in a tree hierarchy. Each Application can be opened to show the Business Objects owned by that Application, and in turn, each Business Object node can be opened to display the Business Components that are owned by the Business Object.
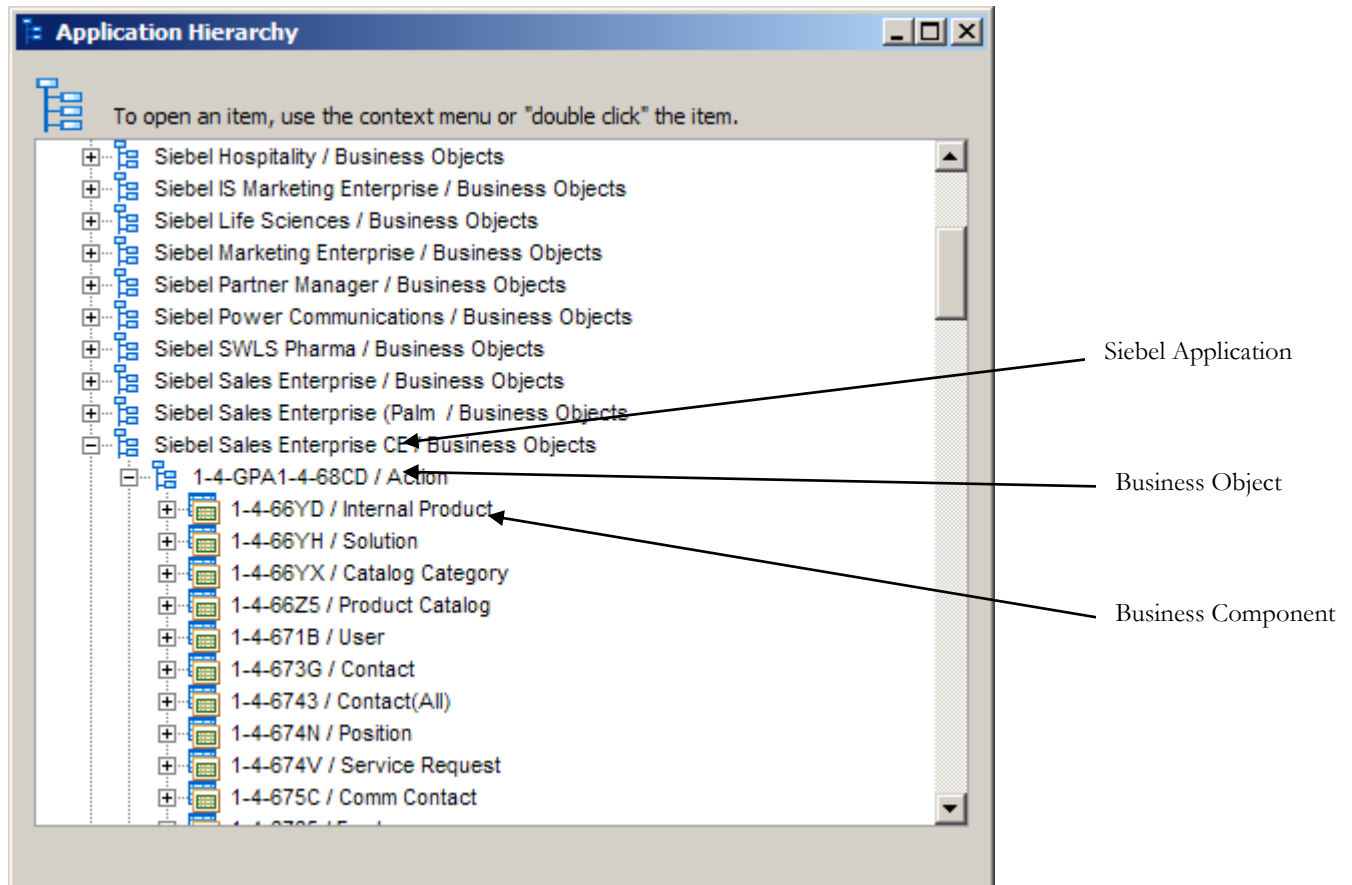
Business Object opened in the Hierarchy to show Business Components

Double-clicking on a given View (Business Component) will show full details of that object (see 'Viewing Seibel Business Components' above).

Index

Application Hierarchy, 15
Business Components, 14
Business Objects, 11, 15
SA/ERP
    Configuring to connect to Siebel, 4
    Configuring to work with Siebel, 4
Set-up, 3
Siebel Applications, 10, 15
Siebel Extraction

    Running, 10
Siebel Extractor
    Described, 2
    Installation, 3
    Running, 9
Siebel metadata
    viewing in SA/ERP, 13
System requirements, 3