



Informatica® Data Archive  
6.4.3

# Siebel Applications Accelerator Reference

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# Preface

The *Data Archive Siebel Applications Accelerator Reference* is written for Database Administrators (DBAs) that perform key tasks involving data backup, restore and retrieval using the Informatica Data Archive User Interface (UI). This guide assumes you have knowledge of your operating systems, relational database concepts, and the database engines, flat files, or mainframe systems in your environment.

## Informatica Resources

### Informatica Network

Informatica Network hosts Informatica Global Customer Support, the Informatica Knowledge Base, and other product resources. To access Informatica Network, visit <https://network.informatica.com>.

As a member, you can:

- Access all of your Informatica resources in one place.
- Search the Knowledge Base for product resources, including documentation, FAQs, and best practices.
- View product availability information.
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- Find your local Informatica User Group Network and collaborate with your peers.

### Informatica Knowledge Base

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## Informatica Product Availability Matrixes

Product Availability Matrixes (PAMs) indicate the versions of operating systems, databases, and other types of data sources and targets that a product release supports. If you are an Informatica Network member, you can access PAMs at

<https://network.informatica.com/community/informatica-network/product-availability-matrices>.

## Informatica Velocity

Informatica Velocity is a collection of tips and best practices developed by Informatica Professional Services. Developed from the real-world experience of hundreds of data management projects, Informatica Velocity represents the collective knowledge of our consultants who have worked with organizations from around the world to plan, develop, deploy, and maintain successful data management solutions.

If you are an Informatica Network member, you can access Informatica Velocity resources at <http://velocity.informatica.com>.

If you have questions, comments, or ideas about Informatica Velocity, contact Informatica Professional Services at [ips@informatica.com](mailto:ips@informatica.com).

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## Informatica Global Customer Support

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<http://www.informatica.com/us/services-and-training/support-services/global-support-centers>.

If you are an Informatica Network member, you can use Online Support at <http://network.informatica.com>.

# CHAPTER 1

## Start Here

This chapter includes the following topic:

- [Data Archive Overview, 8](#)

## Data Archive Overview

When your organization purchases a license to use Informatica Data Archive, you get licenses for one or more Data Archive Modules. Each Module contains one or more Entities, which enable Archives to manage transaction tables used by a particular ERP application or module.

## Worksheets and Business Rules

### Worksheets

Entities have parameters that determine the records that will be archived and purged. Complete the worksheets in this section to determine the Entity's parameters. When you finish, you are ready to begin using Data Archive.

### Business Rules

This guide contains explanations of the Business Rules encapsulated in the Entity, with recommended workarounds for rules that have exceptions. This information can provide insight into methods about using Data Archive Business Rules to suit your business needs and “archive and purge” strategy. Both your user community and application developers are likely to find this information useful.



## CHAPTER 2

# Accounts

This chapter includes the following topics:

- [Accounts Overview, 9](#)
- [Worksheet, 9](#)

## Accounts Overview

Accounts play a critical role in defining the Siebel-owning companies' positional hierarchy. This includes mapping all regions and divisions into a hierarchy that is reflective of the companies reporting structure. In a typical Siebel implementation, hundreds of Account records makeup divisions, subdivisions, regions, etc. These records should never be archived from a Clients production database. Account records contain information about people with whom the client enters into business. Account records are one of the most highly transacted records.

## Worksheet

### Business Rules: Summary Information

System: Data Archive

Subsystem: Accounts

Cycle Name:

Cycle Date:

Parameter	Definition	Required?	Default	Your Organization's Value
p_org_id	Organization	No	NULL	
p_period_to	Last Update Date (LAST_UPD)	Yes	NULL	

Accounts that meet all of the following criteria will be considered inactive and are candidates for archive and purge process.

- The account is not related to any agreements.
- The account is not related to any agreement items.
- The account is not related to any Activities.
- The account is not related to any Call Lists.
- The account is not related to Assets as primary account.
- The account is not related to Assets.
- The account is not related to any Marketing Offers.
- The account is not related to any of the Quotes.
- The account is not related to any of the Quote Terms.
- The account is not related to Activities.
- The account is not related to any Event Travel Plans.
- The account is not related to any Event Locations.
- The account does not participate in Forecast Line Item.
- The account does not participate in Compensation Deal Credit.
- The account does not participate in Transactions that can be compensated.
- The account is not an Inventory Location.
- The account is not an Organization for any other Inventory Locations.
- The account is not related to Invoices.
- The account is not related to Opportunities.
- The account is not associated with Part Repairs.
- The account is not part of an Internal Organization.
- The account is not associated with Change Requests.
- The account is not associated with a Marketing Event or an Activity.
- The account is not associated with an Event Organization.
- The account is not associated with an Event Equipment Requirement.
- The account is not associated with a Service Request.
- The account is not associated with Invoice Charges.
- The account is not associated with Orders.

### Exception Description

If an Account does not satisfy any of the above Business Rules, it should not be a candidate for archive and purge.

### Exception Workaround

Informatica does not make any adjustments to this rule since it does not support archiving and purging information related to the Account if it is participating in any of the Business Rules.

## CHAPTER 3

# Activities

This chapter includes the following topics:

- [Activities Overview, 11](#)
- [Worksheet, 11](#)

## Activities Overview

Activities are the tasks and actions performed to maintain relationships with customers. These customers are companies or individuals with which your company conducts business. It archives and purges the inactive activities of companies or individuals with which the company conducts business.

## Worksheet

### Business Rules: Summary Information

System: Data Archive

Subsystem: Activities

Cycle Name:

Cycle Date:

Parameter	Definition	Required?	Default	Your Organization's Value
p_org_id	Organization	No	NULL	
p_period_to	Actual Activity End Date (TODO_ACTL_END_DT)	Yes	NULL	
p_act_status	Activity Status Code	No	NULL	

Activities that meet all of the following criteria are considered inactive and are candidates for archive and purge process.

- Activities status is set to Cancelled, Done, Declined, Completed, or Closed.

- Status of an Activity is Done, which indicates the Activity is complete.
- Activity related Quote status is set to Accepted, Approved, or Rejected.
- Status of an Activity related to another Activity is set to Cancelled, Done, Declined, Completed, or Closed.
- Activity related Invoice status is set to Paid, Written Off, Cancelled, Closed, or Rejected.
- Activity related Order status is set to Closed, Cancelled, Rejected, or Complete.
- Activity related Order Item status is set to Approved or Booked.
- Activity is not associated with a Contact.
- Activity associated Campaign status is Completed or Cancelled.
- Activity associated Opportunity status is Accepted or Rejected.
- Activity is not associated with an Account.
- Activity associated Product Defect status is Closed or Verified.

### Exception Description

If an Activity does not satisfy any of the above Business Rules, it should not be a candidate for archive and purge.

### Exception Workaround

Informatica does not make any adjustments to this rule since it does not support archiving and purging information related to the Activity if it is participating in any of the Business Rules.

## CHAPTER 4

# Assets

This chapter includes the following topics:

- [Assets Overview, 13](#)
- [Worksheet, 13](#)

## Assets Overview

Assets in Siebel are considered as an instance of a Siebel product. Asset records are rarely transacted. However, they are referenced often in terms of agreements, entitlement, and warranty coverage. Assets are a core component of Siebel's Service module.

## Worksheet

### Business Rules: Summary Information

System: Data Archive

Subsystem: Assets

Cycle Name:

Cycle Date:

Parameter	Definition	Required?	Default	Your Organization's Value
p_org_id	Organization	No	NULL	
p_period_to	Last Update Date (LAST_UPD)	Yes	NULL	

Assets that meet all of the following criteria will be considered inactive and are candidates for archive and purge process:

- Asset status is set to a status other than Active.
- Asset is part of an Order Item and the status of that Order Line Item is Closed, Cancelled, or Rejected.

- Asset is part of an Opportunity and the status of that Opportunity line is Lost, or Rejected.
- Asset is not part of an Invoice Item.
- Asset is not part of an Entitlement Item.
- Asset is part of an Auction Item and the status of the Auction Item is Closed.

#### Exception Description

If an Asset does not satisfy any of the above Business Rules, it should not be a candidate for archive.

#### Exception Workaround

Informatica does not make any adjustments to this rule since it does not support archiving and purging information related to the Asset if the status is Active.

## CHAPTER 5

# Change Request

This chapter includes the following topics:

- [Change Request Overview, 15](#)
- [Worksheet , 15](#)

## Change Request Overview

Change request (CR) is a formal report or recommendation aimed at correcting a defect or adding an improvement to a product. Such products can include hardware, software, manufactured goods and capital equipment. Siebel Quality can manage multiple types of change requests, including enhancement requests and product defect reports.

## Worksheet

### Business Rules: Summary Information

System: Data Archive

Subsystem: Change Request

Cycle Name:

Cycle Date:

Parameter	Definition	Required?	Default	Your Organization's Value
p_org_id	Organization	No	NULL	
p_period_to	Last Update Date (LAST_UPD)	Yes	NULL	
p_defect_type	Defect Type	No	NULL	

Parameter	Definition	Required?	Default	Your Organization's Value
p_defect_area	Defect Area	No	NULL	
p_defect_sub_area_cd	Defect Sub Area	No	NULL	

Change Requests that meet all of the following criteria will be considered inactive and are candidates for archive and purge process.

- Change Request status is set to Closed or Verified.
- Change Request is not part of a Service Request.

#### Exception Description

If a Change Request does not satisfy any of the above Business Rules, it should not be a candidate for archive and purge.

#### Exception Workaround

Informatica does not make any adjustments to this rule since it does not support archiving and purging information related to the Change Request if it is participating in any of the Business Rules.



## CHAPTER 6

# Contacts

This chapter includes the following topics:

- [Contacts Overview, 17](#)
- [Worksheet , 17](#)

## Contacts Overview

Contacts are all persons that come in contact with the Siebel application, including a person or individual involved in the sales, service, or marketing process. They are also users of the Siebel system, employees within the enterprise organization, or partner users of the Siebel application. Contacts in Siebel support many groups and functions across the enterprise. Contacts are some of the most highly transacted records.

## Worksheet

### Business Rules: Summary Information

System: Data Archive

Subsystem: Contacts

Cycle Name:

Cycle Date:

Parameter	Definition	Required?	Default	Your Organization's Value
p_org_id	Organization	No	NULL	
p_period_to	Last Update Date (LAST_UPD)	Yes	NULL	

Contacts that meet all of the following criteria are considered inactive and are candidates for archive and purge process:

- Contact has related Assets and the status of the Assets is not Active.

- Contact has related Campaigns and the status of the Campaigns is Rejected or Completed.
- Contact has related Agreements and the status of the Agreements is Expired, Cancelled, or Inactive.
- Contact has related Quotes and the status of the Quotes is Expired or Rejected.
- Contact has related Activities and the status of the Activities is Cancelled, Done, Declined, Completed, or Closed.
- Contact is not related to any Entitlements.
- Contact has related Fulfillment Requests and their status is Cancelled or Done.
- Contact is part of an Event and the status of the Event is Cancelled.
- Contact is not related to any Travel Plan for any of the Events.
- Contact is not related to any Event Reviews.
- Contact is not related to any Event Vendor Reviews.
- Contact is related to any Event Location with a status of Inactive or Retired.
- Contact is related to Invoices with a status of Cancelled, Rejected, or Closed.
- Contact is part of any of the Billing Contacts for the Invoices.
- Contact is related to an Opportunity; then the Opportunity which is Rejected.
- Contact is related to any of the Part Repairs; and all of them are marked with a Closed status.
- Contact is related to any of the Partner Program Applications; and their status is Rejected.
- Contact is related to a Service Request; which has a Closed or Cancelled status.

### Exception Description

If a Contact does not satisfy any of the above Business Rules, it should not be a candidate for archive and purge.

### Exception Workaround

Informatica does not make any adjustments to this rule since it does not support archiving and purging information related to the Contact if it is participating in any of the Business Rules.

## CHAPTER 7

# Invoices

This chapter includes the following topics:

- [Invoices Overview, 19](#)
- [Worksheet, 19](#)

## Invoices Overview

An invoice may be considered as receivable or payable for the company. It may be generated to bill for an order, a project, a part repair, an agreement, a service request or an activity for products or services. Items on the invoice may be reconciled with one or more other entities as well. A payment may be made for one or more Invoices, and an invoice may be paid through one or more payments.

## Worksheet

### Business Rules: Summary Information

System: Data Archive

Subsystem: Invoices

Cycle Name:

Cycle Date:

Parameter	Definition	Required?	Default	Your Organization's Value
p_period_to	Fully Paid Date (INVC_FULLY_PAID_DT)	Yes	NULL	
p_org_id	Bill to Account Organization	No	NULL	

Invoices that meet all of the following criteria will be considered inactive and are candidates for archive and purge process:

- Invoice status is set to Cancelled, Closed or Rejected.

- Invoice is related to a Service Request and its status is set to Closed or Cancelled.
- Invoice is related to an Order and its status is set to Closed, Cancelled, Rejected, or Complete.

#### Exception Description

If an Invoice does not satisfy any of the above Business Rules, it should not be a candidate for archive and purge.

#### Exception Workaround

Informatica does not make any adjustments to this rule since it does not support archiving and purging information related to the Invoice if it is participating in any of the Business Rules.

## CHAPTER 8

# Opportunities

This chapter includes the following topics:

- [Opportunities Overview, 21](#)
- [Worksheet, 21](#)

## Opportunities Overview

A Sales Opportunity represents a unique potential revenue-producing event related to an account. A Sales Opportunity can be a type of Product, Service, Hosted revenue or a combination thereof. The Sales Rep creates an Opportunity in Siebel when information is received for a qualified Sales Opportunity within their territory. Products and services may be added or priced to an opportunity.

## Worksheet

### Business Rules: Summary Information

System: Data Archive

Subsystem: Opportunities

Cycle Name:

Cycle Date:

Parameter	Definition	Required?	Default	Your Organization's Value
p_org_id	Organization	No	NULL	
p_period_to	Last Update Date (LAST_UPD)	Yes	NULL	
p_sales_stg	Sales Stage	No	NULL	

Parameter	Definition	Required?	Default	Your Organization's Value
p_sales_mthd	Sales Method	No	NULL	
p_revn_type	Revenue Type	No	NULL	

Opportunities that meet all of the following criteria will be considered inactive and are candidates for archive and purge process.

- Opportunities status is set to Won or Lost.

### Exception Description

If an Opportunity does not satisfy any of the above Business Rules, it should not be a candidate for archive and purge.

### Exception Workaround

Informatica does not make any adjustments to this rule since it does not support archiving and purging information related to the Opportunity if it is participating in any of the Business Rules.

## CHAPTER 9

# Orders

This chapter includes the following topics:

- [Orders Overview, 23](#)
- [Worksheet , 23](#)

## Orders Overview

An order is a commitment on part of the customer to purchase products and services at a specific price. Orders can be generated by sales people from quotes, or may be created directly by call center agents and sales administrators. Orders can be created and placed all at once, or developed in stages as the customer clarifies the configuration of the items, requests availability, payment information, shipping information, and other details.

## Worksheet

### Business Rules: Summary Information

System: Data Archive

Subsystem: Orders

Cycle Name:

Cycle Date:

Parameter	Definition	Required?	Default	Your Organization's Value
p_org_id	Organization	No	NULL	
p_period_to	Order Date (ORDER_DT)	Yes	NULL	

Parameter	Definition	Required?	Default	Your Organization's Value
p_order_type	Order Type	No	NULL	
p_currency_cd	Currency Code	No	NULL	

Orders that meet all of the following criteria will be considered inactive and are candidates for archive and purge process.

- Order status is set to Closed, Cancelled, Rejected, or Complete.
- Order associated Invoice status is Paid, Written Off, Cancelled, Closed, or Rejected.
- Order is associated to an Order Item which in turn is associated to an Activity which is associated to an Invoice whose status is Paid, Written Off, Cancelled, Closed, or Rejected.

#### Exception Description

If an Order does not satisfy any of the above Business Rules, it should not be a candidate for archive and purge.

#### Exception Workaround

Informatica does not make any adjustments to this rule since it does not support archiving and purging information related to the Orders if it is participating in any of the Business Rules.



# CHAPTER 10

## Quotes

This chapter includes the following topics:

- [Quotes Overview, 25](#)
- [Worksheet , 25](#)

## Quotes Overview

A quote is an offer to a customer for specific products and services at a specific price. Quotes can be generated by employee, end users such as call center sales representatives, by customers or by a channel partners. Quotes have plan and rate information provided to a client or partner. Quotes in Siebel provide limited policy information such as effective end dates, policy term, and contract state.

## Worksheet

### Business Rules: Summary Information

System: Data Archive

Subsystem: Quotes

Cycle Name:

Cycle Date:

Parameter	Definition	Required?	Default	Your Organization's Value
p_org_id	Organization	No	NULL	
p_period_start	Effective Start Date (EFF_START_DT)	No	NULL	
p_period_to	Effective Due Date (DUE_DT)	Yes	NULL	

Quotes that meet all of the following criteria will be considered inactive and are candidates for archive and purge process.

- Quote status is set to Expired or Rejected.
- Quote related Opportunity status is set to Lost or Rejected.
- Quote related Order status is set to Closed, Cancelled, Rejected, or Complete.

### Exception Description

If a Quote does not satisfy any of the above Business Rules, it should not be a candidate for archive and purge.

### Exception Workaround

Informatica does not make any adjustments to this rule since it does not support archiving and purging information related to the Quote if it is participating in any of the Business Rules.

# CHAPTER 11

## Service Request

This chapter includes the following topics:

- [Service Request Overview, 27](#)
- [Worksheet , 27](#)

### Service Request Overview

Service Request (SR) is a request or inquiry from customers for information about the products or services offered by a business. Incoming inquiries from customers are logged as SRs. SRs have the following characteristics: an owner, a status, a commit date, and a priority level. They also usually have Activities associated with them that detail the actions taken to resolve the SR.

### Worksheet

#### Business Rules: Summary Information

System: Data Archive

Subsystem: Service Request

Cycle Name:

Cycle Date:

Parameter	Definition	Required?	Default	Your Organization's Value
p_org_id	Organization	No	NULL	
p_sr_source	Source of an SR	No	NULL	
p_sr_type	Service Request Type	No	NULL	

Parameter	Definition	Required?	Default	Your Organization's Value
p_period_to	Service Request Close Date (ACT_CLOSE_DT)	Yes	NULL	
p_sr_priority	SR Priority	No	NULL	
p_sr_severity	SR Severity	No	NULL	
p_ignore_act_status	Ignore Service Request Activity status	No	NULL	
p_prod_id	Specific products	No	NULL	
p_prod_version	Product Version	No	NULL	
p_prod_active	Active Flag on Product Record	No	NULL	
p_prod_line	Product Line	No	NULL	

Service Requests that meet all of the following criteria will be considered inactive and are candidates for archive and purge process.

- Service Request status is set to Closed or Cancelled.
- Service Request related Activities are set to Completed, Closed, Cancelled, Declined, or Done.
- Service Request related Order status is Closed, Cancelled, Rejected, or Complete.
- Service Request related Quotes status is Rejected or Expired.
- Service Request is related to other Service Requests and none of them have a status set to Open or Pending.
- Service Request related Order Invoice status is Paid, Written Off, Cancelled, Closed, or Rejected.
- Service Request related Activity Invoice status is Paid, Written Off, Cancelled, Closed, or Rejected.
- Service Request related Order Item's Activity Invoice status is Paid, Written Off, Cancelled, Closed, or Rejected.
- Service Request has no related Product Defects.
- Service Request related Invoice status is Paid, Written Off, Cancelled, Closed, or Rejected.

### Exception Description

If a Service Request does not satisfy any of the above Business Rules, it should not be a candidate for archive and purge.

### Exception Workaround

Informatica does not make any adjustments to this rule since it does not support archiving and purging information related to the Service Request if it is participating in any of the Business Rules.

## CHAPTER 12

# Solutions

This chapter includes the following topics:

- [Solutions Overview, 29](#)
- [Worksheet , 29](#)

## Solutions Overview

Siebel's Solutions are answers to frequently asked questions (FAQs). Solutions are documented by service agents and call center administrators. Agents and customers can frequently resolve service issues by searching this knowledge base of solutions.

## Worksheet

### Business Rules: Summary Information

System: Data Archive

Subsystem: Solutions

Cycle Name:

Cycle Date:

Parameter	Definition	Required?	Default	Your Organization's Value
p_org_id	Organization	No	NULL	
p_period_to	Last Update Date (LAST_UPD)	Yes	NULL	

Solutions that meet all of the following criteria will be considered inactive and are candidates for archive and purge process.

- Solution status is set to Obsolete.
- Solution is related to a Change Request and the Status of the Change Request is Closed.

- Solution is related to a Service Request and the Status of the Service Request is Closed.

#### Exception Description

If a Solution does not satisfy any of the above Business Rules, it should not be a candidate for archive and purge.

#### Exception Workaround

Informatica does not make any adjustments to this rule since it does not support archiving and purging information related to the Solution if it is participating in any of the Business Rules.