



**SIEBEL**<sup>7</sup>  
eBusiness

**SIEBEL ANYWHERE  
ADMINISTRATION GUIDE**

**MIDMARKET EDITION**

***eBUSINESS APPLICATIONS***

*VERSION 7.0, REV. A*

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# Who Should Use This Guide

This guide provides information necessary to configure, create, and distribute Siebel Anywhere, MidMarket Edition upgrade kits.

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**NOTE:** All Siebel MidMarket product names include the phrase MidMarket Edition to distinguish this product from other Siebel eBusiness Applications. However, in the interest of brevity, after the first mention of a MidMarket product in this document, the product name will be given in abbreviated form. For example, after Siebel Call Center, MidMarket Edition, has been mentioned once, it will be referred to simply as Siebel Call Center. Such reference to a product using an abbreviated form should be understood as a specific reference to the associated Siebel MidMarket Edition product, and not any other Siebel Systems offering. When contacting Siebel Systems for technical support, sales, or other issues, note the full name of the product to ensure its proper identification and handling.

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Although job titles and duties at your company may differ from those listed in the following table, the audience for this guide consists primarily of employees in these categories:

<b>Database Administrators</b>	Persons who administer the database system, including data loading, system monitoring, backup and recovery, space allocation and sizing, and user account management.
<b>Siebel Application Administrators</b>	Persons responsible for planning, setting up, and maintaining Siebel applications.
<b>Siebel System Administrators</b>	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.

This guide assumes users have an understanding of their system and network.

## How This Guide Is Organized

After an overview of the product and screens, this guide discusses the server side of the process to create and distribute upgrade kits. Then the discussion focuses on the client side to explain procedures to pull down the upgrade kit from the server and install it properly.

The final topics include advanced usage scenarios and FAQs to help resolve problems.

## Additional Documentation

The product documentation set for Siebel eBusiness Applications is provided on the *Siebel Bookshelf, MidMarket Edition* CD-ROM. For general information about Siebel product documentation, see the *Siebel Bookshelf, MidMarket Edition* home page and *Documentation Roadmap, MidMarket Edition*.

Siebel Systems, Inc., reserves the right to modify the documentation for Siebel eBusiness Applications at any time. For updates to Siebel documentation, go to the SupportWeb site (<http://ebusiness.siebel.com/supportweb/>).

If you want to order additional Siebel documentation and copies of the *Siebel Bookshelf, MidMarket Edition* CD-ROM, go to Books Online at <http://ebusiness.siebel.com/booksonline>.

To access both SupportWeb and Books Online, you will need to provide the user name and password you received from Siebel Support Services (support@siebel.com).

## What's New in This Release

For a list of features new in this release, see the “What’s New” books included on the *Siebel Bookshelf, MidMarket Edition*. Your Siebel implementation may not have all the features described in those guides, depending on which software modules you have purchased.

It is also strongly recommended that you read *Fundamentals, MidMarket Edition* so that you can make optimal use of your Siebel application, especially if you are new to Siebel software.

# Contacting Siebel Technical Support

Do you know how to access Siebel Technical Support? It is crucial that you understand the requirements for getting support before you encounter technical issues that require Siebel Technical Support's assistance. This will facilitate smooth resolution of your issues. If you have questions, please don't hesitate to contact us.

To maximize your knowledge of Siebel products and your return on investment:

- You must attend Siebel training to become a *designated contact*.
- Your Siebel-trained designated contacts provide technical support to your users. Siebel Technical Support provides support directly to your designated contacts only.

To provide efficient, timely support and access to the Technical Support knowledge base:

- Siebel Technical Support is primarily Web-based; it can be accessed through Siebel SupportWeb (<http://ebusiness.siebel.com/supportweb/>). Please submit new service requests to us through SupportWeb, where you can also search the knowledge base for solutions.
- Designated contacts receive read/write access to Siebel SupportWeb. All other project team members at your company receive read-only accounts so that they can access the knowledge base.

To register for Siebel training, access <http://siebeluniversity.siebel.com/> and choose Implementation Team Training.

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- The title and version of the guide (very important)
- The name and version number of the Siebel application you are using
- Your name, job title or functional area, company name, phone number, and email address

Contact us through regular mail or email at:

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We appreciate your feedback.

# Siebel Anywhere Overview

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# About This Chapter

This chapter presents a functional overview of Siebel Anywhere. It describes the screens for system administrator access, related views, and applets to create and manage upgrade kits. To access the system administrator's screen (Siebel Anywhere Administration), you must be logged on at the system administration level. In some cases users may have been granted a subset of the Siebel Administrator security. Consequently, such users may have been given access to the Siebel Anywhere Administration Views as part of their limited access.

Also, this chapter describes the Product Updates view in the User Preferences screen. This is the single view for users of the mobile and dedicated Web clients to retrieve optional upgrade kits.

# About Siebel Anywhere

Siebel Anywhere allows the Siebel System Administrator to apply upgrades to dedicated Web clients, mobile Web clients, and Siebel Servers. Upgrades can include custom configurations, new versions of Siebel eBusiness Applications (as licensed), custom extensions to the database schema, custom files, or third-party files or applications.

Siebel Anywhere uses pull-based technology for retrieving upgrade kits. There are two server components and one executable for the creation and installation of Siebel Anywhere upgrade kits. These are described below, along with some other key terminology:

- The Siebel Upgrade Kit Wizard (UpgKitWiz) automates the administrator's task of collecting information for the kit to be created. The wizard provides a user interface to collect all the necessary information for creating an upgrade kit. The associated log file is `UpgKitWiz.log`.
- Siebel Upgrade Kit Builder (UpgKitBldr) is the server component that takes the information collected by the Kit Wizard and creates the kit. The associated log file is `UpgKitBldr_<task id>.log`.
- Siebel Upgrade Wizard is a standalone executable that installs the upgrade kit on the clients. The associated log files are `UpgWiz.log` (Windows).

- Upgrade Component defines how to version check different software modules.
- Upgrade Configuration is a collection of upgrade components.
- Upgrade Kit is an archived file with instructions and contents to perform specific actions as defined by the Kit Wizard for a particular upgrade component.
- Subscriber is a user who belongs to an active configuration. Subscribers can also include servers.

It is strongly recommended enabling Siebel Anywhere on only one Siebel Applications Server in the enterprise—to create kits this server must be running. Also, in order to create an upgrade kit, the Upgrade Kit Builder must be running.

The Upgrade Wizard automates the installation of upgrade kits on the clients, including restarting and recovery.

Siebel Anywhere provides the following mechanisms:

- Security to make sure users are connecting to a system with the predetermined set of prerequisites.
- Distribution to provide users the acceptable version levels to access the system.

Keep in mind this fundamental process flow:

- First, you must have both a requirement to distribute an upgrade and the components to build the upgrade kit.
- Next, you build the appropriate kit and distribute it to a defined set of clients or Siebel servers. Upgrade kits are automatically placed on the file system. Some kits are required, and others are optional.
- Last, you test the kit with a test configuration. It is recommended that you distribute the kit through a test configuration and have a mobile and a connected user attempt to download the kit through a test configuration before distributing the kit to the production configuration.

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**NOTE:** Testing the kit manually does not guarantee successful download of the kit by production users.

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For details about the software and hardware platforms supported by this release, see the system requirements and supported platforms documentation for your Siebel application.

### Siebel Anywhere Subscribers

A Siebel Anywhere subscriber belongs to one upgrade configuration. These include the following:

- Mobile Web clients of eBusiness Applications such as Siebel Sales, or Siebel Call Center.
- Dedicated Web client, which is the standard mobile Web client in server connected mode.
- Siebel Tools clients requiring version checks of Tools software. Siebel Anywhere is *not* designed to apply kits to Siebel Tools.

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**NOTE:** Any user with Siebel administrator responsibilities should *not* be associated with Siebel Anywhere configurations. For details regarding why, see [“Logging on as the Siebel Administrator” on page 1-6](#).

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- Siebel Servers operating against the Siebel Server Database (referred to as the Headquarters Server).

The Siebel Administrator has full control over the upgrades distributed and applied by Siebel Anywhere.

When the client starts and successfully connects to a database (server or local), the subscribing system automatically checks the versions of its currently installed components. This check occurs against a *component registry* as part of the version check process. The component registry is part of the server database. Subscribers can see the information in the component registry from within Siebel Anywhere.

Table 1-1 indicates when a version check occurs for each type of subscriber.

**NOTE:** Version checking is done automatically only if the Required at Startup parameter is checked for the particular component in question.

**Table 1-1. Version Check Occurrence**

Subscriber Type	When Version Check Occurs
Mobile and dedicated users, including Siebel Tools users	Mobile and dedicated Web clients, and Siebel Tools clients perform the version check when the client starts up and connects to either the server or local database. Mobile Web clients also perform a version check during each synchronization session.
Headquarters servers	Depends upon the parameter VersionCheck on the HQ server. A version check activates at start-up <i>only</i> when the server parameter Version Check is set to TRUE. The default value for VersionCheck is FALSE.

## Configurations

Each Siebel Anywhere subscriber requires a bundle of one or more software components to operate.

Siebel eBusiness Applications provide several default configurations:

- Siebel Test Client
- Siebel Service Client
- Siebel Tools Client
- Siebel Sales Client
- Siebel Call Center Client
- Siebel HQ Server

Siebel Anywhere supports global deployments by including seeded upgrade configurations and components for each supported language included within the Siebel eBusiness Applications. Consider carefully the receivers or subscribers to any upgrade kit you create and use the correct upgrade component based on end user languages.

Users can also create a new configuration for special situations. (See [“Creating a New Configuration” on page 3-6.](#))

Each Siebel subscriber has an individual Siebel Anywhere configuration that includes a specific set of components. Usually, the ComponentName entry in the Siebel section of the CFG file specifies the configuration of a Siebel client. The Siebel Anywhere Administrator establishes the configurations for the Siebel implementation. (See [“Planning an Upgrade” on page 3-3.](#))

The components used by the Siebel eBusiness Application are predefined in Siebel Anywhere. Users can also upgrade most third party products used in conjunction with Siebel eBusiness Applications.

## Logging on as the Siebel Administrator

The Siebel database installation process creates a Siebel administrator account that can be used to perform the tasks described in this guide. For information on this, see *Siebel Server Installation Guide, MidMarket Edition*.

Any user with Siebel administrator responsibilities should *not* be associated with Siebel Anywhere configurations. For example, a potential problem can occur if a Siebel Administrator user is associated to a configuration, then the RepAgent server component that is started using that particular LOGIN will perform version check against the Siebel Administrator’s dynamically associated configuration. Such a scenario could severely impact functionality of the system.

### **To log on to your Siebel eBusiness Application as the Siebel administrator**

- Start the application and log on using the user name and password assigned by your database administrator.

Siebel Anywhere administrative operations should *not* be executed on a local database or in disconnected mode.



**Caution:** Do not perform system administrative functions on your local database. Although there is nothing to prevent you from doing this, it can have serious implications. Examples include:

- Data conflicts
- Potential for overly large local database
- Potential for large number of additional transactions to route

## Upgrade Kits

A Siebel Anywhere upgrade may contain software or database schema changes required to upgrade a specific component. It also defines actions to make the changes to the subscriber. The available actions include:

- Executing any type of program or batch script.
- Copying, moving, or deleting files.

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**NOTE:** The System Administrator must use the Upgrade Kit Wizard to create an upgrade kit. Further into this chapter, you will see that to invoke the wizard is simply a matter of clicking Auto Create in the Upgrade Kit view.

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After the Siebel Anywhere Administrator creates an upgrade kit, it is automatically stored on the Siebel file system, where it is available for retrieval and installation by subscribers.

Upgrade kits created for Siebel servers should always be designated as required kits. Database schema kits are Required kits by default.

### Required Upgrade Kits

Required upgrade kits must be retrieved and installed on the intended client or server. Siebel Clients (Mobile and Dedicated Web) and HQ Servers behave differently for required kits. [Table 1-2 on page 1-8](#) describes the behavior of each type of client or server during the version check process.

This process uses information contained in the component registry for each subscriber's configuration. See [“Minimum and Maximum Version Fields” on page 4-9](#) and [“Applying Versions of an Upgrade Kit” on page 5-5](#) for details about entering and applying appropriate version information for use during distribution and installation.

The table below indicates the client and server behavior for required upgrade kits.

**Table 1-2. Response to Version Check Process When Machine Status Varies**

Client or Server	Status of Machine: Running	Status of Machine: Startup
Mobile Web Client	During synchronization: Yes, upgrade will take place. No, synchronization ends.	Yes, upgrade takes place. No, read only mode on the node.
Dedicated Web Client	Not applicable.	Yes, upgrade takes place. No, read only mode on the node.
HQ Server	Not applicable.	If Version Check is TRUE, the HQ server will not startup until upgraded. If Version Check is FALSE, the HQ server will start up.

When a Siebel Anywhere subscriber's version check encounters a discrepancy between the version in the component registry and the version of the currently installed components, the subscribing system automatically enters a suspended mode until the subscriber retrieves and installs the required version. Siebel servers automatically stop every task in this mode; Siebel clients can continue to log in, but the application will be in a read-only mode.

For a Siebel client subscriber, the system automatically prompts the user to retrieve the appropriate upgrade kit and upgrade the components using the Upgrade Wizard. For servers the sequence is different. The upgrade kits already exist in the file system.

If the server parameter `VersionCheck` is set to `TRUE` and the Siebel server detects there is a required upgrade kit, the server shuts down automatically. If `VersionCheck` is set to `FALSE`, the server will not shut down automatically. However, it will stop merging database changes, and the administrator needs to manually shut down the server.

In both cases, when the server shuts down, it prompts the administrator to manually install the kit in the appropriate log file using the Upgrade Wizard. The associated log files are `repagent_<task id>.log` and `<enterprise name>.<siebel server name>.log`. If the upgrade kit is not installed, the server will not restart.

## Optional Upgrade Kits

An optional upgrade kit is one that is made available to subscribers, but they are not required to retrieve and apply the kit. For example, optional upgrade kits are useful for making third-party applications, files, or other noncritical components available for users to retrieve at their discretion.

When a subscribing system executes a version check, it does not automatically prompt the user to retrieve and install any optional kits. Optional upgrade kits are manually retrieved using the Product Updates view, accessible from the Siebel User Preferences screen, and are installed using the Upgrade Wizard. (See [“Retrieval and Installation of Upgrade Kits”](#) on page 6-3.)



**Caution:** Be sure to use the optional kit feature as a method for testing *every* Siebel Anywhere component upgrade. By creating an upgrade kit first as an optional kit, the System Administrator can thoroughly test the retrieval and installation of the kit from the Product Updates view. After testing, the administrator can make the kit required or optional.

## Upgrade Kit Creation Architecture

The most significant change in Siebel Anywhere architecture is the upgrade kit creation process to support Siebel 7 Web deployment. Administrators can use an HTML browser without any Siebel software installed on their machines to perform the Siebel Anywhere administrative tasks. To accommodate this situation, the upgrade kit creation process has two parts:

- The Upgrade Kit Wizard defines and validates parameters for the upgrade kit to be created. It uses a web-enabled user interface. This wizard also handles file attachment uploads for certain types of upgrade kits. At the conclusion of defining an upgrade kit, the Upgrade Kit Wizard submits a schedule-mode server request to invoke the Upgrade Kit Builder.

- The Upgrade Kit Builder is part of the Siebel Anywhere Component Group. The task of kit creation must be delegated to the server side in order to support the web deployment philosophy. When invoked, the Upgrade Kit Builder uses the information defined by the Upgrade Kit Wizard to construct upgrade kits.

During the creation process, the Siebel Administrator can monitor the progress of the Upgrade Kit Builder through the Server Component Request screen or the Upgrade Kit Builder log file. After building the kit, the status of the newly created upgrade kit will be “Pending.”

### Upgrade Kit Wizard

Siebel administrators can invoke the Upgrade Kit Wizard by clicking Auto Create in the Upgrade Kits view. You must use the Upgrade Kit Wizard to create an upgrade kit.

### Upgrade Kit Builder

The Upgrade Kit Builder constructs kits, on the server side, based upon definitions of kits collected by the Upgrade Kit Wizard.

## Siebel Anywhere Component Group

It is strongly recommended that you enable the Siebel Anywhere component group on only one Siebel server in the Siebel Enterprise. During the installation of the first Siebel server in the Siebel enterprise, do not enable the Siebel Anywhere component group. Wait until every Siebel server is installed. Then enable the Siebel Anywhere component group on only one Siebel server. For details on how to enable a Component group, refer to *Siebel Server Administration Guide, MidMarket Edition*.

## Upgrade Wizard Recovery

The Siebel Upgrade Wizard is a stand-alone executable that reads and applies the upgrade kit. The Siebel Upgrade Wizard also tracks the upgrade process and automatically recovers from errors.

During the installation of the upgrade kit, the Upgrade Wizard creates a backup of affected files. If an error occurs during the upgrade, the Upgrade Wizard attempts to roll back the changes and restore the machine to its original state. Subsequently, when the user starts the Siebel client, Siebel eBusiness Applications detects that an upgrade is either in progress or has failed and notifies the user.

The Upgrade Wizard cannot roll back to the previous version after the upgrade has been installed successfully. The Siebel Upgrade Wizard also tracks the upgrade process and can restart after encountering errors. After a successful upgrade, the Upgrade Wizard cleans up (that is, deletes) the interim files in the `\temp` or `\upgrade` folders. Consequently, restoring to a previous configuration is not possible.

## **For More Information**

For more information about topics and related information in this chapter, see *Siebel Server Installation Guide, MidMarket Edition* and *Siebel Server Administration Guide, MidMarket Edition*.

The next chapter describes the relationship of the single Siebel Anywhere Administration screen to its five views, and the forms and lists within each view.

## **Siebel Anywhere Overview**

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# Screens and Views in Siebel Anywhere

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# About This Chapter

This chapter describes the relationship of the Siebel Anywhere Administration screen to its five views and the forms and lists within each view. The chapter also explains the relationship between the User Preferences screen, the Product Updates view and Product Updates applet to retrieve and install optional upgrade kits.

# Using Screens and Views in Siebel Anywhere

This section describes the relationship between the single Siebel Anywhere Administration screen, its five views, and applets within each view. You must be logged on to the Siebel eBusiness Applications as a valid Siebel Administrator in order to access this screen. A view presents one or more applets at one time in a predefined visual arrangement and logical data relationship. For further information about screens, views, and applets see *Fundamentals, MidMarket Edition*.

In some cases, users are granted a subset of the Siebel Administrator security. Consequently, such users are given access to the Siebel Anywhere Administration Views as part of their limited access.

### **To access the Siebel Anywhere Administration screen and views**

- 1** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2** From the Show drop-down list, select one of the views listed:
  - **Configurations.** Displays configurations and the related components. Use this view to define configurations and to distribute new versions of the components. See “[Configurations View](#)” on page 2-3 for more information.
  - **Employees.** Displays the login, first name, and last name of employees associated with a given configuration. Use this view to dynamically assign employees to a specific configuration. When associating employees to configurations, keep in mind the following recommendations:
    - Do not use this view to permanently assign employees to a configuration.
    - Do not dynamically associate the System Administrator to a configuration.

- Do not dynamically associate Siebel Tools users to a configuration.
- See [“Employees View” on page 2-7](#) for more information.
- **Upgrade Components.** Displays information about the components currently defined in Siebel Anywhere. See [“Upgrade Components View” on page 2-12](#) for more information.
- **Upgrade Kits.** The starting point for creating new upgrade kits. See [“Upgrade Kits View” on page 2-20](#) for more information.
- **Upgrade Kit Items.** Displays details about upgrade kit contents and actions. See [“Upgrade Kit Items View” on page 2-24](#) for more information.

The following subsections describe each of these views in more detail.

## Configurations View

Each Siebel Anywhere subscriber requires one or more software components to operate. The use of multiple components to operate is called a configuration. See [Configurations on page 1-5](#) for a list of the default configurations provided with your license.

The Siebel Anywhere Configurations view, shown in [Figure 2-1 on page 2-4](#), lists each configuration and its related components. The Active column indicates if the configuration is enabled. The Distribute button delivers current upgrade component information to the users of the configuration; the information is essential to the version-checking process invoked on the user’s machine.

Use this view to:

- **Define configurations.** A preinstallation task that is important—especially for global deployments—is determining how to segregate the user base to provide capability to distribute upgrade kits based upon user needs. See *Global Deployment Guide, MidMarket Edition* for more details. Also see [“Planning an Upgrade” on page 3-3](#).

## Screens and Views in Siebel Anywhere

Using Screens and Views in Siebel Anywhere

- **Distribute required versions of the component.** Allows delivery of upgrade kits to a specific configuration. See [“To distribute upgrade component version information” on page 5-7.](#)

The screenshot displays the Siebel Anywhere Configurations View. At the top, there is a navigation bar with 'Show: Configurations', 'History', and 'Favorites'. Below this, the 'Upgrade Configurations' table is shown with columns: Name, Active, Configuration Type, and Comments. The 'Siebel Sales Client' row is highlighted in yellow and has a checkmark in the 'Active' column. Below this is the 'Related Components' table with columns: Name, Required At Start, Min Version, Max Version, and Comments. The 'Siebel Client Customer Revisions\_\_DEU' row is highlighted in yellow.

Name	Active	Configuration Type	Comments
Siebel Service Client		Siebel Client Configuration	Sample configuration for the Siebel Service Client
Siebel Test Client		Siebel Client Configuration	Sample Siebel Client configuration used for testing
Siebel Call Center Client		Siebel Client Configuration	Sample configuration for the Siebel Call Center Client
Siebel HQ Server		Siebel Server Configuration	Sample Siebel Server configuration on a HQ server database
Siebel Sales Client	✓	Siebel Client Configuration	Sample configuration for the Siebel Sales Client
Siebel Tools Client		Siebel Client Configuration	Sample configuration for the Siebel Tools Client (meant for version checking only)

Name	Required At Start	Min Version	Max Version	Comments
Siebel Client Customer Revisions__DEU	✓			Track customer DEU-specific files for Siebel Client installations
Siebel Client Customer Revisions__ENU	✓			Track customer ENU-specific files for Siebel Client installations
Siebel Client Executables	✓	7.0.2 [10754]		Language-independent Siebel executables, DLLs, help files, reports for using a Siebel Client
Siebel Client Executables__ENU	✓	7.0.2 [10754] ENU		ENU-specific Siebel executables, DLLs, help files, reports for using a Siebel Client
Siebel Client Repository File__ENU	✓			Compiled SRF file for using the Siebel Client in ENU
Siebel Database Schema	✓	39,74.0.0		Siebel tables, indexes and seed data
Siebel Sales CFG__DEU	✓	100		Sample Siebel Sales configuration file for the Siebel Client in DEU

Figure 2-1. Siebel Anywhere Configurations View

**NOTE:** The parameter `ComponentName` in the configuration (`.cfg`) file has a default value that matches its corresponding Siebel Anywhere configuration. For example, the configuration file for the English version of the Siebel Sales Client (`siebel.cfg`) contains the following default entry: `ComponentName = Siebel Sales Client`. The file's location is `{ClientRootDir}\bin\ENU\siebel.cfg`. If a new configuration is created, a configuration is split or merged with another configuration, or the name of an existing configuration is changed, the `ComponentName` parameter on the corresponding Siebel clients must also be updated so that the clients can detect any upgrades.

## Upgrade Configurations Applet

The Configurations applet lists the configurations available in Siebel Anywhere. A description of the fields for the Configurations applet is shown in [Table 2-1](#).

**Table 2-1. Fields in the Configurations Applet**

Field	Comment
Name	This is the name of the configuration.
Active	The configuration is being version-checked by subscribers.
Component Type	This value is either client or server configuration.
Comments	Comments can be entered here.

## Related Components Applet

The Related Components applet lists the components related to the configuration selected in the Configurations applet. A description of the fields for the Related Components applet is shown in [Table 2-2](#).

**Table 2-2. Fields in the Related Components Applet (1 of 2)**

Field	Comment
Name	Name of the component. Only single-byte, alphanumeric characters, blank space, underscore, and dash are allowed. They may not include special characters like periods or other invalid characters such as slash, asterisk, pipe, question mark, colon, quotes, or angle brackets.
Required at Startup	If this field is checked, the component is required on the Siebel subscriber and is verified during version checks. This field should be checked for any upgrade component that will have required minimum versions.  Components that are not required are not subject to version checks and are not automatically upgraded. However, the version checking for the upgrades is automatic if the user chooses to upgrade.
Min Version	Minimum version required for the component on the client's system.  If the client uses a version of the component that is less than the minimum, the client must upgrade or the application will appear in read-only mode.

**Table 2-2. Fields in the Related Components Applet (2 of 2)**

Field	Comment
Max Version	Maximum version allowed for the component on the client's system. If clients use a version of the component that is between the minimum and maximum, they can still use the application in read/write mode without installing an upgrade kit, even if the upgrade kit is required. Clients can access the system if their local version is higher than the maximum version for the component.
Comments	Comments can be entered here.

Clicking Distribute makes the minimum/maximum version information available to Siebel Anywhere subscribers. A new kit is not available, as either a required or an optional kit, until the new minimum and maximum version information is distributed.

---

**NOTE:** It is strongly recommended that you thoroughly test upgrade kits using Siebel Test Client configuration before distributing them as required or optional kits. You can test the retrieval and installation of the kit from the Product Updates view on individual client machines.

---

## Employees View

Use the Siebel Anywhere Employees view, shown in [Figure 2-2](#), to dynamically move clients from one configuration to another or limit the distribution of a specific kit. Siebel Anywhere uses the value of ComponentName in the client's CFG to determine what configuration the client is using and what component version it should check. This checking occurs only if the client's name is not specified under a specific configuration. (See [“Assigning Employees to Configurations”](#) on [page 3-7](#).)

Configuration:

Upgrade Configurations			
Name	Active	Configuration Typ	Comments
Siebel Service Client		Siebel Client Config: Sample configuration for the Siebel Service Client	
Siebel Test Client		Siebel Client Config: Sample Siebel Client configuration used for testing	
Siebel Call Center Client		Siebel Client Config: Sample configuration for the Siebel Call Center Client	
Siebel HQ Server		Siebel Server Config: Sample Siebel Server configuration on a HQ server database	
Siebel Sales Client	✓	Siebel Client Config: Sample configuration for the Siebel Sales Client	
Siebel Tools Client		Siebel Client Config: Sample configuration for the Siebel Tools Client (meant for version checking only)	

Upgrade Employee Configuration		
Login	First Name	Last Name
GAUSTIN	Grace	Austin
JBAILEY	Jerry	Bailey

**Figure 2-2.** Siebel Anywhere Employees View

If the login is specified under an Employees view, then Siebel Anywhere does not check the .cfg any further and only checks the version of the component listed under the associated configuration for that client. Use this only for unique situations—it is not recommended as a routine practice.

**NOTE:** The first time a mobile Web client connects to the Remote Server to initialize the local database, Siebel Anywhere will do a version check for the client using the Upgrade Configuration as specified in the CFG file. If there is a dynamic association defined in the Employees view, Siebel Anywhere will not know about it at this time. However, after the mobile Web client successfully initializes the local database, the dynamic association with the Upgrade Configuration will be available for Siebel Anywhere to recognize.

This view is recommended for temporarily assigning employees to specific configurations for testing or retrieval of special kits.

Upon synchronization (for mobile users) or login (for dedicated users), Siebel Anywhere first checks to determine if you are subscribing to a specific configuration. If this column is null, then Siebel Anywhere checks the `ComponentName` in the client's `.cfg` to determine what configuration the client subscribes to. In other words this screen overrides the `ComponentName` in the `.cfg` for mobile and dedicated users alike.

This allows you to create, activate, apply, and then limit distribution of a kit only to a specific configuration. Consequently, only a few mobile and dedicated users, who temporarily subscribe to this configuration, can test the kits for you.

For example, you could put a user's login name under Siebel Test Client configuration and, without changing the user's `.cfg`, have the user receive the upgrade kit and test it. After the kit is successfully tested, you can remove names from the Employee screen and distribute the kit to every appropriate configuration so the intended users will receive it.

You can also use this screen to limit the distribution of a specific kit to certain users. For example, you might have a situation where you want to send a set of reports only to management.

The following tasks are necessary to limit kit distribution for a new configuration:

- **Create, activate, and apply the kit.** For details regarding these procedures, see [Chapter 4, “Creating and Defining the Upgrade Kit”](#) and [Chapter 5, “Activating, Applying, and Distributing the Upgrade Kit.”](#)
- **Create a new configuration.** Associate the component you just built to a kit for this configuration. For details regarding these procedures, see [“Creating a New Configuration” on page 3-6.](#)
- **Add the login of the users.** Add the login for the users you want to receive this kit to the Employee view for this configuration. For details regarding these procedures, see [“Employees View” on page 2-7.](#)
- **Distribute the configuration.** This will distribute the kit to this selected group of users and your other users will not know about this newly distributed kit. For details regarding these procedures, see [Chapter 5, “Activating, Applying, and Distributing the Upgrade Kit.”](#)

- **Give these clients enough time to download the kit.** You need to disassociate these clients from this special configuration as soon as possible. This will allow them to continue their subscription to their original configuration and can receive kits targeted for those users. For details regarding these procedures, see [“Employees View” on page 2-7.](#)

Another approach to limiting distribution is to create a new upgrade component just for a special occasion. For example, you need to deliver a set of sensitive files to a small group through Client Customer Revisions.

The following tasks are necessary to limit kit distribution for a new component:

- **Create a new component.** Name this new component Client Customer Revisions - special. For details regarding these procedures, see [“Creating a Custom Component” on page 3-16.](#)
- **Modify the LOCATE information columns.** This will help prevent confusing the kits for limited distribution with the regular Customer Revisions kits. For details regarding these procedures, see [“Creating a Custom Component” on page 3-16.](#)

For example you can specify the Locate Information as  
`Siebel,ClientRootDir,bin/clntspl.cfg.`



**Caution:** This step is very important to maintain integrity of the limited distributions—it is a security feature. If you do not modify this information, you may send many users information intended only for a few, such as confidential reports.

- **Create, activate, and apply the kit.** Use the new component that you just created. For details regarding these procedures, see [Chapter 4, “Creating and Defining the Upgrade Kit”](#) and [Chapter 5, “Activating, Applying, and Distributing the Upgrade Kit.”](#)
- **Add the new component.** Add the new component to the configuration that you want this new kit to be distributed to. For details regarding these procedures, see [“Setting Up Configurations” on page 3-5.](#)

- **Distribute.** This will distribute the kit to this selected group of users and your other users will not know about this newly distributed kit. For details regarding these procedures, see [“Distributing Upgrade Component Version Information” on page 5-7.](#)



**Caution:** Use limited distribution with extreme caution because this process will change your component version number permanently. When you create the next kit of the same type, you must adjust the Minimum Version Number so it does not require users to download the special kit.

Siebel Anywhere *will not* allow an Employee to be dynamically associated with more than one configuration. For example, if the employee JSMITH is dynamically associated with Configuration A and the Siebel Administrator then associates JSMITH with Configuration B, JSMITH will automatically be disassociated from Configuration A and only dynamically associated with Configuration B.

Dynamically associating the System Administrator account with any configuration under the Employees view is not recommended.

The Siebel Administrator should be aware of the expected behavior in case an employee is accidentally associated with the incorrect configuration. When this situation occurs, the employee will be disassociated from the correct configuration.

The Siebel Administrator can choose an audit mechanism (for example, a query) to make sure that the expected employees are dynamically associated with a configuration.

The Employees view under the User Administration screen in the Configuration field will identify the configuration an employee belongs to if any.

If an employee will use more than one installation of the Siebel client in the same Siebel eBusiness implementation, do not associate that employee to a configuration. For example, if the Employee JSMITH chooses to install and use both Siebel Call Center and Siebel Sales, then that employee should not be dynamically associated with a Siebel Anywhere configuration. The reason is the upgrade kit for one configuration will likely be different than the upgrade kit for another configuration.

In this example, the CFG file (or .cfg) would be different for the Siebel Call Center and Siebel Sales configurations. If JSMITH were dynamically associated to the Call Center configuration and logged on using the Siebel Sales client, the version check would only detect that there was a new upgrade kit and would not differentiate between the two installations of the Siebel client.

The Employees view has two applets: Upgrade Configurations and Upgrade Employee Configuration.

### **Upgrade Configurations Applet**

The Upgrade Configurations applet lists the configurations available in the Employee view. These are the same configurations that appear in the Upgrade Configurations view; see [Upgrade Configurations Applet on page 2-5](#) for a description of the fields.

### **Upgrade Employee Configuration Applet**

The Upgrade Employee Configuration applet lists the employees who are dynamically associated to the configuration selected in the Upgrade Configurations applet. A description of the fields for the Upgrade Employee Configuration applet is shown in [Table 2-3](#).

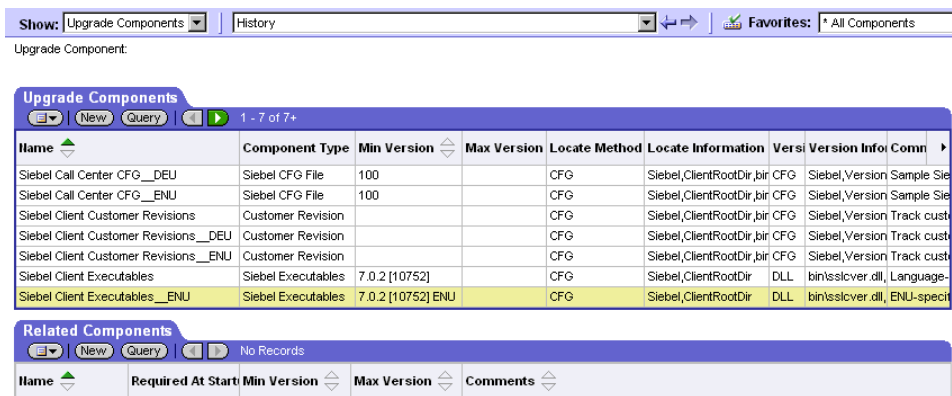
**Table 2-3. Fields in the Upgrade Employee Configuration Applet**

<b>Field</b>	<b>Comment</b>
Login	Login for user
First Name	First Name
Last Name	Last Name

### Upgrade Components View

The Upgrade Components view, shown in [Figure 2-3](#), lists each upgrade component, its related components and relevant information about each. Use this view to:

- **Relate one component to another.** See “[Relating One Component to Another](#)” on page 7-7.
- **Check existing component version and location information.** See “[Verification of Existing Component Information](#)” on page 3-4.
- **Add your own components.** See “[Creating a Custom Component](#)” on page 3-16.



**Figure 2-3. Siebel Anywhere Upgrade Components View**

A Siebel Anywhere configuration contains one or more upgrade components. The Siebel Administrator can include any of the following upgrade components, or component types, in a configuration. Seeded components are available based upon the languages installed on the database server. These upgrade components include:

- Siebel Call Center CFG\_\_`{language code}`
- Siebel Client Customer Revisions\_\_`{language code}`
- Siebel Client Executables\_\_`{language code}`
- Siebel Client Repository File\_\_`{language code}`

- Siebel Database Schema
- Siebel Database Schema {Version Check}
- Siebel Sales CFG\_{language code}
- Siebel Server Customer Revisions\_{language code}
- Siebel Tools CFG\_{language code}
- Siebel Upgrade Wizard
- Third Party – Adobe Acrobat Reader
- Third Party – Microsoft Word
- Custom Components

See [“Creating a Custom Component” on page 3-16.](#)

---

**NOTE:** {language code} refers to the language installed during database installation or added to the database.

---

Siebel eBusiness Applications provides several Upgrade Components out-of-the box. The Siebel Administrator can also register additional Siebel Anywhere components or other third-party software and other elements. Siebel Anywhere can upgrade these components, just as it does the predefined components used by Siebel eBusiness Applications. For example, it would be possible to create an upgrade component to run a batch program in the form of a .bat or .exe file. Each upgrade component is classified by a component type:

- Siebel Configuration File
- Siebel Database Extensions
- Siebel Executables
- Siebel Repository File
- Third-Party Software
- Customer Revisions

The Upgrade Components view lists each Upgrade Component and the information from the latest Upgrade Kit associated with it; see [Table 4-1 on page 4-5.](#)

The Siebel Administrator *must define* how Siebel Anywhere will monitor and verify the version number for a custom upgrade component. Siebel Anywhere maintains an individual version number for each upgrade component. The version number must be maintained on a Siebel Anywhere subscriber in order to compare it to the version number in the component registry. The Siebel Administrator can maintain the version number in the application, in a file, or in the Windows registry.

---

**NOTE:** It is *strongly recommended* the Siebel Administrator use the Copy Record functionality to copy existing upgrade components and simply rename the new upgrade component so that the correct parameters are used for the new upgrade component. Make sure that you also update the Locate and Version columns appropriately.

---

The Upgrade Components view has two applets—Upgrade Components and Related Components.

Descriptions of the fields in these applets are listed in the next section. For information on specific use of these fields, see [Upgrade Components Applet on page 2-14](#) and [Related Components Applet on page 2-19](#).

### Upgrade Components Applet

The Upgrade Components applet lists the Siebel Anywhere components along with detailed information regarding each component's version check. A description of the fields for the Upgrade Components applet is shown in [Table 2-4](#).

**Table 2-4. Fields in the Upgrade Components Applet (1 of 2)**

Name	Comment
Name	Name of the Siebel Anywhere subscriber or component.
Component Type	The type of component kit; for example, Siebel Executables or third-party software.
Min Version	The minimum version for which an upgrade is applied.
Max Version	The maximum version for which an upgrade is applied.
Locate Method	Method used by the Siebel Anywhere subscriber to locate a component in order to check its version.

**Table 2-4. Fields in the Upgrade Components Applet (2 of 2)**

Name	Comment
Locate Information	Variables used by the Siebel Anywhere subscriber when invoking the Locate Method.
Version Method	Method used by the Siebel Anywhere subscriber to check the component's version.
Version Information	Variables used by the Siebel Anywhere subscriber when invoking the Version Method.
Comments	This field is available for comments.

See [“Version Information Checking” on page 2-15](#) for a description of how Siebel Anywhere uses Locate Method, Locate Information, Version Method, and Version Information to determine the version of a component.

---

**NOTE:** Until you click Distribute in the Siebel Anywhere Configurations view, changes to the minimum or maximum versions in the Upgrade Components view are not available to Siebel Anywhere subscribers. Usually, you should not modify Location Information in the Upgrade Components view. This information is specified through the Upgrade Kit Wizard.

---

## Version Information Checking

The Siebel Anywhere Version Check feature combines information in the Locate Method, Locate Information, Version Method, and Version Information fields to determine how it needs to check the version of a component. Depending on the component, Version Check uses some or all of these. [Table 1-1 on page 1-5](#) indicates when a version check occurs for each type of subscriber.

The following subsection describes Locate Method and Version Method followed by a few examples of each.

### Locate Method

The purpose of Locate Method is to build a path to a file, or other location such as a registry. This value is then passed to the Version Method to read the version of the file. See [Table 2-5](#) for Locate Method values.

**Table 2-5. Locate Method Values**

Value	Comment
Siebel Root	Determines location based on the client's Siebel root directory. Locate Information is ignored in this case. (For example, this method would be used for Siebel Client Repository File components.)  Both server and client use this to retrieve the value of Siebel Root.
Registry	Determines location based on information in the Microsoft Windows registry. Locate Information would contain the path in the registry to read. (For example, this method would be used for Third Party - Microsoft Word components.)
Environment	Determines the location on the client by reading an environment variable. The parameter Locate Information would contain the name of the environment variable to read.
Common Core Facility	Determines location on server from a set of common core facility (CCF) parameters. Locate Information would contain the value from the CCF program context. (For example, this method would be used for a Siebel Server Customer Revision component.)
CFG	Determines location based on reading the client's active <code>.cfg</code> . Locate Information would contain the section and entry to read from the <code>.cfg</code> , plus an optional value to append to the value read from the <code>.cfg</code> . (For example, this method would be used for a Siebel Client Customer Revision component.)
File Name	Determines location based on reading the client's active <code>.cfg</code> . Locate Information would have the correct name of the client's active <code>.cfg</code> .

**Version Method**

This field provides additional information that is used in conjunction with Locate Method to read the version of a file. See [Table 2-6](#) for Version Method values.

**Table 2-6. Version Method Values**

Value	Comment
File Version	Determines version based on reading the version of a file. Version Information would contain the name of the file to version check. This method is mainly used with the registry.
Registry	Determines version based on reading the version from the registry. Version Information would contain the path in the registry to read.
Environment	Determines the version based on reading an environment variable. Version Information would contain the name of the environment variable.
DLL	Determines the version based on executing an entry point in a DLL file. Version Information would contain the name of the DLL file and the name of the entry point. For example, <code>bin\sslcver.dll,VersionString</code> executes the function <code>VersionString</code> in the file <code>bin\sslcver.dll</code> .
Database	Determines the version based on reading the Siebel Database Schema. Version Information is ignored in this case.
CFG	Determines version based on reading the client's active <code>.cfg</code> . Version Information would contain the section and entry to read from the <code>.cfg</code> , plus an optional value to append to the value read from the <code>.cfg</code> . (For example, this method would be used for a Siebel Client Customer Revision component.)
SRF	Determines the version based on reading the <code>.srf</code> . Version Information would contain the section name and the entry name from the active <code>.cfg</code> to be read to determine the name of the <code>.srf</code> .

### Examples of the Locate and Version Methods

The following two examples explain how Version Check works.

**Example:** Siebel Client Customer Revision\_\_`{language code}`

Given: Contents of the fields are:

Locate Method: CFG

Locate Information: Siebel,ClientRootDir,bin\enu\clntrev.cfg

Version Method: CFG

Version Information: Siebel,Version

**Locate Method:** CFG that indicates to read from client's active cfg file.

**Locate Information:** Siebel,ClientRootDir,bin\{language code}\clntrev.cfg means to read the entry ClientRootDir from the section [Siebel], in client's active .cfg and append bin\{language code}\clntrev.cfg to it. This request can return a patch such as c:\siebel\bin\{language code}\clntrev.cfg. This assumes C:\siebel to be the value of ClientRootDir under [Siebel] section in the CFG file.

**Version Method and Version Information:** Indicates to read from the file identified above (clntrev.cfg) and retrieves version number from the [Siebel] section.

**Example:** Siebel Client Repository File\_\_`{language code}`

Given: Content of the fields are:

Locate Method: CFG

Locate Information: Siebel,ClientRootDir,objects\enu

Version Method: SRF

Version Information: Siebel,RepositoryFile

**Locate Method:** CFG that indicates to read from client's active .cfg.

**Locate Information:** Siebel,ClientRootDir,objects\{language code} which means to read the entry ClientRootDir from the section [Siebel], in client's active .cfg. This request should return a path such as c:\siebel\objects\{language code}.

**Version Method and Version Information:** Indicates to read from the client's active CFG and retrieves the value for the RepositoryFile entry under the [Siebel] section.

Version Check then builds a string from the value obtained from Locate Method and Locate Information + "objects\{language code}" + the value obtained from Version Method and Version Information to locate the file for version checking. This will return something like  
c:\siebel\objects\enu\siebel.srf.

### **Related Components Applet**

The Related Components applet allows you to view how components relate to other components. A component will have related components if one component depends upon another component to function properly. To control the order of upgrades, use the Upgrade Kits View, ["Upgrade Kit Components Applet"](#) on [page 2-23](#).

### Upgrade Kits View

The Upgrade Kits view, shown in [Figure 2-4](#), lists the upgrade kits and relevant information about each. It is where upgrade kits are defined and maintained—this is the default view when opening the Siebel Anywhere Administration screen.

Use the view in [Figure 2-4](#) to:

- 1 Create upgrade kits.** See [Chapter 4, “Creating and Defining the Upgrade Kit.”](#)
- 2 Activate new upgrade kits.** See [Chapter 5, “Activating, Applying, and Distributing the Upgrade Kit.”](#)
- 3 Apply upgrade kit version information to the upgrade component registry.** See [Chapter 5, “Activating, Applying, and Distributing the Upgrade Kit.”](#)
- 4 Deactivate kits.** See “Deactivating the Upgrade Kit” on page 5-4.

Upgrade Kit:

Name	Status	Archive Kit Name	File Size	Comments
Siebel Client Customer Revisions__ENU1	Active	Kit1-10TUM.arc	1,106	
Siebel Client Executables 7.0 [10718-12]	Active	Kit1-10RCVV.arc	158,829,097	
Siebel Client Executables__ENU 7.0 [10718-12]	Active	Kit1-10RP2.arc	23,853,481	
Siebel Client Repository File__ENU 2	Active	Kit1-10UMK.arc	8,702,232	
Siebel Database Schema 39.66.0.1	Pending	.		
Siebel Upgrade Wizard 7.0	Active	Kit1-10QZU.arc	900,951	

Name	Min Old Version	Max Old Version	New Version	Comments
Siebel Client Customer Revisions__ENU			1	
Siebel Upgrade Wizard	7.0	7.0		

**Figure 2-4. Siebel Anywhere Upgrade Kits View**

The Status column indicates whether the Upgrade Kit is Request Submitted (awaiting for Server to pick up) or In Progress (in process of being created). The status column may have other values as well such as Pending, Active, Error, and so on. It is not limited to just Request Submitted and In Progress. [Table 2-7](#) describes the values and description of the Status column.

**Table 2-7. Status Column Values and Definitions, Upgrade Kit View**

Values	Description
Request Submitted	Request has been submitted to the server to create a new upgrade kit.
In Progress	Creation of new upgrade kit is underway on the server.
Pending	Kit successfully created and ready to be activated.
Active	Kit is ready to be applied and distributed.
Inactive	Kit on hold and not ready for further processing. First step to activate the kit is to change status to Pending. Then you can activate it.
Error	Indicator that there was an error while creating the kit.

A Siebel Anywhere upgrade kit can contain the software or database schema changes required to upgrade a specific component and defines the actions to apply the changes to the subscriber. The available actions include executing any type of program or batch script, copying files, moving files, or deleting files.

---

**NOTE:** The Siebel Administrator *must* use the Upgrade Kit Wizard to create an upgrade kit. Siebel Administrators invoke the Upgrade Kit Wizard by clicking Auto Create in the Upgrade Kits view.

---

After the Upgrade Kit Wizard has been invoked, the Siebel Administrator selects the desired upgrade component to create an upgrade kit for it. The processes for creating various types of upgrade kits are outlined in the following section. It is important to remember that any files, scripts, and so on are not stored as is after they are included in an upgrade kit; instead, they are stored in a condensed, uniquely named file in the Siebel file system.

The Siebel Administrator identifies the Minimum Version Number, Maximum Version Number, and New Version Number while creating the upgrade kit. These version numbers apply to the upgrade component that was selected for the upgrade kit. By default, Siebel Anywhere will increment the current version number for the upgrade component by one (1) and use this value for the New Version Number.

The Upgrade Kits view has two applets—Upgrade Kits and Upgrade Kit Components.

### Upgrade Kits Applet

The Upgrade Kits applet displays each upgrade kit defined in the system. The applet's fields are described in [Table 2-8](#).

**Table 2-8. Fields in the Upgrade Kits Applet**

Name	Comment
Name	Automatically generated name of the upgrade kit. The name includes the component name and version in the kit. The name cannot be modified once the kit is created. The user can specify the name (it is called title on an Upgrade Kit Wizard page) when creating the kit. However, please use descriptive names if you do not accept the default wording. Also see <a href="#">Table 2-2 on page 2-5</a> for additional limitations for a name.
Status	For definition of Status and the associated values and descriptions, see <a href="#">Table 2-7 on page 2-21</a> .
File Size	Size of the physical file containing the upgrade kit.
File Date	Date that the upgrade kit file was created.
Comments	This field is available for comments.



**Caution:** Deactivating a previously distributed kit could cause mobile users to have an unsuccessful synchronization. Also, this action places them unnecessarily into a read-only state.

The Upgrade Kits applet has the following buttons:

- **Auto Create.** Invokes the Upgrade Kit Wizard.
- **Activate.** Gathers the specified files for the upgrade and creates a single archive file.
- **Apply Versions.** Invokes the Apply Upgrade Kit page. Applies the upgrade kit version information to the upgrade components registry. The Apply Upgrade Kit page allows you to make a kit required instead of optional.

## Upgrade Kit Components Applet

The Upgrade Kits Components applet displays the components associated with the upgrade kit. The components are automatically created by the Upgrade Kit Wizard when you click Auto Create on the Upgrade Kits applet. Do not delete the default records in the Upgrade Kit Components applet.

The Upgrade Kit Components applet displays the fields shown in [Table 2-9](#).

**Table 2-9. Fields in the Upgrade Kit Components Applet**

Name	Comment
Name	Name of the component.
Min Old Version	Minimum component version that a subscriber must have in order to apply this upgrade kit.
Max Old Version	Maximum component version that a subscriber may have in order to apply this upgrade kit.
New Version	New version of the component.
Comments	This field is available for comments.

This applet also controls the upgrade kit sequence—the order of upgrades. For example, if Kit 1 should be applied before Kit 2, add component Kit 1 upgrades as Upgrade Kit Components of Kit 2. For details, refer to [“Controlling the Order of Kit Installation” on page 7-6](#).

### Upgrade Kit Items View

A Siebel Anywhere upgrade kit contains one or more upgrade kit items, which are the actions to be performed and the files associated with those actions. The Upgrade Kit Items view ([Figure 2-5 on page 2-25](#)) can be used to view the items, the defined sequence of events, and so on.

Siebel Administrators must use the Upgrade Kit Wizard to create upgrade kits. The Upgrade Kit Wizard automatically defines the upgrade kit items and sequence of events. When you activate the upgrade kit, the kit items you see in this view turn into item entries in the upgrade.ucf, which is part of every Siebel Anywhere upgrade kit.

Upgrade.ucf is the driver file for the Upgrade Wizard to apply the upgrade kit. It contains an ordered list of action items for the Upgrade Wizard to execute during the installation of the upgrade kit.

Use this view to review items and steps in an upgrade kit. See [Chapter 5](#), “Activating, Applying, and Distributing the Upgrade Kit.”

Show: Upgrade Kit Items				Favorites: * All Up		
<b>Upgrade Kits</b>						
<input type="button" value="Auto Create"/> <input type="button" value="Activate"/> <input type="button" value="Apply Versions"/> <span>1 - 6 of 6</span>						
Name	Status	Archive Kit Name	File Size	Comments		
Siebel Client Customer Revisions__ENU 1	Active	Kit1-10TUM.arc	1,106			
Siebel Client Executables 7.0 [10718-12]	Active	Kit1-10ROW.arc	158,829,097			
Siebel Client Executables__ENU 7.0 [10718-12]	Active	Kit1-10RP2.arc	23,853,481			
Siebel Client Repository File__ENU 2	Active	Kit1-10UMK.arc	8,702,232			
Siebel Database Schema 39.66.0.1	Pending	.				
Siebel Upgrade Wizard 7.0	Active	Kit1-10QZU.arc	900,951			
<b>Upgrade Kit Items</b>						
<input type="button" value="Query"/> <span>1 - 2 of 2</span>						
Sequence	Title	Item Type	Estimated Disk Space	Comments		
1	Install Customer Revision	FileCopy				
2		FileCopy				
<b>Upgrade Kit Item Parameters</b>						
<input type="button" value="Query"/> <span>1 - 2 of 2</span>						
Name	Value	Attachment Name	File Ext	Size	Date	Comments
File Name		LogFile_10718Microsoft SQL Server	txt	790	8/29/2001 6:09:47 P	
Destination	\$\$SiebelRoot\upgrade\\$\$KitName\					

**Figure 2-5. Siebel Anywhere Upgrade Kit Items View**

The Upgrade Kit Items view has three applets—Upgrade Kits, Upgrade Kit Items, and Upgrade Kit Item Parameters. The Upgrade Kits applet is described in “[Upgrade Kits Applet](#)” on [page 2-22](#) of this guide.

### Upgrade Kits Applet

The Upgrade Kits applet displays each upgrade kit defined on the system. These are the same kits that appear in the Upgrade Kits View described earlier in this chapter; see [“Upgrade Kits View” on page 2-20](#).

### Upgrade Kit Items Applet

The Upgrade Kit Items applet displays the individual items or actions to be executed by the upgrade kit. [Table 2-10](#) displays the field descriptions for this applet.

**Table 2-10. Fields in the Upgrade Kit Items Applet**

Field	Comment
Sequence	The order in which the Upgrade Wizard executes the item.
Title	The title of the item, which is displayed in the Upgrade Wizard.
Item Type	The type of item to execute.
Estimated Disk Space	The disk space required to download and execute an item (optional). The Upgrade Wizard validates that this amount of free disk space is available before applying the upgrade kit. If adequate disk space is not available, the Upgrade Wizard returns an error message.
Comments	This field is available for comments.

## User Preferences Screen and View

This section describes the relationship between the Product Updates view and the Product Updates applet. This view is only available on dedicated and mobile Web clients.

### Siebel Product Updates View

Siebel client subscribers use the Product Updates view of the User Preferences screen for retrieving and installing optional upgrade kits. This view also allows client subscribers to query and see their current update status. An example of the Product Updates view is shown in [Figure 2-6 on page 2-28](#).

---

**NOTE:** Configuration changes are not reflected in the Product Updates view until a reconnection occurs.

---

There are two types of upgrade kits for Siebel client subscribers: required and optional. Upgrade kits created for Siebel servers should always be required.



**Caution:** It is *strongly recommended* that System Administrators choose the proper logical settings within Siebel Anywhere to make sure upgrade kits created for Siebel servers are always required.

As a Siebel Anywhere Administrator, you use the Product Updates view to test upgrade kits on individual client machines before making the kit required. See [“Distributing Upgrade Component Version Information” on page 5-7](#) for more information on testing kits.

The screenshot shows the Siebel Product Updates view. At the top, there is a 'Show:' dropdown menu set to 'Product Updates'. Below this is a navigation bar with tabs for 'Inaging', 'Outbound Communications', 'Price List & Sales Methodology', 'Product Updates', 'Remote Status', 'Search', 'Spelling', and 'Synchronize CDA Projects'. The 'Product Updates' tab is active. Below the navigation bar is a toolbar with buttons for 'Upgrade Selected Components', 'Save', and a pagination indicator '1 - 7 of 7+'. The main content area displays a table with the following data:

Upgrade	Component Name	Status	Current Version	Minimum Version	Maximum Version	Upgrade Size (bytes)	Download Time (r
✓	Siebel Call Center CFG__ENU	Upgrade Required	100	101	101	4,544	1
	Siebel Client Customer Revisions	Version OK	1		1	0	0
	Siebel Client Customer Revisions__ENU	Upgrade Available	1		2	9,878	1
	Siebel Client Executables	Version OK	7.0 [10718] LANG__	7.0 [10718-11]		0	0
	Siebel Client Executables__ENU	Version OK	7.0 [10718] ENU	7.0 [10718-11] ENU		0	0
	Siebel Client Repository File__ENU	Version OK	2		2	0	0
	Siebel Database Schema	Version OK	39.66.0.1	39.66.0.0		0	0

**Figure 2-6. Product Updates View**

## Product Updates Applet

The Product Updates view has one applet, of the same name. The Product Updates applet fields are described in [Table 2-11](#).

**Table 2-11. Fields in the Product Updates Applet (1 of 2)**

Field	Comment
Upgrade	Check this field to upgrade the component.
Component Name	Name of the upgrade component.
Status	Status of the upgrade kit. Values can include the following: <ul style="list-style-type: none"> <li>■ Upgrade Available - an upgrade kit available for you to retrieve, either required or optional.</li> <li>■ Upgrade Required - can operate in read-only mode until kit is installed.</li> <li>■ Version OK - versions of your software components are current.</li> <li>■ Upgrade Not Available - the software component is outdated and needs to be updated; however no kit is available to do this. Contact your system administrator.</li> </ul>
Current Version	The version of the component on the client machine.

**Table 2-11. Fields in the Product Updates Applet (2 of 2)**

Field	Comment
Minimum Version	The minimum allowable version of the component.
Maximum Version	The maximum allowable version of the component.
Upgrade Size (bytes)	The size of the upgrade kit.
Download Time (mins)	The estimated time to download the kit on a 28.8 modem.

The Product Updates applet has an Upgrade Selected Components button, which invokes the Upgrade Wizard. See [“Retrieval and Installation of Upgrade Kits”](#) on [page 6-3](#) for more details.

## For More Information

For more information about topics and related information in this chapter, see *Fundamentals, MidMarket Edition* and *Global Deployment Guide, MidMarket Edition*.

The next chapter describes the planning and preliminary tasks to prepare the components necessary to define upgrade kits. Make sure you allow enough time to plan your upgrades.

## **Screens and Views in Siebel Anywhere**

*For More Information*

# Upgrade Planning and Preliminary Tasks

# 3

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# About This Chapter

This chapter helps you understand how to use Siebel Anywhere to plan and accomplish preliminary tasks. Upgrades may include new versions of Siebel eBusiness applications, custom extensions to the database schema, custom Siebel eBusiness configurations, third-party files or applications, or the associated language packs for each supported language included within the Siebel eBusiness Applications. If necessary, you can create your own custom components or configurations, using the procedure described in this chapter.

## Upgrade Planning and Preliminary Tasks Process Flow

The following list describes the tasks in this process:

- 1 Understand the requirement.** First, make sure you understand exactly what needs to be done to plan and implement the upgrade.
- 2 Set up configurations.** Planning includes identifying upgrade components, or language packs, for each end-user language. An example of a language choice would be one associated with a specific language such as enu\_1252.dbf for English, deu\_1252.dbf for German, and ptb\_1252.dbf for Brazilian Portuguese. Be sure to use the correct end-user language pack (or upgrade component for each language included in the Siebel eBusiness Application) while creating upgrade kits. See [“Planning an Upgrade” on page 3-3](#).
- 3 Prepare upgrade kit contents.** Gather the software, files, or database schema updates required for the kit into the appropriate directory (remember, one kit at a time). The specific process to follow depends on the type of components you are planning to upgrade. See [“Preparation of Upgrade Kit Contents” on page 3-9](#).

---

**NOTE:** Some kits do not require any files. For example, Database Schema kits do not require any files to create a kit.

---

You must use the Upgrade Kit Wizard to define the upgrade kit. See [“Defining the Upgrade Kit” on page 4-3](#).

## Planning an Upgrade

Careful planning and thorough testing are essential to avoid problems during an upgrade. Siebel Anywhere has the capability to distribute and apply upgrades across the organization, thereby underscoring the necessity for planning and testing.



**Caution:** Any errors in an upgrade kit, whether in the files being distributed or in application processes defined for them, can have rapid and widespread impact on your production environment.

### Test Plan Strategy

To successfully upgrade with Siebel Anywhere, create the kit as an optional kit and distribute the component information to test it as an optional kit. If the kit will remain optional, that is the only testing that is required. If the kit will be required, then test the kit using the Test Client Configuration. When you are successful using various tests and forms of clients, release the kit to production.

### Upgrade Kit Requirements

Before you begin the process of creating upgrade kits, you need to understand the requirement for the upgrade. You need to define exactly how many and what type of upgrade kits are required and to whom they will be distributed.

The number and type of upgrade kits required for your upgrade depend on your subscribers and the components to be upgraded. For example, you may be preparing to upgrade to a new version of your custom Siebel configuration, requiring the distribution of a new `.srf` to every mobile and dedicated user.

Your custom configuration may also need to apply database schema changes to your Siebel databases and to the local databases of Mobile Web clients. Database schema changes are not distributed by a kit to dedicated Web clients. Creating a database schema kit applies the changes from the logical schema to the physical schema. These changes are visible to dedicated Web clients, without distribution through a kit, because they connect directly to the Siebel Server Database.

You must create an upgrade kit for each component to be upgraded. In the preceding example, you would need to create one upgrade kit for the Siebel Client Repository File and a second upgrade kit for the database schema extensions.

It is a good idea to compile a list of the upgrade kits you will need and then check the existing component information against the new requirements. For example, look up the minimum and maximum version information existing on your production client systems.



**Caution:** Create and test kits required for the upgrade before you click **Distribute** on the Siebel Anywhere Configurations view. Each time you click **Distribute**, a transaction is added for your mobile users. This addition causes a new prompt to notify mobile users of a possible required upgrade kit.

The remainder of this chapter describes other tasks to prepare for upgrades. Where a given step varies by component to be upgraded, specific instructions for each component are provided.

## Verification of Existing Component Information

An important part of planning for a new upgrade kit is checking the existing component information. You need to make note of the current version requirements and any special parameters for the specific components.

To check the current minimum and maximum version information, go to the Upgrade Components view. This view lists the minimum and maximum version numbers, as well as the Locate and Version Methods.

The Siebel Remote Client Status view contains the Siebel Anywhere version information in the Product Versions field for mobile users *only*. For more information about this view, see *Siebel Remote Administration Guide, MidMarket Edition*. To check on special parameters, go to the Upgrade Kit Items view. This view provides information on item type and estimated disk space, as well as parameter values. Parameter values appear in the Upgrade Kit Item Parameters applet.

You should use the following approach for testing upgrades:

For Siebel client and Siebel Server upgrades, first create the upgrade in your development or test environment as an optional kit. Test it manually on several clients. Validate that the kits can be retrieved successfully and applied in this environment while paying close attention to the version information.

For further information on testing, see [Chapter 6, “Retrieving, Installing, and Testing Upgrade Kits.”](#)

## Setting Up Configurations

The Configuration view allows you to review the components in each of the defined configurations and make changes according to your company needs. This section describes how to use the Configuration view.

### Adding Components to a Configuration

At times, you may need to add components to an existing configuration.

#### **To add a component to a configuration**

- 1** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2** From the Show drop-down list, select Configurations.
- 3** In the Upgrade Configurations list, select the configuration to which you want to add a component.
- 4** In the Related Components list, click New.
- 5** In the Upgrade Components dialog box, select the component you want to add, and click the pick button.

The component remains selected (highlighted) in the Related Components list.

- 6** If you want version checking to occur for the selected component when the client starts up, click in the Required at Startup field.

Repeat [Step 3](#) through [Step 6](#) for any additional components you want to add.

## Removing Components from a Configuration

At times, you may need to remove components from an existing configuration.

### **To remove a component from a configuration**

- 1** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2** From the Show drop-down list, select Configurations.
- 3** From the Upgrade Configurations list, select the configuration from which you want to remove a component.
- 4** On the Related Component list, select the component you want to remove.
- 5** In the Related Components list, click the menu button and select Delete Record.
- 6** In the dialog box, confirm this is the record you want to delete.

Repeat [Step 3](#) through [Step 6](#) for any additional components to be removed from this configuration.

## Creating a New Configuration

In most cases, the configurations provided with Siebel Anywhere are sufficient. However, you can create new configurations for special situations or to represent different installed clients within your company.

For example, if everyone in your company uses Siebel Sales and you need to distribute certain upgrades to employees in remote offices separately from the rest of the company, you would create a new configuration to accommodate this situation. The employees in the remote offices would be temporarily associated with the new configuration in order to distribute the special upgrade just to them. (See [“Assigning Employees to Configurations” on page 3-7](#) for details on associating specific employees with a configuration.)

Also, you may need to create different configurations based upon language usage. If there is a set of the users in your company only using ENU and another set using both ENU and DEU, you should create two different configurations.

If there is a need to create a new configuration for long term use (as in language usage), you must make sure that every client CFG file is appropriately updated.

**To create a new configuration**

- 1 From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2 From the Show drop-down list, click Configurations.
- 3 From the Upgrade Configurations list, click menu and then New Record.  
A blank record appears.
- 4 Complete the necessary fields.  
Limit the Name field to 91 characters or less.



**Caution:** Exceeding the 91-character limit in the Name field causes the synchronization process to fail.

- 5 Add appropriate Related Components to the new configuration you just created.  
To do this, see [“To add a component to a configuration” on page 3-5](#).

## Assigning Employees to Configurations

The purpose of assigning employees to configurations is to handle uncommon situations. In most cases, employees are associated with a specific configuration based on a ComponentName entry in the `.cfg` of an application. For example, in the Siebel Sales application the ComponentName in the default `.cfg` (`siebel.cfg`) would be Siebel Sales Client by default. This means that everyone using the Siebel Sales application is automatically associated with the Siebel Sales configuration.

Assigning employees to a configuration in the Upgrade Employee Configuration applet in the Employee view can be used in place of the entry in the `.cfg`, or as a method for overriding the entry in the `.cfg`. Again, the purpose of assigning employees to configurations is to handle uncommon situations.

---

**NOTE:** Do not assign System Administrator to any configuration. If, for some reason, you assign System Administrator to a configuration, then create a kit and distribute it to that configuration, System Administrator may not be able to login.

To remedy this error, set the ComponentName entry in the CFG file to None.

---

#### **To assign an employee to a configuration**

- 1** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2** From the Show drop-down list, click Employees.
- 3** From the Upgrade Configurations list, select the configuration to which you want to add an employee.
- 4** In the Upgrade Employee Configuration list, click New.
- 5** In the Login field, click the select button.

From the Pick Employee dialog box, select the employee you want to add, and click OK.

Repeat [Step 3](#) through [Step 5](#) to assign additional employees to this configuration.

---

**NOTE:** When it initializes the local database for the first time, Siebel Anywhere uses the configuration in the `.cfg`. It does not use the configuration defined in the Employees view under the Siebel Anywhere Administration Screen.

---

## Preparation of Upgrade Kit Contents

Preparing to create an upgrade kit involves gathering the software, files, or database schema updates required for the kit. The specific process to follow depends on the type of components you are planning to upgrade. Component types include:

- Customer Revisions
- Siebel Upgrade Wizard
- Siebel Configuration File
- Siebel Database Extensions
- Siebel Executables
- Siebel Repository File
- Third-Party Software

---

**NOTE:** Do not use the upgrade kit type Customer Revisions for upgrade kits containing a Siebel SRF or CFG file. Instead, use the Siebel Client Repository File and Siebel Client CFG kit types, respectively, for these upgrades. This will allow proper version checking.

---

Preparing for an upgrade kit could be as simple as gathering a new CFG file or a simple batch script. Preparation for other kits can be complex. The following section discusses several of the component types that entail some complexity.

### Siebel Executables

You can use this component type for either new versions of Siebel eBusiness Applications or for Siebel patches.

#### New Versions of Siebel eBusiness Applications

If your upgrade includes a new version of a Siebel client installation, use the Siebel Packager utility. Use this utility to gather the files and information needed for a custom installation package for each subscriber configuration. See *Siebel Web Client Administration Guide, MidMarket Edition* for further details.

---

**NOTE:** When creating upgrade kits to deliver a full Siebel client installation, there will be a separate kit for each language component plus the base. For example, delivery of a full upgrade with ENU and DEU components will include three separate Siebel Anywhere upgrade kits—one each for BASE, ENU, and DEU.

---

After the package has been tested and is available for distribution to clients, you can create the Siebel Executables kit using that package. The following procedure describes how to do this.

#### To create a Siebel Executables kit

- 1 From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2 From the Show drop-down list, click Upgrade Kits.
- 3 From the Upgrade Kits list, click Auto Create.
- 4 From the Upgrade Kit Wizard, select the appropriate upgrade component.  
  
For example, use Siebel Client Executables for base or Siebel Client Executables\_\_ENU for English language pack.
- 5 Click next and input the UNC path to the package just created.

---

**NOTE:** Note that the UNC path needs to be accessible by the server.

---

**6** Click next.

Input command line arguments for `install.exe`. In most cases the default argument will be enough.

**7** Click next, and input correct version numbers.**8** Click next, and input a title for the kit and then click finish.

Repeat this procedure for each language pack.

## Distributing a Siebel Patch

Do *not* use Packager for Siebel Patches. To distribute a Siebel patch, the System Administrator needs to first apply the patch to the master installation and test it before distributing it to end users. After successful testing, distribute the Siebel Patch using the Client Executables Kit. You must create a separate base kit and language package kit from respective directories—depending on the environment.

### **To distribute a Siebel patch**

- 1** Copy the Siebel Client Patch to a local directory (client patches typically reside in a subdirectory of the patch directory).
  - Dedicated and Mobile Web Clients — `\sea`
  - HTML Thin Client

---

**NOTE:** Only mobile and dedicated Web clients can use Siebel Anywhere to download the kit. For other types of clients, such as Siebel Tools clients, users can only receive notification and then manually apply the patch.

---

- 2** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 3** From the Show drop-down list, click Upgrade Kits.

The Upgrade Kits view appears.

**4** Click Auto Create to start the Upgrade Kit Wizard and follow the prompts to set these options:

**a** Choose Siebel Client Executables as the upgrade kit component in the Select Component page.

**b** Enter the directory where you have copied the patch on the local machine (from [Step 1](#)) in the UNC Path for Master Installations.

Do not check Uninstall Previous Siebel Version as this would cause a failure.

**c** On the File to Execute page, input command line arguments for `install.exe`. In most cases the default argument will be sufficient.

Do *not* change the predefined parameter.

**d** Enter the correct new version string of the new patch in the New Version entry.

You must enter the version number of the patch—including the build number in the bracket—and the language code—exactly.

For example, the first Siebel 7 patch New Version should be set to 7.0.x.x [10xxx] ENU.

**e** Change the title of the kit.

**f** Click Finish.

**g** Click Alt-Enter to refresh the view.

When Status of the newly created kit shows as Pending in the Upgrade Kits list, proceed to the next step. You may need to refresh the view several times for the Status to change.

Repeat the above steps for each language pack.

**5** In the Upgrade Kits list, select the upgrade kit that you just created.

**a** Click Activate.

**b** Click Apply Versions.

From the Apply dialog box follow the instructions to make this a required or optional upgrade kit.

- 6 From the Show drop-down list, select Configurations.
- 7 From the Upgrade Configurations list, select the configuration to which you want to distribute the patch.
- 8 For the configuration you selected, verify the following are listed in the Related Components list:
  - The Siebel Client Executables.
  - Each of the relevant language packs (Siebel Client Executables\_\_{language code}).
  - Click Distribute.

After the Upgrade Wizard has successfully detected and downloaded the Upgrade Kit, it will proceed to install the patch on the clients. InstallShield will default the client installation path to `c:\sea\client`, which the end user should set to the current Siebel client installation. This installation path can be defaulted to the correct path by customizing the `siebel.ini` file for the patch and then disabling the dialog box for the path. For `siebel.ini` syntax, refer to Packager information in *Siebel Web Client Administration Guide, MidMarket Edition*.

## Database Schema Extensions

Siebel Anywhere upgrade kits can include changes to the Siebel base tables. The following sequence of tasks provides the administrator an overview of how to implement database schema extensions:

**Define custom extensions.** You must define your extensions in the logical database schema in the Siebel Repository before creating the upgrade kit. This includes migrating the repository from development to production.

**Create a database schema upgrade kit.** This will increment the custom schema version by 1 in the HQ database and apply the changes from the logical schema to the physical schema on the HQ database. Then, the entire schema definition is distributed to mobile Web clients.

**Install the upgrade kit.** The Upgrade Wizard synchronizes the logical and physical schemas on the local databases of mobile Web clients.

For more information regarding the tasks above, see *Siebel Tools Reference, MidMarket Edition*.

The process for defining database schema extensions differs between the development and production environments. You must first create schema extensions in the development environment before proceeding with either the test or production environment upgrades. See *Siebel Tools Reference, MidMarket Edition* for details.

For Siebel client configurations schema upgrade kits and the related Siebel Repository File kits should always be distributed at the same time to avoid upgrade errors that result when the SRF upgrade kit arrives on the client system before the Schema upgrade kit. Be sure that both kits are activated and applied before you click Distribute on the Components view. You should set the SRF kit to be dependent on the Schema kit for best results. See [“Controlling the Order of Kit Installation” on page 7-6](#) for more details.

During database schema upgrades, new and changed objects are identified by comparing the current physical schema with the new virtual schema. Based on this comparison, Upgrade Wizard adds new objects and alters existing objects by using the following:

- To create the new objects: create table, create index, and so forth.
- To alter the existing objects: alter table, alter index, and so forth.



**Caution:** Downsizing existing columns is not recommended as it may cause an error.

Normally, the database does not allow downsizing a column that already contains data that could not fit into a new smaller column. If you downsize a column, the column representation in the repository would be different from the physical schema. This may cause an error. In addition, Siebel Remote would fail under these conditions.

For example, after downsizing existing columns, one of the columns in the new database is shorter (it is created from the representation in the repository). Then a local database is re-extracted (this includes a new schema). After the Remote user synchronizes, initialization occurs. Upgrade Wizard first applies the new local database (including a new schema) to a Remote user’s machine. Next, Upgrade Wizard applies any server transactions downloaded during synchronization. If these transactions were generated before the schema changed, Upgrade Wizard tries to insert data that does not fit into the new column. This will cause an error.

## Development Environment

In the development environment, you make changes directly to the logical database schema in the Siebel Repository using Siebel Tools. Refer to *Siebel Tools Reference, MidMarket Edition* for instructions regarding database extension implementation.

You do not need to apply the logical schema changes to the physical schema on the server database. They are applied automatically when you create the upgrade kit.

## Test or Production Environment

To extend the database schema in your test or production environment, you migrate the entire Siebel Repository containing the desired database extensions from the development environment, rather than making changes directly to the repository in the test or production environment. Use the Configuration Utility to do this. See *Siebel Tools Reference, MidMarket Edition* for more information about this utility.

*Siebel Tools Reference, MidMarket Edition* details the procedure for moving repositories between your development and test or production environments. As in the development environment, you do not need to use Siebel Tools to apply the logical schema changes in the repository to the physical database. These changes are automatically applied when you create the upgrade kit.

## Siebel Repository Files, Third-Party Applications, and Other Files

In order to prepare for creating an upgrade kit for a Siebel repository file, third-party application, or other non-Siebel file, copy the files to a directory accessible from the Siebel Server from which you will run the Upgrade Kit Builder server component.

---

**NOTE:** The SRF upgrade kit *must* contain the entire SRF file. SRF upgrade kits for servers are not supported in Siebel Anywhere.

---

Siebel Anywhere can install third-party applications or other files using one of the following methods:

- Executing a batch script or installation program.
- Copying files to a specified location.

Before deploying a kit through Siebel Anywhere, make sure that any files, scripts, or other programs required to install third-party applications contain the necessary data and are fully tested.

### Creating a Custom Component

Siebel Anywhere functionality allows you to define your own custom components, if necessary.

#### **To define a custom component**

- 1** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2** From the Show drop-down list, click Upgrade Components.
- 3** In the Upgrade Component list, click New.

A blank record appears.

- 4** Complete the necessary fields.

Use a meaningful name to describe the function of the component. Limit the Name field to 91 characters or less.



**Caution:** Exceeding the 91-character limit in the Name field causes the synchronization process to fail.

Make sure the Minimum and Maximum version fields are blank. This information is filled in when the kits are applied.

- 5** Click New on the Related Components list, and select a related component for the new custom component you just created.
- 6** Click the pick button.

Repeat steps [Step 5](#) and [Step 6](#) for as many related components you want to relate to the new custom component.

- 7** Add the new custom component to a configuration, by following the procedure, [“To add a component to a configuration” on page 3-5](#).

## **For More Information**

For more information about topics and related information in this chapter, see *Siebel Web Client Administration Guide, MidMarket Edition* and *Siebel Tools Reference, MidMarket Edition*.

This chapter discussed the planning and preliminary tasks for an upgrade kit. The next chapter discusses how to use the results of these tasks to define the upgrade kit.

## **Upgrade Planning and Preliminary Tasks**

---

*For More Information*

# Creating and Defining the Upgrade Kit

# 4

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# About This Chapter

This chapter outlines the four-step process for creating an upgrade kit. This process includes defining, activating, applying and distributing an upgrade kit. The chapter then describes the first step, defining the upgrade kit, in detail. The remaining three steps in the kit creation process are discussed in the next chapter.

## Creation of the Upgrade Kit

After you prepare the contents for an upgrade kit, you are ready to create the kit. Upgrade kits are defined and maintained in the Siebel Anywhere Upgrade Kits view. For a description of this view, see [“Upgrade Kits View” on page 2-20](#).

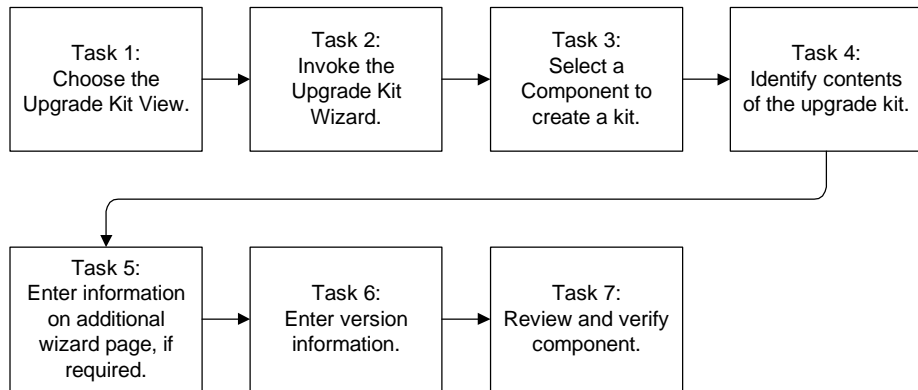
Creation of an upgrade kit is a four-step process to take the component, prepared earlier, and make it available to subscribers in the form of a kit. The remainder of this chapter describes the first step in the process, defining the upgrade kit. Then the following chapter discusses the other three steps in the process: activating, applying and distributing the upgrade kit.

Before defining an upgrade kit, it is essential to understand the difference between the Upgrade Kit Wizard and the Upgrade Kit Builder server component.

- The Upgrade Kit Wizard provides a means to identify the component type and required parameters for building a new kit on the Siebel Server. The status of this component group must be Online for the Siebel Administrator to be able to create upgrade kits.
- The Upgrade Kit Builder component on the Siebel Server receives the information from Upgrade Kit Wizard to build the kit and place it on the server file system.

## Defining the Upgrade Kit

Defining the upgrade kit is the first of four steps required to create a kit. In this step, you identify the components of the kit and enter version information—through a series of seven tasks shown in [Figure 4-1](#). After completion of these tasks, an upgrade kit record is added to the database.



**Figure 4-1. Defining the Upgrade Kit**

The process of defining an upgrade kit begins with the Upgrade Kit view that allows you to invoke the Upgrade Kit Wizard. *Always* Click Auto Create in this view to invoke the Upgrade Kit Wizard to define your upgrade kit. This wizard helps you correctly define the necessary information and components for your kits.

---

**NOTE:** It is recommended that you do not add, update, or delete any records in the following lists on the Upgrade Kit Items view: Upgrade Kit Items list and Upgrade Kit Item Parameters list.

---

The Upgrade Kit Wizard leads you through a series of pages to gather the information.

- Click Next when you have specified the necessary options for a page.
- If you need to change any selections, click Previous to return to the appropriate page.
- Click Cancel to cancel the upgrade kit creation.

---

**NOTE:** There are two Database schema kits available—Siebel Database Schema and Siebel Database Schema (Version Check). Choose Siebel Database Schema, not the other one that contains (Version Check).

---

#### **To invoke the Upgrade Kit Wizard**

- 1** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2** From the Show drop-down list, click Upgrade Kits.  
The Upgrade Kits view appears.
- 3** Click Auto Create to invoke the Upgrade Kit Wizard.  
The Upgrade Kit Wizard - Upgrade Component page appears.
- 4** Follow the prompts to specify all parameters necessary to define your upgrade kit.

See [“Upgrade Kit Wizard Tips” on page 4-11](#) for assistance while using the Upgrade Kit Wizard.

## Predefined Siebel Anywhere Components

You can choose one of the predefined Siebel Anywhere upgrade components or any additional custom components. See [“Creating a Custom Component” on page 3-16](#) for more information about components you may have added to the Upgrade Components view.

For examples of predefined components, see [Table 4-1](#).

---

**NOTE:** An upgrade kit is retrieved and applied only by Siebel Anywhere subscribers that use the specified component.

---

**Table 4-1. Predefined Examples of Siebel Anywhere Components (1 of 2)**

Siebel Component Type	Siebel Anywhere Component	Comment
Customer Revisions	<ul style="list-style-type: none"> <li>■ Siebel Client Customer Revision</li> <li>■ Siebel Client Customer Revisions__<code>{language}</code></li> </ul>	A nonspecific component for distributing any customer-revised files, such as Online Help files, Siebel Report files, Siebel Help Files, Siebel Sample Database Files, third-party files or applications on the Siebel client.
	<ul style="list-style-type: none"> <li>■ Siebel Server Customer Revisions</li> <li>■ Siebel Server Customer Revision__<code>{language}</code></li> </ul>	A nonspecific component for distributing any customer-revised files on the Siebel server.
Siebel Upgrade Wizard	<ul style="list-style-type: none"> <li>■ Siebel Upgrade Wizard</li> </ul>	The Siebel Upgrade Wizard. It is automatically associated with every upgrade kit to make sure the client uses the current version of the wizard.
Siebel Configuration File	<ul style="list-style-type: none"> <li>■ Siebel Sales CFG__<code>{language}</code></li> </ul>	A component for distributing a customized <code>.cfg</code> for client systems.
Siebel Database Extensions	<ul style="list-style-type: none"> <li>■ Siebel Database Schema</li> </ul>	The database schema used by the Siebel server and Siebel Remote user databases.
Siebel Executables	<ul style="list-style-type: none"> <li>■ Siebel Client Executables</li> <li>■ Siebel Client Executables__<code>{language}</code></li> </ul>	The Siebel eBusiness Applications client executables.

**Table 4-1. Predefined Examples of Siebel Anywhere Components (2 of 2)**

Siebel Component Type	Siebel Anywhere Component	Comment
Siebel Repository File	■ Siebel Client Repository File_{language}	The file used by Siebel eBusiness Applications (.srf).
Third-Party Software	■ Third Party - Microsoft Word ■ Third Party - Microsoft SQL Server Driver ■ Third Party - Microsoft Internet Explorer ■ Third Party - Adobe Acrobat Reader ■ Third Party - Adobe Acrobat	Third-Party Software, as used on the Siebel client.  These Upgrade Components are for version checking <i>only</i> . Siebel Anywhere is not intended to deliver entire Third Party software as an upgrade kit.  For smaller and simpler software such as Adobe Acrobat and Winzip, you can use Siebel Anywhere to deliver them as a Third-Party upgrade kit.

If you select a new customized component, you must add the component as a related component on any Siebel Anywhere configuration that you want to upgrade with the component. To relate components, see [“Adding Components to a Configuration”](#) on page 3-5.

## Siebel Database Extension Component

The Siebel Database Extensions component identifies the database schema used by the Siebel server and Siebel remote databases.

Make sure the ODBC data source correctly points to the server database that has the extended database definition.

[Table 4-2](#) includes the parameters to create a database schema kit, both required and optional. The parameters are specific to your database platform. They can be obtained by running some SQL queries on the server database.

**Table 4-2. Database Schema Kit Parameters**

Parameter	Comment
ODBC Data Source (required)	Points to the server database.
User Name (required)	Siebel Administrator's login.
User Password (required)	Siebel Administrator's password.
Table Owner (required)	Database platform dependent: dbo user login for MS SQL.
Table Owner Password (required)	Database dependent.
Table Space (required)	Database table space or segment for new tables.
Index Space (optional)	Database table space or segment for new indexes.
16K Table Space (optional)	Obtain the optional parameter through a SQL query on the server database. This is specific to the database platform.
32K Table Space (optional)	Obtain the optional parameter through a SQL query on the server database. This is specific to the database platform.
Table Group File (optional)	Obtain the optional parameter through a SQL query on the server database.

## Siebel Client Repository File

Make sure the file is accessible from the Siebel server where Upgrade Kit Builder will be running.

## File Attachments

To understand how Siebel Anywhere handles file attachments to upgrade kits requires a short description of the overall process.

Basically, you identify the file attachments you want associated with a kit. When you finish the Upgrade Kit Wizard, the Upgrade Kit Builder goes to work and creates the upgrade kit. When the server component is done, the newly created record in Upgrade Kits view will show the status Pending. At this point, you should have S\_UPG\_KIT\_IARG\_\*.SAF files created in your file system for each of your attachments, plus the associated Siebel Anywhere Component, which is specific to the type of Siebel Component type.

Click Activate to collect every file attachment and the associated Siebel Anywhere Component to form one single file attachment, S\_UPG\_KIT\_<ROW\_ID>\_<VER\_NO>.SAF, again in your file system. This is the file that end users will download. If you deactivate and reactivate the kit, a new S\_UPG\_KIT\_<ROW\_ID>\_<VER\_NO>.SAF will result with the same ROW\_ID but different VER\_NO.

## Select File to Execute

The Upgrade Wizard Kit's Select Execute File page is an extra action required only for the following components:

- Customer Revisions
- Third-Party Software

For the Customer Revisions kits, select any single file depending on the kit's contents—it can be a custom batch script or executable. For Third Party software kits, select the file that runs the software installer on the subscriber (for Siebel Packager custom installations and patch upgrade kits, this is `INSTALL.exe`). For this kit (and other types of kits for which this is applicable) only one file can be selected for execution.

---

**NOTE:** Do not select a file that cannot be executed. For example, if a `.txt` or `.cfg` is selected (highlighted), then the kit will not be successfully applied, because Siebel eBusiness Applications will try to run a file that is not an executable.

---

Add any required command-line arguments. For example, if you need to pass the Siebel root directory to the application being invoked, in the command line field enter: `$SiebelRoot`.

## Minimum and Maximum Version Fields

When you define a Siebel Client Executables Kit with a full install package produced by Packager, the Minimum and Maximum version fields must be blank. Copy the new version information in the exact format as seen in the base file included with the path. For example, for 7.0 [107xx-1] full release, remove the full release part and copy only the version string.

Generally, you should keep the version numbers (Min and Max version) for Siebel Client Customer Revision kits as defaults when creating the kit. Your users will download every kit of this type without skipping any of them. When you know a kit that you distributed is invalid, then you can deactivate the kit and create another one with the exact same version numbers (that is, Min, Max, and New). In this case you need only to activate the kit; you do not need to apply or distribute.



**Caution:** When implementing major upgrades, preserve the version numbers for every component. Siebel Anywhere assigns increasing version numbers. Never reset any of these version numbers to zero.

If you want to allow clients, regardless of what version of the component they currently have, to be able to use the upgrade kit to upgrade to the new version, leave the Minimum and Maximum field values blank. This blank field indicates to Siebel Anywhere that the client does not need any specific version of the component in order to install this kit. (In the case of mobile Web clients, if you create a new kit after distributing and deactivating a prior kit, make sure the new version number is the same as the one used before.)

Be careful when using this feature. For example, if you create a kit for a customer revision, the only time you can leave the Minimum and Maximum fields blank is when you either do not care if your clients have received the previous kits of the same type, or you are able to include every file required by the component in this kit or kits you are going to create after this one.

For example, there are two reports with the following:

- report1 min null, max null new 1
- report2 min null, max null new 2

If the user logs in after Kit 2 has been distributed, only report 2 will be retrieved. Therefore, in this model, make sure that client customer revision kits are cumulative rather than collective. Otherwise, users can use the following version mechanism:

- report1 null null 1
- report2 1 1 2

You should always leave the Minimum and Maximum version fields blank when you are creating a Siebel Repository File component upgrade kit.



**Caution:** Make certain that minimum, maximum, and new versions are correctly set before finishing your upgrade kit, using the default numbering system, if possible. Incorrectly specifying the version information can prevent subscribers from upgrading successfully.

## Upgrade Kit Wizard Tips

Some features of the Upgrade Kit Wizard require additional explanation. [Table 4-3](#) provides tips on using these features successfully.

**Table 4-3. Upgrade Kit Wizard Tips (1 of 2)**

Siebel Component Type or Topic	Comment
Siebel Client Customer Revisions	<ul style="list-style-type: none"> <li>■ Choose Siebel Client Customer Revisions to distribute generic files.</li> <li>■ Choose Siebel Client Customer Revisions__<code>{language code}</code> to distribute language specific files.</li> </ul>
Siebel Configuration File	<ul style="list-style-type: none"> <li>■ If you are not sure you selected the right file to create the CFG kit, click Cancel and restart by clicking Auto Create.</li> </ul>
SRF	<ul style="list-style-type: none"> <li>■ To specify files for these components, enter the Universal Naming Convention (UNC) path—browsing is not available.</li> <li>■ The upgrade kit also sets the version of the <code>.srf</code> in the file itself. When creating SRF kit, the new version MUST be an integer. This type of kit must contain the entire SRF file.</li> <li>■ If you want to delete the upgrade kit files when the kit is applied, check the Delete destination file when done check box.</li> </ul>

**Table 4-3. Upgrade Kit Wizard Tips (2 of 2)**

Siebel Component Type or Topic	Comment
Siebel Client Executables	<ul style="list-style-type: none"> <li>■ When specifying the UNC path, you must choose the directory where the package was created:               <ul style="list-style-type: none"> <li>■ \seaw folder on the Siebel CD</li> <li>■ {ClientRootDir}\temp\{PackageName} (for Siebel Client Executables)</li> <li>■ {ClientRootDir}\temp\{PackageName}\{Language Code} (for Siebel Client Executables_{Language Code}).</li> </ul> </li> <li>■ Check Uninstall Previous Siebel Version check box only when you are performing a new installation of Siebel Executables.</li> <li>■ If you are creating a kit for a Siebel client patch, <i>do not</i> select the Uninstall Previous Siebel Version check box. When selected, this check box determines whether the Upgrade Wizard automatically uninstalls the existing Siebel Executables before proceeding with installation of the upgrade.</li> <li>■ If you want to delete the upgrade kit files when the kit is applied, check the Delete destination file when done check box.</li> </ul>
Third-Party Software	<ul style="list-style-type: none"> <li>■ The Client Destination Directory field specifies where the files of the upgrade kit are to be placed on the client machine. \$SiebelRoot refers to the Siebel client root directory, and \$KitName refers to a subdirectory with the name of the upgrade kit. Both of these variables are case-sensitive.</li> </ul>
Min and Max Version Fields	<ul style="list-style-type: none"> <li>■ The component and version information is read-only on this page; should you need to change either of these items, you must click Previous to return to the appropriate wizard page.</li> </ul>

## Finish Defining the Upgrade Kit

When you click Finish, the Upgrade Kit Wizard exits. You remain in the Upgrade Kits View and it displays the new upgrade kit record added to the database. The Status is set to Request Submitted.

---

**NOTE:** The status of this request can be monitored in My Component Request view in the Server Component Requests screen. The Systems Administrator should check the log file every time UpgKitBlDr creates a database schema kit—make sure that error messages or warnings, if any, are nonfatal.

---

If the upgrade kit includes database schema extensions, these extensions are applied to the server database at this point.

After defining the upgrade kit, the status should be Request Submitted. When the server component picks up the request, the status will be In Progress. After the server component successfully registers the request, the status becomes Pending. This status indicates the kit has been defined but has not been physically created. It is not available to subscribers.

If you select the new upgrade kit in the Upgrade Kit applet, you will notice that two records appear in the Upgrade Kit Components applet. The first record is the component to be upgraded. The second is the Siebel Upgrade Wizard. Including the Upgrade Wizard as a component reinforces using the correct version of the Upgrade Wizard for the upgrade.

See [“Controlling the Order of Kit Installation” on page 7-6](#) for details on making one kit dependent on another.

If your complete upgrade includes other components, repeat the process of using the Upgrade Kit Wizard described in this section to define an upgrade kit for each additional component. If this is the last component, continue to the procedures in [Chapter 5, “Activating, Applying, and Distributing the Upgrade Kit.”](#)

### **For More Information**

For more information about topics and related information in this chapter, see [Chapter 2, “Screens and Views in Siebel Anywhere,”](#) and [Chapter 3, “Upgrade Planning and Preliminary Tasks.”](#)

This chapter discussed creating and defining an upgrade kit. Defining an upgrade kit is the first of four steps in the kit creation process. Before you can distribute it, you must activate and apply it. The next chapter discusses activating, applying, and distributing the kit—the remaining steps to create a kit.

# Activating, Applying, and Distributing the Upgrade Kit

# 5

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# About This Chapter

This chapter discusses the remaining three steps in the process of creating an upgrade kit—activating, applying and distributing the kit. These steps involve the following tasks:

- 1 Activating the upgrade kit.** This step gathers all the files for the upgrade and creates a single archive file. This step also addresses deactivating an upgrade kit. See [“Activating the Upgrade Kit” on page 5-3](#).
- 2 Applying the upgrade kit.** This step updates the upgrade component registry with the new version information. During this step, you indicate whether or not a kit will be required. See [“Applying Versions of an Upgrade Kit” on page 5-5](#).
- 3 Distributing the upgrade kit.** This step makes the upgrade kit available to subscribers as either a required kit or an optional kit, depending on your selection in [Step 2](#) above. See [“Distributing Upgrade Component Version Information” on page 5-7](#).

This chapter explains each of these tasks in detail.

## Activating the Upgrade Kit

After you define the upgrade kits for an upgrade, you need to activate each kit. The status of a kit must be Pending before activating it. Activating a kit gathers the files to be included in the upgrade kit and compresses them into a single archive on the Siebel File System. It also sets the status of the upgrade kit to Active.

### **To activate an upgrade kit**

**1** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.

**2** From the Show drop-down list, click Upgrade Kits.

The Upgrade Kits view appears.

**3** Select the kit you want to activate.

The Status field must show that it is Pending.

**4** Click Activate.

A dialog box appears indicating activation is in progress.

The Status field should change to Active.

Repeat [Step 3](#) and [Step 4](#) to activate each kit required for your upgrade.

---

**NOTE:** Activating the upgrade kit does not affect the version information stored in the component registry. Activating a kit populates the File Size field for that kit. The kit is not available to subscribers until it has been applied and distributed.

---

After a kit is activated, use the Upgrade Kits view to test the kit on the local system. See [“Distributing Upgrade Component Version Information” on page 5-7](#) for more information.

# Deactivating the Upgrade Kit

There are times when you may need to deactivate an active kit—perhaps there was a last minute decision to delete a kit. Basically, this is the reverse of the procedure “[To activate an upgrade kit](#)” on page 5-3.

Keep in mind, you must first deactivate a kit before deleting it.

You need to understand the implications of deactivating upgrade kits. You should only deactivate kits:

- If you are sure that every user who needs this upgrade kit has already applied it.
- If there was a problem with this kit, then the kit can be deactivated and a replacement kit should be created to upgrade the users who had problems with the kit.



**Caution:** If you have new users to the system and their installation does not include deactivated kits, this situation can cause a problem. Therefore, new client installations should be cloned from existing up-to-date clients to prevent problems when prompting for kits that have been deactivated.

### To deactivate an upgrade kit

- 1 From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2 From the Show drop-down list, click Upgrade Kits.  
The Upgrade Kits view appears.
- 3 Select the kit you want to deactivate.  
The Status field should show that it is Active.
- 4 Click the menu button and select Deactivate.  
A warning message will ask you to confirm. If appropriate, click OK.  
The Status field should change to Inactive.

Repeat [Step 3](#) and [Step 4](#) for each kit that you want to deactivate.

## Applying Versions of an Upgrade Kit

After you activate the upgrade kits for an upgrade, you need to apply each kit. Applying a kit updates the component registry with the component version information. This is an essential step in creating an upgrade kit. This is also the step where you indicate whether a kit is a required upgrade kit.

---

**NOTE:** When applying a full product upgrade kit, the user needs Windows NT Administrator privileges because the upgrade will uninstall the old client and install the new client. For other types of kits, the user does not need to have Windows NT Administrator privileges.

---

### **To apply an upgrade kit**

- 1** Navigate to the Anywhere Administration screen, and from the Show drop-down list, click Upgrade Kits.

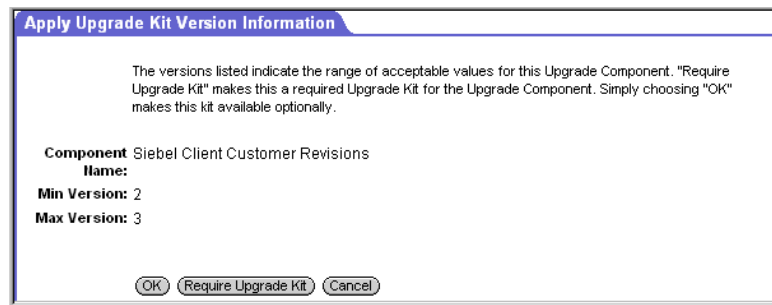
The Upgrade Kits view appears.

- 2** Select the kit you want to apply.

The Status field must show that it is Active.

- 3** Click Apply Versions.

The Apply Upgrade Kit Version Information dialog box appears. Review the information in this dialog box.



- The Minimum and Maximum version numbers in this dialog box apply to the version of the component that can be used to bring up the application. If users have a version below the minimum and choose not to install the upgrade, they can only access the application in a read-only mode.
- If you click OK without clicking Require Upgrade Kit, you are making it an optional kit (that is, after the kit is distributed, your subscribers can use Siebel eBusiness Applications without upgrading—provided their version is between the minimum and maximum).

---

**NOTE:** Server upgrade kits should always be required.

---

- If you click Require Upgrade Kit, the minimum version changes to match the maximum version, which is the new version. In this case, the subscribers will have to upgrade after the configuration is distributed; otherwise, they can only bring up the application in a read-only mode.

---

**NOTE:** You are strongly advised to create upgrade kits as optional and then test to make sure the kit is functioning properly. After you thoroughly test a kit using retrieval and installation, you can return to the Upgrade Kits view and reapply and distribute the kit as a required kit. See [“Distributing Upgrade Component Version Information” on page 5-7](#) for more information.

---

- 4 Click OK if the version information is correct or click Cancel to exit the dialog box without applying the upgrade kit.

If you click OK, a prompt reminds you that you need to distribute the kit in order to make it available to subscribers. For information on distributing kits, see [“To distribute upgrade component version information” on page 5-7](#).

Repeat [Step 2 on page 5-5](#) through [Step 4 on page 5-6](#) for each kit in this upgrade.

If you want to relate one component to another so that they are distributed together, see [“Relating One Component to Another” on page 7-7](#). Otherwise, continue to [“Distributing Upgrade Component Version Information” on page 5-7](#) for distributing updated registry information for upgrade kits.

## Distributing Upgrade Component Version Information

After applying the upgrade kit, you need to distribute it. Distributing the upgrade kit makes the version information in the component registry available to Siebel Anywhere subscribers.

If the kit is required, subscribers that use any of the components are automatically prompted to retrieve and apply it.

If the kit is optional, subscribers use the Product Updates view and Upgrade Wizard to locate and install the kit.



**Caution:** Before you distribute a kit, you must define, activate, and apply it.

The following procedure provides the steps to distribute a kit from the Configurations view. The same procedure can also be accomplished from the Employees view.

### **To distribute upgrade component version information**

- 1** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2** From the Show drop-down list, click Configurations.

The Configurations view appears. For more information, see [“Configurations View” on page 2-3](#) or [“Employees View” on page 2-7](#).

- 3** In the Configurations view, select the appropriate Anywhere subscriber configuration.

Verify that the components in the upgrade kit are included in the configuration as related components.

The related components for the configuration are listed in the Related Components list.

#### 4 Click Distribute.

This action makes the registry version information available to subscribers with that particular configuration.

A dialog box appears to confirm the intent to distribute the related components to the configuration.

Repeat [Step 3](#) and [Step 4](#) for other configurations, as applicable.

## For More Information

For more information about topics and related information in this chapter, see [“Configurations View” on page 2-3](#), [“Employees View” on page 2-7](#), and [“Relating One Component to Another” on page 7-7](#).

The chapter discussed the last three steps in the creation process for an upgrade kit. The next chapter discusses the retrieving, installing, and testing of upgrade kits.

# Retrieving, Installing, and Testing Upgrade Kits

# 6

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# About This Chapter

After you distribute upgrade kits, the users must retrieve and install them. This chapter discusses retrieval and installation of the kits. The chapter also discusses the testing of upgrade kits.

## Retrieval, Installation, and Testing Process Flow

The following tasks occur in the retrieval, installation, and testing process flow.

- 1 Retrieve required and optional upgrade kits.** The procedure for retrieving an upgrade kit depends on its type. See [“Retrieval and Installation of Upgrade Kits” on page 6-3](#).
- 2 Install with the Upgrade Wizard.** The process for invoking the Upgrade Wizard depends on the subscriber type. See [“Upgrade Wizard Launch” on page 6-8](#).
- 3 Test the upgrade kit.** Test the retrieval and installation of kits prior to release to users—this is critical. See [“Testing Upgrade Kits” on page 6-11](#).

If you encounter errors in this process, you may also need to:

- **Recover from client upgrade errors.** [“Client Upgrade Error Recovery” on page 6-9](#).
- **Retrieve required Siebel server upgrade kits.** [“Retrieving Siebel Server Upgrade Kits” on page 6-10](#).

## Retrieval and Installation of Upgrade Kits

The procedure for retrieving an upgrade kit depends on its type:

- Optional upgrade kits can be manually retrieved and applied by Siebel client subscribers through the Product Updates view.
- Required upgrade kits are automatically retrieved by Siebel Anywhere subscribers with configurations using the specific components in the kit.

It is a common misunderstanding that mobile Web clients retrieve kits directly from the file system. Instead:

- Mobile Web clients request the files from the Siebel Remote Server. The Remote Server retrieves the files from the file system.
- Dedicated Web clients retrieve kits (.saf files) directly from the file system or through the help of the File System Manager depending on the settings defined in the active CFG file.

Subscribers use the Siebel Anywhere Upgrade Wizard to install upgrade kits after they are retrieved. The process for invoking the Upgrade Wizard varies by subscriber type. For client subscribers, the Upgrade Wizard is invoked automatically after an upgrade is retrieved. For Siebel server subscribers, the Upgrade Wizard is invoked manually (see [“Retrieving Siebel Server Upgrade Kits” on page 6-10](#)).

The process for retrieving and installing upgrade kits by Siebel client and Siebel server subscribers is described in subsequent sections.

---

**NOTE:** Before installing a Siebel Anywhere schema upgrade, be sure to synchronize mobile Web clients. Synchronization will keep any changes to local databases since the last synchronization. These clients must not make any changes to their local databases until the upgrade is complete.

---

### Retrieving Optional Upgrade Kits—Dedicated Web Client

Optional upgrade kits are only for client subscribers. Upgrade kits for server subscribers should always be required by explicit action from the System Administrator.

The retrieval and installation of an optional upgrade kit begins on the Product Updates view, which is part of the User Preferences screen. See [“User Preferences Screen and View” on page 2-27](#) for an example of the Product Updates view.

The Status field indicates the status of the upgrade kit. For a listing of values, see [Table 2-11 on page 2-28](#).

As a Siebel Anywhere Administrator, you use the Product Updates view to test upgrade kits on individual client machines before making the kit required. See [“Distributing Upgrade Component Version Information” on page 5-7](#) for more details.

---

**NOTE:** Web clients are not Siebel Anywhere subscribers even though the Product Updates view may be accessible to them.

---

Dedicated Web clients can retrieve optional upgrade kits as described in the procedure below.

#### **To retrieve an optional kit for a dedicated Web client**

- 1 Invoke the dedicated Web client.
- 2 From the application-level menu, select View > Site Map > User Preferences screen > Product Updates.
- 3 In the Product Updates list, select the desired upgrade component and check the checkbox under the Upgrade column of the desired upgrade component.

A check appears. The upgrade status should be Upgrade Available for those components where optional kits are available.

- 4 Click Upgrade Selected Components.

This will download the upgrade kit, shutdown the dedicated Web client, and launch the Upgrade Wizard. After the Upgrade Wizard completes, it will automatically restart the dedicated Web client.

- 5 Log in, and from the Product Updates list verify the Status is Version OK for the desired upgrade component.

## Retrieving Optional Upgrade Kits—Mobile Web Client

Mobile Web clients can retrieve optional upgrade kits as described in the procedure below.

### **To retrieve an optional kit for a mobile Web client**

- 1 Invoke the mobile Web client.

---

**NOTE:** Make sure that Transaction Processor and Transaction Router are up and running. Verify the Status of the process.

---

- 2 From the application-level menu, select File > Synchronize > Database.
- 3 In the Siebel Remote dialog box, click Synchronize.  
  
Synchronization takes place and is complete when the opposing arrows (red and blue) in the lower right corner of the screen disappear.
- 4 From the application-level menu, select View > Site Map > User Preferences screen > Product Updates.
- 5 In the Product Updates list, select the desired upgrade component and check the checkbox under the Upgrade column.  
  
A check appears. The upgrade status should say Upgrade Available for those components where optional kits are available.
- 6 Click Upgrade Selected Components.
  - a A dialog box appears. Follow the instructions in the dialog box to start a Siebel Remote session and retrieve the Upgrade Kit necessary to upgrade your system.
  - b Click OK, and the dialog box closes.
- 7 Synchronize *again* as in [Step 2](#) and [Step 3](#) to retrieve the corresponding upgrade kits.

- 8 Click Upgrade Selected Components again to invoke the Upgrade Wizard for the desired upgrade component.

After the Upgrade Wizard completes, it will automatically restart the mobile Web client.

- 9 Log in, repeat [Step 4](#), and from the Product Updates list verify the Status is Version OK for the desired upgrade component.

## Retrieving Required Upgrade Kits

Both mobile and dedicated Web clients perform a version check during login. During version checks, required client upgrade kits are retrieved only if you click Yes to Download Kit. The following procedures for both the dedicated and mobile Web clients illustrate this point.

Upgrade kits are *not* automatically retrieved upon version check. They are downloaded only if you click yes to download kit.

### **To retrieve required upgrade kits for mobile Web clients**

- 1 Invoke the mobile Web client.

---

**NOTE:** Make sure that Transaction Processor and Transaction Router are up and running. Verify the Status of the process.

---

- 2 From the application-level menu, select File > Synchronize > Database.

A dialog box appears indicating there is a required upgrade available.

- 3 In the dialog box, click OK.

- 4 From the application-level menu, select File > Synchronize > Database.

A dialog box appears providing the option to upgrade now or later. If you choose not to upgrade at this time, you can only operate in read-only mode.

- 5 From the dialog box, click Yes and follow the prompts to invoke the Upgrade Wizard.

The Upgrade Wizard will shut down the Siebel client, apply the upgrade kit, and automatically restart the client unless there is an error while applying the kit.

- 6** Log in, and from the application-level menu, select View > Site Map > User Preferences > Product Updates.
- 7** Verify that the Status and Current Version columns contain the updated information.

The version check for mobile Web clients occurs during synchronization. If the version check detects the need for an upgrade, the user receives a prompt indicating a possible upgrade. The remote user logs in again to synchronize the server and local database.

A prompt appears, asking if the user would like to retrieve the upgrade kit.

The version check verifies the components used by the client configuration; multiple required components can be displayed in the dialog box. Mobile Web clients will detect a new required upgrade when merging changes from the first synchronization session following distribution of the upgrade kit.

If the user answers Yes, every required upgrade kit for the components used by the client configuration is automatically retrieved and the Upgrade Wizard is launched.

If the user answers No, the user's session continues in read-only mode against either the local or server database, until the upgrade has been completed. A prompt notifies the user of this status.

While operating in read-only mode, both dedicated and mobile users can view screens, views and data as usual, but they cannot make changes. Mobile users can synchronize, but can only download files; they cannot send, receive, or apply database changes. Read-only mode prevents users from corrupting data with an outdated or invalid Siebel configuration.

If the mobile user starts the Siebel client in read-only mode, the user is again prompted to upgrade at each synchronization session. Both dedicated and mobile users exit read-only mode when the Siebel eBusiness Application is restarted following a successful upgrade. At that point, a mobile user can perform a full synchronization, sending to the Siebel Server any local database changes that predate the upgrade.

### **To retrieve required upgrade kits for dedicated Web clients**

- 1** Invoke a dedicated Web client.

Login will trigger a version check and will prompt for retrieval of a required upgrade kit. If you choose not to upgrade at this time, you can only operate in read-only mode.

- 2** Click Yes.

The Siebel client will download the appropriate upgrade kits.

After the retrieval is complete, it will invoke the Siebel Upgrade Wizard before exiting.

After the client exits, the Siebel Upgrade Wizard takes over and applies the upgrade kits and automatically restarts the client when it is done.

- 3** Log in, and from the application-level menu, select View > Site Map > User Preferences > Product Updates.

- 4** In the Product Updates list, verify that Status is Version OK.

## **Upgrade Wizard Launch**

After an upgrade kit has been retrieved, the Upgrade Wizard is launched. It automatically shuts down the Siebel client. It then displays a progress page as it completes the upgrade kit items for the upgrade kits that were retrieved.

---

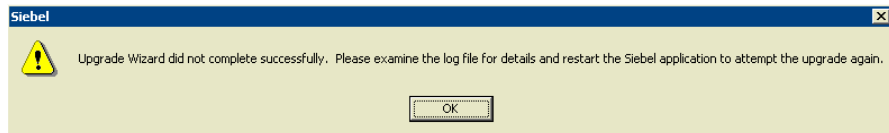
**NOTE:** The items displayed on the Upgrade Wizard page vary, depending on the number and type of kits.

---

When the Upgrade Wizard has successfully installed the upgrade kit, the Siebel client is automatically restarted.

## Client Upgrade Error Recovery

Before beginning the upgrade process, the Upgrade Wizard makes a backup copy of every file affected by the upgrade. If errors are encountered in the upgrade process, the Upgrade Wizard stops processing, and Siebel Anywhere displays error information in the Error dialog box, as shown in [Figure 6-1](#).



**Figure 6-1. Error Dialog Box**

Click OK to exit the Upgrade Wizard.

The next time the user restarts the Siebel client, a prompt appears that states there had been an upgrade in process.

After the user clicks OK, another prompt appears where the user can cancel the upgrade or restart the upgrade from the point of failure. Canceling the upgrade restores the client configuration to its status before the upgrade.

The Siebel Upgrade Wizard functionality includes error recovery for upgrades on individual files, such as database schema extensions, client configurations or SRFs. However, upgrades cannot easily be rolled back without manual intervention.



**Caution:** For Siebel client executable upgrades, which first install the Siebel client version before installing the new version, recovery is much more difficult because a backup of the entire client configuration is not made.

---

**NOTE:** If you plan to delete any old kits, make sure there is an installation where each new kit has been applied. Then, create a package based upon this installation for any new users so that new users have the kits that were already distributed. (See the last example in the FAQ, [“Deleting Old Upgrade Kits”](#) on page A-10.)

---

For a Siebel client upgrade, you must have an existing Siebel client installation. Alternatively, you can install the new version of the Siebel client into a separate subdirectory and not specify that the Upgrade Wizard should uninstall the existing version when creating the upgrade kit. This allows the new client installation to be replaced by the previous version should it fail.



**Caution:** There are other implementation and deployment issues that the Administrator must consider but are outside the scope of this guide. Consult the *Upgrade Guide for Microsoft Windows, MidMarket Edition* for further information.

You can distribute a second upgrade kit later that uninstalls the previous client version. If you do this, set the minimum version for applying this second kit to the version of the first kit so that only the users who successfully upgraded will uninstall the previous client version.

## Retrieving Siebel Server Upgrade Kits

Upgrade kits for Siebel server configurations are retrieved automatically by the Siebel server. These upgrade kits may include a database schema or user-defined files to be installed with version tracking.

With the Siebel server and all tasks stopped, the Siebel Administrator must manually invoke the Upgrade Wizard.

### **To manually invoke the Upgrade Wizard on Windows**

- 1** Open a command prompt window on the Windows server where the Siebel server is installed.
- 2** Navigate to the `SIEBSVR_ROOT\BIN` directory, where `SIEBSVR_ROOT` is the root directory of the Siebel server installation.
- 3** Copy the file `siebug.exe` to `siebug1.exe`.
- 4** Execute `siebug1.exe` to launch the Upgrade Wizard.

Follow the prompts on the wizard pages.

**5** Restart Siebel server.

See *Siebel Server Administration Guide, MidMarket Edition* for details.

Repeat the process from [Step 1](#) on any other Siebel server as appropriate.

Should the Upgrade Wizard fail, there will be an error message to that effect.

A common failure is not being able to retrieve a kit. You should exit the Upgrade Wizard, correct the condition that caused the error, and restart the Upgrade Wizard using the `SIEBUPG1.exe` file. Upon restarting, Upgrade Wizard prompts you either to cancel the upgrade, restoring the Siebel server to its preupgrade state (if possible), or to retry the upgrade from the point of failure. You will need to restart the Siebel server to initiate a version check to restart the upgrade process. If you want to restart, you should choose Retry.

After a successful installation of an upgrade, it will take manual intervention to roll it back.

## Testing Upgrade Kits

There is one point at which an administrator can test a client upgrade kit—as a limited distribution kit.

When testing new upgrade kits, it is highly recommended that you perform tests using both dedicated and mobile Web clients. If for any reason mobile Web clients experience problems applying or downloading the new kit, the problems will be significant.

The recommended method for testing kits is to create and distribute a kit to a limited and controlled number of users. In this method, you can assign specific testing accounts to the Test Client configuration so your regular subscribers will not be allowed to apply any kits in the testing phase. Distribute the kit only to the Siebel Test Client configuration. See [“Using the Siebel Test Client Configuration for Testing” on page 6-12](#).

After a kit has been thoroughly tested under the Siebel Test Client configuration, you can then distribute it to the appropriate configurations.

---

**NOTE:** For dedicated users, there are no database schema upgrades. Database extensions should be tested in the development environment.

---

### Using the Siebel Test Client Configuration for Testing

Siebel Anywhere provides a special configuration called Siebel Test Client to serve as your test user. By default, the Siebel Test Client configuration is representative of the other out of the box subscriber configurations, but it can be modified to reflect your active configuration.

#### **To test an upgrade kit**

- 1 Create a user and assign this user with the Siebel Test Client configuration in either of the following ways:
  - **Assign the user to the configuration.** See [“Assigning Employees to Configurations” on page 3-7](#) for information about assigning an employee with a configuration.
  - **Install a client.** Install a client and set ComponentName = Siebel Test Client in the active CFG file.
- 2 Define, activate and apply as an optional or required kit and distribute to the appropriate configuration—distribute the upgrade kit as an optional or required kit, as appropriate.

---

**NOTE:** Do not click Require Upgrade Kit in the Apply dialog box if you are dealing with an optional kit.

---

- 3 Verify that the Siebel Test Client configuration contains the components being upgraded with the kit.

Notify the selected users assigned to the Siebel Test Client configuration to log on. Instruct them to use the procedures described in [“Retrieval and Installation of Upgrade Kits” on page 6-3](#) to retrieve and install the upgrade kit.

---

**NOTE:** If you want to change your optional kit to a required kit after testing, refer to the following section, [“Converting an Optional Kit to a Required Kit” on page 6-13](#).

---

If the test is unsuccessful, refer to [Chapter 7, “Advanced Usage and Problem Solving,”](#) or [Appendix A, “Frequently Asked Questions,”](#) for possible solutions.

## Converting an Optional Kit to a Required Kit

After thoroughly testing an optional kit, you can reapply the kit to convert it to a required upgrade kit if you wish to.

### **To convert an optional kit to a required kit**

- 1** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.

- 2** From the Show drop-down list, click Upgrade Kits.

The Upgrade Kits view appears.

- 3** From the Upgrade Kits list, select the optional kit you want to convert.

The current status should be Active.

- 4** Click Apply Versions.

The Apply Upgrade Kit dialog box appears. Review the information in this dialog box.

- 5** Click Require Upgrade Kit to make the upgrade kit required.

The Minimum and Maximum Version numbers are now the same because it is a required kit.

- 6** Click OK if the version information is correct or click Cancel to exit the dialog box without applying the upgrade kit.

If you click OK, a prompt reminds you that you need to distribute the kit in order to make it available to subscribers. See [“Distributing Upgrade Component Version Information”](#) on page 5-7.

### **For More Information**

For more information about topics and related information in this chapter, see [Chapter 7, “Advanced Usage and Problem Solving,”](#) or [Appendix A, “Frequently Asked Questions.”](#)

The next chapter discusses Siebel Anywhere advanced usage and problem solving.

# Advanced Usage and Problem Solving

# 7

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## About This Chapter

Siebel Anywhere offers advanced techniques that can help you solve problems that can arise after the upgrade kit is created and distributed.

This chapter discusses some of these techniques and the problems you can solve by using them.

## Global Deployment with Siebel Anywhere

This section provides an example of a global deployment using Siebel Anywhere. The objective is to allow users to access and use the same application in different languages.

You have upgrade components for the languages you installed with your database server. You will map these to the applicable configurations. These configurations will be based upon the languages different set of users require to access the same application.

### Assumptions

This example makes the following assumptions:

- You have five sets of users for five different languages.
- You will base your application on Siebel Call Center.
- You will have five SRFs compiled, one for one each language.
- You will have customer revisions (reports for example) depending on the language.
- You will use the same database.
- Each user only uses the application in one language.

## Requirements

You will need:

- Five components for the Siebel Repository Files (SRF)
- Five components for the CFG files
- Five components for Client Customer Revisions
- Five configurations to distribute the upgrade kits
- Six components for Client Executables: 1 for Client Executables (base), Five are Client Executables\_\_\$Language (language pack)

The language pack component has same locate method, locate information, and version method as the base Client Executables component, but with different Version Information: bin\sslcvr.dll,VersionString,\$Language

## Records Available

For the records available, use the values in the following tables.

**Table 7-1. Example CFG Records in the Upgrade Components View Files**

Field	Comment
Name	CFG XXX
Component Type	Siebel CFG File
Min Version	100
Max Version	Should be blank
Locate Method	CFG
Locate Information	Siebel,ClientRootDir,bin\__\$Language\uagent.cfg
Version Method	CFG
Version Information	Siebel,Version

**Table 7-2. Example SRF Records in the Upgrade Components View**

<b>Field</b>	<b>Comment</b>
Name	Siebel Client SRF XXX
Component Type	Siebel Repository File
Min Version	Should be blank
Max Version	Should be blank
Locate Method	CFG
Locate Information	Siebel,ClientRootDir,objects\Language
Version Method	SRF
Version Information	Siebel,RepositoryFile

**Table 7-3. Example Client Customer Revision Records in the Upgrade Components View**

<b>Field</b>	<b>Entry</b>
Name	Customer Revision XXX
Component Type	Customer Revision
Min Version	Should be blank
Max Version	Should be blank
Locate Method	CFG
Locate Information	Siebel,ClientRootDir,bin\clntrev.cfg
Locate Information - language dependent component	Siebel,ClientRootDir,bin\Language\clntrev.cfg
Version Method	CFG
Version Information	Siebel,Version

**Table 7-4. Example Client Configuration Records in the Siebel Anywhere Configurations View**

Field	Comment
Name	Siebel Call Center XXX
Component Type	Siebel Client Configuration
In the related components applet, add the following records:	
Siebel Call Center CFG_XXX	Required
Siebel Client Customer Revisions	Required
Siebel Client Customer Revisions_XXX	Required
Siebel Client Executables	Required
Siebel Client Executables_XXX	Required
Siebel Client Repository File_XXX	Required
Siebel Database Schema	Required
Siebel Upgrade Wizard	Required
Third Party - File Attachment	Not Required

**NOTE:** You must create a configuration for each language combination. For example, if a user installed both ENU and FRA on a system, create a configuration with the components related to these two languages. For more information regarding multi-lingual deployments, see *Global Deployment Guide, MidMarket Edition*.

## Controlling the Order of Kit Installation

Usually, when you distribute upgrades to a configuration requiring several related components, the order in which kits are installed is undefined. If you need to control the installation order of kits, you can do this by making one kit dependent upon another. An example of this type of situation would be when you have one Siebel Repository File kit (Kit 1) and another Siebel Client Customer Revision kit (Kit 2), and you need Kit 1 to be installed first.

### **To set the order of kit installation**

- 1** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2** From the Show drop-down list, click Upgrade Kits.  
The Upgrade Kits list appears.
- 3** In the Upgrade Kits list, select the kit you need installed second.  
In the example above, this would be Kit 2, the Siebel Client Customer Revision kit.
- 4** If it is already activated, manually set the status to Pending or deactivate the kit and change the status to pending.
- 5** In the Upgrade Kit Component applet (lower applet in the same view), click New.
- 6** Select the component Kit 1 upgrades.  
In the example above, this would be Siebel Client Repository\_\_\$Language.
- 7** In the new record, set the Min Old Version to the New Version of the kit (the Siebel Repository File).
- 8** Click to activate the Upgrade Kits applet.
- 9** Select the kit you need installed second again and click Activate.

This procedure forces first the installation of Kit 1 (Siebel Repository File), followed by Kit 2 (Siebel Client Customer Revision). This interlinked series can be extended to three or more kits.

## Relating One Component to Another

In some instances, you may want to relate one component to another in order to make sure that the components are distributed together.

### **To relate one component to another**

- 1** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2** From the Show drop-down list, click Upgrade Components.  
The Upgrade Components view appears.
- 3** Select the first component.
- 4** Click the Related Components list to make it the active applet.
- 5** Click New.
- 6** Select the component that you want to relate to the first component and click the Pick icon.
- 7** Click to check the Required at Startup field for the related component.

Repeat [Step 3](#) through [Step 7](#) to add other related components.

# Using the Priority Configuration to Deliver an Upgrade

There are two situations in which the Priority Upgrade can be useful:

- When you want to deliver a kit to your mobile users immediately.
- When your mobile Web clients are unable to synchronize due to an incorrectly defined upgrade kit.

In both cases, you can use the Priority Configuration to deliver a new kit that would correct the situation.

Suppose you are the Siebel Administrator. It has come to your attention that many mobile users are taking an unusually long time to apply database changes during the synchronization process. After investigating the situation, you determine the correct solution is to increase the memory allocation for the local database engine. You can change this allocation by modifying the `ConnectionString` parameter under the Local section in the appropriate CFG file. Therefore, you decide to send down a required CFG kit to your end users to correct the problem.

However, it would be beneficial for the mobile users to immediately retrieve and apply the CFG kit during the next synchronization. This approach would reduce the waiting time, especially for those users who do not synchronize very often. To allow immediate retrieval, you will distribute the CFG kit under the Priority configuration.

For example, create a priority configuration with the word `Priority` appended to it. Do this by copying the current configuration (that is, `Siebel Sales Client`) and append `- Priority` as such: `Siebel Sales Client - Priority`. Then, create the upgrade kit or kits and distribute these under the `Priority` configuration. Finally, test the upgrade thoroughly before making it available to your end users.

## Recovering from a Required Kit That Cannot Be Installed

If you create and distribute a required upgrade kit that, for some reason, cannot be installed on the client or server, you need to create and distribute a new upgrade kit that functions properly.

A new upgrade kit *alone* will not work because the nonfunctioning kit prevents users from downloading the repair kit from the Siebel Server. To allow mobile users to download the new kit, you have the option of creating a priority configuration to distribute the new upgrade kit.

A priority configuration has the word Priority at the end of its name. For example, if the original configuration (under which the nonfunctioning kit was distributed) is called Client, then the priority kit *must* be called Client Priority (exactly).

### Creating a Priority Kit

Distribution of the new kit under this priority configuration upgrades the user's installation from the last known good version, skipping the nonfunctioning version number. The mobile Web client is thus able to bypass the nonfunctioning kit.

---

**NOTE:** Dedicated users need exactly the same repair kit, but it can be distributed under the regular configuration; the priority configuration is necessary only for mobile users.

---

#### **To create a priority configuration**

- 1** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2** From the Show drop-down list, click Configurations.  
The Configurations view appears.
- 3** In the Upgrade Configurations list, select the configuration under which the nonfunctioning kit was distributed.

For example, if the original configuration is called Siebel Call Center Client, then find and select the configuration with that name.

- 4 From the Upgrade Configurations list menu, choose Copy Record.

A duplicate configuration record appears.

- 5 Edit the name of the new record by adding Priority (one space, followed by the word Priority) to the end of its name.

For example, the correct name for the Siebel Call Center Client priority configuration is Siebel Call Center Client Priority (exactly).

## Defining and Distributing a Repair Kit

This section begins by discussing the overall process of defining a repair kit. Then it includes a procedure describing how to distribute the kit.

- To define a repair kit, use the Upgrade Kit Wizard to create the new kit.
- Make sure the version information in the repair kit differs from the version information in the nonfunctioning kit in the following ways:
  - If the minimum version is editable, make sure that its value is set to the last known good version for this upgrade component.

For example, if the minimum version of the nonfunctioning kit was 5, the minimum version of the priority kit should be no higher than 5.

- The new version is at least one version number higher than the new version of the nonfunctioning kit.

For example, if the new version of the nonfunctioning kit was 6, make the new version of the priority kit 7. Then, Siebel Anywhere can upgrade the user's setup from the last good version, skipping the nonfunctioning version.

- After you've defined your priority kit, treat it as you would any required kit: activate it and test it.

For additional information about defining, activating and testing upgrade kits, see [Chapter 5, "Activating, Applying, and Distributing the Upgrade Kit."](#)

- Distribute it as appropriate for dedicated or mobile users, as described in the following procedure.

**To distribute the repair kit**

**1** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.

**2** From the Show drop-down list, click Configurations.

The Configurations list appears.

**3** Prepare the kit for distribution.

For dedicated users, perform the following tasks:

- a** In the Upgrade Configurations list, select the configuration under which you distributed the nonfunctioning kit.
- b** Verify that the components in the repair kit are included in the configuration as related components.
- c** With this configuration selected, click Distribute.

For mobile users, perform the following tasks:

- a** In the Upgrade Configurations list, select the priority configuration you created earlier (the one ending in Priority).
- b** Verify that the components in the repair kit are included in the configuration as related components.
- c** With this configuration selected, click Distribute.

## Creating Multiple Kits of the Same Type

If you need to distribute multiple files to different directories, you should create a kit of the appropriate type Client Customer Revision for each destination directory. You should use the Min and Max version of the upgrade kits so that they create an unbroken sequence.

This following example uses the Customer Revision kit type. Keep in mind that the same logic can be used for other types of kits when there is a need to distribute multiple kits of the same type.

Create the first kit as usual (for example, Min Old Version and Max Old Version should be set to blank, New Version = 1).

For the next kit set Min Old Version = 1, Max Version = 1, New Version = 2, and so forth.

If you have to skip a version number for some reasons, then set the Min and Max old versions appropriately. Always set the Min Old version so that it matches the New version of the previous active kit.

You need three Kits, but Kit 2 was skipped because it contained one wrong file.

The version information would be the following:

#### **Kit 1:**

- Min Old Version = Null, Max Old version = Null, New Version = 1

**Kit 2:** (This is the kit which was never activated and has to be skipped.)

- Min Old Version = 1, Max Old version = 1, New Version = 2

#### **Kit 3:**

- Min Old Version = 1, Max Old version = 2, New Version = 3

#### **Kit 4:**

- Min Old Version = 3, Max Old version = 3, New Version = 4

For more information about the version numbers used by Siebel Anywhere, see [“Upgrade Kit Wizard and Apply Upgrade Kit Version Numbers” on page A-12.](#)

## Performing Database Schema Updates

Often upgrades are required to deploy database extensions. For example, Siebel developers may decide to add extension columns to existing Siebel tables. Sometimes it is also necessary to create or modify views and applets to display the extension data. See *Siebel Tools Reference, MidMarket Edition* for detailed information regarding database extensibility.

After thorough testing at the developer's local database, the changes are then applied to the developmental database. At this point, you need to test the schema changes thoroughly in a test environment. When ready to move into a production environment, you should apply schema changes to the server database using the Siebel Configuration Utility—specifically option Migrate Repository which takes one repository definition from a source database and imports it into a target database. This synchronizes the logical and physical schemas.

At this point, you need to propagate these changes to any local databases on mobile Web clients. The remainder of this section explains how to propagate changes.

To propagate schema changes to mobile client databases, do one of the following:

- Re-extract
- Distribute Database Schema changes via Siebel Anywhere

The use of Siebel Tools to apply schema changes should only be done in a development environment. For more information see *Siebel Tools Reference, MidMarket Edition*.

If you are using Siebel Anywhere to distribute incremental schema changes, you do not need to re-extract mobile users. Generate New Database must be run to generate the new database template based upon the incremental schema changes. This will then only be used by future extracts, as needed.

---

**NOTE:** Do *not* use Siebel Tools to activate the new extensions if you plan to use Siebel Anywhere.

---



**Caution:** Have all mobile users perform a synchronization session before propagating schema changes to promote proper operations. The new schema will ignore previous transactions against the old schema.

#### **To create a database schema upgrade kit**

- 1** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2** From the Show drop-down list, click Upgrade Kits View.  
The Upgrade Kits view appears.
- 3** Click the Auto Create.  
The Upgrade Kit Wizard - Upgrade Component page appears.
- 4** Follow the prompts to specify all information necessary to define your upgrade kit. Use the following on the appropriate pages:
  - Choose Siebel Database Schema as the upgrade component.
  - In the ODBC Information form, complete the necessary fields.  
For details about these fields, see [Table 4-2 on page 4-7](#).
  - Verify that the New Version information is appropriate before clicking Finish.
  - Wait for the Status in the Upgrade Kits list to change to Pending. You may need to refresh the view several times to see Status change.
- 5** Activate the newly created Database Schema upgrade kit.
- 6** Apply the upgrade kit, as required, to the component registry.

**To distribute a kit for mobile Web clients**

- For mobile Web clients assigned to the HQ Server, distribute the kit under the appropriate configurations so each mobile Web client can receive the kit during synchronization.

---

**NOTE:** The Database Schema kit will only be downloaded by mobile users.

---

The mobile Web clients should be able to synchronize and perform the Schema Upgrade kit in much the same manner as any other kits by using the Siebel Upgrade Wizard.

If the Siebel Developer created or modified applets or views to display data in new extension columns, it is necessary to create and distribute the accompanying Siebel Repository File upgrade kit. This allows users to view these data after the schema upgrade.

After the Database Schema upgrade is finished, distribute the new SRF kit to its corresponding mobile Web clients.

For the dedicated Web clients connected to the HQ Applications Server, you can distribute the SRF upgrade kit and the schema upgrade kit at the same time. But be sure that both kits are activated and applied before you distribute the configuration.



**Caution:** Do not make any kits dependent upon the database schema component. If you create this type of dependency, you will receive an error when first time mobile users initialize their local databases. The error will indicate the system was unable to check initialization status.

After the new database schema has been retrieved by and applied to the new databases, normal operations can begin.

---

**NOTE:** It is important to distribute a new SRF kit when needed. Running with an old SRF file on the new schema can cause data integrity issues in your Siebel database.

---

# Updating Specific Lines in the CFG File

It is recommended that you have uniform client installations across a Siebel deployment. But if for some reasons, some of your Siebel clients are installed in different locations than others, the traditional CFG Upgrade Kit will not work for every client in the deployment. The reason for this failure is that certain parameters (for example, `ClientRootDir`) in a CFG file are directly tied to the installation directory.

To address this issue in Siebel 7, we have provided a standalone executable (`cfgedit.exe`) that is capable of modifying specific lines in a CFG file. We recommend using a kit of the type Customer Revisions to deliver and execute `cfgedit.exe`. You may create a separate Upgrade Component of the type Customer Revisions to keep track of the version history as well.

Below is a simple example of a procedure. In this example you use `cfgedit.exe` to modify a specific line in the client's ENU `uagent.cfg`.

### To update specific lines in the CFG file

- 1 From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2 From the Show drop-down list, click Upgrade Kits.  
The Upgrade Kits view appears.
- 3 Click Auto Create to invoke the Upgrade Kit Wizard.  
The Upgrade Kit Wizard - Upgrade Component page appears.
- 4 Follow the prompts to specify all necessary information to define your upgrade kit. Use the following on the appropriate pages:
  - For Siebel Component Type, pick Customer Revisions.
  - Add the following to the kit: `cfgedit.exe` and `source.cfg`.

Sample file for `source.cfg`

```
[Siebel]
ComponentName= New Component Name
[New Section]
NewKey = New Value
```

- Change the Destination Directory from the default to `$SiebelRoot\bin\`
- Select to execute, `cfgedit.exe`
- For command line arguments, use `"/s source.cfg /d $SiebelRoot\bin\enu\uagent.cfg."`

---

**NOTE:** To keep track of the changes to specific configuration files, it is recommended to create a new upgrade component, such as Client Customer Revision-CallCenterCFG\_\_ENU.

---

- For more information about version information, see [“Minimum and Maximum Version Fields”](#) on page 4-9.
- 5 Activate, apply, and distribute the upgrade kit you built in previous step.

## For More Information

For more information about the topics covered in this chapter see *Global Deployment Guide, MidMarket Edition* and *Siebel Tools Reference, MidMarket Edition*.

[Appendix A](#) describes FAQs to help administrators solve some situations that can arise while fulfilling their responsibilities.

## **Advanced Usage and Problem Solving**

---

*For More Information*

# Frequently Asked Questions

# A

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## About This Appendix

This appendix includes FAQs to help administrators resolve some problems that can arise while performing their responsibilities.

## Unlocking Administrator's Locked Account Due to Failed Upgrade Kit

**Question** What should I do if the Siebel Administrator's account is locked out due to a failed upgrade kit?

**Answer** The following procedures will help you recover from lockout because of a failed upgrade kit.

**To unlock the Siebel Administrator - Option one**

- The System Administrator logs in as a Web Client (which does not have version checking or upgrades).
- Take corrective measures to resolve the issue related to the failed upgrade.

**To unlock the Siebel Administrator - Option two**

- 1** Edit the Siebel Administrator's CFG file by changing the ComponentName parameter to None. This change will prevent the Siebel client from performing any version checking. If you dynamically associated the System Administrator account to a configuration by means other than using the applets in the Employees view, contact Siebel Technical Support for assistance to help resolve this issue.

---

**NOTE:** Dynamically associating the System Administrator account with any Configuration under the Employees view is *not* recommended.

---

- 2** If the upgrade kit failed while the Siebel Upgrade Wizard was running, then delete the file upgwiz.ucf in the \bin directory.

The Siebel client always checks for the existence of the file upgwiz.ucf in the \bin directory to find out if it was in the middle of an upgrade.

- 3 Log in to the system to determine the reason for the failed upgrade, and take corrective measures.  
  
Presumably, the other subscribers to your original configuration are also affected.
- 4 Test your solutions using the Siebel Test Client configuration.
- 5 After testing the upgrade kit thoroughly, you may then distribute the correct upgrade kit to every appropriate configuration. Do not forget to change the value of the `ComponentName` parameter to its original value in the `.cfg`.

## Version Numbers on Upgrade Kit Wizard Page

**Question** Why are there two different version numbers in the Upgrade Kit Wizard page?

**Answer** The Min and Max versions on this page apply to the version of the component required to apply this upgrade kit. The Min and Max version numbers work together creating a range of version numbers for the component being upgraded that a client can have in order to upgrade to the new version by applying this upgrade kit.

- **Min version.** Indicates that a client with this version or higher for the component being upgraded by this kit can use this upgrade kit to upgrade to the New version indicated in the New version box.
- **Max version.** Indicates that a client must have this version or lower for the component being upgraded by this kit in order to upgrade to the New version indicated in the New Version box.

Now, if you want to allow any client, regardless of what version of the component they have applied previously, to be able to use the upgrade kit to upgrade to the new version of that component, then you need to blank out Minimum and Maximum version numbers on this screen. This will indicate to Siebel Anywhere that the client does not have to be on any specific version of the component in order to apply this kit. (If you create a kit after distributing a previous kit to mobile Web clients, the mobile Web client will use the kit provided that the new version for this new kit has the same new version as the bad kit that was created and deactivated.)

---

**NOTE:** Please use the above option with caution. For example, if you are creating a kit of type Customer Revision, then the only times you can leave Min and Max Version fields blank are the following: (1) you do not care if your clients have received the previous kits of the same type, or (2) you are able to include the files that were sent previously, in this kit or kits you are going to create after this one. Also again keep in mind that the new version should stay the same as the kit that you have deactivated so that mobile Web clients can use this newly created kit in place of the one that has been deactivated.

---

It is best to always leave Min and Max version blank when you are creating a kit of type Siebel Repository File or Siebel CFG File.

## Distributing Different CFG Files to Different Users

**Question** How do I distribute different CFG files to different sets of users?

**Answer** Assume that you have two different sets of users (Sales users and Engineer users) and each one of these groups uses a different `.cfg` (`Sales.cfg` and `Eng.cfg`) to bring up the Siebel Application. Now you need to send a new `.cfg` to each group through Siebel Anywhere.

### ***To distribute different CFG files to different sets of users***

- 1 Prepare the files `Sales.cfg` and `Eng.cfg` files.
- 2 Launch the Siebel Application.
- 3 From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 4 From the Show drop-down list, click Upgrade Components.  
The Upgrade Components list appears.

- 5 Create a component for each language, such as Sales CFG\_\_ENU, similar to the Siebel Call Center CFG component. Use the Copy Record option. Set the values for the columns for each record as shown in the tables below.

Example values for Record 1:

<b>Field</b>	<b>Comment</b>
Name	Sales CFG
Component Type	Siebel CFG__ENU File
Min Version	100
Max Version	Leave this blank for now
Locate Method	CFG
Locate Information	Siebel,ClientRootDir,bin\enu\sales.cfg
Version Method	CFG
Version Information	Siebel,Version

Example values for Record 2:

<b>Field</b>	<b>Comment</b>
Name	Engineering CFG
Component Type	Siebel CFG__ENU File
Min Version	100
Max Version	Leave this blank for now
Locate Method	CFG
Locate Information	Siebel,ClientRootDir,bin\enu\eng.cfg
Version Method	CFG
Version Information	Siebel,Version

- 6 Create a configuration for each language combination for both sets of users (Sales and Engineering) and add the appropriate CFG components you just created as related components.

See [Chapter 3, “Upgrade Planning and Preliminary Tasks”](#) for details.

- 7 Go to Siebel Anywhere Administration > Upgrade Kits and use Auto Create to create two kits.
  - One for Sales users (using Sales CFG component and `Sales.cfg`).
  - The other is for Engineering users (using Engineering CFG component and `Eng.cfg`).
- 8 Apply the kits, and be sure to click on the Require Upgrade Kit button in the Apply Upgrade Kit dialog box.

#### **To test distributing CFG files to different sets of users**

- 1 From the application-level menu, select View > Site Map > Siebel Anywhere Administration > Configuration.
- 2 Add the new CFG components (Sales CFG and Engineering CFG) to the Siebel Test Client configuration.
- 3 Add two or more users to the Employee list for Siebel Test Client.
- 4 Distribute the Siebel Test Client to verify that you can retrieve the kit successfully.
- 5 Make sure that your users' CFG files reflect the correct ComponentName in their CFG.

Sales users should have this parameter set to Sales Configuration while Engineering users should have this parameter set to Engineering Configuration. Also, users should verify an exact match between the ComponentName in `.cfg` and Configuration name in the Anywhere Administration > Configuration view.

- 6 Distribute the Sales Configuration and Engineering Configuration to send the kit to all users.

## New Upgrade Kit Status “In Progress”

**Question** Why does my new upgrade kit status remain In Progress for a long time?

**Answer** There may be times when the upgrade kit takes a long time to build. If this is the case, consider the following information to help troubleshoot the situation.

Some of the reasons for this include:

- The upgrade kit is still being built. To monitor the progress of the upgrade kit, you have three options to check the latest status:
  - Go to the My Component Requests view and look for the latest status.
  - In the server manager line-mode utility, enter:

```
list task for comp UpgKitBldr
```
  - Look for the component log file for Upgrade Kit Builder (UpgKitBldr\_ <taskno> .log) in the log directory.
- If you conclude that Upgrade Kit Builder is indeed not responding, check two other Server Components that support Upgrade Kit Builder: File System Manager (FSM) and Service Request Broker (SRBroker). Be sure these components are running correctly.
- Sometimes a file system error or a network connection error interrupts the operation of Upgrade Kit Builder. Edit the record, set the status to error (from In Progress), save, and then delete the record before trying to rebuild. Delete the failed record to avoid a naming conflict.
- Then, rerun Upgrade Kit Builder to build the kit.

# Unable to Download Upgrade Kit

**Question** My client is getting Unable to Download the Upgrade Kit... message. Why?

**Answer** There are times when the following error messages appear when attempting to download an upgrade kit.

- Unable to select required upgrade kits to upgrade your system. Please contact your Siebel Administrator or try again.
- The file 'XXX\_XXX.arc' could not be found on any specified file system.
- Upgrade wizard did not complete successfully. Restart Siebel application to attempt the upgrade again.
- Unable to open compressed file (<Sublevel directory patch>\S\_UPG\_KIT\_IARG\_XXX\_XXXX.saf).
- Unable to download the Upgrade Kit '%1' required to upgrade your system.

These errors can be caused by the following conditions:

- A previously required kit has been deactivated or deleted. The client is trying to find an active kit with a certain New Version number, but there is no such kit because it was deactivated or deleted.

To solve this problem, have your mobile Web client first synchronize using an invalid Configuration (set the Component Name in the CFG file to none). This action will get the recent transactions routed to the mobile web client and pass the transaction regarding the nonfunctioning or inactivated kit.

Have users change the Component Name back to the original value and synchronize again. You can make this process transparent to your users by sending them a batch file that synchronizes for them from the command line using a different `.cfg` that was sent to them with the batch file. Use `siebsync.exe` and specify the `.cfg` with the `/c` option.

- The kit you have created is of type Siebel Client Customer Revision and when you were creating the kit, you selected a nonexecutable file to be executed. You need to deactivate the kit and recreate it with the same version number. Activate the kit, but do not apply or distribute it.

- The user's connection to File System is not set correctly.
  - **For dedicated users.** Check the dedicated users' CFG files and make sure that the File System parameter under Server section is set to the appropriate location and that your user has read/write access to that directory. One test for this would be to have the user open an attachment and if that is successful then the connection to File System is set correctly.
  - **For mobile users.** Because mobile users are connected to the File System through the Siebel Server, make sure the Siebel File System parameter of Synchronization Manager is set to the correct location—the same location as the File System parameter in the CFG file (of the user who has created the kit). In other words, make sure that the File System Manager is working properly.
- There is not enough space on the machine to download the kit. Free some space and try to retrieve and apply the upgrade kit again.
- An upgrade that the System Administrator intends for the end users to retrieve may depend on another kit that has either been deactivated, deleted, or not created yet. The Siebel Client will make sure that all kits are ready before invoking the Upgrade Wizard.

# Deleting Old Upgrade Kits

**Question** Can I delete old upgrade kits?

**Answer** Yes, but be sure you understand the consequences of your actions before you begin.

Sometimes you may want to purge older upgrade kits to free up some space used by these kits. When you purge old kits, however, you must make sure that new users will not encounter errors when they retrieve the kits expecting to use information in the older kits.

Two groups of users can be adversely affected when old kits are deleted, new users and infrequent users. For example, assume that your end users belong to the same configuration. Also assume they are currently using version 3 of Client Customer Revisions and version 4 of SRF.

If you were to delete all the previous Client Customer Revisions and SRF kits, a new user may have trouble with Client Customer Revisions if starting from version 0. This situation occurs because Client Customer Revisions kits often depend on the previous versions. Siebel Anywhere will not be able to find an upgrade path for Client Customer Revisions if say version 2 is needed in order to get to version 3 when the kit for version 2 is deleted. However, the new user would not have any trouble with the SRF kit because SRF kits do not depend on any version history.

The correct way to handle this situation is to keep an updated installation for new users where each of the kits has been applied. You do this by creating a package periodically and make the most current package available to new users. This method will address the problem for new users, because they will always install a client with up-to-date configurations.

However, do not delete old kits as soon as a new package is created, either. There may be infrequent users in your organization who have not logged in for months. While the rest of the company is using version 3, they may still be on version 1. In this case, it is up to the individual Siebel Administrators to assess the situation and determine how old is old enough before deletion.

Sometimes you have a few kits of the type Customer Revision that were distributed long ago. Use the following procedure to delete them.

**To delete old Customer Revision kits**

- 1** Establish one installation that includes all the Customer Revision kits ever applied.
- 2** Create a package from that installation.
- 3** Set up each new user with the package prepared in [Step 1](#). This will provide the new clients the files that were distributed through the old Customer Revision kits, and also provides the new clients the correct version of the `clntrev.cfg`.

Use the same logic if you are planning to delete any other kits.

## Differences Between siebug.exe and siebug1.exe

**Question** What is the difference between `siebug.exe` and `siebug1.exe`?

**Answer** Both `siebug.exe` and `siebug1.exe` are stand-alone executables for the Siebel Upgrade Wizard. The Siebel Upgrade Wizard is a stand-alone program that is invoked to carry out the application of the upgrade kits for a Siebel Client as well as a Siebel Server. It is also used to carry out the initialization process for local databases of mobile users.

In most cases, `siebug.exe` and `siebug1.exe` are identical. But during an upgrade, the Siebel Client always calls `siebug1.exe` to carry out the job. In the case of a Siebel Server upgrade, the Siebel Administrator should manually copy `siebug.exe` to `siebug1.exe` before invoking `siebug1.exe`.

The reason there are two stand-alone executables is that the upgrade may contain an upgrade kit that upgrades the Siebel Upgrade Wizard itself. When that happens, the new Siebel Upgrade Wizard executable is copied to `siebug.exe`. If you were using `siebug.exe`, this copy action would not be possible because the Siebel Upgrade Wizard would still be running. As soon as the Siebel Upgrade Wizard detects that it is upgrading itself, it will accomplish the upgrade and restart immediately. During restart, it would automatically copy the new `siebug.exe` to `siebug1.exe` and run `siebug1.exe` to resume the upgrade process.

## Upgrade Kit Wizard and Apply Upgrade Kit Version Numbers

**Question** Why are the version numbers different in the “Upgrade Kit Wizard” pages and “Apply Upgrade Kit” dialog boxes?

**Answer** The following section explains the differences in the version numbers you encounter on wizard pages when creating an upgrade kit and on dialog boxes when applying it.

### Upgrade Kit Wizard Pages

The Minimum and Maximum Version numbers specified in the Upgrade Kit Wizard pages define a range of version numbers for the specific component that the client must have in order to upgrade to the new version. The minimum version is defaulted from the current version in the component registry.

- **Minimum version.** This value indicates that a client with this version or higher, for the component being upgraded, can use this upgrade kit to upgrade to the new version indicated in the New Version field.
- **Maximum version.** This value indicates that a client must have this version or lower, for the component being upgraded, in order to upgrade to the new version indicated in the New Version field.

If you want to allow clients to use the upgrade kit to upgrade to the new version—regardless of their current version of the component—leave the Minimum and Maximum field values blank. These blanks indicate to Siebel Anywhere that the client does not need any specific version of the component in order to install this kit. (In the case of mobile Web clients, if you create a new kit after distributing and deactivating a kit, make sure that the new version number is the same as the previous one.)

---

**NOTE:** Use this feature with caution. For example, if you create a Customer Revision upgrade kit, the only time you can leave the Minimum and Maximum fields blank is when you either don't care if your clients have received the previous kits of the same type or you are able to include every file required by the component in this kit or kits you are going to create after this one.

---

## **Apply Upgrade Kit Version Information Dialog Box**

After you activate each upgrade kit for an upgrade, you need to apply each kit. Applying a kit updates the component registry with the component version information. This step is essential in creating an upgrade kit and is also the step in which you indicate whether a kit is required or optional.

When you click Apply Versions, in the Upgrade Kits view, the Apply Upgrade Kit Version Information dialog box appears. (See [“Applying Versions of an Upgrade Kit” on page 5-5](#) for a screen shot of this page.) The Minimum and Maximum Version numbers in this dialog box refer to the version of the component that can be used to bring up the application. If you click OK (within this dialog box) without clicking Require Upgrade Kit, you make it an optional kit—after the kit is distributed, your subscribers can use Siebel eBusiness Applications without upgrading if their version is between the minimum and maximum values.

If users have a version below the minimum version and choose not to install the upgrade, they can only bring up the application in read-only mode.

Clicking Require Upgrade Kit changes the minimum version to match the maximum version, which is the new version. In this case, the subscribers will have to upgrade after the configuration is distributed.

See [Chapter 2, “Screens and Views in Siebel Anywhere”](#) for more details regarding topics in this FAQ.

# Converting a Required Kit to an Optional Kit

**Question** How do I convert the most recently distributed required kit to an optional kit?

**Answer** If you distribute a required kit and realize it should have been optional, use this procedure to make the change.

---

**NOTE:** This procedure only applies to dedicated users. Kits for mobile users cannot be changed from required to optional.

---

### **To convert a required kit to an optional kit**

- 1** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2** From the Show drop-down list, click Upgrade Components.  
  
The Upgrade Components list appears.
- 3** From the Upgrade Components list, select the name of the Upgrade Component for which you distributed the upgrade kit.
- 4** Modify the Min Version field with the minimum value that is acceptable, or change it to null.



**Caution:** Perform this step carefully, because the wrong minimum value could cause some users to skip a related required kit.

- 5** Step off the record, or choose Save Record from the applet menu, to save the record.
- 6** Go to the Anywhere Administration screen.
- 7** From the Show drop-down list, click Configurations.  
  
The Upgrade Configurations and Related Components list applets appear.
- 8** On the Upgrade Configurations list applet, select the configurations you had previously distributed the component information to.

- 9 Click Distribute.

These steps make the upgrade kit optional and allow the users to log in to the Product Updates view—if the client version they are using is between the minimum and maximum for the upgrade component in the Upgrade Components view.

## Resetting Min and Max Information After Distribution

**Question** How do I reset the Min old and Max old version information after distribution?

**Answer** The following steps outline how to change minimum and maximum versions of a kit that has been distributed.

### ***To change minimum and maximum versions of a kit after distribution***

- 1 From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2 From the Show drop-down list, click Upgrade Kits.  
The Upgrade Kits list appears.
- 3 From the Upgrade Kits list, select the target upgrade kit.
- 4 If the status is Active, change the status to Pending.
- 5 Change Min Old Version and Max Old Version per your requirement.  
If you want it to be available for every client, you should set both Min and Max to blank.
- 6 While the kit is selected, click Activate. Do *not* change status to Active manually.
- 7 You do not need to apply or distribute.

# Testing for Upgrade Kit Component Consistency

**Question** What should I do to make sure Siebel Anywhere upgrade kits are consistent after I upgrade my Siebel application?

**Answer** Version numbering should continue across releases for Upgrade Components in each Siebel Anywhere Configuration. Upgrading to a new release of Siebel eBusiness Applications upgrades the Siebel Anywhere table definitions. However, it does not reset the Upgrade Component information for Siebel Anywhere Configurations.

As a result, Siebel Anywhere will resume version checking against the existing component versions in the new release of Siebel eBusiness Applications. If required upgrade kits for Siebel Client Repository File, Siebel Client Customer Revisions, or Siebel CFG File were distributed in the previous release, newly upgraded Production clients will be prompted for upgrade kits when they synchronize with the server.

Before upgrading Production users, test the upgrade kit using the Packager Client machine with version checking enabled. Verify that this client passes version check, so that after the upgrade kit is packaged and distributed, it will function correctly for the remainder of your Production users.

To accomplish this testing, verify that Administrator Client has the latest versions for Siebel Client Repository File\_\_`{language code}`, Siebel Client Customer Revisions, and Siebel CFG\_\_`{language code}` in advance of running the Siebel Packager utility. For the purposes of this example, `SIEBEL_CLNT_ROOT` will be the Packager Client root directory and Siebel Call Center will be the application.

The following procedure describes how to test for Siebel Client Repository File component consistency.

### **To test Siebel Client Repository File component consistency**

- 1 Use the `sfrstamp.exe` utility to read the current version of the SRF file and compare it to the component version.

You can find this utility in `SIEBEL_CLNT_ROOT\bin`.

- 2 Use the `srfstamp.exe` to stamp a new version to the SRF file, as required.

The following procedure describes how to test for Siebel Client Customer Revisions component consistency.

**To test Siebel Client Customer Revisions component consistency**

- Copy the `clntrev.cfg` file from one of your previous release Production Clients to the `SIEBEL_CLNT_ROOT\bin` directory of the Administrator Client.

The following procedure describes how to test for Siebel CFG File component consistency.

**To test Siebel CFG File component consistency**

- Edit the appropriate CFG file under `SIEBEL_CLNT_ROOT\bin\{language code}` and increment the Version parameter in the [Siebel] section to the Maximum Version of the Upgrade Component Siebel Call Center CFG for the previous release.

Test with the Administrator Client until this client passes version check. Run the Siebel Packager Utility to create the custom installer. Distribute the custom installer through Siebel Anywhere (as described in *Upgrade Guide for Microsoft Windows, MidMarket Edition*) or through a shared network location.

# Creating Kits That Check DLL File Versions

**Question** How do I create an upgrade kit that checks DLL file versions?

**Answer** Sometimes you need to upgrade third-party software based upon the version of a particular DLL file. An example would be an ODBC upgrade on a client based upon the version of `odbcint.dll`.

In order to achieve this functionality, first create a new Upgrade Component and then an Upgrade Kit.

### **To create an upgrade component and kit for DLL version check**

- 1 From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2 From the Show drop-down list, click Upgrade Components.  
The Upgrade Components list appears.
- 3 Create an Upgrade Component and specify the following field values:

<b>Field</b>	<b>Comment</b>
Name	Upgrade Component Name
Component Type	Third-Party Software
Locate Method	Registry
Locate Information	< hkey > , < subkey name > , < value name >
Version Method	FileVersion

In this table, the value for Locate Information points to the registry hkey, subkey and a specific value that points to the DLL file you wish to version check.

For example:

```
HKEY_LOCAL_MACHINE , SOFTWARE \ ODBCFileDSN \ DefaultIcon , Driver
```

If the registry value is DefaultIcon, then the < value name > must be omitted. This value in the registry will then point to the specific DLL file.

For example:

```
C:\WINNT\System32\odbcint.dll
```

- 4 After creating the above custom component, define the upgrade kit as shown in [Chapter 4, “Creating and Defining the Upgrade Kit.”](#)

When defining the Upgrade Kit, remember to select the name of the custom upgrade component (created above) when the Upgrade Wizard page appears.

## Constructing Third-Party Upgrade Kits

**Question** How do I construct a third-party upgrade kit?

**Answer** Third-Party Software components are meant to be used to create kits only for version checking and not to upgrade the software on the users’ machines. The example below uses WinZip as the third-party software to illustrate this.

There are two procedures to this process described below:

- To create a new upgrade component Third-Party WinZip.
- To define a Third-Party WinZip upgrade kit.

### **To create a new upgrade component Third-Party WinZip**

- 1 From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2 From the Show drop-down list, click Upgrade Components.

The Upgrade Components list appears.

- 3 On the Upgrade Components list, click New.

A blank record appears.

Enter the necessary information.

As an alternative, Copy Record on an existing Third Party component and then edit the fields as required.

**4** Enter the following:

<b>Field</b>	<b>Comment</b>
Component Name	Third Party-WinZip.
Component Type	From the pick list, choose Third Party Software.
Locate method	From the pick list, choose Registry.
Locate info - 'HKEY_CLASSES_ROOT, WinZip\shell\open\command'	Locate Info has the following structure when Locate Method = 'Registry': < HKEY > , < Subkey > , < Name > . If < Name > is equal to the default, that is, '(Default)' as seen in the Registry Editor, then leave < Name > as blank in Locate info.
Version method	From the pick list, choose FileVersion.

**5** From the Show drop-down list, click Configurations.

The Configurations list appears, along with the Related Components list.

**6** On the Configurations list, select the desired clients such as Siebel Sales Client.

**7** On the Related Components list, click New.

The Upgrade Components pick list appears.

**8** On the Upgrade Components Selection dialog box, select Third Party-WinZip.

The Configurations list appears, along with the Related Components list.

The new record (Third Party-WinZip upgrade component) is highlighted in the Related Components list, which indicates it is selected.

**9** On the Related Components list, click the Required at Startup field and click the checkbox.

This step completes the procedure to create a new upgrade component, Third-Party WinZip.

**To define a Third-Party WinZip upgrade kit**

- 1** From the application-level menu, select View > Site Map > Siebel Anywhere Administration.
- 2** From the Show drop-down list, select Upgrade Kits.  
The Upgrade Kits view appears.
- 3** Click Auto Create to invoke the Upgrade Kit Wizard.  
The Upgrade Kit Wizard - Upgrade Components page appears.
- 4** Choose Third-Party WinZip in the list and click Next.  
The Upgrade Kit Wizard - Add Files page appears.
- 5** Click browse to select WinZip installer files or enter the path and file name in the Files to Add field.

Click Add.

Repeat this step to add all WinZip installer files. These are the install files in the WinZip folder (`Install.exe`, `Setup.wz`, `wzbetact.exe`, `wzinet95.exe`). Since the Client Destination Directory field specifies where the upgrade kit will be placed on the subscriber, verify the following string is there:

```
$SiebelRoot\upgrade\${KitName}.
```

`$SiebelRoot` refers to the Siebel Root Directory and `${KitName}` refers to the name of the upgrade kit in a subdirectory.

- 6** Click Next.  
The Upgrade Kit Wizard - Select Execute File page appears.
- 7** Select the executable file such as `Install.exe`, and follow the prompts to:
  - a** Review and verify the information.
  - b** Specify the new version number.
  - c** Change title, if you want to do so.

This step completes the procedure to define an Upgrade Kit for Third-Party WinZip (the example third-party software used to demonstrate this procedure).

Follow the procedures in [Chapter 5, “Activating, Applying, and Distributing the Upgrade Kit”](#) to activate, apply, and distribute the kit.

## Turning Off the Prompt for Upgrade Kits

**Question** When end users login, how do I prevent prompting to apply upgrade kits?

**Answer** There may be times when you do not want your users to be prompted to apply upgrade kits. To do this, use one of the methods below, depending upon the type of client:

- For Connected Clients, do one of the following on Siebel Anywhere Administration > Configurations view.
  - Rename the appropriate configurations. For example, rename the Siebel Sales Client as Old Siebel Sales Client, and so forth. Then re-distribute this information to the configuration.
  - Delete all the related components in a configuration and re-distribute this information to the configuration.
  - Remove all the check marks in the Required at Start Up Flag field in the Upgrade Configurations view, Upgrade Components list. Then re-distribute this information to the configuration.
- For Mobile Web Clients, in addition to the above process, do one of the following:
  - Change ComponentName parameter in CFG file to None.
  - Re-extract local database.

If mobile Web clients are associated with a particular configuration through Siebel Anywhere Administration > Employee view, this is the only choice.

## **For More Information**

For more information about topics and related information in this chapter, see *Upgrade Guide for Microsoft Windows, MidMarket Edition* and *Siebel Web Client Administration Guide, MidMarket Edition*.

## **Frequently Asked Questions**

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*For More Information*

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