



SIEBEL[®] 7
eBusiness

**SIEBEL WEB CLIENT
ADMINISTRATION GUIDE**

MIDMARKET EDITION

eBUSINESS APPLICATIONS

VERSION 7.0, REV. A

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Who Should Use This Guide

This guide explains the installation and administration of Siebel clients.

This book will be useful primarily to people whose title or job description matches one of the following:

Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel products.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
Installers	Persons responsible for setting up Siebel systems for initial use.

How This Guide Is Organized

This guide provides information necessary to install, configure, and package Siebel clients. This guide is organized according to types of Siebel clients.

- [Chapter 1](#) applies to all clients.
- [Chapter 2](#) and [Chapter 3](#) apply to users of the Mobile and Dedicated Web Clients.
- The appendices contain information that is applicable in special cases or to a subset of the clients.

Use of the Term Windows in this Guide

In this guide, the term “Windows” refers to all Microsoft Windows operating systems listed as supported for this release in the system requirements and supported platforms documentation for your Siebel application. Likewise, “MS SQL Server” refers to the version of that database referenced in the system requirements and supported platforms documentation for your Siebel application.

Additional Documentation

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

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

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.

If you want to order additional Siebel documentation and copies of the *Siebel Bookshelf* 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*. 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/edportal/jsp/index.jsp> and choose Implementation Team Training.

Please submit your technical issues and updates to Siebel SupportWeb (<http://ebusiness.siebel.com/supportweb/>). If you do not have a SupportWeb account, or if you have a question, please contact us at support@siebel.com or call your local Siebel Support Center:

- **North America:** + 1 800 214 0400 or + 1 650 341 0700
- **Brazil (São Paulo):** + 55 11 3444 0800
- **UK (London):** + 44 (0) 1784 494949
- **Germany (Munich):** + 49 89 957 18 400
- **France (Paris):** + 44 1784 494949
- **Ireland (Galway):** + 44 1784 494949
- **Japan (Tokyo):** 0120 606 750 (toll-free, Japan domestic only),
+ 81 3 5464 7948 (outside of Japan)
- **Singapore:** + 65 212 9266

Outside of local support center hours, Gold and Rollout Support Option customers can call + 1 800 214 0400 or + 1 650 341 0700.

We appreciate your business and look forward to working with you.

Siebel Systems Welcomes Your Comments

To help us improve our products, we want to know about any corrections or clarifications to this guide that you would find useful. Please include in your message:

- The title and version of the guide (very important)
- The name and version number of the Siebel eBusiness 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.

Overview of Siebel Clients

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Introduction to Siebel Clients

This chapter contains an overview of your Siebel client and how it works. [Figure 1-1](#) illustrates the architecture of a Siebel deployment. Following the figure is a summary of the entities that make up the Siebel client and descriptions of each type of client.

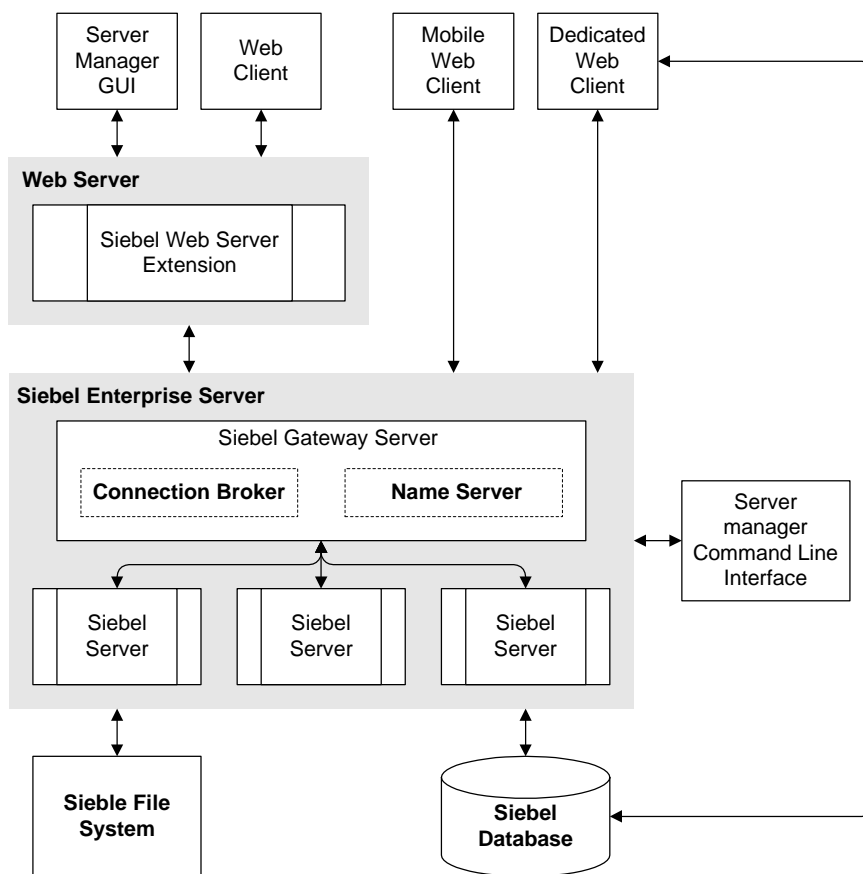


Figure 1-1. Logical Diagram of the Siebel eBusiness Applications Environment

All Siebel eBusiness Applications installations include one or more of the various Siebel clients that connect to various servers to request and analyze data. You can deploy a mixture of clients.

Siebel Client Types

A Siebel client is a computer that operates Siebel eBusiness Applications, accessing data and services from one or more servers.

Siebel eBusiness Applications supports these types of clients:

- **Siebel Web Client.** Siebel Web Client runs in a standard browser from the client personal computer and does not require any additional persistent software installed on the client. The browser connects through a Web server to the Siebel Server, which executes business logic and accesses data from the Siebel Database.
- **Siebel Mobile Web Client.** Siebel Mobile Web Client is designed for local data access, without the need to be connected to a server. A local database is stored on each mobile machine. See [“Siebel Mobile and Dedicated Web Clients” on page 1-7](#) for more information about mobile and dedicated clients.
- **Siebel Dedicated Web Client.** Siebel Dedicated Web Client connects directly to a database server for all data access, and it does not store any Siebel data locally. All layers of the Siebel eBusiness Applications architecture, except for the database, reside on the user’s personal computer. See [“Siebel Mobile and Dedicated Web Clients” on page 1-7](#) for more information about mobile and dedicated clients.

Choosing a Client

Table 1-1 compares the features of the Siebel clients.

Table 1-1. Deciding Which Siebel Client Meets Your Needs

Client Feature	Siebel Web Client	Siebel Mobile Web Client	Siebel Dedicated Web Client
Works on disconnected Windows laptop with synchronization and upgrade capabilities		✓	
Self-contained: does not need a Web server		✓	✓
Network connectivity: direct connection	✓		✓
Installation required		✓	✓
Zero-footprint	✓		
Non-Windows platforms	✓		

Siebel Web Client

Siebel Web Client is a true thin client—no application logic is stored on the client machines. Siebel Web Client provides numerous benefits to the deployment of your Siebel applications:

- Central management and universal support mean reduced IT and deployment costs while implementing Siebel Systems software on a heterogeneous assortment of desktop computers. No complex installation, changes, or upgrades are required on client machines.
- No Siebel software installation required on the client PC.
- Reduced hard disk, CPU, and memory requirements on client machines.
- Intuitive, Web-based user interface while providing high interactivity and direct keyboard control.

Siebel Web Client and Application Object Manager

The Application Object Manager hosts the Business Objects layer and Data Objects layer of the Siebel architecture. The Siebel Web Client hosts the Siebel applications user interface layer.

By hosting Siebel Business Objects and the business logic processing on the server, Application Object Manager supports:

- Deployment of Siebel Web Client
- Real-time integration with external applications through the Siebel Object Interface, at the Application Object Manager level
- Application scalability
- Simplified administration

The Application Object Manager communicates with Siebel Web Client through the Web server using TCP/IP protocol. Communication between the client and the Application Object Manager can be compressed and encrypted. An independent session is established to serve incoming connection requests from each client. Subsequent requests from clients are directed to the same Application Object Manager tasks until the sessions are terminated.

Siebel uses SESSION cookies to track the session state. These cookies persist only within in the browser session, and are deleted when the browser exits. A session cookie is used to tie requests and logoff operations to the user session which started at the login page.

The Siebel repository file (.srf) is installed as part of each Siebel Server installation. Any changes to the application's repository file must be applied to the appropriate Siebel Server installations that serve the modified application to the Siebel Web Client. When reconnecting to the Application Object Manager, Siebel Web Client users automatically retrieve the new Siebel application configuration. User preferences which are set and used by the Siebel Web Client will be saved on the server.

Siebel Mobile and Dedicated Web Clients

The Siebel Dedicated Web Client and Mobile Web Client allow a user to access information managed by Siebel eBusiness Applications.

There are two types of Siebel clients which contain both user interface and business logic:

- **Siebel Mobile Web Client.** This is a portable Microsoft Windows client delivered through a Web browser that is designed for local data access and does not need to be connected to a server. Siebel Mobile Web Client meets the needs of field professionals who do not have continuous access to a network. Siebel Mobile Web Client uses a local database on each mobile machine. Periodically, the client must access Siebel Remote Server via a modem, WAN, LAN, or other network to synchronize data changes with the Siebel database on the database server and Siebel File System. This client requires installation of Siebel software on the user's personal computer. The software installed on the user's machine for the Siebel Dedicated Web Client and Siebel Mobile Web Client is identical; the only difference is the type of connectivity provided.
- **Siebel Dedicated Web Client.** This is a Microsoft Windows client delivered through a Web browser that provides direct connectivity to a database server. It requires software to be installed on the client machine, but does not require a local database, Web server, or Siebel Server for serving up interactive user sessions. A Siebel Server is required for functionality, such as Siebel Territory Assignment Manager. The software installed on the user's machine for the Siebel Dedicated Web Client and Siebel Mobile Web Client is identical; the only difference is the type of connectivity provided.

Siebel Mobile Web Client and Siebel Remote

The Siebel Mobile Web Client is designed to operate without a real-time connection to any server. The Mobile Web Client downloads a portion of the Siebel database and the Siebel File System to the laptop so that the user can access the data locally without being connected directly to the Database Server, Siebel Server, or File System. The mobile client then periodically accesses the Siebel Server via a modem, WAN, LAN or other network connection to synchronize data changes with the Siebel Server.

See *Siebel Remote Administration Guide, MidMarket Edition* for complete setup instructions for Siebel Remote.

Local Database and File System

Mobile clients use a local database to store data for user access. The local database contains Siebel applications tables that store user data.

The local database also contains a local transaction log to store transactions created by the mobile user. Siebel Remote forwards these transactions to the Siebel Remote server when the client synchronizes.

Mobile clients also use a local Siebel File System to store files from the Siebel File System. These files are available when the mobile user disconnects from the Siebel Server. Users can request specific files to download to their local File System. The Siebel administrator can also specify files that should be published or broadcast to all mobile users. Files added to the local File System by the mobile user will be uploaded to the Siebel File System at the next synchronization session.

Siebel Remote Client Software

The Siebel Remote client software runs on the Siebel mobile client and manages the synchronization process between the mobile client and the Siebel Remote server.

Mobile users can start the Siebel Remote client in two ways:

- **Background synchronization**

While the Siebel client is running, mobile users can use the Synchronize menu command to launch the Siebel Remote client as a background process. Work can continue within Siebel applications or in other Windows applications during the synchronization process.

- **Stand-alone synchronization**

While the Siebel client is not running, mobile users can launch Siebel Remote in stand-alone synchronization mode using the Siebel Remote icon or a third-party scheduling program. During stand-alone synchronization, Siebel Remote runs separately from the Siebel client in order to synchronize the mobile database. The Siebel client can not be running during stand-alone synchronization.

The Siebel Remote client uses the TCP/IP protocol to communicate with the Siebel Remote server over a modem using dial-up networking, a local area network, or a wide area network. The Siebel Remote client invokes the synchronization process as follows:

- 1** Connects to the Siebel Remote server, which starts a synchronization manager session for the mobile client.

NOTE: The synchronization manager notifies the mobile user and initializes the local database if the Siebel administrator has performed a database extract for the mobile client or if the local database does not exist.

- 2** Extracts transactions from the local database.
- 3** Sends and receives transaction files to and from Synchronization Manager.
- 4** Sends and retrieves file attachments.
- 5** Applies transaction files from the Siebel Remote server to the local database.

Overview of Siebel Clients

Siebel Mobile and Dedicated Web Clients

Installing the Mobile and Dedicated Web Clients

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About This Chapter

Siebel Systems supports dedicated and mobile client installations on PC hardware and operating systems detailed in the system requirements and supported platforms documentation for your Siebel application.

Use the installation process described in this chapter to install the Siebel client for use in a client/server environment. This installation is based on default installation parameters set by Siebel Systems.

Use this customized installation as a model installation. When application configuration and testing are complete, the system administrator can use the Siebel Packager Utility to prepare custom installation packages for distribution to end users, as described in [Appendix C](#).

[Table 2-1](#) shows an overview of the client installation procedures.

Table 2-1. Mobile and Dedicated Web Client Installation Overview

Who Performs It?	Task
Siebel System Administrator	<ol style="list-style-type: none">1 Review the pre-installation tasks. See “Preinstallation Tasks” on page 2-3.2 Create a model installation by running the Mobile and Dedicated Web Client Installer. See “Installing the Siebel Mobile and Dedicated Web Client” on page 2-6.3 Verify the installation by performing the post-installation tasks. See “Postinstallation Tasks” on page 2-12.4 Configure the Mobile or Dedicated Web Client. See “Configuring the Mobile and Dedicated Web Clients” on page 3-1.5 If you wish to prepare custom software installation packages for distribution to end users based on the model installation, run the Packager Utility. See Appendix C, “Siebel Packager Utility.”

Preinstallation Tasks

Perform the following tasks before running the standard client installation program:

- [Administrative Rights](#)
- [Directory Names](#)
- [Siebel Client Prerequisites on page 2-4](#)
- [Database Connectivity Software on page 2-4](#)
- [Installing Third-Party Software on page 2-4](#)
- [Installing Siebel Search on page 2-5](#)

Administrative Rights

Administrative rights are required for installation or uninstallation of Siebel Dedicated Web Client. For information on setting administration privileges, see *Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition*.

Directory Names

By default, the Siebel client installer assumes an installation directory of `c:\sea700\client`. You cannot install different Siebel components in the same directory. If you install more than one component on the same machine, determine your directory-naming convention before beginning the installation process.

NOTE: It is recommended that you choose names that describe both the version number and the component being installed. This name must not include special characters (such as apostrophes, accents, ampersands), slashes, or spaces (instead, use underscores) and must be unique within the Siebel Enterprise Server. The letters may be lower or uppercase. The name must not exceed 18 characters.

Siebel Client Prerequisites

Before beginning the client installation, be sure that you have completed preparation of the client PC, verified that your hardware meets the minimum configuration, and installed all required third-party software listed in the system requirements and supported platforms documentation for your Siebel application.

Database Connectivity Software

Dedicated Web client PCs using IBM or Microsoft databases must have vendor-specific database connectivity software installed. Refer to the system requirements and supported platforms documentation for your Siebel application.

When you have installed your connectivity software, configure it as follows:

- For IBM DB2, configure the DB2 client software to connect to the database server that you have chosen to run the DB2 database. The connect string and tableowner information should be recorded on the Deployment Planning Worksheet in *Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition*. Use the ODBC driver version specified in the system requirements and supported platforms documentation for your Siebel application.
- For Microsoft SQL Server, use the ODBC driver version specified in the system requirements and supported platforms documentation for your Siebel application. The client uses this driver, but will create its own ODBC data source during installation. This data source should be recorded on the Deployment Planning Worksheet in *Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition*.

Installing Third-Party Software

Your Siebel application requires some third-party software products for full functionality. Refer to the system requirements and supported platforms documentation for your Siebel application.

Install the following third-party software for full Siebel functionality:

- Fulcrum SearchServer (this optional component is required only if you want full content search capabilities on the client)
- Microsoft Word or Lotus Suite (highly recommended; required for Siebel Correspondence functionality)

Installing Siebel Search

If you intend to use Siebel Search locally, you must install Fulcrum SearchServer on the client PC prior to completing the Siebel client installation. See the installation chapter in *Siebel Search Administration Guide, MidMarket Edition* for instructions on installing Siebel Search.

Installing the Siebel Mobile and Dedicated Web Client

The software installed on the user's machine for Siebel Mobile Web Client and Dedicated Web Client is identical. Therefore, a single installer provides the software necessary to run either type of client. The standard Siebel Mobile and Dedicated Web Client installation program performs the following:

- Checks the PC to verify whether required components have already been installed.
- Calls the Microsoft Data Access Components (MDAC) to install the Microsoft Access, Text, SQL Server ODBC drivers, and ADO providers as required.
- Creates all required ODBC data sources.
- Installs Siebel client software and allows the user to view the installation log file.

Before you begin installation, refer to the system requirements and supported platforms documentation for your Siebel application.

NOTE: For Dedicated Web Client only: If you are upgrading from Oracle 7.x client to Oracle 8.x client, you must uninstall and re-install the Siebel client application after upgrading the Oracle client.

NOTE: Each Siebel client is designed to support only a single Siebel Enterprise. To support multiple Enterprises on a single machine for testing purposes, be sure to install clients in separate directories.

To install the Mobile Web Client and Dedicated Web Client software

- 1 Using Windows Explorer, navigate to the `root` directory of the *Siebel eBusiness Applications, MidMarket Edition, Web Client Programs* CD-ROM.



Caution: You must run this and other installation programs from the CD-ROM or a network drive mapped to a drive letter. If you attempt to install from an unmapped network drive, the installation program will be unable to locate files it needs to proceed and may fail.

- 2 Double-click `install.exe` to start the installation program.
- 3 From the Choose Setup Language screen, choose the language in which to conduct the installation and click OK.
- 4 From the Welcome screen, click Next.
- 5 In the Setup Type screen, select the type of Siebel installation to perform:
 - **Typical Setup.** This setup option will install all standard Siebel components except the Server Manager. This option is recommended for most users.
 - **Compact Setup.** This setup option will install the minimal set of components. It does not install the Help Files, Packager Utility, and the Server Manager. Select this option for an installation with minimum storage requirements.
 - **Custom Setup.** This setup option lets you customize your installation by choosing components you want to install.

NOTE: You should use the Custom Setup option to install the Server Manager and the Packager Utility. This setup should be performed by the Siebel administrator so that the Siebel client can be installed on the rest of the non-administrator machines.

- 6 While still in the Setup Type screen, verify that the installation directory listed is correct.

The default directory for Siebel is `c:\sea700\client`.

- Click Next to accept the default directory.
- Click Browse to select a different destination directory.

The directory pathname can be up to 18 characters long and must not include spaces or special characters. If you specify a directory other than the default directory, make the appropriate substitutions throughout the remainder of this chapter.

If you are performing a Typical or Compact installation, proceed to Step 8. If you are performing a Custom installation, go to Step 7.

- 7** From the Select Components screen, select the components you wish to install as part of your custom installation. This screen appears only if you chose Custom installation in Step 5 above.
- 8** In the Choose Languages screen, select the languages to install. Verify that your destination machine has sufficient disk space for the installation and click Next.

NOTE: The installer will only display space requirements for one drive. The drive that will contain the TEMP directory requires at least 10 MB free prior to installation. Also, pay attention to your hard drive file system configuration. Using a FAT configuration with a 64 K allocation unit is not recommended, since this may leave insufficient space for installation of all necessary components and cause the installation to fail.

- 9** In the Server Database screen, select the type of server database on which you are implementing your Siebel application and click Next.
- 10** In the Document Integrator screen, select the product suite that you want to use for document integration and click Next.
- 11** For Dedicated Web Client only, in the first Server Locations screen, enter your File System connectivity information and click Next.

NOTE: For both Mobile and Dedicated Web Client: Siebel File System connectivity information can be either the UNC share name of the Siebel File System directory (for example, \\NTSRV1\siebfiler), or a drive letter mapped to the Siebel File System directory (for example, K:\).

- 12** For Mobile Web Client only, in the second Server Locations screen, enter your Siebel Remote Server connectivity information and click Next.

You must use the network name (machine name) of the server on which the Siebel Remote Server is installed. For instance, a network name might be NTSRV1.

- 13** For Dedicated Web Client only, in the Database Identification screen, enter the following information:
- If you selected IBM DB2 in the Server Database screen, specify your Database Alias and Table Owner and then click Next.
 - If you selected Microsoft SQL Server in the Server Database screen, specify your Server Name and Database Name and then click Next.
 - If you selected Oracle in the Server Database screen, specify your Database Alias and your Table Owner and then click Next.
- 14** For Dedicated Web Client only, in the Enterprise Server Information screen, specify the Gateway Name Server Address and Enterprise Server to which this client will connect for administration.

The address specified for the Gateway Name Server will vary depending on whether your Siebel Servers are using Resonate Central Dispatch to support connection brokering:

- If you are using Resonate Central Dispatch, the Gateway Name Server address is the Gateway VIP (virtual IP address) of the machine on which the Gateway Name Server is installed.
- If you are not using Resonate Central Dispatch, enter either the network name or the IP address of the machine on which the Gateway Server is installed.

The Enterprise Server name is the name of the Enterprise Server under which the Siebel Servers that support this client's server database were installed.

- 15** In the Server Request Information screen, enter the information that clients will use to invoke the Server Request Manager component for interactive operations, and then click Next.

These settings are not applicable unless you are using the Request Manager component:

- The Request Component is the name of the Request Manager component. The value of *SRMSynch* is correct for the server component definitions included in the default Siebel Server installation, unless you have created your own Request Manager.
- If you are not using Resonate Central Dispatch, you must specify the Request Server Name. This is the logical name of the Siebel Server operating the Request Manager component.

- 16** In the Search Configuration screen:

- If you will use Siebel Search, enter the following for the server on which Siebel Search is operating:
 - Search Hostname
 - Search Port Number
- If you will not use Siebel Search, accept the default parameters, and click Next.

NOTE: For system requirements and other information on implementing Siebel Search, consult *Siebel Search Administration Guide, MidMarket Edition*.

- 17** In the Select Program Folder screen, enter the name of the program folder that will contain your Siebel icons in the Select Program Folder dialog box.

The default name is Siebel Client 7.0. You can use spaces and the backslash (\) in folder names to create a folder hierarchy.



Caution: If you are deploying Windows NT 4.0 clients operating against an Oracle database, do not include parentheses in the labels of the Siebel icons if you modify them. Including parentheses will prevent the application from connecting to the Oracle database.

- 18** Click Next. The setup program will copy files to the local host machine's hard disk.

A status bar in the Setup Status dialog box indicates the progress of the installation.

- 19** Review the Event Log screen, and click Next.

This log provides details of the steps the installer has performed during your Siebel client installation.

- 20** Review the Registry Log screen, and click Next.

This log provides details of the registry information the installer has performed during your Siebel client installation.

- 21** Click Finish in the Setup Complete screen.

The Siebel client installation is now complete. Review the installation log to verify that all components installed successfully.

Postinstallation Tasks

Perform the following tasks after running the Siebel client installation program:

- [“Verifying Successful Installation” on page 2-12](#)
- [“Verifying the Siebel Client Directory Structure” on page 2-14](#)
- [“Siebel Client Icons” on page 2-16](#)
- [“Siebel Client ODBC Data Sources” on page 2-17](#)

Verifying Successful Installation

Complete the following instructions to verify a successful Siebel client installation.

Starting Siebel Client Without Siebel VB or Siebel eScript Licensed

The default configuration (.cfg) files for the Siebel client have Siebel VB or Siebel eScript enabled by the parameter `EnableScripting = TRUE`. However, if you do not have Siebel VB or Siebel eScript licensed, the client will not start, and returns an error message indicating that you must turn Siebel VB or Siebel eScript off before running the client.

To start Siebel Client without a licensed Siebel VB or eScript installation

- Set `EnableScripting = FALSE` in the .cfg file used by your Siebel client configuration. By default, this .cfg file resides in the `C:\sea700\client\bin<lang>` directory.

Testing Siebel Correspondence Functionality

Several components must be installed correctly for Siebel correspondence to function properly.

To test Siebel correspondence functionality

- 1** While connected to the sample database, click the New Correspondence toolbar button.
- 2** Pick a correspondence template and attach recipients.
- 3** View the correspondence.

If you are unable to view the correspondence, make sure that the ODBC data source called SEA MMerge `C:/sea700/client` is correctly installed. See [“Siebel Client ODBC Data Sources”](#) on page 2-17 for more information.

NOTE: If you are running Microsoft Word 97 under Windows 95 or 98, you must complete the next setup steps, [“To enable Siebel Correspondence on Windows 95/98,”](#) to configure your Siebel client system to display MS-DOS file extensions.

To enable Siebel Correspondence on Windows 95/98

- 1** Choose View > Options either from the Windows Explorer menu or from My Computer.
- 2** Click the View tab.
- 3** Uncheck the check box labeled Hide MS-DOS file extensions for file types that are registered.

Verifying the Siebel Client Directory Structure

The Siebel installation program creates directories on each Siebel client. Use Windows Explorer to verify the directory structure on your computer. This is an example of the directory structure of a typical installation:

```
sea700
  client
    actuate
    bin
    charts
    fonts
    idcentriclex
    local
    locale
    log
    msgtempl
    objects
    packager (if the Packager option was selected)
    public
    reports
    sample (if the sample database was installed)
    sqltempl
    temp
    upgrade
    webtempl
```

sea700. The top-level directory for Siebel installation. You can change the name during the installation process.

actuate. Contains all the Actuate-related files, for reports.

bin. Contains all binary files (*.exe, *.dll, *.cfg, *.ssf, *.pre), configuration files, user preference files, and language-specific files.

charts. Contains files for generating charts.

fonts. Contains font files.

idcentric. Contains configuration files related to Siebel Data Quality Matching and Data Cleansing.

local. Where the local database is stored.

locale. Stores language-specific files.

log. Stores the log files from client operations, such as synchronization.

msgtempl. Stores message files used by the client.

objects. Contains compiled Siebel Repository (.SRF) files and language-specific files.

packager. Stores files used by the Siebel Packager Utility.

public. Contains HTML files, JavaScript files and images used by the Web Client.

reports. Contains all report files.

sample. Where the sample database is installed.

sqltemp. Contains SQL scripts. These files should not be modified.

temp. Contains working report files.

upgrade. Will contain Siebel Anywhere upgrade files retrieved by the user.

webtempl. Contains Web templates.

Siebel Client Icons

The Siebel installation creates icons in the Siebel program folder for the modules you have chosen to install. These icons include the following:

Siebel Packager. Use this icon to start the Packager Utility.

Siebel Call Center. Use this icon to open Siebel Call Center. Use this icon to connect to the database server (for LAN-connected users), to an initialized local database, or to the Siebel sample database.

Siebel eMail Response. Use this icon to open Siebel eMail Response.

Siebel Partner Manager. Use this icon to start Siebel Partner Manager.

Siebel Remote. Use this icon to start the stand-alone synchronization program.

Siebel Sales. Use this icon to start Siebel Sales.

Siebel Service. Use this icon to start Siebel Service when you are connected to the database server (for LAN-connected users). Mobile users connect to an initialized local database, or to the Siebel sample database.

Siebel Client ODBC Data Sources

The Siebel client installer creates the ODBC data sources shown in [Table 2-2](#). By default, these are created as user data sources, which are visible only to the user account under which Siebel is installed. The drive letter and directory at the end of each data source name will vary, depending on where you have chosen to install the Siebel client.

NOTE: If the database server is SQL Server, the client must be configured to use SQL Server authentication. All ODBC data sources and the SQL Server database should be configured using SQL Server authentication.

NOTE: If two or more users need to logon using the same NT workstation, it is necessary to install the client using the System DSN parameter instead of the User DSN parameter in the siebel.ini file. For more information about the siebel.ini file and custom installations, see [Appendix C, “Siebel Packager Utility.”](#)

Table 2-2. Siebel Client ODBC Data Sources

Data Source	Use
SEAW Local Db C:/sea700/client	Connects to the local SQL Anywhere database.
SEAW MMerge C:/sea700/client	Executes mail merge when generating correspondence.
SEAW MSQl C:/sea700/client	For Microsoft installations only, connects to the Microsoft SQL Server database.
SEAW Oracle C:/sea700/client	For Oracle installations only, connects to the Oracle database. This data source is used only by the Siebel Administrator when creating Siebel Anywhere upgrade kits.
SEAW Search C:/sea700/client	ODBC data source used by Fulcrum SearchServer; created only if Fulcrum is installed. This data source is always created as a System DSN.
SEAW Text C:/sea700/client	Used for reporting and data merge into the local SQL Anywhere database.
SEAW DB2UDB C:/sea700/client	For IBM DB2 installations only, connects to the DB2 database.

NOTE: It is necessary to use the ODBC drivers included on the Siebel Software CD. Do not use other drivers.

To Remove the Mobile and Dedicated Web Clients

To remove the Mobile or Dedicated Web Client, run the Siebel Systems Uninstallation Manager from the Add/Remove Programs Control Panel.

For more information on removing the Mobile or Dedicated Web Client, see *Siebel Remote Administration Guide, MidMarket Edition*.

Configuring the Mobile and Dedicated Web Clients

3

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Logging on to Your Siebel Application

This section provides instructions for logging on to your Siebel application through the Mobile Web Client or Dedicated Web Client.

To log on to your Siebel application and connect to the server database

- 1 Click one of the Siebel icons in the program group.

The user name and password must be those of an employee with a valid position and division defined in the Siebel database. Therefore, the first time you log on to the server database, you should use SADMIN as the user name and password. Then you can set up other users as employees with defined positions and responsibilities.

See *Applications Administration Guide, MidMarket Edition* for more information on setting up employees.

- 2 Specify the Server database and click OK.

The first time you log on to the Server database, the system prompts you to enter your site's license key number, which is located on your CD-ROM case.

- 3 Enter your license key number in the dialog box that appears and click OK.

NOTE: If you need to access License Keys at a later time, navigate to Site Map, open the Application Administration list, and click on License Keys.

If you see a warning message dialog box, click OK, and then enter your license key number in the dialog box that appears.

NOTE: The first time that you launch Siebel eBusiness Applications as a remote user choose the local database. You will automatically be prompted to connect to the Siebel Server and retrieve a new local database. You must first extract this database. See *Siebel Remote Administration Guide, MidMarket Edition* for more information on Siebel Remote and extracting local databases.

Network Connectivity to the Siebel Remote Server

Siebel Remote clients must be able to connect to the Siebel Remote Server using TCP/IP. Verify that you have the correct hardware and software installed and are able to establish TCP/IP connectivity to the Siebel Remote Server.

See [“Setting Siebel Remote Preferences” on page 3-9](#) and *Siebel Remote Administration Guide, MidMarket Edition* for more information.

User Synchronization Options

This section describes the user synchronization options supported by Siebel Remote. The user accesses these options by selecting File > Synchronize from the Siebel client menu bar or by starting Siebel Remote in stand-alone mode. Synchronization occurs in the background, so you can continue to use Siebel applications during synchronization.

The stand-alone synchronization feature allows mobile users to synchronize their local databases with the server database without starting the Siebel application.

Synchronization Dialog Box

The Siebel Remote synchronization dialog box shown in [Figure 3-1](#) contains a list of synchronization actions. Depending on your database options, the list may appear different from that in the example. For instance, if you do not have a local database, only the Connect to Server action will appear in the dialog box.

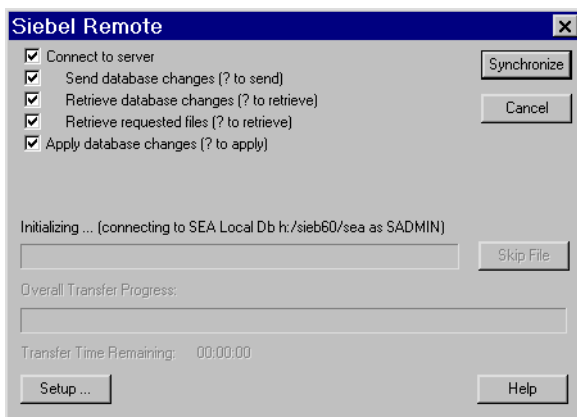


Figure 3-1. Siebel Remote Synchronization Dialog Box

Synchronization Actions

This section describes the available actions in the Siebel Remote synchronization dialog box as shown in [Figure 3-1 on page 3-4](#).

Extract Local Database Changes

This action connects to the local database and extracts all the local transactions in the form of .dx files. This action happens automatically and cannot be disabled. In general, you should be able to ignore this action. This action displays the number of transactions that still need to be extracted.

Connect to Server

This action connects to the server, dials the phone number if necessary, and performs version, schema, and database initialization checking. If a dbinit or upgrade is pending, this action downloads and applies the pending dbinit or upgrade. This action must run successfully for the following three actions to be invoked.

Send Database Changes

This action sends the local transactions to the server by sending one or more .dx files and associated attachment files to the server. This action displays the number of transactions that still need to be sent.

Retrieve Database Changes

This action retrieves transactions from the server by retrieving one or more .dx transaction files and associated attachment files from the server. These files are generated by the Transaction Router on the Siebel Remote server. This action displays the number of transactions that still need to be retrieved.

Retrieve Requested Files

This action retrieves user-requested attachment files from the server. This action displays the number of files that still need to be retrieved.

Apply Database Changes

This action applies database changes retrieved from the server to the local database. This action displays the number of transactions that still need to be applied.

Sleep

This action sets the Siebel Remote client to sleep mode for a given number of seconds. This action displays the number of seconds of remaining sleep time.

Action List

You can enable or disable each action by checking the check box to the left of the action. Here are the possible check box states:



Enabled. This action will run when its turn comes.



Disabled. This action will not run when its turn comes.



Not runnable. This action cannot run because an action it depends upon did not (or will not) run.



Finished. This action is finished.



Skipped. This action was skipped.

While an action is running, you can reset the action check box before the action has finished. If an action is running when you disable it, it will stop as soon as possible, and synchronization will continue with the next action.

The action status check boxes persist throughout the session. If you start synchronization with the Apply Database Changes option disabled, it will remain disabled throughout synchronization. If you restart Siebel applications, the action status check boxes return to their default state (enabled).

Item Status Field

The word *pausing* appears in the Item Status field. Actions are made up of one or more items and may be hidden. The items (and sub-items) that appear in this field update the synchronization status for the user. Below the Item Status field is the item progress indicator, which indicates the remaining processing time for the item.

NOTE: The progress indicator provides reasonably accurate time estimates for long-running items, such as transferring files or merging transactions, but less accurate estimates for short-running items, such as connecting to the server or database.

Skip File Button

The Skip File button is enabled whenever synchronization is performing an item or sub-item that is not critical to the current action. Retrieving an optional attachment file is the only action that can be skipped. Clicking this button skips the current item or sub-item, and the current action continues. Double-clicking this button generates a prompt and skips all remaining optional items for this action.

Overall Transfer Progress Panel

This panel appears when communications with the server are active. The progress indicator displays the progress toward completing the actions that require the communications line.

Transfer Time Remaining Field

This field contains the estimated time for completing the actions.

NOTE: The estimated time may be inaccurate when transferring large attachment files.

Start/Stop Command Button

The Start button starts synchronization. You can click this button even while synchronization is still performing hidden actions, such as connecting to the local database and extracting local database changes. When you click this button, the Synchronization dialog box is hidden (unless SHIFT is held down), and the label on the button changes to Stop.

Clicking the button again will stop synchronization if it is still running. When synchronization finishes, the button changes to OK. Clicking the button again hides the synchronization dialog box. If the Synchronization dialog box is hidden while synchronization is running, invoking synchronization will redisplay the Synchronization dialog box. If synchronization is finished, invoking synchronization will reset the Synchronization dialog box and then display the dialog box.

Cancel/Hide Button

If synchronization has not started, clicking Cancel will close the Synchronization dialog box and abort synchronization. If synchronization has started, the label on this button will change to Hide, and clicking the button will hide the Synchronization dialog box.

Setup Button

Clicking the Setup button displays the Docking Preferences dialog box. The two File options control which files to synchronize. File options can be changed while synchronization is running.

Retrieve Published Files Box

When this check box is selected, synchronization will retrieve all newly published files.

Retrieve Auto Update Files Box

If this check box is selected, synchronization will retrieve updates to local files marked for auto update. Auto update files that are not local or have not been requested will not be retrieved. The auto update flag is local to each node, so users can choose to update files automatically, without affecting other users. If you do not choose the Retrieve Auto Update Files option during this synchronization session, then synchronization will mark the files that need to be updated. Synchronization will then make all auto update files current during the next session when Retrieve Auto Update Files is enabled.

Changes to the dial-up networking options will take effect the next time synchronization makes a connection to the server. The Connection box allows users to select a dial-up networking connection. Leaving the box blank will cause synchronization to use an existing network connection.

When the mobile client receives a transaction on a file table, synchronization decides whether to retrieve the file locally. The default is not to bring down files to the mobile client unless the file is requested. File screens generally have a request field that users can select to bring down the file during the next docking session (if the Retrieve Requested Files action is enabled). Files are also sent upward by docking. If you change a file, you must send the new file up with the transaction to make the corporate database consistent. These files are stored near the corporate database on a file server. Files are named carefully to avoid conflicts if two users attempt to modify a file at the same time.

Auto-Start Siebel Remote Box

If this check box is selected, Siebel Remote will begin synchronization as soon as you invoke synchronization. The Siebel Remote dialog box will not be displayed. If you want to display the dialog box throughout your session, press SHIFT when you click Start.

Mobile Web Client Configuration Parameters

The Siebel Remote client reads configuration parameters in the Siebel configuration file (`.cfg`) to specify the location of the Siebel Server directories, Siebel File Server directories, and the Siebel database installation. Before using Siebel Remote, you must set the values for the configuration parameters. For more information on editing configuration files, see [“Editing Configuration Files” on page 3-13](#).

Setting Siebel Remote Preferences

The Siebel installation program creates a `siebel.cfg` file in the client `bin\ENU` directory with default values for each of these configuration parameters.

Siebel Remote uses the following parameters, located in the [Local] section of the `.cfg` file:

- **ClientRootDir.** Name of the Siebel client installation directory.
- **DockConnString.** The name of the Siebel Server to which you connect for synchronization. This parameter has the following format:

```
siebel server name:network protocol:sync port
#:service:encryption
```

where

- *siebel server name* = the name of the computer where the Siebel Server is currently running.
- *network protocol* = the name of the networking protocol to use. TCPIP is the only valid value and is the default value.

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Mobile Web Client Configuration Parameters

- *sync port #* = the TCP/IP port number dedicated to the Synchronization Manager. The default value is 40400.

NOTE: You can use the Siebel Server Administration screens to override the default value by specifying a value for the SeblMgr component's *SyncPort* parameter and restarting the Siebel Server. You can also specify this port number as a command line option when starting the Siebel Server.

- *service* = the TCP/IP service you are requesting. For docking, it should always be set to the default DOCK.
- *encryption* = the encryption package you are using. The encryption facility must match the type used by the server. Currently, the only supported encryption facility is Mscrypto. The default is NONE.

Examples of valid values are:

SIEBAPP1:TCPIP:40400

SIEBAPP1:9000

SIEBAPP1

- **TableOwner.** Name of the database account on the local database where the Siebel schema is installed. The default is SIEBEL. To initialize a mobile client database, this parameter must be set to SIEBEL.
- **FileSystem.** Name of the directory on the server where attachment files reside. To use alternative file systems, use a comma-separated list of file system directories. An example is:

D:\files,\\bstevens\files

In this example, D:\files is a directory on a CD-ROM, and \\bstevens\files is a directory on the mobile client. In this example, the client will search both directories when files are requested.



Caution: Do not add spaces after the comma in the FileSystem parameter.

- **DockTxnsPerCommit.** Number of transactions that Siebel Remote applies to the local database before performing a commit. You should set this configuration parameter to a value that satisfies the needs at your site. The default is 500.
- **Mobile clients.** If using the Siebel client application to dock, set the DockTxnsPerCommit to a high value. Merged transactions will not lock out other users. This will enhance the performance of Siebel Remote.
- **Stand-alone synchronizer.** If using the stand-alone synchronizer, set the DockTxnsPerCommit to a high value only if the program will be the only active user on the database. If the program will be applying transactions while the user is accessing the database via the application, set a low value to prevent locking out other users while merging transactions.

For more information on editing configuration files, see [“Editing Configuration Files” on page 3-13](#) and [Appendix B, “Configuration Parameters.”](#)

About Installation Failures

Siebel Remote is designed to minimize the impact of a software, communications, or hardware failure. This section describes the most likely failures and how to recover from them.

Siebel Remote Transmission Failure

Mobile clients may experience occasional transmission failures. These failures may be caused by noise on the telephone line. If an error is detected, Siebel Remote continues to retransmit the files in an attempt to synchronize successfully.

Siebel Client Database Failure

If the client machine loses power during a merger process, then the SQL Anywhere database may be corrupted. To avoid this, make sure that the client machine has sufficient power before synchronization.

If a client database becomes unusable because of a media failure or other event, you must refresh the client database. This requires that you run Database Extract for the client.

For more information about the Database Extract process, see *Siebel Remote Administration Guide, MidMarket Edition*.

NOTE: Depending on the kind of failure, database changes and file attachments that were awaiting upload during the next synchronization session may also be lost. In this case, the user must re-enter them.

Setting Up the Siebel Remote Server

The Siebel Remote server runs the Siebel Remote components and manages synchronization sessions with mobile clients. The Siebel Remote server provides an interim storage area for data required to synchronize mobile databases with the Siebel database server. See *Siebel Remote Administration Guide, MidMarket Edition* for information about setting up the Siebel Remote server.

Editing Configuration Files

Siebel Mobile and Dedicated Web clients use configuration files to hold the information that tells the clients how to function at startup. These files have the .cfg extension. An example is siebel.cfg, which is used by Siebel Sales.

NOTE: Unlike the Siebel Mobile and Dedicated Web clients, the zero footprint Siebel Web Client does not install files on the user's PC. Instead, it uses configuration files located on the server.

Because all the configuration files are plain-text files, you can edit them manually using any text editor instead of running the Installer again. You must also copy and edit these files for each new application you create.

There are many reasons why you might edit configuration files and you may want to do so at some point after the installation; for example, you may want to edit configuration files to enable or disable certain functionality, fonts, and features.

Table 3-1 on page 3-14 lists examples of .cfg files for which icons are created and their associated applications. Your installation may contain additional .cfg files besides those listed here.

Table 3-1. Some Configuration Files and Associated Applications

.cfg file	Application
emailresp.cfg	Siebel eMail Response
pmanager.cfg	Siebel Partner Manager
service.cfg	Siebel Service
siebel.cfg	Siebel Sales
uagent.cfg	Siebel Call Center

To edit configuration files

- 1** Create a backup copy of the default .cfg file for which you want to edit parameter values, and save that file as a backup file.
- 2** Using any text editor, such as Notepad, open the default version of the .cfg file.
- 3** Edit the parameter values to obtain the desired application behavior.
- 4** Run a test using the .cfg file that you edited.
- 5** If there is an error in your test, resave the backup file as the default .cfg file.
- 6** If no error occurs, then use the modified .cfg file.

Sample Configuration File

Below is the content of the uagent.cfg configuration file for Siebel Call Center. On the left are the parameters, and on the right are sample values. Edit the values according to how you want your system to function.

```
[Siebel]

RepositoryFile           = siebel.srf

ApplicationName         = Siebel Universal Agent

ApplicationTitle        = Siebel Call Center

ApplicationSplashText   = Siebel Call Center

ComponentName          = Siebel Call Center Client

DataSource              = Local

ClientRootDir           = C:\sea700\mwebc

TempDir                 = C:\sea700\mwebc\temp

JTCHelpURL              = $(JTCHelpURL)

Version                = 100

ClientFileServSupport  = TRUE

MultiCurrency           = TRUE

EnableScripting        = TRUE

EnableOLEAutomation    = TRUE

OLEAutomationDLL       = sscfole.dll

EnableCORBA             = FALSE

CORBADLL               = sscfcorb.dll

JseCorbaConnector      = corbavgn.dll

CorrespODBCDataSource  = SEAW MMerge C:/sea700/mwebc

ReportsODBCDataSource  = $(AccessDatasourceName)
```

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```
ServerDbODBCDataSource      = SEAW C:/sea700/mwebc
DockRepositoryName         = Siebel Repository
HoldExportOdbcConnection   = FALSE
LocalDbODBCDataSource      = SEAW Local Db C:/sea700/mwebc
LargeFont                  = Verdana-8-normal
SmallFont                  = Verdana-8-normal
DefaultChartFont           = Verdana-10-normal
NavBarItemFont             = Verdana-8-bold
NavBarSelectFont           = Verdana-8-bold
NavBarTitleFont            = Verdana-10-bold
AppletTitleFont            = Verdana-10-bold
Language                   = ENU
SrvrUpdateInterval        = 60
SrvrTimeOutInterval        = 600
EnablePersonalization      = TRUE
DocumentIntegrator         = Microsoft Office
WebClientSiteDir           = C:\sea700\mwebc\public\enu
AccessDir                  = $(AccessRoot)
SearchEngine                = Fulcrum
SearchDefName              = Call Center Definition
SearchInstallDir           =
RemoteSearchServer         = True
RemoteSearchServerPath     = CHANGE_ME/tcpCHANGE_ME
LoginDomain                 = INTERNAL
EnableFQDN                 = FALSE
```

```
;; This is a client-only section ( for example twsiebel.exe)
;; All the data sources shown below are defined as
;; named subsystems in the Siebel Enterprise. To change the values
;; for these datasources, use the following command
;; In the line mode srvmgr
;; > change param paramname="<value>" for named subsystem <named
subsys name>
;; In the case below it will be Local/Sample/ServerDataSrc/
GatewayDataSrc
```

[DataSources]

```
Local                = Local
Sample              = Sample
ServerDataSrc      = Server
GatewayDataSrc     = Gateway
```

[Local]

```
Docked              = FALSE
ConnectString       = C:\sea700\mwebc\local\sse_data.dbf -
q -m -x NONE -gp 4096 -c40m -ch60m
TableOwner          = SIEBEL
DockedDBFilename    = CHANGE_ME
DLL                 = SSCDW7.DLL
SqlStyle            = Watcom
MaxCachedCursors    = 16
```

Configuring the Mobile and Dedicated Web Clients

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```
MaxCachedDataSets      = 16
ReverseFillThreshold    = 100
CaseInsensitive         = FALSE
InsensitivityFactor     = 2
DockTxnsPerCommit      = 500
DockConnString         = CHANGE_ME
ChartServer             = localhost:8001
ChartImageFormat       = png
AutoStopDB             = TRUE
EnterpriseServer        = CHANGE_ME

[Sample]
Docked                  = FALSE
ConnectionString        = C:\sea700\mwebc\sample\sse_samp.dbf -
q -m -x NONE -gp 4096 -c40m -ch60m
TableOwner              = SIEBEL
DockedDBFilename       = CHANGE_ME
DLL                     = SSCDW7.DLL
SqlStyle                = Watcom
MaxCachedCursors       = 16
MaxCachedDataSets      = 16
ReverseFillThreshold    = 100
CaseInsensitive        = TRUE
InsensitivityFactor     = 2
FileSystem              = C:\sea700\mwebc\sample\ENU\files
```

```
ChartServer                = localhost:8001
ChartImageFormat           = png
AutoStopDB                 = TRUE

[ServerDataSrc]
Docked                     = TRUE
ConnectionString           = $(ConnectionString)
TableOwner                 = $(TableOwner)
DLL                        = sscddcli.dll
SqlStyle                   = DB2
MaxCachedCursors           = 16
MaxCachedDataSets         = 16
ReverseFillThreshold       = 100
CaseInsensitive            = FALSE
InsensitivityFactor        = 2
FileSystem                  = .\CHANGE_ME\\att
GatewayAddress             = CHANGE_ME
EnterpriseServer           = CHANGE_ME
RequestComponent           = CHANGE_ME
RequestServer              = CHANGE_ME
;SecurityAdapter           = LDAP
CurrentSQLID               = %SQLID%
MaxCursorSize              = -1
PrefetchSize               = -1
ChartServer                = localhost:8001
```

Configuring the Mobile and Dedicated Web Clients

Editing Configuration Files

```
ChartImageFormat          = png
[GatewayDataSrc]
ConnectionString          = CHANGE_ME
PrimaryEnterprise         = CHANGE_ME
DLL                       = sscda10.dll
Hidden                    = TRUE
CaseInsensitive           = FALSE
InsensitivityFactor       = 0

[ActuateReports]
EnableReportServer        = FALSE
ReportServerHost          = CHANGE_ME
ReportCastHost            = CHANGE_ME
ProtocolName              = HTTP
RoxDir                    = /Siebel Reports/ENU/
ConnectionString          = CHANGE_ME

;; This section is a client-only section.

;; It is a part of object manager parameters for the server
components
[CCA]
Enable                    = FALSE
Type                      = CyberSourceICS2
ServerHost                = ics2test.ic3.com
MerchantId                 = ICS2Test
```

```
;; This section is a client-only section.

;; It is a part of object manager parameters for the server
components

[Communication]

CommEnable                = FALSE
CommSimulate              = FALSE
CommLocalDriver           = TRUE
CommLogDebug              = TRUE
CommConfigManager        = FALSE
CommReqTimeout            = 600
CommLogFile               = C:\sea700\mwebc\log\SComm.log

;; This section is a client-only section.

;; It is a part of object manager parameters for the server
components

[DataCleansing]

Enable                    = FALSE
Type                     = FirstLogic
Dir                       =

;; This section is a client-only section.

;; It is a part of object manager parameters for the server
components

[DeDuplication]

Enable                    = FALSE
```

Configuring the Mobile and Dedicated Web Clients

Editing Configuration Files

```
Type = SSA
Dir =

;; These sections below will be read from the cfg file for both the
;; zero-foot-print client and the mobile client.

[Preload]
View1 = Opportunity List View
View2 = All Service Request List View

[SWE]
RequiredIndicator = ICON_REQUIRED
ScreenJumpTabRightOnBitmap = JUMPTAB_NEXT_ON
ScreenJumpTabRightOffBitmap = JUMPTAB_NEXT_OFF
ScreenJumpTabRightBlankBitmap = JUMPTAB_BLANK
ScreenJumpTabLeftOnBitmap = JUMPTAB_PREV_ON
ScreenJumpTabLeftOffBitmap = JUMPTAB_PREV_OFF
ScreenJumpTabLeftBlankBitmap = JUMPTAB_BLANK
ViewJumpTabRightOnBitmap = JUMPTAB_NEXT_ON
ViewJumpTabRightOffBitmap = JUMPTAB_NEXT_OFF
ViewJumpTabRightBlankBitmap = JUMPTAB_BLANK
ViewJumpTabLeftOnBitmap = JUMPTAB_PREV_ON
ViewJumpTabLeftOffBitmap = JUMPTAB_PREV_OFF
ViewJumpTabLeftBlankBitmap = JUMPTAB_BLANK
ScreenTabOpenOnBitmap = SCRNTAB_OPN_ON
```

```
ScreenTabMidOnBitmap          = SCRNTAB_MID_ON
ScreenTabCloseOnBitmap        = SCRNTAB_CLS_ON
ScreenTabOpenOffBitmap        = SCRNTAB_OPN_OFF
ScreenTabMidOffBitmap         = SCRNTAB_MID_OFF
ScreenTabCloseOffBitmap       = SCRNTAB_CLS_OFF
ViewTabOpenOnBitmap           = VIEWTAB_OPN_ON
ViewTabMidOnBitmap            = VIEWTAB_MID_ON
ViewTabCloseOnBitmap          = VIEWTAB_CLS_ON
ViewTabOpenOffBitmap          = VIEWTAB_OPN_OFF
ViewTabMidOffBitmap           = VIEWTAB_MID_OFF
ViewTabCloseOffBitmap         = VIEWTAB_CLS_OFF
ViewBarCaption                 = "Show:"
ListRowStyle                   = "Siebel List"
SystemSWSName                  = CHTMLStyles.sws
;UserSWSName                   = //for customer use only
HighInteractivity              = TRUE
ExtendedKeyboard               = TRUE
AppletSelectStyle             = "Applet Select"
EnableCDA = TRUE
NumberOfListRows = 7
SortAscendingBitmap            = SORT_UP
SortDescendingBitmap           = SORT_DOWN
SortAscendingDisabledBitmap    = SORT_UP_ON
SortDescendingDisabledBitmap   = SORT_DOWN_ON
```

Configuring the Mobile and Dedicated Web Clients

Editing Configuration Files

```
SortAscendingCaption      = "<img src='images/icon_sort_up.gif'
alt='Sort Ascending' border=0>"

SortDescendingCaption     = "<img src='images/icon_sort_down.gif'
alt='Sort Descending' border=0>"

;EditFieldCaption        = "<img src='images/btn_select.gif'
width=39 height=15 border=0 alt='Select' align='absmiddle'>"

EditFieldCaption         = "<img src='images/icon_select.gif'
width=14 height=14 border=0 alt='Select' align='absmiddle'>"

EditFieldType            = Link

CalendarFieldCaption     = "<img src='images/icon_calendar.gif'
width=16 height=15 border=0 alt='Input' align='absmiddle'>"

CalendarFieldType       = Text

CalculatorFieldCaption   = "<img src='images/icon_calculator.gif'
width=16 height=15 border=0 alt='Input' align='absmiddle'>"

CalculatorFieldType     = Text

MarkupLanguage           = HTML

ShortCommands            = FALSE

EncryptNames             = FALSE

AllowAnonUsers           = TRUE

SystemSWFName            = CCHtmlType.swf

UserSWFName              = CfgHtmlType.swf

UserAgentFile            = ua.ini

SMTPServer               = CHANGE_ME

MsgTemplateDir           = C:\sea700\mwebc\msgtempl\ENU

TreeNodeCollapseCaption  = "<img src='images/
tree_collapse.gif'      alt='-' border=0 align=left vspace=0
hspace=0>"

TreeNodeCollapseElbowCaption = "<img src='images/
tree_coll_elbow.gif'    alt='-' border=0 align=left vspace=0
hspace=0>"
```

```
TreeNodeCollapseTeeCaption    = "<img src='images/  
tree_coll_tee.gif'          alt='-' border=0 align=left vspace=0  
hspace=0>"  
  
TreeNodeElbowCaption         = "<img src='images/tree_elbow.gif'  
alt='' border=0 align=left vspace=0 hspace=0>"  
  
TreeNodeExpandCaption       = "<img src='images/tree_expand.gif'  
alt='+' border=0 align=left vspace=0 hspace=0>"  
  
TreeNodeExpandElbowCaption   = "<img src='images/  
tree_exp_elbow.gif'        alt='+' border=0 align=left vspace=0  
hspace=0>"  
  
TreeNodeExpandTeeCaption     = "<img src='images/  
tree_exp_tee.gif'          alt='+' border=0 align=left vspace=0  
hspace=0>"  
  
TreeNodeTeeCaption          = "<img src='images/tree_tee.gif'  
alt='' border=0 align=left vspace=0 hspace=0>"  
  
TreeNodeCloseFolderCaption   = "<img src='images/  
tree_closed_folder.gif'    alt='' border=0 align=left vspace=0  
hspace=0>"  
  
TreeNodeLeafCaption         = "<img src='images/  
tree_leaf_local.gif'       alt='' border=0 align=left vspace=0  
hspace=0>"  
  
TreeNodeOpenFolderCaption    = "<img src='images/  
tree_open_folder.gif'      alt='' border=0 align=left vspace=0  
hspace=0>"  
  
TreeNodeOpenFolder2Caption   = "<img src='images/  
tree_open_folder2.gif'     alt='' border=0 align=left vspace=0  
hspace=0>"  
  
TreeNodeRootCaption         = "<img src='images/tree_root.gif'  
alt='' border=0 align=left vspace=0 hspace=0>"  
  
TreeNodeBarCaption          = "<img src='images/tree_bar.gif'  
alt='|' border=0 align=left vspace=0 hspace=0>"  
  
TreeNodeSpaceCaption        = "<img src='images/tree_space.gif'  
alt=' ' border=0 align=left vspace=0 hspace=0>"  
  
TreeNodeArrowUpCaption      = "<img src='images/arrow_up.gif'  
alt='^' border=0 align=left vspace=0 hspace=0>"
```

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Editing Configuration Files

```
TreeNodeArrowDownCaption = "<img src='images/arrow_down.gif'
alt='V' border=0 align=left vspace=0 hspace=0>"

TreeNodeFontSize          = 1

TreeNodeFontStyle         = MS Sans Serif,Arial,Helvetica

TreeNodeBgColor           = #000080

TreeNodeFgColor           = #ffffff

EnableWebClientAutomation = TRUE

;; To enable the security adapter, make sure that you set it
correctly

;; here (LDAP, DemoSecurityAdapter, etc.) and that it is
uncommented.

[InfraObjMgr]

;SecurityAdapter          = LDAP

[SecurityAdapters]

LDAP                      = LDAP

[LDAP]

DllName                   = %LDAP_DLL%

ServerName                =

Port                      = 389

BaseDN                    =

UsernameAttributeType     = uid

PasswordAttributeType     = userPassword
```

```
CredentialsAttributeType = credentials
RolesAttributeType      = roles
SslDatabase              =

[ThinClientUpgrade]
VersionCheck1 = "<00"C:\sea700\mwebc\sample\tcupgrade.html

[Internet]
TableOwner      = $(TableOwner)
SqlStyle        = DB2
```

Other sources of information for configuration files and configuration parameters include:

- [Appendix A, “Index of Configuration Parameters,”](#) which provides an alphabetical list of the configuration parameters, along with cross-references to the description for each, documented in this guide.
- [Appendix B, “Configuration Parameters,”](#) which addresses `siebel.cfg` configuration parameters.
- *Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition.*

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Index of Configuration Parameters

A

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Appendix Overview

This appendix lists configuration parameters in alphabetical order, with cross-references to the page that documents each one and the configuration file in which it can be found. The list contains configuration parameters for Siebel Web Client, Mobile Web Client and Dedicated Web Client.

NOTE: This appendix does not document the parameters. It provides a cross-reference to the location in this guide where you can find the documentation for each parameter.

Configuration Parameters Index

[Table A-1](#) contains an alphabetical listing of Siebel client configuration parameters, showing the configuration files in which each one can be found and the page that documents each one.

Table A-1. Siebel Configuration Parameters in Alphabetical Order (1 of 6)

Configuration Parameter Name	Configuration File Name	Documented on Page
AccessDir	siebel.cfg	B-2
ActuateDevWBDDir	siebel.cfg	B-14
ActuateReportExportFileName	siebel.cfg	B-14
ADSI	siebel.cfg	B-22
AnonPassword	eapps.cfg	<i>Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition</i>
AnonUserName	eapps.cfg	<i>Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition</i>
AnonUserPool	eapps.cfg	<i>Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition</i>
AppletTitleFont	siebel.cfg	B-2
ApplicationName	siebel.cfg	B-2

Table A-1. Siebel Configuration Parameters in Alphabetical Order (2 of 6)

Configuration Parameter Name	Configuration File Name	Documented on Page
ApplicationSplashText	siebel.cfg	B-2
BaseDN	siebel.cfg	B-19
CaptionPrefix	siebel.cfg	B-2
CaseInsensitive	siebel.cfg	B-8
ClientRootDir	siebel.cfg	3-9, B-2
ComponentName	siebel.cfg	B-3
ConnectString	siebel.cfg	B-8
ContactLogin	siebel.cfg	B-8
CorbaDLL	siebel.cfg	B-3
CorrespODBCDataSource	siebel.cfg	B-3
CredentialsAttributeType	siebel.cfg	B-19
DataSource	siebel.cfg	B-3
DefaultChartFont	siebel.cfg	B-3
Dir	siebel.cfg	B-15 (DataCleansing), B-16 (Data DeDuplication)
DLL	siebel.cfg	B-8
DllName	siebel.cfg	B-19
DockConnString	siebel.cfg	3-9, B-8
DockedDBFilename	siebel.cfg	B-8
DockRecvTxnsPerCommit	siebel.cfg	B-9
DockRepositoryName	siebel.cfg	B-3
DockTxnsPerCommit	siebel.cfg	3-11, B-9
Enable	siebel.cfg	B-15 (DataCleansing), B-16 (Data DeDuplication)
EnableCORBA	siebel.cfg	B-3

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Configuration Parameters Index

Table A-1. Siebel Configuration Parameters in Alphabetical Order (3 of 6)

Configuration Parameter Name	Configuration File Name	Documented on Page
EnableOLEAutomation	siebel.cfg	B-3
EnablePersonalization	siebel.cfg	B-3
EnableScripting	siebel.cfg	B-3
EncryptCredentialsPassword	siebel.cfg	B-20
EncryptPassword	siebel.cfg	B-4
EnterpriseServer	siebel.cfg	B-9
ExtensionType	siebel.cfg	B-9
FileSystem	siebel.cfg	3-10, B-4
GatewayAddress	siebel.cfg	B-9
GatewayDataSrc	siebel.cfg	B-7
GatewayServer	tclient.htm and tclient.stc	<i>Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition</i>
Height	tclient.htm and tclient.stc	<i>Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition</i>
HelpFile	siebel.cfg	B-4
Hidden	siebel.cfg	B-9
HoldExportODBCConnection	siebel.cfg	B-4
InsensitivityFactor	siebel.cfg	B-9
InsUpdAllCols	siebel.cfg	B-10
IntegratedSecurity	siebel.cfg	B-10
JSECorbaConnector	siebel.cfg	B-5
Lang	tclient.htm and tclient.stc	<i>Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition</i>
LargeDataFont	siebel.cfg	B-5
LargeFont	siebel.cfg	B-5

Table A-1. Siebel Configuration Parameters in Alphabetical Order (4 of 6)

Configuration Parameter Name	Configuration File Name	Documented on Page
LDAP	siebel.cfg	B-18
Local	siebel.cfg	B-7
LocalDbODBCDataSource	siebel.cfg	B-5
Login	tclient.htm and tclient.stc	<i>Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition</i>
MainRepositoryName	siebel.cfg	B-5
MaxCachedCursors	siebel.cfg	B-10
MaxCachedDataSets	siebel.cfg	B-10
MaxConnections	siebel.cfg	B-10
MaxCursorSize	siebel.cfg	B-10
MultiCurrency	siebel.cfg	B-5
NavBarItemFont	siebel.cfg	B-5
NavBarSelectFont	siebel.cfg	B-5
NavBarTitleFont	siebel.cfg	B-5
NetworkPacketSize	siebel.cfg	B-10
NonSQL	siebel.cfg	B-10
ObjectManager	tclient.htm and tclient.stc	<i>Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition</i>
OLEAutomationDLL	siebel.cfg	B-5
OLEMessagePendingDelay	siebel.cfg	B-6
PasswordAttributeType	siebel.cfg	B-20
PersonalizationLog	siebel.cfg	B-6
Port	siebel.cfg	B-20
PrefetchSize	siebel.cfg	B-11
Preload	siebel.cfg	B-15

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Configuration Parameters Index

Table A-1. Siebel Configuration Parameters in Alphabetical Order (5 of 6)

Configuration Parameter Name	Configuration File Name	Documented on Page
PrimaryEnterprise	siebel.cfg	B-11
RemoteSearchServer	siebel.cfg	B-11
RemoteSearchServerPath	siebel.cfg	B-11
ReportsDir	siebel.cfg	B-6
ReportsODBCDataSource	siebel.cfg	B-6
RepositoryFile	siebel.cfg	B-6
RequestComponent	siebel.cfg	B-11
RequestServer	siebel.cfg	B-11
ReverseFillThreshold	siebel.cfg	B-11
RolesAttributeType	siebel.cfg	B-20
Sample	siebel.cfg	B-7
SAPIdocAllowedObjects	siebel.cfg	B-17
SAPRfcConnectionString	siebel.cfg	B-17
SAPRfcDestEntry	siebel.cfg	B-17
SAPRfcPassword	siebel.cfg	B-17
SAPRfcUserName	siebel.cfg	B-17
ScriptingDLL	siebel.cfg	B-6
SearchDefName	siebel.cfg	B-11
SearchEngine	siebel.cfg	B-11
SearchInstallDir	siebel.cfg	B-11
SecurityAdapter	siebel.cfg	B-12
ServerDataSrc	siebel.cfg	B-7
ServerName	siebel.cfg	B-20
SharedModeUsersDir	siebel.cfg	B-6

Table A-1. Siebel Configuration Parameters in Alphabetical Order (6 of 6)

Configuration Parameter Name	Configuration File Name	Documented on Page
SiebelEnterprise	tclient.htm and tclient.stc	<i>Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition</i>
SiebelServer	tclient.htm and tclient.stc	<i>Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition</i>
SmallDataFont	siebel.cfg	B-6
SmallFont	siebel.cfg	B-6
SqlStyle	siebel.cfg	B-12
SslDatabase	siebel.cfg	B-20
StatsPage	eapps.cfg	<i>Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition</i>
SupportsIntegratedAuthentication	siebel.cfg	B-21
TableOwner	siebel.cfg	3-10 , B-12
TempDir	siebel.cfg	B-7
Type	siebel.cfg	B-15 (DataCleansing), B-16 (Data DeDuplication)
UpperCaseLogin	siebel.cfg	B-12
UsernameAttributeType	siebel.cfg	B-21
Version	siebel.cfg	B-7
View1	siebel.cfg	B-15
View2	siebel.cfg	B-15
Viewn	siebel.cfg	B-15
Width	tclient.htm and tclient.stc	<i>Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition</i>

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Configuration Parameters Index

Configuration Parameters

B

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Generic Configuration Parameters

This chapter lists and defines parameters in `.cfg` configuration files. The name of the `.cfg` file will vary, depending on the application you are using. Use this information to determine which parameters you must set to achieve optimal performance and enable the features you require.

Client and Server Application Parameters

[Table B-1](#) defines Siebel application parameters.

Table B-1. Siebel Application Parameters (1 of 6)

Name	Description
AccessDir	Directory where Microsoft Access is installed.
AppletTitleFont	Font to use in the applet title. The font settings are for the user interface. AppletTitleFont controls the font for the title control for applets.
ApplicationName	Name of application object in repository to use, such as Siebel Sales or Siebel Service. The ApplicationName setting determines which splash screen appears and which set of menus is enabled.
ApplicationSplashText	Text that appears on the application splash screen when starting up a Siebel application. The default varies by the application. If you are starting Siebel Sales, for example, the ApplicationSplashText is set to Siebel Sales by default.
CaptionPrefix	Allows customizing of the title in the upper left-hand corner of the Siebel client application. Reads Siebel by default.
ClientRootDir	Directory where client software is installed.

Table B-1. Siebel Application Parameters (2 of 6)

Name	Description
ComponentName	<p>This parameter specifies the Siebel Anywhere configuration that should be used during version check. Navigate to the Siebel Anywhere Administration > Configurations view to see the configurations.</p> <p>Change the setting for this parameter if you want this .cfg file to be version-checked by a specific Siebel Anywhere configuration.</p> <p>For example, if you want to version-check the office in one city separately from the office in another city, create two Siebel Anywhere configurations appropriately named, then in the .cfg file for each set of users, enter a different value for the ComponentName entry.</p> <p>It is recommended to use only alphanumeric characters plus dashes and normal parentheses for the ComponentName parameter. If you want to use the Priority upgrade feature the maximum character length for the Upgrade Component name should be 40.</p>
CorbaDLL	The Siebel extension layer for CORBA.
CorrespODBCDataSource	Name of ODBC data source used by mail merges and correspondence.
DataSource	Name of default data source as defined in the .cfg file.
DefaultChartFont	Font name specification for chart applets. Defaults to Arial-10 normal.
DockRepositoryName	Obsolete.
EnableCORBA	<p>EnableCORBA is used to load CorbaDLL. For all installations except CORBA Object Manager, this flag is FALSE by default.</p> <p>When using a configuration file with one of the CORBA Object Manager executables, <code>ssomorbx.exe</code> or <code>ssomvisi.exe</code>, the CORBA Object Manager installer sets the EnableCORBA parameter to TRUE.</p>
EnableOLEAutomation	TRUE or FALSE. Enables OLE interfaces.
EnablePersonalization	Must be set to TRUE to activate the personalization (content targeting) functionality.
EnableScripting	TRUE or FALSE. Enables use of Siebel Visual Basic or Siebel eScript.

Configuration Parameters

Generic Configuration Parameters

Table B-1. Siebel Application Parameters (3 of 6)

Name	Description
EncryptPassword	Determines whether to encrypt user's password before passing it the RDBMS. It is used by those who do not want their users to directly log on to the server database using SQL*Plus or some other RDBMS tool other than Siebel Systems. When enabled, a simple encryption algorithm is applied to the password before it is sent to the database. This occurs when users attempt to log on to Siebel eBusiness Applications with their password. The users' Oracle login must also be set up with the encrypted version of the password. There is a special utility to help the administrator set these up. Not supported for Mobile Web Client.
FileSystem	<p>Specifies how the Dedicated Web Client accesses the File System. There are three scenarios for setting this parameter:</p> <ol style="list-style-type: none">1 If the installation has a Siebel Server and will use File System Manager (FSM), set the following parameters: File System = *FSM* Gateway Address = host name of Gateway server EnterpriseServer = name of the enterprise server2 If the installation has a Siebel Server and will not use FSM, set the following parameter: FileSystem = \$FS_LOCATION\att (\$FS_LOCATION is the location of the Siebel File System). Make sure the Dedicated Web Client user has physical access privileges for the File System directories.3 If the installation has no Siebel Server, set the following parameter: FileSystem = \$FS_LOCATION\att (\$FS_LOCATION is the location of the Siebel File System). The system administrator must manually create the att subdirectory in the Siebel File System and, if there is an existing installation, move all file attachments from \$FS_LOCATION to \$FS_LOCATION\att.
HelpFile	Help file for the current configuration.
HoldExportOdbcConnection	<p>This option applies to Access reports and Correspondence only. It does not apply to Actuate reports, which use OLE to retrieve data.</p> <p>TRUE or FALSE. This parameter tells the Siebel application to disconnect from, or to keep the connection with, the Microsoft ODBC data source after the Siebel application has exported data into a staging database during a report generation or correspondence mail merge. Keeping the connection is more stable than not keeping it. If the option is turned off, then Microsoft's ODBC jet engine driver (ODBCJT32.DLL) will consistently crash on the second disconnect attempt.</p>

Table B-1. Siebel Application Parameters (4 of 6)

Name	Description
JSECorbaConnector	<p>Required for eScript CORBA support if you are using Siebel eScript and calling CORBA from eScript. This parameter defines the name of the eScript CORBA extension DLL.</p> <p>Change this setting, depending on the CORBA ORBs (Object Request Broker) that you are using:</p> <ul style="list-style-type: none"> ■ Use <code>corbavgn.dll</code> for Inprise Visibroker ■ Use <code>corborbx.dll</code> for Iona ORBIX <p>The default setting for this parameter is <code>corbavgn.dll</code>.</p> <p>Note that the <code>ScriptingDLL</code> parameter must be set to <code>sscfjs.dll</code> to select Siebel eScript as the scripting language. By default, the <code>ScriptingDLL</code> parameter is set to Visual Basic.</p>
LargeFont	Font to use when the Siebel application calls for large font.
LargeDataFont	Use in the list applets when the Siebel application calls for a large font.
LocalDbODBCDataSource	Name of the ODBC datasource that is set up to access the local database. It is used by a variety of features in the Siebel eBusiness Applications and in Siebel Tools. It should not need to be modified because it is correctly configured by the installation program.
MainRepositoryName	<p>Repository this configuration should run against.</p> <p><code>MainRepositoryName</code> is different from the <code>RepositoryFile</code> parameter. <code>RepositoryFile</code> is the physical file that contains all runtime object definitions, while <code>MainRepositoryName</code> is used in cases where some part of the code must connect to the database to obtain information from the repository.</p>
MultiCurrency	TRUE or FALSE. Enables multicurrency support.
NavBarItemFont	The NavBar settings affect the Page Tabs and the Viewbar areas. This is the font to use for the Navigation Bar text.
NavBarSelectFont	Font to use when a Navigation Bar item is selected.
NavBarTitleFont	Font to use for titles in the Navigation Bar (View bar's title area).
OLEAutomationDLL	Name of .DLL that implements OLE interfaces.

Configuration Parameters

Generic Configuration Parameters

Table B-1. Siebel Application Parameters (5 of 6)

Name	Description
OLEMessagePendingDelay	Controls the amount of time that the Siebel application will wait for an OLE server to respond to a request before a "Server not responding ..." timeout message appears. This parameter should be set in milliseconds, contained within quotation marks. For example, to set this value to 15 seconds, the format should be <code>OLEMessagePendingDelay= "15000"</code> . The default setting is eight seconds. You may want to increase the timeout on slow computers so that the timeout message does not appear as frequently.
PersonalizationLog	Add <code>PersonalizationLog= "c:\personalization.txt"</code> to <code>.cfg</code> to view a log of all personalization activity, where <code>c</code> is the drive letter where you want to store the log. The log may assist in the process of debugging your rules, events, and actions.
ReportsDir	Directory where reports are installed. It is typically left blank.
ReportsODBCDataSource	Name of ODBC data source used by Access reports.
RepositoryFile	Name of the Siebel <code>.SRF</code> file to use. <code>RepositoryFile</code> is different from the <code>MainRepositoryName</code> parameter. <code>RepositoryFile</code> is the physical file which contains all runtime object definitions, while <code>MainRepositoryName</code> is used in cases where some part of the code must connect to the database to obtain information from the repository.
ScriptingDLL	Name of the shared library that implements Siebel Visual Basic or Siebel eScript.
SharedModeUsersDir	Directory where user preference files are stored. It is typically left blank, otherwise it must be set to a directory under a network shared drive, but it cannot be set to the shared drive itself. For example, if <code>\\yourserver\common</code> is the network shared drive, you cannot set <code>SharedModeUsersDir</code> to <code>\\yourserver\common</code> . Instead, set <code>SharedModeUsersDir</code> to a directory under <code>\common</code> .
SmallDataFont	Use in the list applets when the Siebel application calls for a small font.
SmallFont	Font to use when the Siebel application calls for a small font.

Table B-1. Siebel Application Parameters (6 of 6)

Name	Description
TempDir	Directory where temporary files should be created.
Version	Represents version of file. This parameter is for internal use only and is automatically maintained by Siebel Anywhere. When you create an upgrade kit for the .cfg file, Siebel Anywhere increments this version string appropriately, based on the version information from the Upgrade Components screen. Note that when you perform a Siebel Anywhere upgrade, you must manually upgrade files from the upgraded Siebel client directory to the Siebel server directory.

Datasources

[Table B-2](#) lists DataSources in the Siebel Configuration file.

Table B-2. DataSources

Name	Function
Local	Defines parameters for connecting to local database
Sample	Defines parameters for connecting to sample database
ServerDataSrc	Defines parameters for connecting to Siebel Enterprise Database
GatewayDataSrc	Defines Gateway parameters

Properties of DataSources

[Table B-3](#) lists the properties associated with the different DataSources. The previous table, [Table B-2 on page B-7](#), lists each DataSource name. Each DataSource must have its own section that defines the properties of the DataSource. Sample DataSource sections are shown in “[Sample DataSource Sections in the Siebel.cfg File](#)” on page B-13.

Table B-3. Properties of DataSources (1 of 5)

Name	Comment
CaseInsensitive	TRUE or FALSE. If TRUE, notifies the client to work with the database in case-insensitive mode. Note that queries against fields of type DTYPE_ID are always case-sensitive, even if the CaseInsensitive parameter is set to TRUE.
ConnectionString	Database-dependent string that defines how to connect to the database. For SQL Anywhere, the -q option hides the SQL Anywhere icon. The -c option indicates the initial cache size, and -ch indicates the limit of the cache size. The -m option indicates to the SQL Anywhere database engine to truncate the transaction log after each checkpoint.
ContactLogin	TRUE or FALSE. If TRUE, indicates that the corresponding datasource uses contact login, rather than employee login. Because a contact user is generally not associated one-to-one with a database account, you must use a security adapter to support contact users. If FALSE, the datasource is using employee login, rather than contact login.
DLL	Name of the .DLL file to use for the database connector code. The names differ depending upon whether you are using Oracle, SQL Server, DB2, and so on.
DockConnString	Name of the docking server. It is the machine name of the Siebel Server against which the Mobile Web Client synchronizes.
DockedDBFilename	Specifies local db file name when using MS SQL Server as the local database. For example: m:\siebel\local\sse_data.mdf (where m:\siebel is the Siebel root directory).

Table B-3. Properties of DataSources (2 of 5)

Name	Comment
DockRecvTxnsPerCommit	<p>Number of transactions received by the mobile client before a commit is issued to the database. The default value for this parameter is 10. Change the setting to:</p> <ul style="list-style-type: none"> ■ A higher value if you have a fast network connection, such as a LAN. Increasing the value can provide better performance when synchronizing the mobile client with the server. ■ A lower value if you have a lower-bandwidth network connection, such as a modem.
DockTxnsPerCommit	Number of transactions processed before a commit is issued to the database.
EnterpriseServer	Name of the Siebel Enterprise Server.
ExtensionType	TRUE or FALSE. Determines if the data source shows up in the login dialog's picklist of data sources to which to connect.
GatewayAddress	Virtual IP Address of the Siebel Gateway Server.
Hidden	TRUE or FALSE. Determines if the data source shows up in the login dialog's picklist of data sources.
InsensitivityFactor	<p>Set to a positive integer value (default is 2). Only applies when the datasource's CaseInsensitivity setting is TRUE. The value controls the number of characters in each string that will be treated as case-insensitive in a query. Not all database vendors support case-insensitivity efficiently, so this feature provides an approximate solution. Below is an example of the SQL WHERE clause generated when searching for an Opportunity named New when the InsensitivityFactor is set to 2.</p> <pre>WHERE ((S_OPTY.NAME LIKE 'ne%' OR S_OPTY.NAME LIKE 'Ne%' OR S_OPTY.NAME LIKE 'nE%' OR S_OPTY.NAME LIKE 'NE%') AND UPPER(S_OPTY.NAME)=UPPER('New'))</pre> <p>The above example shows that all permutations of the first two letters of the string 'New' are checked. With a higher factor, the number of permutations grows exponentially, and performance will suffer.</p> <p>Do not set this parameter to a value higher than 13.</p>

Configuration Parameters

Generic Configuration Parameters

Table B-3. Properties of DataSources (3 of 5)

Name	Comment
InsUpdAllCols	TRUE or FALSE. Ordinarily when the Siebel application generates INSERT or UPDATE statements to send to the database, the actual statement contains only the columns where data is present or has changed. When there are situations where you generate many statements on a particular table, the differences in the values being updated may prevent you from using an array interface supported by the DBMS. When this feature is set to TRUE, all columns are present in all INSERT and UPDATE statements. This automatically enables two statements issued against the same table in the same business component as part of a batch operation to use any existing array feature of the DBMS.
IntegratedSecurity	TRUE or FALSE. Turns on the model where the user does not have to enter a database username and password, since the operating system will authenticate the user. This is the property of a particular DataSource, although it is only supported for Oracle and MS SQL Server data sources. It can be set to TRUE or FALSE, but it defaults to FALSE. If TRUE, it prevents the Siebel client software from prompting the user for a username/password. Instead, it uses the database server's own authentication facilities to determine if that user should be allowed to log in to the database. For Oracle, refer to the OPS\$ and REMOTE_OS_AUTHENT features. For MS SQL Server, refer to Integrated Security.
MaxCachedCursors	Designates the maximum number of cursors that will be allowed to connect to the database at single time.
MaxCachedDataSets	Indicates the number of data sets that will be cached in memory. This parameter applies when the Cache Data property is available. The default is 10.
MaxConnections	Number of connections that can be made to the DataSource database server.
MaxCursorSize	This sets the total number of rows that can be returned in a result set.
NetworkPacketSize	The size of the packet sent across the network. This is a datasource property for Sybase databases and allows the TDS network packet size to be changed from the default of 512 bytes.
NonSQL	TRUE or FALSE. Setting that indicates that the data source does not use an SQL DBMS to retrieve its data. This would be used only in conjunction with a specialized business component that would build internally. It would never be arbitrarily set by a Siebel customer.

Table B-3. Properties of DataSources (4 of 5)

Name	Comment
PrefetchSize	Number of records that the Siebel application will read initially as part of a query execution. This parameter is only intended to be used in conjunction with the MaxCursorSize parameter and must be set to the same value. If these two values are set during the execution phase the Siebel application will read the specified number of records and close the database cursor.
PrimaryEnterprise	The name of the Enterprise Server you want to administer from the client machine. Set this parameter to view or change information in the Server Administration screens.
RemoteSearchServer	TRUE or FALSE. TRUE indicates the search will be performed on a remote machine; FALSE indicates the search will be performed on a local machine.
RemoteSearchServerPath	Indicates the name of the remote machine that will perform searches.
RequestComponent	Name of the server component to which the Siebel client should connect. This should be set to SRMSynch.
RequestServer	If you are not using Resonate Central Dispatch, this is the name of the Siebel Server that should service requests from the Siebel client. If you are using Resonate Central Dispatch, this parameter should be left blank.
ReverseFillThreshold	When the current query contains many rows, it may be very inefficient to read sequentially through all of them if the user hits the End button. For this reason, the customer may configure a threshold value to invert the current sort, re-execute the query, and fill the data buffers from the end. This is hidden from the user.
SearchDefName	Search Definition from Tools to be used for searching.
SearchEngine	Defines the search engine to be used for searching. Currently, only Fulcrum is supported.
SearchInstallDir	File location of the Fulcrum installation. Example: C:\Program Files\FULCRUM.

Configuration Parameters

Generic Configuration Parameters

Table B-3. Properties of DataSources (5 of 5)

Name	Comment
SecurityAdapter	<p>Optional. This is set to LDAP in a data source section to specify the Siebel-provided security adapter. This line must be included for each data source for which you want to use a security adapter.</p> <p>If you do not set SecurityAdapter to anything, this indicates that you are using the database for authentication. The value to which you set SecurityAdapter:</p> <ul style="list-style-type: none">■ Indicates the security adapter you are using for authentication. If you are not using the Siebel-provided security adapter, SecurityAdapter will be set to a value other than LDAP.■ Must be a valid value specified in the Security Adapters section, described in “SAP Subsystem Parameters” on page B-17. <p>See also “LDAP Parameters” on page B-19 for a description of other security adapter parameters.</p>
SqlStyle	<p>Tells Siebel eBusiness Applications what database you are using. When generating SQL to send to a DBMS, you may need to construct the SQL statement to suit your particular DBMS.</p>
TableOwner	<p>In a database, tables are identified by both their owner and their name. When queries that reference tables are issued the tableowner must be included in those references (for example, SIEBEL.S_EVT_ACT where SIEBEL is the tableowner).</p>
UpperCaseLogin	<p>The default is FALSE. If set to TRUE, the login name of the user is converted to uppercase before it is sent to the database for authentication. This value is applicable only if the database is used for authentication; the value of the parameter is ignored when SecurityAdapter is set to a non-empty value.</p> <p>Use this parameter if you wish to enforce a policy of having all database accounts in uppercase on a case-sensitive database, but you will not want users to worry about case when they type in their user names.</p> <p>Note that the value of UpperCaseLogin does not affect the password.</p>

Sample DataSource Sections in the Siebel.cfg File

The following example shows the [DataSources] section in the siebel.cfg file.

```
[DataSources]
Local = Local
Sample = Sample
ServerDataSrc = Server
GatewayDataSrc = Gateway
```

In addition, there is a separate parameter list for each data source named in the [DataSources] section. The following example shows a sample list of parameters and values for the Local data source:

```
[Local]
Docked = FALSE
ConnectionString = C:\sea700\client\local\sse_data.dbf
-q -m -x NONE -gp 4096 -c40m -ch60m
TableOwner = SIEBEL
DockedDBFilename = CHANGE_ME
DLL = SSCDW7.DLL
SqlStyle = Watcom
MaxCachedCursors = 16
MaxCachedDataSets = 16
ReverseFillThreshold = 100
CaseInsensitive = FALSE
InsensitivityFactor = 2
DockTxnsPerCommit = 500
DockConnString = FALSE
ChartServer = localhost:8001
ChartImageFormat = png
AutoStopDB = TRUE
EnterpriseServer = CHANGE_ME
```

Configuration Parameters

Generic Configuration Parameters

The following example shows a sample list of parameters and values for the Server data source:

```
[ServerDataSrc]
Docked                = TRUE
ConnectionString       = $(ConnectionString)
TableOwner            = $(TableOwner)
DLL                   = sscddcli.dll
SqlStyle              = DB2
MaxCachedCursors      = 16
MaxCachedDataSets     = 16
ReverseFillThreshold  = 100
CaseInsensitive       = FALSE
InsensitivityFactor   = 2
FileSystem             = .\CHANGE_ME\att
GatewayAddress        = CHANGE_ME
EnterpriseServer      = CHANGE_ME
RequestComponent      = CHANGE_ME
RequestServer         = CHANGE_ME
CurrentSQLID          = %SQLID%
MaxCursorSize        = -1
PrefetchSize          = -1
ChartServer           = localhost:8001
ChartImageFormat      = png
```

Actuate Reports Parameters

Table B-4 defines Actuate Reports parameters.

Table B-4. Actuate Reports Parameters

Name	Definition
ActuateDevWBDDir	Directory used in Tools to determine where Actuate Developer Workbench is located.
ActuateReportExportFileName	File used in Tools to export all Actuate VB scripts to a flat file.

Preload Parameters

Table B-5 defines preload parameters.

Table B-5. Preload Parameters

Name	Description
Preload	Specifies views to load during startup of the application. No data is cached, only the object definitions of the views and their related object definitions, so the information appears more quickly.
View1	Name of the first view to be preloaded at startup.
View2	Name of the second view to be loaded at startup.
View n	Name of the n th view to be loaded at startup.

DataCleansing Parameters

Table B-6 defines the parameters in the [DataCleansing] section of the client .cfg file.

NOTE: Data cleansing is available only for the Siebel Web Client and Dedicated Web Client.

Table B-6. DataCleansing Parameters

Name	Description
Enable	Set this optional parameter to TRUE to turn on data cleansing on a client. Set to FALSE to disable data cleansing. The following are required to use the data cleansing feature: <ul style="list-style-type: none"> ■ Data Quality license key ■ Firstlogic software installed
Type	Do not change the value from IdCentric.
Dir	Set to the local directory where the Firstlogic executable (not Postal Dictionary) files reside. The Siebel Mobile and Dedicated Web Client installation program may set this automatically if you installed Firstlogic prior to installing the Siebel client, but only if the Siebel installer detects the presence of Firstlogic, which depends on your system configuration.

DeDuplication Parameters

Table B-7 defines the parameters in the [DeDuplication] section of the client .cfg file.

NOTE: Data deduplication is available only for the Siebel Web Client and Dedicated Web Client.

Table B-7. DeDuplication Parameters

Name	Description
Enable	Set this optional parameter to TRUE to turn on data deduplication on a client. Set to FALSE to disable data deduplication. To use the data deduplication feature you must have installed Firstlogic software and have entered the Data Quality license key.
Type	Do not change the value from <code>IdCentric</code> .
Dir	Set to the local directory where the Firstlogic executable (not Postal Dictionary) files reside. The Siebel dedicated client installation program may set this automatically if you installed Firstlogic prior to installing the Siebel client, but only if the Siebel installer detects the presence of Firstlogic, which depends on your system configuration.

SAP Subsystem Parameters

Table B-8 defines the [SAPSubsys] section parameters.

Table B-8. SAPSubsys Parameters

Name	Definition
SAPIdocAllowedObjects	<p>This optional parameter specifies allowed integration objects for incoming IDOCs. Change this value to receive IDOCs corresponding to integration objects that are different from the default. The default value is:</p> <p>Product - Receive SAP Material (IDOC Input), Account - Receive SAP Customer (IDOC Input)</p>
SAPRfcConnectString	<p>This optional parameter defines the connect string for SAP name-value pairs, IDOC outbound and BAPI adapter. Change the values to connect to the appropriate SAP client and program ID if your application sends IDOCs or makes BAPI requests.</p> <p>An example SAPRfcConnectString is DEST=dest CLINET= 100 LANG=E</p>
SAPRfcDestEntry	<p>This optional parameter defines the destination entry of type R in the <code>saprfc.ini</code> file (IDOC inbound). Change the value to listen on an RFC program ID to which you want to send IDOCs.</p> <p>An example setting for SAPRfcDestEntry is SAPRfcDestEntry=dest</p>
SAPRfcPassword	<p>This optional parameter is the password for logging into the SAP system (IDOC outbound and BAPI adapter).</p>
SAPRfcUserName	<p>This optional parameter is the username for logging into the SAP system (IDOC outbound and BAPI adapter).</p>

Security Adapters

Siebel Web Client and Dedicated Web Client support security adapters. [Table B-9](#) provides information about the configuration parameter that must be specified for each data source for which you are using a security adapter. An example of the Security Adapters section is shown in “[Sample Security Adapters Section in the Siebel.cfg File.](#)” For more information on security adapters, see *Authentication and Access Control Administration Guide, MidMarket Edition*.

Table B-9. Security Adapter Configuration Parameter

Name	Definition
LDAP	LDAP specifies the LDAP security adapter supported by Siebel Systems. If you are using the Siebel-provided security adapter, then LDAP is the correct value. If you are using another security adapter, the parameter name and value will be something other than LDAP.
ADSI	ADSI specifies a security adapter supported by Siebel Systems. If you are using the Siebel-provided security adapter for Microsoft Active Directory, then ADSI is the correct value. If you are using another security adapter, the parameter name and value will be something other than ADSI.

Sample Security Adapters Section in the Siebel.cfg File

If you are using a security adapter with any of your data sources, you must specify a Security Adapters section in the `siebel.cfg` file. If you are using the security adapter provided by Siebel Systems, then your Security Adapters section in the `siebel.cfg` file will look like this:

```
[SecurityAdapters]

LDAP = LDAP

ADSI = ADSI
```

In addition to setting parameters in the Security Adapters section, you must specify a parameters section for each security adapter. The LDAP section parameters are described in “[LDAP Parameters](#)” on page B-19. The ADSI section parameters are described in “[ADSI Parameters](#)” on page B-22. The LDAP and ADSI parameters sections are valid for the security adapters provided by Siebel Systems.

Sample Security Adapters Section for other Security Adapters

If you are not using the security adapter provided by Siebel Systems, then your Security Adapters section could look like this:

```
[SecurityAdapters]
myadapter = myadapter
```

In this example, `myadapter` represents the name of your security adapter.

If you are not using the security adapter provided by Siebel Systems, you must also specify a parameters section that is similar to the LDAP parameters section.

LDAP Parameters

[Table B-10](#) provides information about the configuration parameters that must be specified for each datasource for which you are using the security adapter provided by Siebel Systems. An example of the LDAP section is shown in [“Sample LDAP Section in the Siebel.cfg File” on page B-21](#).

Table B-10. LDAP Security Adapter Configuration Parameters (1 of 3)

Name	Description
BaseDN	<p>Required. The default is "", but it should never be used. BaseDN represents the root of the sub-tree in the LDAP directory under which all users of interest are stored—for example: "ou = People, o = AKParker.com."</p> <p>Users can be stored directly or indirectly below this DN. If administration through the Siebel client is supported and a new user is added to LDAP through the Siebel application, it will be added directly under this DN.</p>
CredentialsAttributeType	<p>Required. The default is <code>credentials</code>, and represents the attribute type for credentials. They are stored in the user entry under this attribute in LDAP.</p> <p>See <i>Siebel Server Administration Guide MidMarket Edition</i> for more information about credentials.</p>
DllName	<p>Required. Specifies the .DLL to load which implements the security adapter functions. The value for LDAP is <code>sscfldap.dll</code>.</p>

Configuration Parameters

Generic Configuration Parameters

Table B-10. LDAP Security Adapter Configuration Parameters (2 of 3)

Name	Description
EncryptCredentialsPassword	<p>This parameter is optional, and the default value is FALSE. If TRUE, all passwords stored in credentials will be encrypted after they are read from the security adapter and before they are sent to the database or other destination for authentication.</p> <p>The encryption algorithm used for <code>EncryptCredentialsPassword</code> is the same as that used by the general configuration file parameter <code>EncryptPassword</code>.</p>
PasswordAttributeType	<p>Required. The default is <code>userPassword</code>, and represents the attribute type for passwords in LDAP.</p>
Port	<p>Required, and the default is 389 if <code>SslDatabase</code> is not set. If <code>SslDatabase</code> is set, then the default is 636.</p> <p>This value represents the port on the server machine through which LDAP is accessed. In most instances, use 389 for standard transmission and 636 for secure transmission.</p>
RolesAttributeType	<p>Required. The default is <code>roles</code>, which is the attribute type for roles. The roles are stored in the user entry under this attribute in LDAP.</p> <p>See <i>Siebel Server Administration Guide MidMarket Edition</i> for more information about roles.</p>
ServerName	<p>Required. The name of the machine on which the LDAP server is running, such as <code>AKParkerserver.com</code>.</p>
SslDatabase	<p>Required. The default is "". If the value is empty, SSL is not being used.</p> <p>If the value is not empty, it must be the absolute path of a valid Netscape 4.x cert7.db certificate database that contains a certificate for the LDAP server or the Certificate Authority used by the LDAP server.</p> <p>See <i>Siebel Server Administration Guide MidMarket Edition</i> for more information.</p>

Table B-10. LDAP Security Adapter Configuration Parameters (3 of 3)

Name	Description
SupportsIntegratedAuthentication	<p>Optional, and the default value is FALSE. For LDAP, this parameter must be FALSE.</p> <p>If TRUE, the specified Security Adapter supports integrated authentication. This means that the user may not be required to enter a user name and password and may be authenticated in some other way, such as through the operating system. If TRUE, the Siebel client will attempt to use integrated authentication to authenticate with the security adapter.</p> <p>Note that the thin client never uses integrated authentication.</p>
UsernameAttributeType	<p>Required. The default is uid, and represents the attribute type under which the user name is stored.</p> <p>For example, when user SADMIN attempts to log in, the LDAP search will be for uid = SADMIN.</p>

Sample LDAP Section in the Siebel.cfg File

You must specify an LDAP section in the `siebel.cfg` file for each Siebel-provided security adapter that you specify in each data source. Here is a sample LDAP section:

```
[LDAP]
DllName                = sscfldap.dll
ServerName             = ldap.AKParker.com
Port                   = 389
BaseDN                 = "ou=People, o=AKParker.com"
UsernameAttributeType = uid
PasswordAttributeType = userPassword
CredentialsAttributeType = credentials
RolesAttributeType    = roles
SslDatabase            =
```

ADSI Parameters

Table B-11 provides information about the configuration parameters that must be specified for each data source for which you are using the security adapter provided by Siebel Systems for use with Microsoft's Active Directory. An example of the ADSI section is shown in "Sample ADSI Section in the Siebel.cfg File."

NOTE: Win9x and NT4 users who wish to use the ADSI security adapter for the Dedicated Web Client will need to download and install the program ads.exe from www.microsoft.com/ntserver/nts/downloads/other/ADSI25/default.asp.

Table B-11. ADSI Security Adapter Configuration Parameters

Name	Description
CredentialsAttributeType	Required. The default is <code>credentials</code> , and represents the attribute type for credentials. They are stored in the user entry under this attribute in ADSI. See <i>Siebel Server Administration Guide MidMarket Edition</i> for more information about credentials.
DllName	Required, and specifies the dll to load which implements the security adapter functions. The value for ADSI is <code>sscfadsi.dll</code> .
RolesAttributeType	Required. The default is <code>roles</code> , which is the attribute type for roles. The roles are stored in the user entry under this attribute in ADSI. See <i>Siebel Server Administration Guide MidMarket Edition</i> for more information about roles.
ServerName	Required. The name of the machine on which the ADSI server is running, such as <code>AUTHENSERVER</code> .

Sample ADSI Section in the Siebel.cfg File

You must specify an ADSI section in the `siebel.cfg` file for each Siebel-provided security adapter that you specify in each datasource. Here is a sample ADSI section:

```
[ADSI]
DllName           = sscfadsi.dll
ServerName        = servername
-CredentialsAttributeType = physicalDeliveryOfficeName
RolesAttributeType = roles
```

Configuration Parameters

Generic Configuration Parameters

Siebel Packager Utility

C

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About This Appendix

This appendix contains information on using the Siebel Packager Utility to prepare custom software installation packages for distribution to end users. Siebel administrators can use these installation packages whether they are installing Siebel eBusiness Applications for the first time or upgrading from a previous version.

In addition, administrators can use these installation packages to upgrade Siebel clients over a LAN or WAN, the Internet, or CD-ROM. These installation packages can also be distributed using Siebel Anywhere.

For information on how to distribute software and configuration changes, using Siebel Anywhere, see *Siebel Anywhere Administration Guide, MidMarket Edition*.

Siebel Packager Utility Overview

The Packager Utility allows the Siebel administrator to assemble the Siebel client executables and your custom configuration into a self-extracting installer, tailored to your environment. After the software is packaged into a single, self-extracting file, the installer can be distributed to your users in several ways:

- **Siebel Anywhere.** Distribute and execute the installation automatically for both Mobile Web Client and Dedicated Web Client. Because access to the Siebel Anywhere kit requires the previous installation of the Siebel Client on the user's machine, you can use Siebel Anywhere for upgrades but not for an initial rollout.
- **CD-ROM.** Copy the customized software package onto CD-ROMs for distribution to end users.
- **Telephone or LAN.** Apply a software patch over telephone lines or across the LAN either directly or through third-party software.
- **Other methods.** Distribute a patch by email or FTP to end users.

The Packager Utility creates a standard installation program in two steps:

- 1 Gathers the Siebel components and files you specify, copies the standard InstallShield components into the client installer directory, and creates a packing list used by InstallShield.
- 2 (Optional) Packages Client Installer into a self-extracting archive, which when executed, automatically decompresses and starts the Siebel Client installer prepared in the previous step.

Preparing to Use the Siebel Packager Utility

You must complete the procedures in this section before using the Packager Utility.

To prepare to use the Packager Utility

- 1** Perform a Siebel client installation on the PC on which you will run the Packager Utility. This initial installation will serve as a model for other installations, which may be performed by running Packager against the initial installation.
 - Select *Custom* during client installation and be sure to select the Packager Utility option.

For instructions on installing Siebel clients, see [Chapter 2, “Installing the Mobile and Dedicated Web Clients.”](#)

- The rest of this appendix refers to the root-level of the client installation as *SIEBEL_CLNT_ROOT*
- The Packager uses the files from this client installation (or another client installation, as specified when running the Packager) for the installer that it creates.

NOTE: Be sure to customize this model Siebel client installation so that it is identical to how you intend to package it. When creating the custom installer, the Packager Utility will reproduce this model installation exactly.

- 2** If you have custom repository (*.srf*) or configuration (*.cfg*) files, report files, or other changes or additions, copy them to the appropriate subdirectories under *SIEBEL_CLNT_ROOT*, or under the root directory of another installation that you will use to create the custom installation package.
- 3** Make sure that you have sufficient free disk space on the PC on which you are installing the Packager Utility. During the packaging process, the Packager Utility temporarily requires three times the amount of disk space required by the Siebel Mobile and Dedicated Web Client software you are packaging, plus twice the disk space required by the third-party software you are packaging.

NOTE: The Packager Utility can only package files that reside in the *SIEBEL_CLNT_ROOT* directory.

Siebel Modules for Packaging

Siebel eBusiness Applications consists of the installable modules described in [Table C-1](#). Decide which components you want to package for distribution to end users and create a Siebel directory structure that contains only those files. These modules correspond to the subdirectories under the Siebel root directory.

Table C-1. Siebel eBusiness Applications Modules (1 of 2)

Component	Description
ACTUATE	Actuate-related files for Reports, located in the <code>c:\SIEBEL_CLNT_ROOT\actuate</code> directory.
BIN	Siebel Executable Files (Binaries) located in the <code>c:\SIEBEL_CLNT_ROOT\bin</code> directory, including the required <code>.dll</code> files, configuration files, and Siebel executable. You should include all files in this directory in your self-extracting installer, except the user preferences file, <code>user.prf</code> , and the session file, <code>siebel.ses</code> . You may want to replace the <code>siebel.cfg</code> file with your customized configuration file.
Charts	Contains Charts server components for generating charts, located in the <code>c:\SIEBEL_CLNT_ROOT\charts</code> directory.
FONTS	Contains font files, located in the <code>c:\SIEBEL_CLNT_ROOT\fonts</code> directory.
IDCENTRIC	Contains configuration files related to Siebel Data Quality Matching and Data Cleansing, located in the <code>c:\SIEBEL_CLNT_ROOT\idcentric</code> directory.
LOCAL	Location of the local database, located in the <code>c:\SIEBEL_CLNT_ROOT\local</code> directory. Local databases are unique to individual users and should not be packaged.
LOCALE	Language-specific files, located in the <code>c:\SIEBEL_CLNT_ROOT\locale.</code> directory. Do not omit this module when creating a package.
LOG	Log files from client operation (such as synchronization), located in the <code>c:\SIEBEL_CLNT_ROOT\log</code> directory.
MSGTEMPL	Message files used by the client, located in the <code>c:\SIEBEL_CLNT_ROOT\msgtempl</code> directory.
OBJECTS	Object Configuration Template Files (Configured Objects) located in the <code>c:\SIEBEL_CLNT_ROOT\objects</code> directory—the precompiled <code>*.srf</code> file to distribute to end users. The <code>\objects</code> directory must contain at least one <code>.srf</code> file before you start the Packager Utility.

Siebel Packager Utility

Siebel Modules for Packaging

Table C-1. Siebel eBusiness Applications Modules (2 of 2)

Component	Description
PACKAGER	It is recommended that you do not package the Packager Utility for distribution to end users.
PUBLIC	Contains HTML, JavaScript and image files for Siebel Web Client, located in the <code>c:\SIEBEL_CLNT_ROOT\public</code> directory.
REPORTS	Report Template Files located in the <code>c:\SIEBEL_CLNT_ROOT\reports</code> directory. If you have created your own reports, you should replace the standard Siebel report templates in this directory with your own.
SAMPLE	Sample Database, located in the <code>c:\SIEBEL_CLNT_ROOT\sample</code> directory, if you have installed the sample database. You may decide not to distribute this database to your end users. Note that if you do distribute it, the <code>*.cfg</code> and <code>*.srf</code> files for this database must be included. Otherwise, if end-users try to customize Siebel eBusiness Applications and do not include the <code>*.cfg</code> and <code>*.srf</code> files for the demo database, the demo database might not work with other, modified files included by users when they try to compile <code>*.cfg</code> and <code>*.srf</code> files.
SQLTEMPL	Contains SQL scripts used by the Siebel Web Client, located in the <code>c:\SIEBEL_CLNT_ROOT\sqltempl</code> directory.
TEMP	Working Report files, located in the <code>c:\SIEBEL_CLNT_ROOT\temp</code> directory.
UPGRADE	Siebel Anywhere Upgrade files retrieved by the user, located in the <code>c:\SIEBEL_CLNT_ROOT\upgrade</code> directory.
WEBTEMPL	Contains Web templates, located in the <code>c:\SIEBEL_CLNT_ROOT\webtempl</code> directory.

Running the Siebel Packager Utility

This section describes how to run the Siebel Packager Utility. The Packager Utility wizard walks you through four windows to create the custom client installer.

To run the Siebel Packager utility

- 1 From the Windows Start menu, select Programs > Siebel Client 7.0 > Packager.

The Siebel Client Packager wizard launches and the Choose Setup Language window appears.

- 2 Choose the language in which to conduct the rest of the Packager procedure and click OK. The Directory Definition window appears.

- 3 Specify the following values:

- **Package.** The name of the package, which will be used as the name of the self-extracting archive and the name of a subdirectory under `SIEBEL_CLNT_ROOT\packager\temp`, in which the custom installer will be created.
- **Siebel Client.** The root-level directory of the Siebel client installation that will be included in the custom installation. Accept the default, `SIEBEL_CLNT_ROOT`.
- **InstallShield6.21.** The location of the InstallShield installer bin. Accept the default, which is `SIEBEL_CLNT_ROOT\packager\bin`.
- **Language Packs.** Specify a either a Language Pack or Base. If you wish to include Language Packs in the customized installer, select a Language Pack.

NOTE: You must use Siebel Packager to produce a separate installer for each language component including BASE. Be sure to run Packager for BASE after you have run it for all other desired languages. For example, to create upgrade kits to deliver a full Siebel client installation complete with DEU and ENU components, it is necessary to run Packager three times on the master client installation: once for DEU, once for ENU, and once for BASE. All three packages must use the same package name.

- 4 At the bottom-right of the screen, choose either Full Install or Patch Install, based on your desired goal:
 - **Full Install.** Intended for full installations or upgrades of Siebel eBusiness Applications. This performs an entire installation, using the parameters in the `siebel.ini` file.
 - **Patch Install.** Copies only the packaged files, preserving the same directory structure as the source. Typically, this is used with an existing installation not requiring further customizing. When you run a patch installer, it prompts only for the installation directory.

Click Next and the Module Definition dialog box appears.

- 5 In the Module Definition dialog box:
 - a Choose the Siebel Modules to be included in the custom installation package.

A list of possible Modules appears in the Modules list box on the left. For an explanation of these components, refer to [Table C-1 on page C-5](#). Do not include Packager itself as an included Module.
 - b If you wish to include or exclude a Template, select an item in the Modules list. Notice that `*.*` appears in the Include Templates box on the right.

The Include Templates and Exclude Templates boxes allow you to set the filters used to include or exclude files for each selected component. The default Include filter is `*.*`, which includes all files.

Include Templates also has an Include Subdirectories check box to indicate whether files in subdirectories for these components are included.

NOTE: You do not need to modify Include and Exclude Templates for a typical installer.

- If you want to prevent a directory from being created for a particular module, select the module and click Remove.
- If you want to add new modules which are located in the `SIEBEL_CLNT_ROOT` directory but do not appear in the list, click Add and specify the path of the new module.

If you are preparing a full installation, do not remove any modules required to create the directories listed in parentheses below:

- Siebel Client Executables (`bin`)
- Help Files (`help`)
- LOCAL (`local`)
- LOCALE (`locale`)
- LOG (`log`)
- Message Templates (`msgtempl`)
- Object Configuration Templates (`objects`)
- Report Templates (`reports`)
- TEMP (`temp`)

You may safely remove the optional modules, such as Packager Utility.

- To create a required directory without any files, select that module from the Modules list and, under Include Templates, click Remove.

For example, if you do not want to distribute Help files (although at least an empty help directory must exist), select Help Files from the Modules list and click Remove under the Include Templates box to remove the *.* mask.

c Click Next and the Packaging screen appears.

6 To create the custom installer, click Start.

When you click Start, the utility displays progress information while the packager executes.

NOTE: After this process is complete, you can further customize the behavior of the installer by clicking the button labeled Edit siebel.ini. Refer to [“Creating a Customized Siebel.ini File”](#) on page C-12.

- 7 When you are ready to package the custom installer into a self-extracting archive, click Next.

NOTE: If you do not wish to perform this step at this time, you may do it later by running the `selfex.bat` file in the base directory.

The Self-extracting Archive screen appears.

- 8 If you are producing an installer for BASE, click Start to package the self-extracting archive. If you are producing an installer for a language other than BASE, exit the Packager Utility and repeat the Packager procedure for each additional language. When you have run Packager for all desired languages, run Packager for BASE.

The utility creates the archive—a single executable (`.exe`) file in `SIEBEL_CLNT_ROOT\Packager\Temp\name\selfex` and specifies the name of the package in another information box.

- 9 Verify the location of this executable in the directory above.

Making Your Customized Installer Available to End Users

After you have tested your customizations and are satisfied with the client installer you have created, make your customized installer available to end users. You can distribute your customized installation program to end users using one of the following methods.

Siebel Anywhere

For information on distributing Siebel eBusiness Applications to end users, using Siebel Anywhere, see *Siebel Anywhere Administration Guide, MidMarket Edition*.

CD-ROM

To distribute the customized Siebel installation program to end users by CD-ROM, write the executable (.exe) file to the CD-ROM. Be sure to include the third-party software that Siebel eBusiness Applications requires. When users double-click the executable file, the program launches the customized installer.

Local Area Network

Regardless of the version of Siebel eBusiness Applications your client machines are running, connected users can access the self-extracting installer through the LAN.

To distribute a self-extracting installer over a LAN (if you created a self-extracting archive)

- 1 Put the self-extracting installer (`packager_name.exe`) in a network-accessible directory. Make sure that all users have access to this directory.
- 2 Send an email to users explaining how to copy and extract the package from this location. Consider telling users how to `ftp` the self-extracting archive on their own machines and install it from there.

To distribute an installer over a LAN (if you did not create a self-extracting archive)

- 1 Put the package directory in a network-accessible location to which all users have access.
- 2 Send an email to users to tell them how to install the package from this location.

Other Methods

You can distribute the program by using any other file distribution mechanism, such as email or ftp.

Creating a Customized Siebel.ini File

The `siebel.ini` file, located in the `\siebel_client\packager\temp\package_name` directory, controls the behavior of the Siebel client installation. Review this file and customize it as necessary to make sure the client installation uses the correct settings for your specific environment.

NOTE: Be sure to customize the `siebel.ini` file during Step 6 of the procedure for running the Packager Utility. If you customize the `siebel.ini` file before running the Packager Utility, those changes will not become part of the customized installer.

Use the Siebel Packager to produce a separate installer for each language component, including BASE. Be sure to run Packager for BASE after you have run it for all other desired languages. For example, to create upgrade kits to deliver a full Siebel client installation complete with DEU and ENU components, it is necessary to run the Packager three times on the master client installation: once for DEU, once for ENU, and once for BASE. This will result in three separate installers from which to build three separate Siebel Anywhere upgrade kits. All three packages must use the same package name.

The `siebel.ini` file determines all of the parameters used by the client installation program, including the following:

- The third-party software programs and versions that are required on the client PC
- System settings that improve performance
- Configuration of data sources
- Which installation screens end users see when they run the Siebel client installation program
- Which icons are created upon installation

Full instructions for modifying the `siebel.ini` file can be found in the file itself. Use a standard text editor to review and edit `siebel.ini`.

Be sure to set the following parameters in the `siebel.ini` file:

- The `FolderName` parameter in the [Defaults] section of the Language Pack `.ini` file must contain the same value as the `FolderName` parameter in the [Defaults] section of the Base `.ini` file. This ensures that all the relevant icons will be delivered to the same location under the Windows Start key.
- The `rootdir` parameter in the [Defaults] section should be set to the destination of the installation.
- The `ServerDatabase` parameter in the [ServerDatabase] section should be set to the appropriate server for connected use: DB2UDB, SQL Server, or Oracle80.
- The `DockConnString` parameter in the [ServerDatabase] section should not be enclosed in double quotes.
- If the `SystemDSN` parameter is set to 'no,' the installer creates single-user data sources. This type of data source installation is visible only to the user who performed it. If `SystemDSN` is set to 'yes,' the installer creates System data sources, shared by all users who log into that particular machine. You must have ADMIN privileges to create a System installation.

To test an installation program

- 1** Finish modifying the `siebel.ini` file.
- 2** Run `install.exe` from the `\siebel_client\packager\temp\package_name` directory on the Network Installation Server.
- 3** Repeat [Step 1](#) and [Step 2](#) until the `siebel.ini` file is configured to achieve the desired installation.
- 4** Check that your custom client installation is functioning properly. Execute it on each LAN-connected PC by running `install.exe` from the `\siebel\client` directory on the Network Installation Server.

Siebel Packager Utility

Creating a Customized Siebel.ini File

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