



Siebel Disconnected Analytics Online Help

Version 7.7.1
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Siebel Systems, Inc., 2207 Bridgepointe Parkway, San Mateo, CA 94404

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1

What's New in This Release

What's New in Siebel Disconnected Analytics Online Help, Version 7.7.1

Table 1 lists changes described in this version of the documentation to support release 7.7.1 of the software.

Table 1. New Product Features in Siebel Disconnected Analytics Online Help, Version 7.7.1

Topic	Description
Create a shortcut See "Creating a Shortcut to a Local Disconnected Analytics Application" on page 23.	Added a new procedure to create a shortcut to your local Disconnected Analytics application on your desktop or in a folder of your choice.
Create a user name and password See "Creating a User Name and Password for the Siebel Disconnected Analytics Application Manager" on page 21.	Added a new procedure to provide user authentication to secure the laptop data.
Preprocessed synchronization See "Running Preprocessed Disconnected Analytics Synchronizations" on page 27.	Added a new procedure to download data that has already been processed by the Siebel Analytics Server.

2

Overview of Disconnected Analytics

Siebel Disconnected Analytics offers the ability to use Siebel Analytics dashboards while disconnected from the corporate network. A Disconnected Analytics application is a package of Siebel Analytics dashboards with supporting data and metadata.

Disconnected Analytics applications are usually organized according to business areas. For example, your Siebel Analytics administrator might make one application covering sales and another covering marketing campaigns. You can keep more than one Disconnected Analytics application on your laptop, although only one application can be active and running at one time.

Using the Disconnected Analytics Application Manager, you can update and administer the Disconnected Analytics applications on your laptop.

Components of Disconnected Analytics Applications

A Disconnected Analytics application is a local version of the Siebel Analytics platform running on your laptop. It includes the following components:

- A personalized version of Siebel Analytics dashboards

You can access your personal Siebel Intelligence Dashboards as you would if you were logged on to the Siebel Analytics Web. The dashboards may include your own versions of the enterprise-level dashboards, with any special data filters you may add.

- Personalized and secure data from the Siebel Analytics enterprise database

You can download data from the network to your laptop and save reports you have created separately from group data and reports.

- Disconnected Analytics Application Manager

This utility allows you to use and manage Disconnected Analytics applications on your laptop while disconnected from the network. It also allows you to synchronize the data for Disconnected Analytics applications with data on the network. Once installed, you can access the Disconnected Analytics Application Manager from the Windows Start menu.

These components are included in the installation file sent to you by your Siebel Analytics administrator. In technical terms, what the installation file sets up are:

- The local (that is, the laptop) repository

Contains metadata about the data tables available in the local application. Note that this repository is not a subset of the server repository; it is created independently. A Disconnected Analytics application has only one repository.

- The local Web Catalog

Contains metadata about the reports available in the local application. This Web Catalog is not a subset of the server Web Catalog; it is created independently. A Disconnected Analytics application has only one Web Catalog.

- An SQL Anywhere database

Stores the downloaded data. A Disconnected Analytics application has one or more data sets. A data set consists of one or more tables.

Additional Resources

The following Siebel documentation contains information that may be relevant to your use of Siebel Disconnected Analytics.

- For information about installation and configuration tasks related to Siebel Disconnected Analytics, see *Siebel Analytics Installation and Configuration Guide*.
- For information about administrative tasks related to Siebel Disconnected Analytics, see *Siebel Analytics Server Administration Guide*.

About Dashboards and Content in Disconnected Analytics

Disconnected Analytics presents shared content in the form of dashboards. The look and feel of the Siebel Analytics dashboards in Disconnected Analytics is the same as that of the dashboards you find on the network. However, the number of dashboards in Disconnected Analytics, their layouts, and their subject areas may be different from those on the network. For more information, see ["Differentiating Between a Local and a Network Disconnected Analytics Application" on page 22](#).

Data in Disconnected Analytics

The data on the laptop computer is personalized for each end user. You see just the data *you* need to use. Disconnected Analytics follows the same visibility rules as the Siebel Analytics Web. Rules set up by your organization's Siebel Analytics administrator determine whether a given data set is valid for the application you are using.

Disconnected Analytics also supports the use of multiple Siebel Analytics applications, one at a time. Typically, the Siebel Analytics administrator configures the number and type of applications and the setup schedules on which data updates are available.

NOTE: You can use only one application at a time.

Content Sharing in Disconnected Analytics

There are differences in the way data is shared in Disconnected Analytics and in the network-based Siebel Analytics. These differences are:

- Disconnected Analytics users can make modifications only to My Dashboard. Only the administrator can store reports in the shared folders and in shared dashboards on Siebel Analytics Web.

- You must store all reports that you want to keep in your private user folder and not in the shared folder. *Changes made on your personal dashboards will be overwritten the next time you synchronize the application.* Store your reports in My Dashboard or in any other dashboard that is saved under your personal directory.
- As implied by the preceding points, any changes made to the Disconnected Analytics dashboards on your laptop are not transferred to the Siebel Analytics Web dashboards. Therefore, you can modify the applications on your laptop.

3

The Disconnected Analytics Application Manager User Interface

After you start the Disconnected Analytics Application Manager, you see the window shown in [Figure 1](#) (minimized) and [Figure 2 on page 13](#) (expanded).

- The default or minimized view is described in “[Default Disconnected Analytics Application Manager Window.](#)”
- The expanded view is described in “[Expanded Disconnected Analytics Application Manager Window](#)” on [page 13](#).

Default Disconnected Analytics Application Manager Window

The Disconnected Analytics Application Manager window appears as in [Figure 1](#).



Figure 1. The Default Disconnected Analytics Application Manager Window

The buttons in this window and their functions are described in [Table 2](#).

Table 2. Buttons in Minimized Disconnected Analytics Application Manager Window

Button	Description	Tasks Performed by This Button
Application: (Dropdown box)	Application dropdown box—Lists the Disconnected Analytics applications on your laptop	Selecting a Siebel Disconnected Analytics application. See “ Using More than One Disconnected Analytics Application ” on page 24 .
Start	Starts the application selected in the Application dropdown list	See “ Starting a Disconnected Analytics Application ” on page 19 .
Synchronize	Runs the synchronization for the application selected in the Application dropdown list	See “ Process of Synchronizing Disconnected Analytics Applications ” on page 27 .

Table 2. Buttons in Minimized Disconnected Analytics Application Manager Window

Button	Description	Tasks Performed by This Button
Delete	Deletes the application selected in the Application dropdown list	See "Deleting a Disconnected Analytics Application" on page 24.
Get Server Info	Gets information from the server about the application selected in the Application dropdown list	See "Updating Disconnected Analytics Application Data" on page 25.
Help	Opens this help file	Not applicable.
Close	Closes the Disconnected Analytics Application Manager	Exits the application manager.
Advanced>>	Expands this screen (see Figure 2 on page 13)	Not applicable.

Expanded Disconnected Analytics Application Manager Window

Figure 2 shows the Disconnected Analytics Application Manager window after you click the Advanced button. The appearance of the window on your laptop may differ in some details from the illustration. For an explanation of the areas shown, see “Areas of the Expanded Disconnected Analytics Application Manager Window” on page 14.

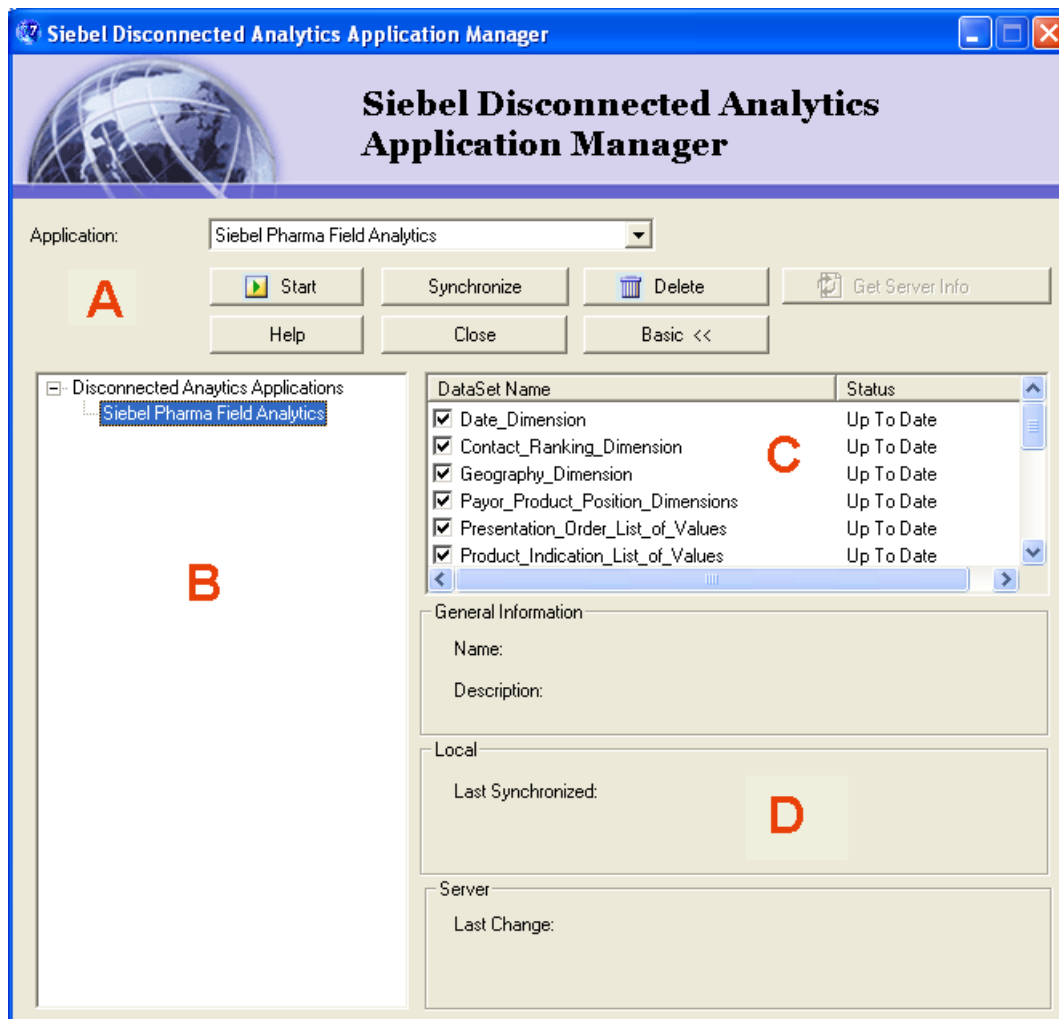


Figure 2. Expanded Disconnected Analytics Application Manager Window

Areas of the Expanded Disconnected Analytics Application Manager Window

Table 3 describes the dialog window areas and the type of information displayed in those areas.

Table 3. Areas of the Expanded Siebel Disconnected Analytics Manager Window

Area	Description
A: Default window (buttons)	Perform main user tasks: <ul style="list-style-type: none"> ■ Start applications ■ Synchronize applications ■ Delete applications See "Default Disconnected Analytics Application Manager Window" on page 11.
B: Applications List	Lists the Disconnected Analytics applications on your laptop. The application currently in use is marked with an asterisk.
C: Synchronization Window	<ul style="list-style-type: none"> ■ Displays the current <i>applications</i> available and the date they were last synchronized. ■ Displays the current <i>data sets</i> and their synchronization status if you have an application selected (in area B). <p>In this list, the column DataSet Name is the name assigned to the data set by the Siebel Analytics administrator, and the column Status is the status of the data set.</p> ■ The data set status can be one of the following: <ul style="list-style-type: none"> ■ Out of Date <p>The data set is out of date. Data sets from an older synchronization are always given this status.</p> ■ In Sync <p>In online synchronization, this status means that the data set timestamp is the same as the timestamp for the data set currently on the server.</p> <p>In preprocessed synchronization, this status means that the data set timestamp is the same as the timestamp for the data set on the server at the time the administrator created the data set.</p> ■ Not Available <p>The server information for that data set is not available. The .dad file for the application has not been downloaded.</p>

Table 3. Areas of the Expanded Siebel Disconnected Analytics Manager Window

Area	Description
D: Status Area Note that the information displayed in this area changes depending on what is displayed in the Synchronization Window (area C).	Displays current status of the item selected. The Get Server Info button updates the information displayed in this area. When <i>applications</i> are displayed in this window: <ul style="list-style-type: none"> ■ General Information area displays comments about the application. ■ Repository area displays the repository name and timestamp. ■ Web Catalog area displays the Web Catalog name and timestamp. When <i>data</i> is displayed in this window: <ul style="list-style-type: none"> ■ General Information area displays comments about this data set. ■ Local area displays the last synchronization time of this data set. ■ Server area displays the timestamp (on the server) of this data set.

4

Process of Using Disconnected Analytics Applications

Before you can use Disconnected Analytics applications, you must first receive a Siebel Disconnected Analytics Applications Manager installation file with instructions from your administrator.

After the Siebel Disconnected Analytics Applications Manager software has been installed on your laptop computer, you can do the following tasks:

- [“Downloading Data from the Disconnected Applications Web Page”](#)

This task downloads a Disconnected application from a network server to your laptop.

- [“Starting a Disconnected Analytics Application” on page 19](#)

This task opens the Siebel Intelligence Dashboard for a Siebel Analytics application.

- [“Using More than One Disconnected Analytics Application” on page 24](#)

This task closes one dashboard and opens another. For example, if you have both Sales and Service Requests dashboards, you use this task to close the Sales dashboard and start the Service Requests dashboard.

- [“Deleting a Disconnected Analytics Application” on page 24](#)

This task removes a disconnected Siebel Analytics application from your laptop. You usually do this to gain space on the disk drive.

- [“Updating Disconnected Analytics Application Data” on page 25](#)

This task connects to the Siebel Analytics Server and downloads the current data for your particular subject areas, data sets, and filters. It also lets you check that the data on your laptop is current with the network data.

Downloading Data from the Disconnected Applications Web Page

All Disconnected Analytics applications are hosted on the enterprise Siebel Analytics network server. In order to download Disconnected Analytics to your laptop, you must first connect to the enterprise Siebel Analytics URL provided to you by your administrator.

After you connect to the enterprise Siebel Analytics URL, you see the Siebel Analytics Web page. From this Web page you can access the Disconnected Analytics applications set up by your administrator and download them to your laptop. After this is done, you can synchronize these applications using the Siebel Disconnected Analytics Applications Manager. For more information on synchronization, see [Chapter 5, “Process of Synchronizing Disconnected Analytics Applications.”](#)

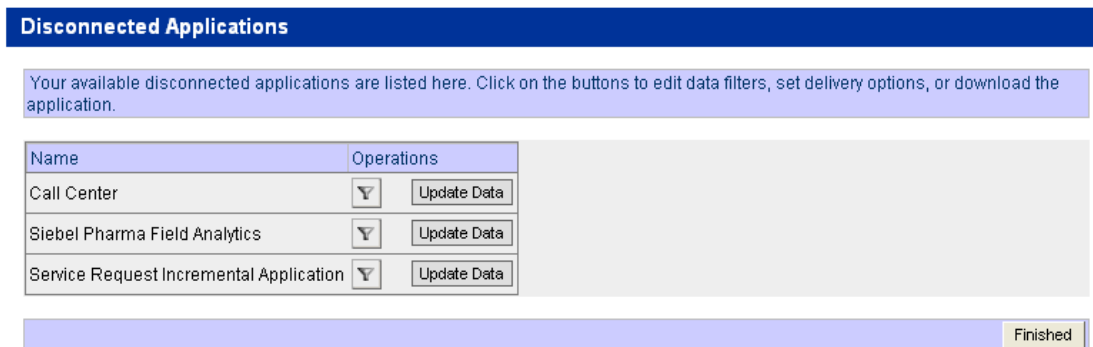
To download Disconnected Analytics applications

- 1 From the series of hypertext links at the top of the Siebel Intelligence Dashboard Web page, click the Disconnected link appearing at the top right corner of the browser screen, shown in the following figure.



Product Line	Part Number	Asset Number	# of SRs	# of Closed SRs	# of Open SRs
A_ProdLine4	104	Unspecified	1	0	0

- 2 The Disconnected Applications Web page appears. See the following figure.



- 3 Click Update Data.
The File Download window appears.
- 4 Select Open.
Siebel Disconnected Analytics Applications Manager opens with the application.
- 5 Synchronize the application.
For more information on synchronization, see [Chapter 5, "Process of Synchronizing Disconnected Analytics Applications."](#)

The application and data are ready to be used as a Disconnected Client.

NOTE: While on the Disconnected Applications Web page, it is also possible to set personalized data filters for each of the applications. For setting data filters or changing subscription options, see [Siebel Analytics Web Online Help](#).

Starting a Disconnected Analytics Application

When you start a disconnected Siebel Analytics application, you start a Web browser window that displays the Siebel Intelligence Dashboard for that Siebel Analytics application. Using this dashboard, you can query for data, analyze trends, and create reports.

This section describes the process of starting a Disconnected Analytics application and connecting to the local dashboards.

If you are starting Siebel Disconnected Analytics Application Manager for the first time, you may need to create a user name and password. For more information, see [“Creating a User Name and Password for the Siebel Disconnected Analytics Application Manager”](#) on page 21.

NOTE: Always synchronize the application before you start it. Otherwise the data you use may not be up to date. For more information about synchronization, see [Chapter 5, “Process of Synchronizing Disconnected Analytics Applications.”](#)

To start a Disconnected Analytics application

- 1 Do one of the following to start the application:
 - From the desktop, open the Siebel Disconnected Analytics Applications Manager by selecting Start > Programs > Siebel Analytics > Siebel Analytics Disconnected Applications Manager.
 - In the Application dropdown box, click the Disconnected Analytics application you want to start.
 - Click Start. The Siebel Analytics logon screen opens.
 - Double click on the application shortcut. For more information see [“Creating a Shortcut to a Local Disconnected Analytics Application”](#) on page 23.

The Siebel Analytics icon appears in the system tray:



- 2 Proceed to [“Connecting to Disconnected Analytics as a Local Instance”](#) on page 19.

Connecting to Disconnected Analytics as a Local Instance

This section describes how to connect to Disconnected Analytics as a local instance—the Disconnected Analytics application on your laptop.

NOTE: The administrator is responsible for setting up authentication. Check with your administrator about whether particular requirements are in effect for your user name and password.

To connect to a local Disconnected Analytics application

- 1** Do one of the following to start the application:
 - In the Siebel Disconnected Analytics Application Manager, click Start.
 - Double click on the application shortcut. For more information see ["Creating a Shortcut to a Local Disconnected Analytics Application"](#) on page 23.
- 2** In the Siebel Analytics logon screen, enter your user name and password.
- 3** Log on to the application.

The application starts and the Siebel Intelligence Dashboard appears inside a Microsoft Internet Explorer browser window. The local Disconnected Analytics application URL should look like this:

```
http://localhost:9762/sawd?Dashboard
```

The Siebel Analytics icon appears in the system tray:



If this icon does not appear, the local application has not started.

- 4** Use your dashboards to generate reports.

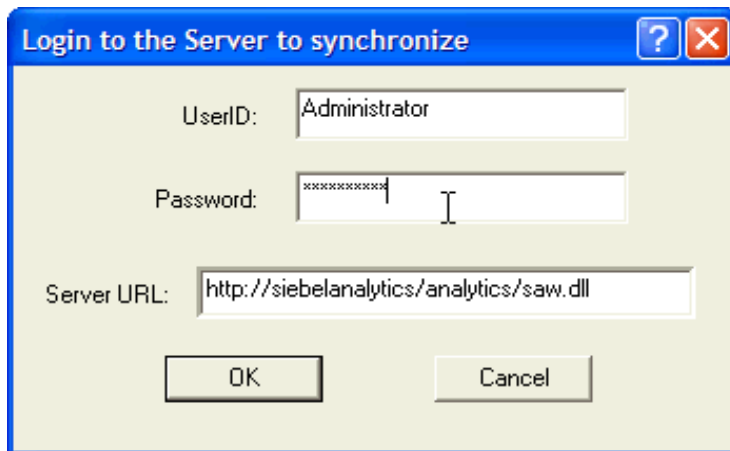
Connecting to Disconnected Analytics as a Network Instance

This section describes how to connect to Disconnected Analytics as a network instance. Using the network connection, you can review other Siebel Analytics dashboards, download a Disconnected Analytics application, or update your data.

To connect to the Siebel Analytics Server

- 1** In the Siebel Disconnected Analytics Application Manager, click Get Server Info.

- 2 In the Login to the Server to synchronize screen, enter your User ID (network login) and password.



By default, the server URL from the last synchronization operation is shown. If necessary, change the server URL.

- 3 Click OK.

You are connected to a network instance of the Siebel Analytics Server. The Disconnected Analytics application URL look like the following example:

`http://siebelanalytics/analytics/sawd?Dashboard`

- 4 Use the dashboards to download an application, update your data, or generate reports. See ["Downloading Data from the Disconnected Applications Web Page"](#) on page 17.

Creating a User Name and Password for the Siebel Disconnected Analytics Application Manager

When you start the Siebel Disconnected Analytics Applications Manager for the first time, you may have to create a user name and password.

NOTE: Check with your administrator about whether particular requirements are in effect for your user name and password.

To create a new user name and password for the Siebel Disconnected Analytics Application Manager

- 1 From the desktop, open the Siebel Disconnected Analytics Applications Manager by selecting Start > Programs > Siebel Analytics > Siebel Analytics Disconnected Applications Manager.

The Create New User dialog box appears as shown in [Figure 3](#).

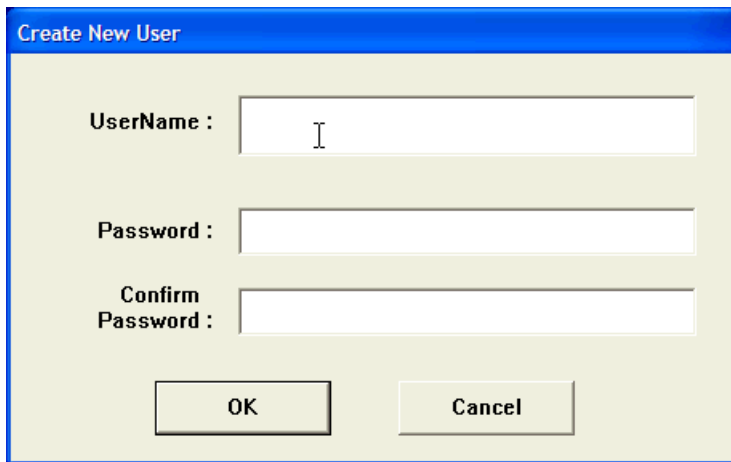


Figure 3. Create New User Dialog Box

- 2 In the Create New User dialog box, enter your user name and password, as specified by your administrator (if applicable).

- 3 Click OK.

The Siebel Analytics Disconnected Applications Manager opens.

- 4 Proceed to start an application, or connect to a local or network Disconnected Analytics instance.

Differentiating Between a Local and a Network Disconnected Analytics Application

The only differences between the appearance of a local Disconnected Analytics application (on your laptop) and that of a network-based Disconnected Analytics application (on the enterprise server) are the following:

- The URL shown:
 - The local Disconnected Analytics application URL is:
`http://localhost:9762/sawd?Dashboard`
 - The Siebel Analytics Web application URL is that of the network server running the application.

- On the local instance, the Siebel Analytics icon appears in the system tray:



Creating a Shortcut to a Local Disconnected Analytics Application

Use the following procedure to create a shortcut to a local Disconnected Analytics application on your desktop or in a folder of your choice.

To create a shortcut to a local Disconnected Analytics application

- 1 From the desktop, open the Siebel Disconnected Analytics Applications Manager by selecting Start > Programs > Siebel Analytics > Siebel Analytics Disconnected Applications Manager.
- 2 In the Application dropdown box, select the Disconnected Analytics application you want to start.
- 3 In the application list area, right-click on the application.

The Create Shortcut menu appears as shown in [Figure 4](#).

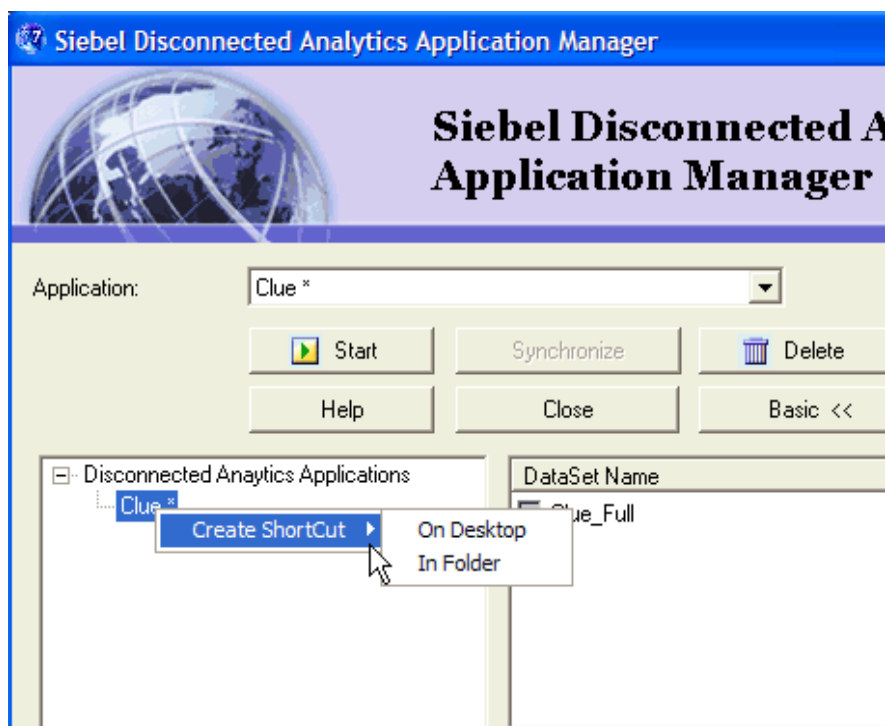


Figure 4. Create Shortcut Menu

- 4 Select one of the choices from the submenu.

The application shortcut is created in the location you specify.

Using More than One Disconnected Analytics Application

If you have more than one Disconnected Analytics application on your laptop computer, you can use only one of them at a given time. You can switch between applications using the Disconnected Analytics Application Manager. For example, if you have been creating reports in Service Requests, but now need to work in Accounts, use the following procedure.

NOTE: Disconnected Analytics Application Manager must be running before you do this procedure.

To use a different Disconnected Analytics application

- 1 Log off your current Disconnected Analytics application by closing the Web browser window.
- 2 If it is not already running, start Disconnected Analytics Application Manager.
- 3 In the Applications dropdown box or Applications list tree, select the application you want to start.

NOTE: The current application is marked with an asterisk.

- 4 Click Start.

The Login to the Server to synchronize dialog box appears.

- 5 Proceed as in [“Connecting to Disconnected Analytics as a Local Instance”](#) on page 19.

Deleting a Disconnected Analytics Application

You may wish to delete one of your Disconnected Analytics applications to create more storage space on your laptop.

NOTE: This action deletes only the application data that you have on your laptop computer, not the data on the Siebel Analytics Server.

To delete a Disconnected Analytics application

- 1 In the Disconnected Analytics Application Manager’s Synchronization Window, expand Disconnected Applications if necessary.
- 2 Select the application you want to delete.
- 3 Click Delete. Confirm that you want the application deleted.

The application is deleted.

Updating Disconnected Analytics Application Data

This procedure updates the Disconnected Analytics application data you have already downloaded, and is the activity you will probably perform most with Disconnected Analytics Application Manager. The updated information comes from the Siebel Analytics Server. When the procedure is finished, the new data timestamp is shown in the Status area Server box (see Area D of ["Expanded Disconnected Analytics Application Manager Window"](#) on page 13).

To update Disconnected Analytics application data

- 1 In the Disconnected Analytics Application Manager's Applications dropdown box or Applications list tree, select the application you want to update.
- 2 Proceed as in ["Connecting to Disconnected Analytics as a Network Instance"](#) on page 20.

The data set is updated and displays a current timestamp.

For more information about updating data through synchronization, see [Chapter 5, "Process of Synchronizing Disconnected Analytics Applications."](#)

Troubleshooting a Disconnected Analytics Application Update

- If, during a synchronization, the update process fails to work, click No in the second progress bar dialog box.
- All actions performed during a synchronization are recorded in the log file located at `$SiebelAnalyticsDirectory/Log/Sync.log`.

5

Process of Synchronizing Disconnected Analytics Applications

Synchronization is the process of updating the laptop repository, Web Catalog, fact and dimensional database data from the current Siebel Analytics Server data. Synchronization allows you to work with the latest possible data for better analyses.

NOTE: Synchronization in Siebel Analytics applications is not related to synchronization made in other Siebel eBusiness applications.

Modes of Disconnected Analytics Synchronization

The Disconnected Analytics synchronization modes are:

- Preprocessed synchronization

In this mode you download data that has already been processed by the Siebel Analytics Server. See ["Running Preprocessed Disconnected Analytics Synchronizations" on page 27](#).

- Online synchronization

In this mode the Siebel Analytics Server generates the personalized data upon request. See ["Running Online Disconnected Analytics Application Synchronizations" on page 28](#).

NOTE: Local data or changes made to your local dashboards are not uploaded to the Siebel Analytics Server.

Running Preprocessed Disconnected Analytics Synchronizations

Preprocessed synchronization is the preferred mode of synchronization. In this mode, you download data that has already been processed by the network-based Siebel Analytics Server. The synchronization mode is controlled by your administrator. If a preprocessed data set has been generated for you, the Disconnected Analytics Application Manager uses that data set. If a preprocessed data set does not exist, the Disconnected Analytics Application Manager uses the online mode of synchronization.

NOTE: Only files that are new since the last synchronization are downloaded.

To run a preprocessed Disconnected Analytics application synchronization

- 1 In the Siebel Disconnected Analytics Application Manager Applications List or Synchronization Window, select the application you want to synchronize.

- 2 Click Synchronize.

A dialog box appears, asking if you want to synchronize this application.

3 Click Yes.

A progress bar indicates that data is being downloaded. Clicking Details in the dialog box lists the actions being performed. The progress bar continues to the end.

4 If a second dialog box appears, click Yes.

5 Click OK when a dialog box appears, stating that the update is finished.

The Disconnected Analytics application has been synchronized. If the synchronized application is running, then the laptop version of Siebel Analytics Server is shutdown.

Running Online Disconnected Analytics Application Synchronizations

Online synchronization mode downloads current data from the Siebel Analytics Server. This synchronization mode requires that you be connected to the Siebel Analytics Server. The length of time taken for this synchronization to complete depends upon the complexity of the application you are using.

NOTE: If the Synchronize button is not enabled, follow the procedure given in [“Updating Disconnected Analytics Application Data”](#) on page 25, and then continue with the following procedure.

The following procedure synchronizes your local data with the data on the Siebel Analytics Server.

To run an online Disconnected Analytics application synchronization

1 In the Siebel Disconnected Analytics Application Manager Applications List or Synchronization Window, select the application you want to synchronize.

2 Click Synchronize.

A dialog box appears, asking if you want to synchronize this application.

3 Click Yes.

A progress bar indicates that data is being downloaded. Clicking Details in the dialog box lists the actions being performed. The progress bar continues to the end.

4 If a second dialog box appears, click Yes.

5 Click OK when a dialog box appears, stating that the update is finished.

The Disconnected Analytics application has been synchronized.

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