



Siebel Analytics Web Administration Guide

Version 7.7.1, Rev. B
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1

What's New in This Release

What's New in Siebel Analytics Web Administration Guide, Version 7.7.1, Rev. B

Table 2 lists changes described in this version of the documentation to support release 7.7.1 of the software.

NOTE: Siebel Analytics Web, Version 7.7.1, is compatible with Siebel operational applications, Version 7.7.

Table 1. New Product Features in Siebel Analytics Web Administration Guide, Version 7.7.1, Rev. B

Topic	Description
Using the SA System subject area with Siebel Delivers See "About the SA System Subject Area and Scheduling iBot Deliveries" on page 48	New topic, for users of Siebel Analytics operational applications and the SA System subject area. It explains why iBot content cannot be delivered to users that are defined only in the Siebel Analytics repository.
SOAP API for extracting and delivering results from Siebel Analytics Web and managing content in the Web Catalog See Chapter 10, "Working with Data and Managing the Web Catalog Using Siebel Analytics Web SOAP API"	Updated this chapter to add more information about structures, classes, methods, and fields.

What's New in Siebel Analytics Web Administration Guide, Version 7.7.1, Rev. A

Table 2 lists changes described in this version of the documentation to support release 7.7.1 of the software.

NOTE: Siebel Analytics Web, Version 7.7.1, is compatible with Siebel operational applications, Version 7.7.

Table 2. New Product Features in Siebel Analytics Web Administration Guide, Version 7.7.1, Rev. A

Topic	Description
<p>Configuration settings for the PopChart Image Server</p> <p>"Managing Settings for the Siebel Analytics Web Chart Image Server" on page 34</p>	<p>New settings are available to specify the download source when Flash is used as the default image type.</p>
<p>Making folders in the selection pane appear as though they are nested</p> <p>"Nesting Folders in the Selection Pane in Siebel Answers" on page 41</p>	<p>To make selections easy for users to discern in the selection pane, you can set up the presentation layer in the Siebel Analytics Server Administration Tool to give the appearance of nested folders.</p>
<p>Setting permissions for Siebel Delivers and iBots</p> <p>"About Permission Settings for Siebel Delivers and iBots" on page 47</p>	<p>This topic clarifies the iBot object permission settings that users need to have when they are granted access to the Publish for Subscription privilege.</p>
<p>Creating a drop-down list from which users can select dashboards</p> <p>"Setting the Number of Siebel Intelligence Dashboard Names to Appear on a Screen" on page 53</p>	<p>When there are more than 15 dashboard names to display, Siebel Analytics creates a drop-down list from which users can choose the dashboard to view. A new setting is available that allows you to specify how many dashboard names to display before a drop-down list is created.</p>
<p>Setting options for the Download link that appears with requests</p> <p>"Downloading Siebel Analytics Results in Non-UNICODE Format" on page 54</p>	<p>By default, the Download Data option downloads results in a UNICODE, tab-separated text file. For organizations that require a non-UNICODE, comma-separated file for use with certain applications, you can override behavior of the Download Data option or add another download option.</p>

What's New in Siebel Analytics Web Administration Guide, Version 7.7.1

Table 3 lists changes described in this version of the documentation to support release 7.7.1 of the software.

NOTE: Siebel Analytics Web, Version 7.7.1, is compatible with Siebel operational applications, Version 7.7.

Table 3. New Product Features in Siebel Analytics Web Administration Guide, Version 7.7.1

Topic	Description
<p>Siebel Delivers integration with Siebel Workflow 7.7</p> <p>See "Integrating Siebel Delivers with Siebel Workflow 7.7" on page 46</p>	<p>This new feature lets you use Advanced tab in Siebel Delivers to set up iBots to trigger workflows in the Siebel Workflow 7.7 application.</p>
<p>Option to set the number of Siebel Analytics Briefing Book links that users can follow</p> <p>See "Setting the Number of Siebel Analytics Briefing Book Links to Follow" on page 53</p>	<p>You can modify the Windows registry or the Siebel Analytics Web configuration file instanceconfig.xml to set the number of Siebel Analytics Web Briefing Book links that users can follow.</p>
<p>Updated procedure to localize Web Catalog text strings</p> <p>See "Localizing Siebel Analytics Web Catalog Text Strings" on page 74</p>	<p>The procedure to export text strings for translation and then expose them when translation is complete has changed in Version 7.7.1.</p>
<p>Use of Analytics Catalog Manager to rename items in the Web Catalog</p> <p>See "Using Analytics Catalog Manager to Rename Items in the Siebel Analytics Web Catalog" on page 77</p>	<p>You can use Analytics Catalog Manager to rename items in the Web Catalog. This can be useful when you are migrating from a development environment to a production environment.</p>

Table 3. New Product Features in Siebel Analytics Web Administration Guide, Version 7.7.1

Topic	Description
<p>SOAP API available for extracting results from Siebel Analytics Web and managing content in the Web Catalog</p> <p>See Chapter 10, "Working with Data and Managing the Web Catalog Using Siebel Analytics Web SOAP API"</p>	<p>The Siebel Analytics Web SOAP API allows J2EE and .NET external applications to use Siebel Analytics as an analytical calculation and data integration engine. It provides a set of Web services that allow external applications to communicate with the Analytics Web Server.</p>
<p>Removed the chapter Siebel Analytics Third-Party SQL Tool Integration Example"</p>	<p>The content that was in Chapter 10 was moved into Chapter 9 "Using the Siebel Analytics Web Integration API."</p>

2

Administering Siebel Analytics Web

This chapter provides general post-installation configuration and administration procedures that are *not* specific to Siebel Answers, Siebel Delivers, Siebel Intelligence Dashboards, or Siebel Analytics Web Catalog. Directions for configuring these components of Siebel Analytics Web are given in subsequent chapters.

This chapter contains the following topics:

- ["Making Siebel Analytics Web Configuration Changes" on page 14](#)
- ["Changing the Siebel Analytics Web ODBC DSN" on page 17](#)
- ["Setting the Siebel Analytics Web Configuration File Path" on page 17](#)
- ["Disabling the Siebel Analytics Web Feature to Remember Users' Names and Passwords" on page 18](#)
- ["Setting the Time to Expire for Siebel Analytics Web Client Connections" on page 19](#)
- ["Administering Sessions in Siebel Analytics Web" on page 19](#)
- ["Setting the Time to Keep an Unsaved Siebel Analytics Request" on page 22](#)
- ["Setting the Time to Cancel an Unattended Siebel Analytics Request" on page 23](#)
- ["Setting the Time to Log Users Off Siebel Analytics Web Automatically" on page 23](#)
- ["Managing the Siebel Analytics Web Cache Settings" on page 24](#)
- ["Configuring the Siebel Analytics Web Cookie Domain" on page 26](#)
- ["Configuring the Siebel Analytics Web Cookie Domain" on page 26](#)
- ["Managing Siebel Analytics Web URL Generation and Resource File Location" on page 27](#)
- ["Specifying the Default Language for the Siebel Analytics Web Login Screen" on page 31](#)

Making Siebel Analytics Web Configuration Changes

This section provides procedures for making configuration changes in Windows and UNIX environments. You need to make changes only if you want to change default parameters, such as the name of the Siebel Analytics Web Catalog, or override internal default settings, such as the time for client connections to expire.

You can make configuration changes by modifying the Windows registry or the Siebel Analytics Web XML message file instanceconfig.xml:

- Sites running Siebel Analytics Web under UNIX must modify instanceconfig.xml.
- Sites running Siebel Analytics Web under Windows can modify either the Windows registry or instanceconfig.xml.

NOTE: In Windows, Siebel Analytics Web reads the file instanceconfig.xml first and then reads the Windows registry. Entries you make in the file instanceconfig.xml override equivalent entries in the Windows registry. If you made entries in the Windows registry for a previous version of Siebel Analytics Web, those entries continue to function unless you override them in the file instanceconfig.xml.

For information about working in the Windows registry, see [“Making Siebel Analytics Web Configuration Changes in the Windows Registry.”](#)

For information about working in the file instanceconfig.xml, see [“Making Siebel Analytics Web Configuration Changes in the Configuration File instanceconfig.xml”](#) on page 16.

Making Siebel Analytics Web Configuration Changes in the Windows Registry

For sites running Siebel Analytics Web under Windows, the Windows registry contains information about the configuration of a computer, including the settings of programs installed on it. The operating system continually references the registry while the machine is running.

Several Siebel Analytics Web registry entries are created during the installation process. You can customize Siebel Analytics Web by modifying these entries and adding new entries to override internal default settings.

CAUTION: Use extreme care when you modify the registry. Always back up the entire registry, or the registry keys that you plan to work on, before you make any changes.

To start the Windows Registry Editor

- 1 From the Start Menu, select Run.
- 2 In the text box, type regedit.
- 3 Navigate to the registry entries for Siebel Analytics:
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics

- In the right pane, right-click and select New, and then select the appropriate key or value. You can make your changes using the keys and values given elsewhere in this chapter.

NOTE: Enter data values as string values. The type should be REG_SZ.

- Exit the registry editor.

Your changes take effect when the Analytics Web Server service is restarted.

Figure 1 shows several registry keys for Siebel Analytics in the left pane of the Windows Registry Editor.

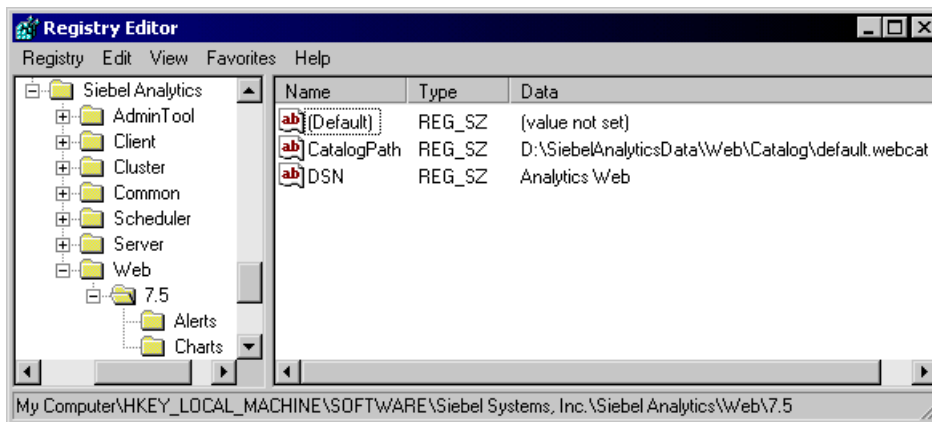


Figure 1. Example Registry Keys and Entries Created During Installation

In this book, the registry keys and entries for Siebel Analytics Web are described as the path to the key followed by the entry name. The example key in Figure 1 is for version 7.5, which has three values:

- Default, the entry for the key itself.

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.5
(Default)      (value not set)
```

- CatalogPath, the path for the Siebel Analytics Web Catalog.

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.5
CatalogPath   D:\SiebelAnalyticsData\web\Catalog\default.webcat
```

- DSN, the name of the Siebel Analytics Server data source name used by Siebel Analytics Web to access Siebel Analytics Server.

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel systems, Inc.\Siebel
Analytics\web\7.5
DSN           Analytics web
```

NOTE: Make sure that you work with the keys that apply to the currently installed version.

Making Siebel Analytics Web Configuration Changes in the Configuration File instanceconfig.xml

The file instanceconfig.xml is used to hold configuration settings for Siebel Analytics Web. If you run Siebel Analytics Web under Windows or UNIX, you can customize Siebel Analytics Web by modifying these entries and adding new entries to override internal default settings.

NOTE: For general background information about customizing the Siebel Analytics Web XML files, see "Customizing the Siebel Analytics Web User Interface Using XML Message Files" on page 113.

To make changes to the configuration file instanceconfig.xml

- 1 Navigate to Siebel Analytics data directory at the following location:

\SiebelAnalyticsData\Web\Config

CAUTION: Always make a backup copy of the file instanceconfig.xml before you make any changes.

- 2 Locate the file instanceconfig.xml and make a backup copy.
- 3 Use a text editor to open the file instanceconfig.xml.
- 4 Place your entries between the tags <ServerInstance> and </ServerInstance>, using the values given elsewhere in this chapter.
- 5 Save the file when you are done.

Your changes take effect when the Analytics Web Server service is restarted.

The following is an example instanceconfig.xml file.

```
<?xml version="1.0" ?>
<!-- Siebel Analytics Web Configuration File -->
<!-- The following example shows initialization settings for a server instance. -->

<webConfig>
  <ServerInstance>
    <CatalogPath>/SiebelAnalyticsData/web/catalog/default.webcat<CatalogPath>
    <DSN>Analyticsweb</DSN>
  </ServerInstance>
</webConfig>
```

Several entries are present in the file instanceconfig.xml by default, including the path to the Siebel Analytics Web Catalog, and the name of the Siebel Analytics Server data source name used by Siebel Analytics Web to access Siebel Analytics Server.

For example, the path to the Siebel Analytics Web Catalog is shown between the <CatalogPath> and </CatalogPath> tags.

- In Windows, an example path might be the following:

```
<CatalogPath>c:\SiebelAnalyticsData\web\Catalog\default.webcat</CatalogPath>
```

- In UNIX, an example path might be the following:

```
<CatalogPath>/usr/local/SiebelAnalyticsData/web/catalog/default.webcat</CatalogPath>
```

Changing the Siebel Analytics Web ODBC DSN

Siebel Analytics Web accesses a Siebel Analytics Server repository with a single Siebel Analytics Server data source name (DSN). The installation process configures a DSN named Analytics Web for this purpose. For information on configuring a new or existing DSN, see *Siebel Analytics Server Administration Guide*.

If you change the name of the DSN, you need to update the Windows registry or the Siebel Analytics Web configuration file instanceconfig.xml to use the new name.

Siebel Answers must use a single DSN.

For information about working in the Windows registry or the configuration file instanceconfig.xml, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7
```

```
DSN    Analytics Web Production
```

- instanceconfig.xml example:

```
<DSN>Analytics Web Production</DSN>
```

Setting the Siebel Analytics Web Configuration File Path

You can override the path that Siebel Analytics Web searches for configuration files upon startup. The internal default location is \$(DataDir)\Web\Config, where \$(DataDir) is the resolved entry of one of the following specifications:

- In Windows:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Common\7.7\DataDir
```

- In UNIX, this is configured by an environment variable defined in initialization scripts. For more information, see *Siebel Analytics Installation and Configuration Guide*.

Siebel Analytics Web must have read permission to this path. The default data directory is SiebelAnalyticsData.

You can override the internal default by adding the following entry to the Windows registry or the Siebel Analytics Web configuration file instanceconfig.xml.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web  
ConfigDir      SiebelAnalyticsTest
```

- instanceconfig.xml example:

```
<ConfigDir>SiebelAnalyticsTest</ConfigDir>
```

For information about working in the Windows registry or the configuration file instanceconfig.xml, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

Disabling the Siebel Analytics Web Feature to Remember Users' Names and Passwords

By default, users are asked if they want to have their user names and passwords remembered when logging on to Siebel Analytics Web. You can disable this by modifying the Windows registry or the Siebel Analytics Web configuration file instanceconfig.xml to add the following entry. When the value is set to No, users always have to type their user names and passwords.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7  
AllowRememberPassword      "No"
```

- instanceconfig.xml example:

```
<AllowRememberPassword>No</AllowRememberPassword>
```

For information about working in the Windows registry or the configuration file instanceconfig.xml, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

Setting the Time to Expire for Siebel Analytics Web Client Connections

You can override the number of minutes to elapse before Siebel Analytics Web client sessions are closed by modifying the Windows registry or the Siebel Analytics Web configuration file instanceconfig.xml to add the following entry. The internal default is 3.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7  
ConnectionExpireMinutes    "3"
```

- instanceconfig.xml example:

```
<ConnectionExpireMinutes>3</ConnectionExpireMinutes>
```

For information about working in the Windows registry or the configuration file instanceconfig.xml, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

Administering Sessions in Siebel Analytics Web

To perform session administration, you must have the Manage Sessions privilege. For more information, see ["Default Siebel Analytics Web Privilege Assignments" on page 100](#).

To view information about logged on users and running requests

- 1 In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.

- 2 Click the Manage Sessions link.

The Sessions table of the Sessions area gives information about users who are logged on, including the unique Session ID which is based on the IP address of the connected computer.

The Cursor Cache table shows the status of requests made by users.

Field	Description
User	The name of the user who ran the request and last placed it into the cache. If two IDs are shown, the second ID is impersonating the first. For example, the entry lhurley/administrator means that the Administrator account logged on and impersonated lhurley. This can happen when the Scheduler starts an iBot on someone's behalf. The Scheduler logs on and impersonates that user so security and content filters still apply.
Refs	The number of references to this entry since it was placed into the cache.
Status	The status of the request using this cache entry. <ul style="list-style-type: none"> ■ Running. The request is currently running. ■ Finished. The request has finished. ■ Queued. The system is waiting for a thread to become available so the request can be processed. ■ Canceling. The system is in the process of canceling the request. ■ Error. An error was encountered during the processing or running of the request. Look in the Statement column for information about the error.
Time	The time taken to process and run the request, displayed in one second increments. A value of 0s (zero seconds) indicates that the request took under 1 second to complete.
Statement	The SQL issued for the request, or if the request resulted in an error, information about the nature of the error.

To cancel all running requests

- 1 In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2 Click the Manage Sessions link.
- 3 Click the Cancel Running Requests link.
- 4 Click Finished.

To cancel one running request

- 1 In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2 Click the Manage Sessions link.
- 3 In the Cursor Cache table, identify the request and click the Cancel link in the Action column.
The user receives a message indicating that the request was canceled by a Siebel administrator.

To clear the Web cache

- 1 In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2 Click the Manage Sessions link.
- 3 In the Cursor Cache table, identify the request and click the link Close All Cursors.
- 4 Click Finished.

To clear the cache entry associated with a request

- 1 In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2 Click the Manage Sessions link.
- 3 In the Cursor Cache table, identify the request and click the Close link in the Action column.

To view the query file for information about a request

- 1 In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2 Click the Manage Sessions link.
- 3 In the Cursor Cache table, identify the request and click the View Log link.

NOTE: Query logging must be turned on for data to be saved in this log file. For more information about query logging, see *Siebel Analytics Server Administration Guide*.

Setting the Time to Expire for Siebel Analytics Web Client Sessions

You can override the number of minutes to elapse before browser client sessions are removed by modifying the Windows registry or the Siebel Analytics Web configuration file instanceconfig.xml to add the following entry. The internal default is 1440 (24 hours).

NOTE: The value must be greater than or equal to the value specified for the setting `SearchIDExpireMinutes`, described in ["Setting the Time to Keep an Unsaved Siebel Analytics Request" on page 22](#).

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7
ClientSessionExpireMinutes    "1440"
```

- instanceconfig.xml example:

```
<ClientSessionExpireMinutes>1440</ClientSessionExpireMinutes>
```

For information about working in the Windows registry or the configuration file instanceconfig.xml, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

Setting the Time to Keep an Unsaved Siebel Analytics Request

You can override the time, in minutes, that an unsaved request remains valid by modifying the Windows registry or the Siebel Analytics Web configuration file instanceconfig.xml to add the following entry. This entry applies to unsaved requests only. The internal default is 180 (three hours).

NOTE: The value must be less than or equal to the value specified for the setting `ClientSessionExpireMinutes`, described in ["Setting the Time to Expire for Siebel Analytics Web Client Sessions" on page 22](#).

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7
SearchIDExpireMinutes    "180"
```

- instanceconfig.xml example:

```
<SearchIDExpireMinutes>1440</SearchIDExpireMinutes>
```

For information about working in the Windows registry or the configuration file instanceconfig.xml, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

Setting the Time to Cancel an Unattended Siebel Analytics Request

You can override the time to elapse, in minutes, before an unattended request is cancelled by modifying the Windows registry or the Siebel Analytics Web configuration file `instanceconfig.xml` to add the following entry. An unattended request is one that has not been accessed in the number of minutes specified by this setting. The internal default is 5. The minimum value is 2.

This handles the case where a user is at the Request screen in Siebel Answers and browses elsewhere, abandoning the request, at least temporarily. Do not set the value too small, however, as the user may return to the request.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7
UnaccessedRunningTimeoutMinutes    "5"
```

- `instanceconfig.xml` example:

```
<UnaccessedRunningTimeoutMinutes>5</UnaccessedRunningTimeoutMinutes>
```

For information about working in the Windows registry or the configuration file `instanceconfig.xml`, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

Setting the Time to Log Users Off Siebel Analytics Web Automatically

You can override the time to elapse, in minutes, before a user is automatically logged off. This applies only to users who do not have the following option selected at the Log In screen:

Remember my ID and password

The default is 180 (three hours). You can change the number of minutes by modifying the Windows registry or the Siebel Analytics Web configuration file `instanceconfig.xml` to add the following entry.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7
LogonExpireMinutes    "180"
```

- `instanceconfig.xml` example:

```
<LogonExpireMinutes>180</LogonExpireMinutes>
```

NOTE: You can disable this setting by setting it to a value greater than the value for the setting `ClientSessionExpireMinutes`, described in ["Setting the Time to Expire for Siebel Analytics Web Client Sessions" on page 22](#).

For information about working in the Windows registry or the configuration file `instanceconfig.xml`, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

Managing the Siebel Analytics Web Cache Settings

The entries described in this section are available for managing the Siebel Analytics Web cache:

- [“Specifying The Maximum Amount of Time an Entry Can Exist in the Siebel Analytics Web Cache” on page 24](#)
- [“Specifying the Least Amount of Time an Entry Can Exist in the Siebel Analytics Web Cache” on page 25](#)
- [“Specifying the Least Amount of Time an Entry Can Exist in the Siebel Analytics Web Cache After Use” on page 25](#)
- [“Specifying the Maximum Number of Siebel Analytics Web Open Record Sets” on page 25](#)

The cache is accessed when users make requests in Siebel Answers. This is not the same cache that is accessed by the Analytics server. You can change the internal defaults by modifying the Windows registry or the Siebel Analytics Web configuration file `instanceconfig.xml` to add the following entries.

For information about working in the Windows registry or the configuration file `instanceconfig.xml`, see [“Making Siebel Analytics Web Configuration Changes” on page 14](#).

Specifying The Maximum Amount of Time an Entry Can Exist in the Siebel Analytics Web Cache

You can override the maximum amount of time, in minutes, that an entry in the cache can exist before it is removed. The internal default is 60 (one hour).

Depending on (the number of requests being run, an entry may be removed before the time limit expires.

NOTE: The setting for `CacheMinUserExpireMinutes`, described in [“Specifying The Maximum Amount of Time an Entry Can Exist in the Siebel Analytics Web Cache,”](#) can force an entry for a particular user to exist for a longer time than that specified by `CacheMaxExpireMinutes`.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7
```

```
CacheMaxExpireMinutes    “60”
```

- `instanceconfig.xml` example:

```
<CacheMaxExpireMinutes>60</CacheMaxExpireMinutes>
```


Specifying the Least Amount of Time an Entry Can Exist in the Siebel Analytics Web Cache

You can override the minimum amount of time, in minutes, that an entry in the cache can exist before it is removed. The internal default is 10.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7
CacheMinExpireMinutes    "10"
```

- instanceconfig.xml example:

```
<CacheMinExpireMinutes>10</CacheMinExpireMinutes>
```

Specifying the Least Amount of Time an Entry Can Exist in the Siebel Analytics Web Cache After Use

You can override the minimum amount of time, in minutes, that an entry in the cache can exist after it has been viewed by a user. The internal default is 10.

For example, suppose CacheMaxExpireMinutes is set to 60 minutes. If a user views the entry during the 59th minute, the entry exists for that user for an additional 10 minutes. This allows the user to continue paging through the data without requiring a new request to be run.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7
CacheMinUserExpireMinutes    "10"
```

- instanceconfig.xml example:

```
<CacheMinUserExpireMinutes>10</CacheMinUserExpireMinutes>
```

Specifying the Maximum Number of Siebel Analytics Web Open Record Sets

You can override the maximum number of open record sets that Siebel Analytics Web keeps open at any one time. The internal default is 10. The minimum value is 3. For systems under significant loads, you can increase this value to 500 or 1000.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7
CacheMaxEntries    "100"
```

- instanceconfig.xml example:

```
<CacheMaxEntries>100</CacheMaxEntries>
```

Configuring the Siebel Analytics Web Cookie Domain

You can configure the cookie domain by modifying the Windows registry or the Siebel Analytics Web configuration file instanceconfig.xml to add the following entries:

- [“Specifying Siebel Analytics Web Cookie Domain Information” on page 26](#)
- [“Overriding the Siebel Analytics Web Cookie Domain Path” on page 26](#)
- [“Specifying the Expiration Date for Persisted Siebel Analytics Web Cookies” on page 26](#)

For information about working in the Windows registry or the configuration file instanceconfig.xml, see [“Making Siebel Analytics Web Configuration Changes” on page 14](#).

Specifying Siebel Analytics Web Cookie Domain Information

You can specify domain information for a cookie sent to the browser. There is no default value.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7  
CookieDomain    value
```

- instanceconfig.xml example:

```
<CookieDomain>value</CookieDomain>
```

Overriding the Siebel Analytics Web Cookie Domain Path

You can override the domain path that cookies apply to. The internal default is “/”.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7  
CookiePath      c:\Test\Cookies
```

- instanceconfig.xml example:

```
<CookiePath>/usr/local/test/cookies</CookiePath>
```

Specifying the Expiration Date for Persisted Siebel Analytics Web Cookies

You can override the date on which persisted cookies expire by modifying the Windows registry or the Siebel Analytics Web configuration file instanceconfig.xml to add the following entry. For example, remembered passwords expire on this date (see [“Disabling the Siebel Analytics Web Feature to Remember Users’ Names and Passwords” on page 18](#)). The default value is “Tue, 31 Dec 2030 23:59:59 GMT”.

The format for the date is "day, dd mon year hh:mm:ss GMT", where:

day	The standard three-letter abbreviation for the day of the week.
dd	The 2-digit day of the month.
mon	The standard three-character abbreviation for the month.
year	The 4-digit year.
hh:mm:ss	The hour, minutes and seconds.
GMT	The time zone, Greenwich Mean Time.

You should not change this entry.

■ Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7
CookieExpire      "Tue, 31 Dec 2040 23:59:59 GMT"
```

■ instanceconfig.xml example:

```
<CookieExpire>Tue, 31 Dec 2040 23:59:59 GMT<\CookieExpire>
```

Managing Siebel Analytics Web URL Generation and Resource File Location

You can override how Siebel Analytics Web generates URLs and where resource files are located by modifying the Windows registry or the Siebel Analytics Web configuration file instanceconfig.xml to add the following entries:

- ["Specifying How Siebel Analytics Web Command URLs Are Generated" on page 28](#)
- ["Specifying How Siebel Analytics Web Static URLs Are Generated" on page 28](#)
- ["Specifying the Location of Siebel Analytics Web Primary Resource Files" on page 29](#)
- ["Specifying the Path to Siebel Analytics Web Primary Resource Files" on page 29](#)
- ["Specifying the Location of Siebel Analytics Web Nonprimary Resource Files" on page 30](#)
- ["Specifying the Path to Siebel Analytics Web Nonprimary Resource Files" on page 30](#)
- ["Specifying Whether Siebel Analytics Web Generates Fully Qualified URLs" on page 30](#)

If you are modifying the Windows registry, you need to create a URL under KEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7, and create the registry entries in the URL key.

If you are modifying instanceconfig.xml, you need to create the tags <URL> and </URL> after the <ServerInstance> tag, and place your entries between the <URL> and </URL> tags.

For information about working in the Windows registry or the configuration file instanceconfig.xml, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

NOTE: Most of the URL entries are interrelated.

Specifying How Siebel Analytics Web Command URLs Are Generated

You can specify how Siebel Analytics Web generates command URLs.

If you explicitly specify an entry, it must be of this form:

```
protocol://server/virtualpath
```

where virtualpath is the complete virtual path to Siebel Analytics Web. The default is determined separately for each client, based on the URL sent by the client to the Siebel Analytics Web server.

■ Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7\URL  
AbsoluteCommandURLPrefix    value
```

■ instanceconfig.xml example:

```
<URL>  
  <AbsoluteCommandURLPrefix>value</AbsoluteCommandURLPrefix>  
</URL>
```

Specifying How Siebel Analytics Web Static URLs Are Generated

You can specify how Siebel Analytics Web generates URLs for static resources such as images, script files, style sheets, and other user-specified files. The default is protocol://server from the URL\AbsoluteCommandURLPrefix setting, described in [“Specifying How Siebel Analytics Web Command URLs Are Generated” on page 28](#).

If you explicitly specify an entry, it must be of this form:

```
protocol://server
```

If you specify a virtual path, it is stripped off.

This entry also allows you to designate a separate Web server for delivering static resources, thereby reducing the load on the main Web server. This prefix will be used for the resources that have a fully qualified virtual path of the form `’/Path/file’`. If a resource file has a relative virtual path of the form `’Path/file’`, the prefix used is the same used for commands to the Siebel Analytics Web server extension.

■ Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7\URL  
ResourceServerPrefix    value
```

■ instanceconfig.xml example:

```
<URL>  
  <ResourceServerPrefix>value</ResourceServerPrefix>  
</URL>
```

Specifying the Location of Siebel Analytics Web Primary Resource Files

You can override the physical location of Siebel Analytics Web's primary resource files (these are the resource files distributed with Siebel Analytics Web, not user-customized files such as custom styles or skins). The internal default is \$(INSTALL_DIR)\Web\App\Res.

You must provide a full path. Siebel Analytics Web must have read permission to this path. For example, if this is a shared network resource, the Siebel Analytics Web administrator needs to make sure that the user under which Siebel Analytics Web is running has read access to the share, as well as read access to the file system the share is exported from.

NOTE: If the value for this entry is different from the physical location of the Siebel Analytics Web DLLs, you must specify a setting for URL\ResourceVirtualPath, described in "Specifying the Path to Siebel Analytics Web Primary Resource Files" on page 29.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7\URL
ResourcePhysicalPath    value
```

- instanceconfig.xml example:

```
<URL>
  <ResourcePhysicalPath>value</ResourcePhysicalPath>
</URL>
```

Specifying the Path to Siebel Analytics Web Primary Resource Files

You can override the virtual path used for Siebel Analytics Web's primary resource files as specified by the setting URL\ResourcePhysicalPath, described in "Specifying the Location of Siebel Analytics Web Nonprimary Resource Files" on page 30. These resource files and customer-defined resource files must be served from the same Web server.

- For generating relative URLs, the virtual path defaults to Res, assuming that the resource folder is present under the same virtual directory as the Siebel Analytics Web DLLs.
- For generating absolute URLs, the entry of the value URL\AbsoluteCommandURLPrefix is used as the default.

The value must be a fully qualified virtual path of this form:

```
‘/VirtualPath’
```

If you omit the leading slash, one will be added.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7\URL
ResourceVirtualPath    value
```

- instanceconfig.xml example:

```
<URL>  
  <ResourceVirtualPath>value</ResourceVirtualPath>  
</URL>
```

Specifying the Location of Siebel Analytics Web Nonprimary Resource Files

You can override the physical location of resource files that are not part of a default installation. Such resource files include customized styles and skins. The internal default is $\$(DataDir)\Web\App\Res$, where $\$(DataDir)$ is the resolved entry of `HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Common\7.7\DataDir`.

You must provide a full path. Siebel Analytics Web must have read permission to this path. For example, if this is a shared network resource, you need to make sure that the user under which Siebel Analytics Web is running has read access to the share, as well as read access to the file system the share is exported from.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7\URL  
CustomerResourcePhysicalPath    value
```

- instanceconfig.xml example:

```
<URL>  
  <CustomerResourcePhysicalPath>value</CustomerResourcePhysicalPath>  
</URL>
```

Specifying the Path to Siebel Analytics Web Nonprimary Resource Files

You can override the virtual path used for resource files that are not part of a default installation as specified in the setting `URL\CustomerResourcePhysicalPath`, described in ["Specifying the Location of Siebel Analytics Web Nonprimary Resource Files" on page 30](#). The internal default is `Res`.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7\URL  
CustomerResourceVirtualPath    value
```

- instanceconfig.xml example:

```
<URL>  
  <CustomerResourceVirtualPath>value</CustomerResourceVirtualPath>  
</URL>
```

Specifying Whether Siebel Analytics Web Generates Fully Qualified URLs

You can override whether Siebel Analytics Web always generates fully qualified URLs for resource files that have fully qualified virtual paths. The internal default is `No`.

When set to No, resources and the Siebel Analytics Web server extension are served from one server. When set to Yes, default resources are served from the same server as the Siebel Analytics Web server extension, and customer resources are served from another server. Depending on the value of the other settings described in this section, you could also set it up to have default and customer resources served from one server, and the Siebel Analytics Web server extension served from another server.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7\URL  
ForceAbsoluteResourceURL    value
```

- instanceconfig.xml example:

```
<URL>  
    <ForceAbsoluteResourceURL>value</ForceAbsoluteResourceURL>  
</URL>
```

Specifying the Default Language for the Siebel Analytics Web Login Screen

The default language in which the Siebel Analytics Web login screen appears is obtained from the user's client browser settings. The following procedure explains how to change the language.

NOTE: The following procedure uses Internet Explorer 6.0 as an example. If you are using a different browser, make the necessary substitutions.

To change the default language on a user's login screen

- 1 In Internet Explorer, choose Tools > Internet Options.
- 2 The Internet Options dialog box appears.
- 3 Click the Languages button.
- 4 The Language Preference dialog box appears.
Installed languages appear in the Languages list. The language at the top of the list is used as the default language.
- 5 If the desired language is not installed on the browser, add it.
- 6 Use the Move Up and Move Down buttons to position the desired language at the top of the list.
- 7 Restart the browser and log into Siebel Analytics Web.

The default language should match the language in the browser's Language list.

NOTE: If a user does not select a different language from the drop-down list on the login screen, the setting for the User Interface Language at the user's My Account screen determines the language in which the user interface is displayed.

3

Administering Siebel Answers

This chapter describes procedures that are used to administer Siebel Answers. For an introduction to Siebel Answers, see *Siebel Analytics User Guide*.

This chapter contains the following topics:

- “Managing Settings for the Siebel Analytics Web Chart Image Server” on page 34
- “Managing the Siebel Analytics Web Charting Settings” on page 36
- “Configuring Siebel Answers Pivot Table Settings” on page 38
- “Configuring the Maximum Number of Rows in a Siebel Answers Table View” on page 39
- “Adding Support for Navigation and Drill Down in Siebel Answers” on page 39
- “Changing the Default Currency in Siebel Answers” on page 40
- “Nesting Folders in the Selection Pane in Siebel Answers” on page 41

Managing Settings for the Siebel Analytics Web Chart Image Server

Siebel Analytics Web uses a third-party charting engine to render charts (PopChart Image Server from CORDA Technologies, Inc.). You can override the default image type and browser client connection type by modifying the Windows registry or the Siebel Analytics Web configuration file `instanceconfig.xml` to add the following entries:

- [“Specifying the Siebel Analytics Chart Image Type” on page 34](#)
- [“About Downloading and Using Flash as the Default Image Type in Siebel Analytics” on page 35](#)
- [“Specifying How the Siebel Analytics Web Server Connects to the PopChart Image Server” on page 36](#)

If you are modifying the Windows registry, you need to create a POP key in the Chart key, and create the registry entries in the POP key.

If you are modifying `instanceconfig.xml`, you need to create the tags `<POP>` and `</POP>` after the `<ServerInstance>` tag, and place your entries between the `<POP>` and `</POP>` tags.

For information about working in the Windows registry or the configuration file `instanceconfig.xml`, see [“Making Siebel Analytics Web Configuration Changes” on page 14](#).

Specifying the Siebel Analytics Chart Image Type

You can override the image type generated by the PopChart Image Server. The internal default is Flash.

The other choices are SVG (W3C Scalable Vector Graphics), PNG (W3C Portable Network Graphics), and JPEG. Flash and SVG images provide the greatest degree of interaction because they support mouseover behaviors (such as pop-up data labels), navigation, and drilling.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel  
Analytics\Web\7.7\Charts\POP
```

```
DefaultImageType    PNG
```

- `instanceconfig.xml` example:

```
<POP>  
  <DefaultImageType>PNG</DefaultImageType>  
</POP>
```

About Downloading and Using Flash as the Default Image Type in Siebel Analytics

In some organizations, users are instructed to download the latest Flash software from a corporate location instead of the vendor's Web site. The default download source for Siebel Analytics Web is the vendor's Web site. You can modify the default download source to point to another location. Then, when users view a chart in Siebel Analytics and a newer version of the Flash software is available on the corporate server, they can be prompted to download the newer version. This section contains the following topics:

- "Modifying the Default Flash Download Source" on page 35
- "Enabling a Download Prompt for New Flash Versions" on page 35

Modifying the Default Flash Download Source

The default download source for the Flash plug-in is the vendor's Web site. You can change this to another location by modifying the Windows registry or the Siebel Analytics Web configuration file `instanceconfig.xml` to point to the location that holds the Flash code base.

NOTE: If you are modifying the Windows registry, you need to create a `FlashCodeBase` key in the `Charts` key, and create the registry entries in the `FlashCodeBase` key. If you are modifying `instanceconfig.xml`, you need to create the tags `<FlashCodeBase>` and `</FlashCodeBase>` after the `<Charts>` tag, and place your entries between the `<FlashCodeBase>` and `</FlashCodeBase>` tags.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel
Analytics\Web\7.7\Charts\FlashCodeBase

FlashCodeBase    \\CORPORATE\Download\FIash
```

- `instanceconfig.xml` example:

```
<Charts>
  <FlashCodeBase>\\CORPORATE\Download\FIash</FlashCodeBase>
</Charts>
```

Enabling a Download Prompt for New Flash Versions

After modifying the default Flash download source, you can enable a download prompt by creating a new classID for the Flash ActiveX control to add a custom global identifier (clsid) property. You can obtain the current global identifier property from any machine where Siebel Analytics Web charting is being used. (For version 7.7.1, the global identifier property used by Siebel Analytics is D27CDB6E-AE6D-11CF-96B8-444553540000.) The custom global identifier property must contain the same number of characters and dashes as the global identifier used in the default Flash ActiveX control.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel
Analytics\Web\7.7\Charts\FlashCLSID

FlashCLSID      E38CDB6E-BA6D-21CF-96B8-432553540000
```

- instanceconfig.xml example:

```
<Charts>
  <FlashCLSID>E38CDB6E-BA6D-21CF-96B8-432553540000</FlashCLSID>
</Charts>
```

You should test flash charts independent of Siebel Analytics to make sure that they function with the custom global identifier property.

Specifying How the Siebel Analytics Web Server Connects to the PopChart Image Server

You can override how the Siebel Analytics Web server connects to the PopChart Image Server. The default is `http://AnalyticsWeb_machine:2001/?`, where `AnalyticsWeb_machine` is the machine name where Siebel Analytics Web is running, and 2001 is the port number.

This setting must be fully qualified with the port number (if other than 80) using the notation as shown.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel
Analytics\Web\7.7\Charts\POP
```

```
ServerPrefix      http://Analyticsweb_machine:85/?
```

- instanceconfig.xml example:

```
<POP>
  <ServerPrefix>http://Analyticsweb_machine:85/?</ServerPrefix>
</POP>
```

Managing the Siebel Analytics Web Charting Settings

You can change certain Siebel Analytics Web charting settings from their internal default settings by adding entries to the Windows registry or the Siebel Analytics Web configuration file `instanceconfig.xml`:

- [“Specifying the Location of Temporary Storage for Chart Cache in Siebel Analytics Web” on page 37](#)
- [“Specifying the Interactive Behavior of Charts in Siebel Analytics Web” on page 37](#)
- [“Specifying the URL for Chart Navigation in Siebel Analytics Web” on page 37](#)

In Windows, the installation process creates the following registry key for the charting function:

```
\Siebel Systems, Inc.\Siebel Analytics\Web\7.7\Charts
```

If you are modifying the Windows registry, you can place the entries described in this section in the Chart key.

If you are modifying the file `instanceconfig.xml`, you need to create the tags `<Chart>` and `</Chart>` after the `<ServerInstance>` tag, and place your entries between the `<Chart>` and `</Chart>` tags.

For information about working in the Windows registry or the configuration file instanceconfig.xml, see [“Making Siebel Analytics Web Configuration Changes” on page 14](#).

Specifying the Location of Temporary Storage for Chart Cache in Siebel Analytics Web

You can override the internal default entry for the location used by Siebel Analytics Web as temporary storage for chart cache. The internal default is dirletter:\SiebelAnalyticsData\Temp\nQWCharts, where dirletter is the drive where the Siebel Analytics Web software is installed.

The location should be a fully-qualified path name, such as d:\SiebelWebChartCache. The folder or directory structure must exist before you start the Analytics Web Server service again.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7\Charts
CacheDirectory      c:\SiebelAnalyticsData\Temp\ChartCache
```

- instanceconfig.xml example:

```
<Charts>
  <CacheDirectory>/usr/local/SiebelAnalytics/Data/temp/chartcache</CacheDirectory>
</Charts>
```

Specifying the Interactive Behavior of Charts in Siebel Analytics Web

You can override the default interactive behavior of Siebel Analytics Web charts. Valid entries are Drill, Navigate and None. The default is Drill. This means that charts are created drillable by default.

If you specify Navigate, charts navigate to the URL described in [“Specifying the URL for Chart Navigation in Siebel Analytics Web” on page 37](#). If you specify None, charts are not interactive; for example, clicking on a chart or chart region does nothing.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7\Charts
DefaultInteraction   Navigate
```

- instanceconfig.xml example:

```
<Charts>
  <DefaultInteraction>Navigate</DefaultInteraction>
</Charts>
```

Specifying the URL for Chart Navigation in Siebel Analytics Web

If you specify Navigate as the interactive behavior of charts (described in [“Specifying the Interactive Behavior of Charts in Siebel Analytics Web” on page 37](#)), you can override the default URL to which charts navigate. The internal default URL is <http://www.siebel.com/>.

If the interactive behavior is not Navigate, this entry is ignored.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7\Charts  
DefaultNavigationPath    http://www.intranet.com/
```

- instanceconfig.xml example:

```
<Charts>  
  <DefaultNavigationPath>http://www.intranet.com/</DefaultNavigationPath>  
</Charts>
```

Configuring Siebel Answers Pivot Table Settings

You can change certain pivot table settings from their internal defaults by adding entries to the Windows registry or the Siebel Analytics Web configuration file instanceconfig.xml:

- ["Specifying the Maximum Number of Records To Process in a Siebel Analytics Pivot Table"](#)
- ["Specifying the Maximum Number of Populated Cells in a Siebel Analytics Pivot Table"](#)

For information about working in the Windows registry or the configuration file instanceconfig.xml, see ["Making Siebel Analytics Web Configuration Changes"](#) on page 14.

Specifying the Maximum Number of Records To Process in a Siebel Analytics Pivot Table

You can override the maximum number of records that can be processed by a pivot table. The internal default is 20000.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7  
CubeMaxRecords    30000
```

- instanceconfig.xml example:

```
<CubeMaxRecords>30000</CubeMaxRecords>
```

Specifying the Maximum Number of Populated Cells in a Siebel Analytics Pivot Table

You can override the maximum number of populated cells that Siebel Analytics Web allows in a pivot table. The internal default is 150000. If the user exceeds this value, the server returns an error message when the pivot table is rendered.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7  
CubeMaxPopulatedCells    160000
```

- instanceconfig.xml example:

```
<CubeMaxPopulatedCells>160000</CubeMaxPopulatedCells>
```

Configuring the Maximum Number of Rows in a Siebel Answers Table View

You can override the maximum number of rows that can appear in a Table view by modifying the Windows registry or the Siebel Analytics Web configuration file instanceconfig.xml to add the following entry. The internal default is 10000. If the user exceeds this value, the server returns an error message when the table view is rendered.

NOTE: This entry applies to the Table view, not the Pivot Table view.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7
```

```
ResultRowLimit    12000
```

- instanceconfig.xml example:

```
<ResultRowLimit>12000</ResultRowLimit>
```

Adding Support for Navigation and Drill Down in Siebel Answers

When you create a request, you can allow users to navigate to related requests and content. If the Siebel Analytics Server administrator set up dimensions and dimensional hierarchies for the subject area, users can drill down on data results presented in charts, tables and pivot tables to obtain more detailed information.

There are no specific privilege settings that impact access to Siebel Analytics Web Navigation and drill down features, which are available to all users.

Dimensional hierarchies are a system of levels in a dimension that are related to each other by one-to-many relationships. For example, a region hierarchy might be defined as a postal code rolling up to a city, rolling up to a region. There is exactly one city and one region corresponding to a single postal code, but there might be many postal codes corresponding to a single city, and there might be many cities corresponding to a single region.

Drill down allows users to move through the dimensional hierarchies associated with the subject area to obtain more detailed results. For example, if the results contain a total sales column, the user might be able to click total sales to drill down for sales by region, and then click a region to see sales by city in that region. The information available to Siebel Analytics Web users through drill down is constrained by the dimensional hierarchies configured by the Siebel Analytics Server administrator for the specific subject area.

For information about setting up dimensions and hierarchies, see *Siebel Analytics Server Administration Guide*.

Changing the Default Currency in Siebel Answers

You can change the default currency displayed in the Siebel Answers user interface, for example, from French Francs to Euros.

If you are using Siebel Analytics applications, with no customizations, you only need to set the default data warehouse currency.

If you have created additional subject areas, the currency column data is in the number format, and you need to specify the currency for the customized subject area as described in the second procedure.

For more information about using formatting functions in Siebel Answers, see *Siebel Analytics User Guide*.

To set the default data warehouse currency

- 1 Open the currencies.xml file in the directory \\SiebelAnalyticsData\Web\Config.
- 2 Search for the currency that you want to make the default, for example USD, CAD, PEN, or MAD.
- 3 Copy the entire currency element.

For example, copy the currency tag for the Euro:

```
- <Currency tag="int:euro-1" type="international" symbol="_"
displayMessage="kmsgCurrencyEuroLeft" digits="2" format="$ #">
<negative tag="minus" format="- $ #" />
</Currency>
```

- 4 Search for the text string int:wrhs, located towards the top of the file.
- 5 Select the entire element and replace it by pasting the copied element over it.
- 6 Replace the tag attribute so it reads int:wrhs.

For example, replace tag="int:euro-1" with tag="int:wrhs".
- 7 Restart the Analytics Web Server service.

To specify the currency for customized subject areas

- 1 In Siebel Answers, modify the request that uses the subject area.
- 2 Click the Format Column icon for the currency column.

The Column Properties dialog box appears.
- 3 At the Value Format tab, in the Data Format area, click the following option:

Override Default Data Format
- 4 In the Treat Numbers As drop-down list, select Currency.

- 5 In the Currency Symbol drop-down list, select the currency symbol.
- 6 To save this as the system-wide default for this data type, click the Save button and then select the appropriate option.
- 7 Click OK when you are done, and then repeat the preceding steps for any other columns you want to change.

Nesting Folders in the Selection Pane in Siebel Answers

To make selections easy for users to discern in the selection pane, you can set up the presentation layer in the Analytics Server Administration Tool to give the appearance of nested folders. For example, you can make the Sales Facts folder appear as a subfolder in the Facts folder. You can accomplish this during the construction of the presentation layer by prefixing the name of a folder to appear as a subfolder with a hyphen (-) and a space.

The preconfigured Siebel Analytics repository for Siebel operational applications provides examples of this construction. For more information, see *Siebel Analytics Server Administration Guide*.

4

Administering Siebel Delivers

This chapter describes procedures used to administer Siebel Delivers. For information about using Siebel Delivers, see *Siebel Analytics User Guide*.

This chapter contains the following topics:

- [“About Siebel Delivers iBots and Impersonation” on page 43](#)
- [“About Siebel Delivers iBots and AntiVirus Software” on page 44](#)
- [“Viewing Entries in the Siebel Delivers iBot Log Directory” on page 44](#)
- [“Disabling Siebel Delivers” on page 45](#)
- [“Specifying the Machine Running Siebel Analytics Scheduler” on page 45](#)
- [“Changing the Directory in Which Siebel Delivers iBot Deliveries Are Stored” on page 46](#)
- [“Integrating Siebel Delivers with Siebel Workflow 7.7” on page 46](#)
- [“Using Siebel Delivers to Seed the Siebel Analytics Server Cache” on page 47](#)
- [“About the SA System Subject Area and Scheduling iBot Deliveries” on page 48](#)

About Siebel Delivers iBots and Impersonation

Siebel Delivers makes use of intelligence agents or Bots (called iBots). iBots are software-based agents driven by schedule or events that access, filter, and perform analytics on data based upon defined criteria. Users receive information from iBots in the form of alerts that appear on their designated delivery devices or dashboards.

To create an iBot, Siebel Analytics Web administrators and users use Siebel Delivers to define the actions the iBot is to perform. Siebel Analytics Web gathers information about the priority, delivery devices, user, and other characteristics; packages that information into a job; and tells Siebel Analytics Scheduler when it wants the job to execute.

Because the Scheduler runs these jobs on behalf of users without accessing or storing their passwords, Siebel Analytics Server allows the Scheduler and Siebel Analytics Web to impersonate users. This is done by configuring the Scheduler to use a user ID and password with administrator privileges that can act on behalf of other users. An iBot logs on to the system using this user ID and password, and then the Scheduler executes the job on behalf of the user.

NOTE: If Siebel Analytics Server is configured to authenticate users through database logons, then impersonation is not allowed. Siebel Delivers works with database authentication provided that only the initialization block set up for authentication in the Siebel Analytics Server Administration Tool uses a connection pool with pass-through authentication. That connection pool cannot be used for any other initialization block or request.

For information about user authentication options, see *Siebel Analytics Server Administration Guide*. For information about the Scheduler, see *Siebel Analytics Scheduler Guide*.

About Siebel Delivers iBots and AntiVirus Software

Some antivirus software programs, such as Norton AntiVirus, enable a script-blocking feature, which tries to block all calls made by scripts to system objects (such as the Windows file system object) that the antivirus software deems unsafe.

If you launch a script as part of post-iBot processing, this antivirus feature may cause unexpected results. If you are running antivirus software with a script-blocking feature on the machine where Siebel Analytics Scheduler is installed, you should disable the script-blocking feature to prevent the software from unexpectedly blocking iBot script calls.

Viewing Entries in the Siebel Delivers iBot Log Directory

If an iBot fails to execute fully or if debugging is turned on in Siebel Analytics Scheduler, a log file is generated for the iBot.

The location for iBot log files is specified on the iBots tab of the Job Manager Configuration dialog box in Siebel Analytics Scheduler. The default location is the Log directory in the Siebel Analytics installation directory on the machine where Siebel Analytics Scheduler is installed.

The log file name has the following format:

NQiBot-JobID-InstanceID.xxx

where:

NQiBot	The preface for all iBot log files.
JobID	The Scheduler job ID for the iBot.
InstanceID	The Scheduler instance ID for the iBot.
xxx	The file extension:
	■ .err for iBot error log files.
	■ .log for debug log files.

The iBot error and debug log files are written as separate files for each iBot instance. You can use a text editor to view the files. Entries are generally self-explanatory. Exit codes are generic and do not indicate any particular condition.

The presence of an error log does not necessarily mean that an iBot failed completely. For example, suppose an iBot delivers content to multiple email addresses. If some of the addresses are invalid or the mail server is down, an error log is generated for the iBot.

For more information about the Scheduler, see *Siebel Analytics Scheduler Guide*.

Disabling Siebel Delivers

Siebel Delivers is an optional component of Siebel Analytics Web that is enabled by default for organizations that have purchased the appropriate license. To disable Siebel Delivers, you can edit the Windows registry or the Siebel Analytics Web configuration file `instanceconfig.xml` to add the following entry. The default value is Y (Siebel Delivers is enabled). To disable Siebel Delivers, set this to N.

If you are modifying the Windows registry, you need to create the registry entries in the Alerts key.

If you are modifying `instanceconfig.xml`, you need to create the tags `<Alerts>` and `</Alerts>` after the `<ServerInstance>` tag, and place your entries between the `<Alerts>` and `</Alerts>` tags.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7\Alerts
Enabled      N
```

- `instanceconfig.xml` example:

```
<Alerts>
  <Enabled>No</Enabled>
</Alerts>
```

For information about working in the Windows registry or the configuration file `instanceconfig.xml`, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

Specifying the Machine Running Siebel Analytics Scheduler

You can identify the machine running Siebel Analytics Scheduler by editing the Windows registry or the Siebel Analytics Web configuration file `instanceconfig.xml` to add the following entry. If Siebel Analytics Scheduler is running on the local machine, this is populated with the name of the local machine.

If you are modifying the Windows registry, you need to create the registry entries in the Alerts key.

If you are modifying `instanceconfig.xml`, you need to create the tags `<Alerts>` and `</Alerts>` after the `<ServerInstance>` tag, and place your entries between the `<Alerts>` and `</Alerts>` tags.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7\Alerts
ScheduleServer      Server02
```

- `instanceconfig.xml` example:

```
<Alerts>
  <ScheduleServer>Server02</ScheduleServer>
</Alerts>
```

For information about working in the Windows registry or the configuration file instanceconfig.xml, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

NOTE: If you are migrating a Siebel Analytics environment to a new system, make sure you also migrate the Siebel Analytics Server repository file and the Scheduler tables. The Scheduler tables are required for iBots.

Changing the Directory in Which Siebel Delivers iBot Deliveries Are Stored

You can specify the directory in which iBot deliveries are stored by editing the Windows registry or the Siebel Analytics Web configuration file instanceconfig.xml to add the following entry. The deliveries directory is, by default, stored in the same location as the Web Catalog. (The value described in ["Changing the Name and Location of the Siebel Analytics Web Catalog" on page 60](#) defines where the Web Catalog is stored.) At startup, Siebel Analytics Web attempts to create the deliveries directory.

If you are modifying the Windows registry, you need to create the registry entries in the Web key.

If you are modifying instanceconfig.xml, you need to create the tags <Web> and </Web> after the <ServerInstance> tag, and place your entries between the <Web> and </Web> tags.

■ Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web
```

```
PersistentStorageDirectory c:\SiebelAnalytics\Data\Web\Catalog\TestDelivery
```

■ instanceconfig.xml example:

```
<PersistentStorageDirectory>/usr/local/SiebelAnalytics/Data/web/catalog/  
TestDelivery</PersistentStorageDirectory>
```

For information about working in the Windows registry or the configuration file instanceconfig.xml, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

Integrating Siebel Delivers with Siebel Workflow 7.7

You can use the Advanced tab in Siebel Delivers to set up iBots to trigger workflows in the Siebel Workflow 7.7 application. The procedures to configure this capability are given in *Siebel Analytics Scheduler Guide*.

By default, only Siebel Analytics Web administrators have the necessary privileges to set up iBots to trigger workflows.

For information about the Advanced tab in Siebel Delivers, see *Analytics Web Online Help*.

Using Siebel Delivers to Seed the Siebel Analytics Server Cache

You can use the Advanced tab in Siebel Delivers to set up iBots to seed the Siebel Analytics Server cache. Seeding the cache can improve response times for users when they run requests in Siebel Answers or view requests that are embedded on their dashboards. Do this by scheduling iBots to execute requests that refresh this data.

For more information about Siebel Analytics Server cache, see *Siebel Analytics Server Administration Guide*.

For information about the Advanced tab in Siebel Delivers, see *Analytics Web Online Help*.

About Permission Settings for Siebel Delivers and iBots

The permission settings for Siebel Delivers and iBots are available in the Siebel Delivers section on the Privilege Administration page in Siebel Analytics Administration.

When users are granted access to the Publish for Subscription privilege, they also need to have Change/Delete permission to the shared iBots object and child objects in the Siebel Analytics Web Catalog.

You can grant the Change/Delete permission by using the Manage Catalog feature. For information about using the Manage Catalog feature, see ["Administering Items in the Siebel Analytics Web Catalog" on page 78](#).

About the SA System Subject Area and Scheduling iBot Deliveries

This section applies only to organizations using Siebel Analytics operational applications.

When the SA System subject area is being used, iBot deliveries cannot be made to user IDs that are defined only in the Siebel Analytics repository. Such internally defined user IDs include the Administrator user ID.

The SA System subject must return rows for any acceptable user of Siebel Analytics. In all Siebel Analytics operational applications, the Administrator user ID is not defined in the Siebel OLTP, and therefore is not returned from queries to the SA System subject area. You should test alerts with a valid Siebel OLTP user.

5

Administering Siebel Intelligence Dashboards

End users with appropriate privileges can modify personal and shared Siebel Intelligence Dashboards, including the addition of pages and content. End users cannot create dashboards.

Siebel Analytics Web administrators can create and manage dashboards, using the procedures in this chapter. For an introduction to dashboards and end-user procedures for modifying them, see *Siebel Analytics User Guide* and *Analytics Web Online Help*.

This chapter contains the following topics:

- [“Creating and Deleting Shared Siebel Intelligence Dashboards” on page 49](#)
- [“Changing Siebel Intelligence Dashboards Properties” on page 51](#)
- [“Creating Siebel Intelligence Dashboards Action Links” on page 52](#)
- [“Setting the Number of Siebel Intelligence Dashboard Names to Appear on a Screen” on page 53](#)
- [“Setting the Number of Siebel Analytics Briefing Book Links to Follow” on page 53](#)
- [“Downloading Siebel Analytics Results in Non-UNICODE Format” on page 54](#)
- [“Integrating Siebel Answers Into Other Portals or Intranets” on page 55](#)

Creating and Deleting Shared Siebel Intelligence Dashboards

Before you create shared dashboards, make sure you have planned your Web Catalog directory or folder structure and security strategy. Guidelines for creating a shared dashboard, within the broader context of Web Catalog structure and security framework, are given in [“Guidelines for Configuring Siebel Analytics Web Security for the Web Catalog and Dashboards” on page 102](#).

For more information about shared folder structures in the Web Catalog see [Chapter 6, “Administering the Siebel Analytics Web Catalog.”](#)

For more information about permissions, see [Chapter 7, “Managing Siebel Analytics Web Security.”](#)

Overall, to create a shared dashboard, you first create the dashboard and then add content using the Dashboard Editor. You can also assign Web Groups permissions to access the dashboard. Users who are members of more than one Web Group can select the dashboard they see by default from all of the dashboards to which they have permissions.

NOTE: When you use a Siebel operational application, dashboard integration is done using Siebel applications. For information, see *Siebel Analytics Installation and Configuration Guide*.

This section describes, from an administrator’s perspective, how to create and delete dashboards, and add sections. For more information about adding pages, sections, and content from an end-user’s perspective, see *Siebel Analytics User Guide*.

To create a shared dashboard

- 1** In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2** Click the link Manage Intelligence Dashboards.
- 3** Scroll down if necessary, and click the following link:
Create a new Intelligence Dashboard
The Create Dashboard screen appears.
- 4** Specify entries for the following fields:
 - a** Select the appropriate Group Folder from the drop-down list.
The members of this Web group (and other groups and users with appropriate permissions) will have Read access to the shared dashboard.
 - b** Type a name for the dashboard in the Dashboard Name text box.
 - c** In the Dashboard Builder text box, type the name of the user or Web Group that can make changes to the dashboard.
For information about creating Web Groups, see ["About Siebel Analytics Web Groups and Siebel Analytics Session Variables"](#) on page 90.
- 5** Click Finished when you are done.
- 6** In Siebel Answers, click the Dashboards tab in the selection pane, and then click the Refresh Display link near the bottom of the selection pane.
The newly created dashboard appears in the list of dashboards.
- 7** In Siebel Intelligence Dashboards, navigate to the dashboard and click the Edit Dashboard link.
The Dashboard Editor screen opens, where you can add content to the dashboard. For information, see *Analytics Web Online Help*.

To delete a dashboard

- 1** In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2** Click the link Manage Intelligence Dashboards.
- 3** Locate the dashboard you want to delete and click the Delete icon.
The Confirm Deletion screen appears.
- 4** Click Yes, and then click Finished.

Changing Siebel Intelligence Dashboards Properties

You can change dashboard properties at the Dashboard Properties screen.

To change dashboard properties

- 1 In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2 Click the link Manage Intelligence Dashboards.
- 3 Locate the dashboard you want to change and click the Properties icon.
The Dashboard Properties screen appears.
- 4 Follow directions in the table to change the property, and then click Finished when you are done.

NOTE: Clicking the Cancel button does not undo changes in the Dashboard Pages area.

Dashboard Property Change	Directions
Style	In the General Properties area, select the style from the Style drop-down list. For more information about styles, see Chapter 8, "Customizing the Siebel Analytics Web User Interface."
Hide Dashboard	Click this option to hide the dashboard from users. This is useful while you are setting up a dashboard.
Description	Type a description for the dashboard. The description does not appear on the dashboard.
Name of a page	In the Pages table, identify the page and click the Rename icon.
Deletion of a page	In the Pages table, identify the page and click the Delete icon.
Permissions for a page	In the Pages table, identify the page and click the Security icon. For information about changing dashboard permissions, see "About Setting Siebel Analytics Web Permissions" on page 94.
Order in which the page tabs appear	In the Pages table, identify the page and click the Move Up or Move Down arrow to change the order in which the page appears

Creating Siebel Intelligence Dashboards Action Links

Siebel Analytics action links allow end users to navigate from their analytic dashboards to a record in a Siebel operational application. Siebel Analytics applications contain prebuilt action links in requests and dashboards. For example, a user can drill down directly from a Siebel Sales Analytics dashboard to a specific record in a Siebel Sales view. Drilldown is based on the row identifier column contained in a request.

NOTE: End users must have the appropriate permissions and responsibilities to access the view, and any drilldown links.

To create an action link

- 1 Identify the target Siebel operational application view.
- 2 Select the Siebel operational application view or applet that you want to drill down to, and select Help > About View.

A pop-up window shows the names of the view and applet. Note the view and list applet names. You need these names in [Step 5](#).

- 3 Using a Subject Area that is appropriate for the target applet, use Siebel Answers to create a new Analytics request with the row identifier column in it, for example, Account_Row_ID.
- 4 Click the Properties icon for the column.
The Edit Column Format screen appears.
- 5 Make the following changes:
 - a Clear the option Default Data Format.
 - b Select the option Treat Text as Custom Text Format.
 - c Enter the following HTML, substituting the appropriate view name and list applet names. The following example HTML shown uses All Account List View as the View Name, and Account List Applet as the target applet.

```
"<a href=\"javascript:NQSWENav('All Account List View','Account List Applet','@');\">\"@\" </a>"
```

- 6 Click Finished, and then view the request on the dashboard.

After the request is saved and placed on a dashboard, the row identifier column automatically produces an action link to the Siebel operational application.

Optionally, the row identifier column can be replaced with icons in the column, using the following sample HTML. This provides an image source for the action links, such as ActionLink.gif as shown in the sample. Substitute the name of the image that you want to use. The image must be located on the Web server machine.

```
[HTML] "<a href=\"javascript:NQSWENav('All Account List View','Account List Applet','@');\" title=\"@\"><img src=\"Res/s_Siebel7/Views/ActionLink.gif\" border=0></a>"
```

Setting the Number of Siebel Intelligence Dashboard Names to Appear on a Screen

Siebel Analytics typically displays the names of individual dashboards across the top of the screen. To minimize the amount of screen space used for this, when there are more than 15 dashboard names to display, Siebel Analytics creates a drop-down list from which users can choose the dashboard to view. A drop-down list shows individual dashboards as grouped under the name of the folder that contains them, and replaces the dashboard names at the top of the screen with that folder name. Together with the entry described in this section, you can create and manipulate folders containing dashboards within the Web Catalog to create the desired dashboard presentation.

You can change the number of dashboard names to show before a drop-down list appears by modifying the Windows registry or the Siebel Analytics Web configuration file `instanceconfig.xml` to add the following entry. The minimum value is 1.

NOTE: This entry takes effect for all folders that contain dashboards if any folder contains more than the value you specify. For example, if dashboard folder A contains 8 dashboards and dashboard folder B contains 11 dashboards, and you specify a value of 10, drop-down lists will appear for both folders.

For information about working in the Windows registry or the configuration file `instanceconfig.xml`, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

■ Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7
DashboardMaxBeforeMenu    10
```

■ `instanceconfig.xml` example:

```
<DashboardMaxBeforeMenu>10</DashboardMaxBeforeMenu>
```

Setting the Number of Siebel Analytics Briefing Book Links to Follow

A Briefing Book navigation link is a special type of link that can be added to a dashboard using the Dashboard Editor. The default value for the maximum number of links to follow is 5.

You can change the default by modifying the Windows registry or the Siebel Analytics Web configuration file `instanceconfig.xml` to add the following entry. The minimum value is 1. The maximum value is 10.

For information about working in the Windows registry or the configuration file `instanceconfig.xml`, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

■ Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7
MaxFollowLinks    10
```

- instanceconfig.xml example:

```
<MaxFollowLinks>10</MaxFollowLinks>
```

Downloading Siebel Analytics Results in Non-UNICODE Format

Siebel Analytics provides options for downloading results that appear in Siebel Answers as options for the Download link. The Download link can also appear with a request in a dashboard.

By default, the Download Data option downloads results in a UNICODE, tab-separated text file. For organizations that require a non-UNICODE, comma-separated file for use with certain applications, you can override behavior of the Download Data option or add another download option by modifying the message `kmsgEVCDownloadLinks` in the XML messages file `viewscontrolmessages.xml`.

If you change the behavior of the Download Data option or add a new option that retrieves comma-separated data, the Windows registry or `instanceconfig.xml` entry described in this section is used to determine the character set to use. You can view supported character sets by examining the message file `charsetdefinitions.xml` located in the `SiebelAnalyticsData\Web\Config` directory.

For example, adding the following XML code to the message `kmsgEVCDownloadLinks` in the file `viewscontrolmessages.xml` adds the option Download CSV to the Download link:

```
<a class="NQWMenuItem" name="SectionElements"
href="javascript:void(null);" onclick="NQWClearActiveMenu();
Download('@{command}&Format=csv&Extension=.csv')">Download CSV</a>
```

The Download CSV option will download a comma-separated file that uses the following entry to determine the character set.

For information about working in the Windows registry or the configuration file `instanceconfig.xml`, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7
CSVCharset    us-ascii
```

- instanceconfig.xml example:

```
<CSVCharset>us-ascii</CSVCharset>
```

For information about making changes to the XML messages files, see ["Customizing the Siebel Analytics Web User Interface Using XML Message Files" on page 113](#).

Integrating Siebel Answers Into Other Portals or Intranets

The following customization settings are available for integrating Siebel Answers into other portals and intranets without requiring the use of Siebel Intelligence Dashboards. These settings are configured in XML message files.

You can perform the following actions:

- Change the text of the Dashboards link.
- Change the URL to which users are directed when they click that link.

NOTE: Make sure that you first review the information in [“Customizing the Siebel Analytics Web User Interface Using XML Message Files”](#) on page 113 before making any integration changes.

To change the text of the dashboards link

- 1 Navigate to the file `UIMessages.xml`.

This file is located in the folder `Web\App\Res\l_xx\Messages` in the Siebel Analytics Web installation directory, where `xx` is the language identifier of the selected locale.

CAUTION: Always make a backup copy of the file `UIMessages.xml` before you make any changes.

- 2 Use a text editor to open the file `UIMessages.xml`.
- 3 Locate the message `"kmsgUIPortal"`.

The message has the following form:

```
<webMessage name="kmsgUIPortal">
  <TEXT>Dashboards</TEXT>
</webMessage>
```

The default text is Dashboards.

- 4 Change the default text to text of your choosing.

For example, to change the text to be your company's intranet, you might change it to the following:

```
<webMessage name="kmsgUIPortal">
  <TEXT>Intranet</TEXT>
</webMessage>
```

- 5 Save the file when you are done.

Your changes take effect when the Analytics Web Server service is restarted.

To change the destination of the dashboards link

- 1 Navigate to the file ControlMessages.xml.

This file is located in the folder Web\App\Res\l_xx\Messages in the Siebel Analytics Web installation directory, where xx is the language identifier of the selected locale.

CAUTION: Always make a backup copy of the file ControlMessages.xml before you make any changes.

- 2 Use a text editor to open the file ControlMessages.xml.
- 3 Locate the message "kmsgPortalLink."

The message has the following form:

```
<webMessage name="kmsgPortalLink">
  <HTML>
    <A insert="1">
      <MessageRef name="kmsgUIPortal" />
    </A>
  </HTML>
</webMessage>
```

The default location is Siebel Intelligence Dashboards (indicated by the reference to insert="1", which is an internal reference).

- 4 Change the default location to a location of your choosing.

NOTE: If no location is specified, no link appears in Siebel Answers.

For example, to change this to your company's intranet, you can include the appropriate attributes and change it to point to that location instead:

```
<webMessage name="kmsgPortalLink">
  <HTML>
    <A href="http://intranet" target="_top" title="Click here for your intranet">
      <MessageRef name="kmsgUIPortal" />
    </A>
  </HTML>
</webMessage>
```

- 5 Save the file when you are done.

Your changes take effect when the Analytics Web Server service is restarted.

For more information about controlling the default appearance and behavior of the Siebel Analytics Web user interface, see ["Customizing the Siebel Analytics Web User Interface Using XML Message Files" on page 113](#).

6

Administering the Siebel Analytics Web Catalog

This chapter describes how to administer the Siebel Analytics Web Catalog and provides information about basic maintenance procedures. For organizations that have Siebel Analytics applications, this chapter also explains how to use Analytics Catalog Manager to locate the names and descriptions of the requests delivered with preconfigured dashboards.

This chapter contains the following topics:

- [“Changing the Name and Location of the Siebel Analytics Web Catalog” on page 60](#)
- [“How the Siebel Analytics Web Catalog Backup Process Works” on page 61](#)
- [“Setting the Number of Automatic Siebel Analytics Web Catalog Backups” on page 62](#)
- [“Setting the Number of Minutes Between Backups of the Siebel Analytics Web Catalog” on page 63](#)
- [“Creating a New Siebel Analytics Web Catalog” on page 63](#)
- [“Recovering From a Failure to Load the Siebel Analytics Web Catalog” on page 64](#)
- [“Moving a Siebel Analytics Web Catalog to Another System” on page 65](#)
- [“Migrating Changes to Siebel Analytics Requests and Filters” on page 66](#)
- [“About Siebel Analytics Catalog Manager” on page 66](#)
- [“Opening Siebel Analytics Catalog Manager” on page 67](#)
- [“Viewing the Siebel Analytics Catalog Manager Workspace” on page 67](#)
- [“Working with Siebel Analytics Catalog Manager Properties” on page 69](#)
- [“Copying and Pasting Content Between Siebel Analytics Web Catalogs” on page 71](#)
- [“Updating the Siebel Analytics Web Catalog to a Newer Version” on page 72](#)
- [“Localizing Siebel Analytics Web Catalog Text Strings” on page 74](#)
- [“Recommendations For Working with the Siebel Analytics Web Catalog” on page 76](#)
- [“Viewing Information About Siebel Intelligence Dashboards” on page 76](#)
- [“Using Analytics Catalog Manager to Rename Items in the Siebel Analytics Web Catalog” on page 77](#)
- [“Administering Items in the Siebel Analytics Web Catalog” on page 78](#)

Changing the Name and Location of the Siebel Analytics Web Catalog

The installation process sets the name of the Web Catalog to default.webcat for Siebel Analytics stand-alone sites, and to SiebelAnalytics.webcat for organizations that have Siebel Analytics applications.

The following locations are the default locations for the Web Catalog:

■ In Windows

`\SiebelAnalyticsData\web\Catalog`

■ In UNIX

`INSTALLDIR/Data/web/catalog`

where `INSTALLDIR` is the Siebel Analytics Web installation directory. The default installation directory is `/usr/local/SiebelAnalytics`.

If you move the Web Catalog or change its name, you need to update the Windows registry or the Siebel Analytics Web configuration file `instanceconfig.xml` to specify the new location or name.

For information about working in the Windows registry or the configuration file `instanceconfig.xml`, see [“Making Siebel Analytics Web Configuration Changes” on page 14](#).

■ Windows registry example:

`HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7`

`CatalogPath c:\SiebelAnalyticsData\web\Catalog\test.webcat`

■ `instanceconfig.xml` example:

`<CatalogPath>/usr/local/SiebelAnalyticsData/web/catalog/test.webcat</CatalogPath>`

NOTE: There is a one-to-one relationship between a Siebel Analytics repository and a Siebel Analytics Web Catalog. Multiple Siebel Analytics Web servers may be configured to point to a single Siebel Analytics server, but each Web Catalog must point to a unique repository. You cannot, for example, configure two Siebel Analytics Web servers to use the same Web Catalog concurrently.

How the Siebel Analytics Web Catalog Backup Process Works

Siebel Analytics Web maintains automatic Web Catalog backup files and version files in the location where the Web Catalog is stored. Web Catalog backup files are useful when the Siebel Analytics Web administrator is customizing or testing Siebel Analytics Web content. The version file is used to help maintain Web Catalog integrity.

This section contains the following topics:

- [“About Siebel Analytics Web Catalog Backup Files” on page 61](#)
- [“About the Siebel Analytics Web Catalog Version File” on page 61](#)
- [“When Changes Are Written to the Siebel Analytics Web Catalog” on page 62](#)

About Siebel Analytics Web Catalog Backup Files

By default, Siebel Analytics Web performs a Web Catalog backup every five minutes. The backup files are saved into the same location as the in-use Web Catalog. Automatic backups are identified by `nnn.autosave` appended to the Web Catalog name, where `nnn` represents the sequential number assigned to the backup.

For example, in Windows, if the path to the Web Catalog is:

```
c:\SiebelAnalyticsData\web\Catalog\SiebelAnalytics.webcat
```

then the third backup file is:

```
c:\SiebelAnalyticsData\web\Catalog\SiebelAnalytics.webcat.03.autosave
```

The default number of Web Catalog backup files is 10. If the server crashes, it creates another set of 10 backup files. After ten sets of backup files have been created, the numbering goes back to 01-10.

You can control the number of automatic Web Catalog backup files and the interval between them. For more information, see [“Setting the Number of Automatic Siebel Analytics Web Catalog Backups” on page 62](#) and [“Setting the Number of Minutes Between Backups of the Siebel Analytics Web Catalog” on page 63](#).

About the Siebel Analytics Web Catalog Version File

Information about the last known good Web Catalog backup is stored in a file ending in `.version`. For example, in Windows, using the example locations shown in [“About Siebel Analytics Web Catalog Backup Files” on page 61](#), the current version of `SiebelAnalytics.webcat` would be tracked in:

```
c:\SiebelAnalyticsData\web\Catalog\SiebelAnalytics.webcat.version
```

The version file is interrogated during Siebel Analytics Web startup:

- If the version file does not exist, the Web Catalog is read from the original path specified in the `CatalogPath` registry key. (For more information about this key, see [“Changing the Name and Location of the Siebel Analytics Web Catalog” on page 60](#).)

- If the path does not exist, the Web Catalog is created in the default location for the operating system, described in [“Changing the Name and Location of the Siebel Analytics Web Catalog” on page 60](#).
- If the version file exists, the backup file that it references (nnn.autosave) must also exist. If the backup file does not exist, Siebel Analytics Web will not start.

The version file is updated during Siebel Analytics Web shutdown. After a successful shutdown, the version file includes an entry indicating that the Web Catalog was successfully written to the original catalog path.

NOTE: The Siebel Analytics Web shutdown process does not create a Web Catalog backup file.

When Changes Are Written to the Siebel Analytics Web Catalog

Changes made to the Web Catalog are written to the Web Catalog when the Analytics Web Server service is stopped. Until the service is stopped, changes are written to the current Web Catalog backup file.

When the Analytics Web Server service is started again, the Web Catalog is read, and any subsequent changes are written to the current backup file.

Setting the Number of Automatic Siebel Analytics Web Catalog Backups

Siebel Analytics Web automatically performs backups of the Web Catalog. The internal default is 10 backups. You can override the default by modifying the Windows registry or the Siebel Analytics Web configuration file instanceconfig.xml to add the following entry. The minimum value is 3.

Automatic backups are identified by nnn.autosave appended to the Web Catalog name, where nnn represents the sequential number assigned to the backup.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7  
CatalogMaxAutoSaves      “20”
```

- instanceconfig.xml example:

```
<CatalogMaxAutoSaves>20</CatalogMaxAutoSaves>
```

For information about working in the Windows registry or the configuration file instanceconfig.xml, see [“Making Siebel Analytics Web Configuration Changes” on page 14](#).

For more information about automatic Web Catalog backups, see [“How the Siebel Analytics Web Catalog Backup Process Works” on page 61](#).

Setting the Number of Minutes Between Backups of the Siebel Analytics Web Catalog

You can override the number of minutes that Siebel Analytics Web waits between creating automatic Web Catalog backups by modifying the Windows registry or the Siebel Analytics Web configuration file `instanceconfig.xml` to add the following entry. The internal default is 5 minutes.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\web\7.7  
CatalogAutoSaveMinutes "10"
```

- `instanceconfig.xml` example:

```
<CatalogAutoSaveMinutes>10</CatalogAutoSaveMinutes>
```

For information about working in the Windows registry or the configuration file `instanceconfig.xml`, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

Creating a New Siebel Analytics Web Catalog

The following procedure explains how to create a new Siebel Analytics Web Catalog.

To create a new Web Catalog

- 1 Stop the Analytics Web Server service.

NOTE: When Analytics Web is installed on a Microsoft IIS Web server, the IIS Web server creates temporary files for its Web caching capability in a location specified by the Microsoft IIS installation. If the Analytics Server is stopped before the Analytics Web Server, these temporary files usually remain, consuming disk space.

- 2 Stop these other services:

- Siebel Analytics Server
- Siebel Analytics Scheduler
- Siebel Analytics Cluster Server
- IIS Admin Service (Microsoft Internet Information Server), and any additional services that it wants to stop

- 3 Set the `CatalogPath` registry key or `instanceconfig.xml` entry to point to a new Web Catalog path that does not already exist.

For details, see ["Changing the Name and Location of the Siebel Analytics Web Catalog" on page 60](#).

- 4 Make sure that there is no version file associated with the new Web Catalog and path and that the new target directory is empty.
- 5 Restart the services.

Recovering From a Failure to Load the Siebel Analytics Web Catalog

Siebel Analytics Web attempts to load the Web Catalog as part of its startup procedures. If it cannot load the Web Catalog, a failure message is logged in the operating system's application event log, and no one will be able to access Siebel Analytics Web. When possible, the system attempts to load the last saved Web Catalog, determined from the version file. (For information about the version file, see ["How the Siebel Analytics Web Catalog Backup Process Works"](#) on page 61.)

To recover from a failure to load the Web Catalog

- 1 Stop the Analytics Web Server service.

NOTE: When Analytics Web is installed on a Microsoft IIS Web server, the IIS Web server creates temporary files for its Web caching capability in a location specified by the Microsoft IIS installation. If the Analytics Server is stopped before the Analytics Web Server, these temporary files usually remain, consuming disk space.

- 2 Stop these other services:
 - Siebel Analytics Server
 - Siebel Analytics Scheduler
 - Siebel Analytics Cluster Server
 - IIS Admin Service (Microsoft Internet Information Server), and any additional services that it wants to stop
- 3 Make a backup of files related to the Web Catalog.
- 4 Rename the latest backup file (nnn.autosave) to the name of the original Web Catalog.
For example, rename SiebelAnalytics.webcat.03.autosave to SiebelAnalytics.webcat.
- 5 Delete the associated version file (.version) file.
- 6 Restart the services.

If the Web Catalog still fails to load, repeat [Step 3](#) through [Step 6](#) with earlier backup files until Siebel Analytics Web starts successfully.

Moving a Siebel Analytics Web Catalog to Another System

This procedure explains how to move an existing Web Catalog to another Analytics installation. (For information about migrating a complete Siebel Analytics installation, see the Technical Notes section on SupportWeb.)

To move an existing Web Catalog to another system

- 1 Stop the Analytics Web Server service.
- 2 Stop these other services:
 - Siebel Analytics Server
 - Siebel Analytics Scheduler
 - Siebel Analytics Cluster Server

NOTE: When Analytics Web is installed on a Microsoft IIS Web server, the IIS Web server creates temporary files for its Web caching capability in a location specified by the Microsoft IIS installation. If Siebel Analytics Server is stopped before Siebel Analytics Web, these temporary files usually remain, consuming disk space.

When you stop the Analytics Web Server service, the Web Catalog is written to the path shown in the CatalogPath registry key or instanceconfig.xml entry. (For more information, see ["Changing the Name and Location of the Siebel Analytics Web Catalog" on page 60.](#))

- 3 Verify successful shutdown by checking that the latest modified Web Catalog file is the original Web Catalog file with a .webcat extension, and not a backup file with an nnn.autosave extension.
- 4 Copy the original Web Catalog file to the appropriate location on the new system.

Optionally, you can also copy the version file (it has a .version extension).

NOTE: If you are migrating a Siebel Analytics environment to a new system, make sure you also migrate the Siebel Analytics Server repository file and the Scheduler tables. The Scheduler tables are required for iBots.

- 5 Restart the services.

NOTE: If you do not want to stop the services, you can copy the related Web Catalog files to the appropriate location on the new system. This includes the original Web Catalog file (.webcat extension), the Version file (.version extension), and the Web Catalog backup files (nnn.autosave extensions).

Migrating Changes to Siebel Analytics Requests and Filters

When you create and save requests and filters in Siebel Analytics Web, the objects are saved in the Web Catalog. The requests and filters are saved with the logical object references as they exist in the Siebel Analytics metadata in the Presentation layer of the Siebel Analytics Server Administration Tool.

If the Presentation layer metadata that affects these is changed through the renaming of objects, aliases are maintained for these objects that the Web Catalog can reference.

However, if the Presentation layer metadata changes through the following ways, the link from the stored object in the Web Catalog to the metadata will be broken:

- Aliases are deleted.
- Objects are moved between Presentation Catalog Folders in the Presentation layer.

To repair those links within a stored request, you need to refresh the requests and filters.

To refresh requests and filters

- 1** Log on to Siebel Analytics Web and access Siebel Answers.
- 2** Open the broken request and click the Advanced tab.
- 3** Click the Enter SQL link.
- 4** Change the FROM clause to reference the new Subject Area (Catalog Folder in the Presentation layer) where the SELECT columns now reside.
- 5** If the column names have been changed, those changes must also be applied.
- 6** Reapply any required filters using the new Presentation layer definitions.
- 7** Redefine any affected saved filters using the new Presentation layer definitions.

The changes are applied the next time that the Analytics Web Server service and the IIS Admin Service are started.

About Siebel Analytics Catalog Manager

Siebel Analytics Catalog Manager Siebel is a tool for Siebel Analytics Web administrators to perform offline management of the Siebel Analytics Web Catalog. It should be installed on a secure machine accessible only to Siebel Analytics Web administrators. Administrators can use Analytics Catalog Manager to perform the following functions:

- Administrators can rename and delete content, and move and copy content within and between Web Catalogs. This is critical for installations that maintain distinct test and production systems, as well as those that are creating content on top of Siebel Analytics Stand-Alone.
- Administrators that have one or more Siebel Analytics applications installed can use Analytics Catalog Manager to generate a list of dashboard requests. The requests are distributed with Siebel Analytics applications.

- Analytics Catalog Manager allows administrators to upgrade their Siebel Analytics applications to new versions without losing any site-specific changes and enhancements.
- Administrators that need to localize content can use Analytics Catalog Manager to export text strings for translation.

Opening Siebel Analytics Catalog Manager

Use only the procedure that follows to open Analytics Catalog Manager. Analytics Catalog Manager operates on the Web Catalog only when the Analytics Web Server service is stopped.

To open Analytics Catalog Manager

- 1 Stop the Analytics Web Server service.

NOTE: When Analytics Web is installed on a Microsoft IIS Web server, the IIS Web server creates temporary files for its Web caching capability in a location specified by the Microsoft IIS installation. If the Analytics Server is stopped before the Analytics Web Server service, these temporary files usually remain, consuming disk space.

- 2 Stop these other services:

- Siebel Analytics Server
- Siebel Analytics Scheduler
- Siebel Analytics Cluster Server
- IIS Admin Service (Microsoft Internet Information Server), and any additional services that it wants to stop.

- 3 On the machine where Analytics Catalog Manager is installed, choose Start >Programs > Siebel Analytics > Siebel Analytics Catalog Manager.

The Analytics Catalog Manager window opens.

- 4 When you have finished working with Analytics Catalog Manager, restart the services.

Viewing the Siebel Analytics Catalog Manager Workspace

This section explains how to how to view items in the Analytics Catalog Manager workspace. It contains the following topics:

- [“How the Siebel Analytics Catalog Manager Workspace Appears” on page 68](#)
- [“About Folders in the Siebel Analytics Catalog Manager Workspace” on page 68](#)
- [“About Siebel Analytics Catalog Manager Columns in the Workspace” on page 68](#)

How the Siebel Analytics Catalog Manager Workspace Appears

Figure 2 shows how the Analytics Catalog Manager workspace appears after opening SiebelAnalytics.webcat and clicking the Web Catalog icon. (SiebelAnalytics.webcat is the Web Catalog distributed with Siebel Analytics applications.)

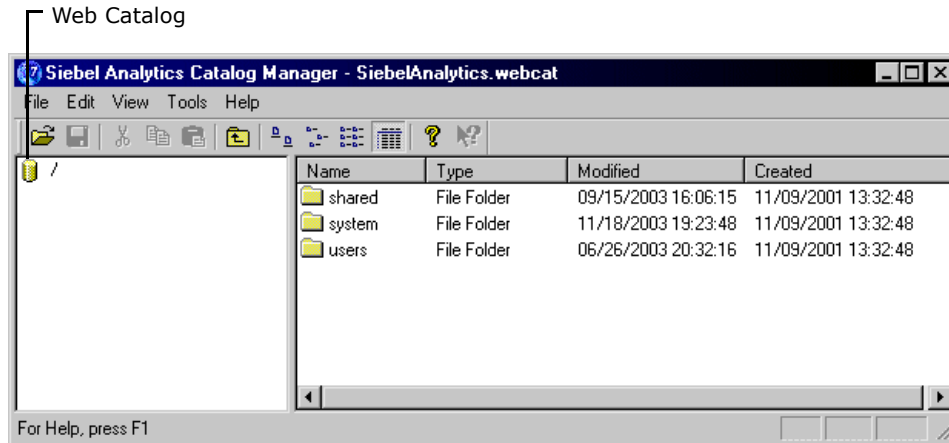


Figure 2. Analytics Catalog Manager Workspace

To view the Web Catalog tree structure

- Do one of the following:
 - Double-click the Web Catalog icon.
 - Click a folder in the right pane.

About Folders in the Siebel Analytics Catalog Manager Workspace

The shared folder contains content that is shared among Analytics Web users. This includes the preconfigured dashboards and requests that are distributed with Siebel Analytics applications, and other items such as shared filters.

The system folder contains administrative elements of Siebel Analytics Web. Some of these elements are distributed with the product, and others are set up by the Siebel Analytics Web administrator, such as privileges.

The users folder contains content that Analytics Web users with the appropriate permissions have saved to their personal folders, such as individual requests.

About Siebel Analytics Catalog Manager Columns in the Workspace

The right pane of the Analytics Catalog Manager has four columns. One column, needing additional explanation, is described here.

Type. Identifies the type of item. Items that are identified as "unknown file" are generally internally-used items, and their type is not exposed in Analytics Catalog Manager.

Working with Siebel Analytics Catalog Manager Properties

Analytics Catalog Manager allows Siebel Analytics Web administrators to work with a subset of the administration functions available in Siebel Analytics Web. For example, you can modify an item's properties, hide a request from display, and change user and group permissions to items in the Web Catalog.

For more information about setting permissions, see ["Setting Siebel Analytics Web Permissions Through Analytics Catalog Manager" on page 97](#).

Other administration tasks, such as setting up new Web Groups, are performed using the administration features in Siebel Analytics Web.

To view properties for an item

- Double-click the item, or right-click the item in the Name list and choose Properties.

The Properties window for the item appears.

NOTE: The New button is used to create a new property. You should use it only if instructed to do so by Siebel Systems. The Read Only option is unused. The System option indicates that the item is maintained internally and should not be altered.

Figure 3 is an example of the Properties window for a request named Top Partner Opportunities. This request is from the Overview page on the Channel Sales dashboard in the Siebel Partner Analytics application.

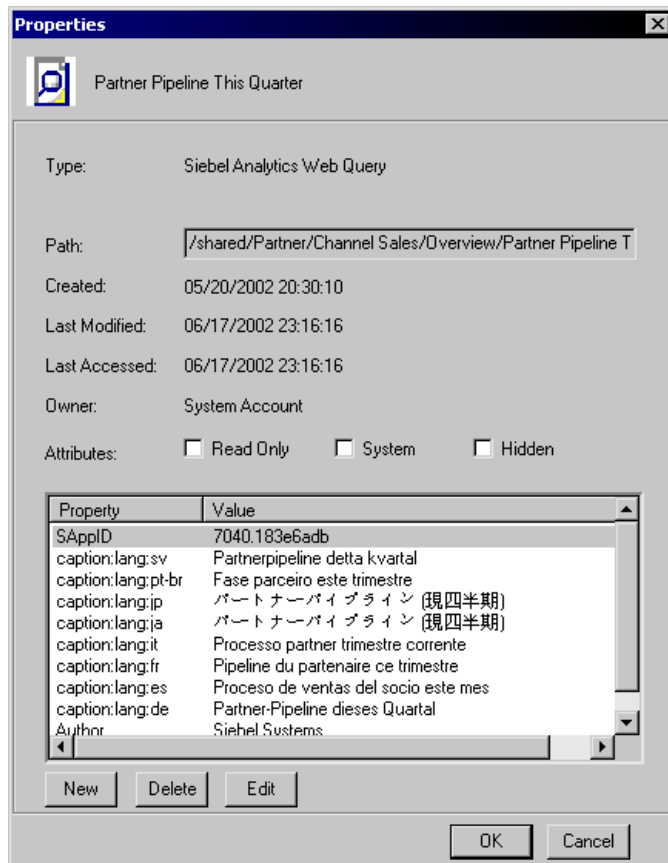


Figure 3. Properties Window

To hide an item from display in Siebel Analytics Web

- Select the Hidden option.

Copying and Pasting Content Between Siebel Analytics Web Catalogs

This section describes how to move content between Web Catalogs.

Web Catalogs are structured in hierarchical folders. When copying or merging items, remember to also copy any items that are associated with them, such as dashboard folders, request links, and requests. URL paths may need to be re-established after a copy or merge operation if the entire folder path is not copied, for example, if added to the dashboard as a link or text.

NOTE: If you want to upgrade your existing Web Catalog with a newer version received from Siebel Systems, see ["Updating the Siebel Analytics Web Catalog to a Newer Version"](#) on page 72.

To copy and paste content between Web Catalogs

- 1** Make backup copies of both Web Catalogs.
- 2** Choose File > Open from the Analytics Catalog Manager toolbar and select the first Web Catalog to open.

This should be the Web Catalog that you want to change. The name of the Web Catalog that you opened appears in the title bar.

TIP: It is recommended that you first open the Web Catalog that you want to change. If the catalogs have the same name, rename the second catalog before opening it.

- 3** Using the same instance of Analytics Catalog Manager, choose Choose File > Open from the Analytics Catalog Manager toolbar, and then select the second Web Catalog to open.

This should be the Web Catalog that contains the content you want to copy.

A second instance of Analytics Catalog Manager opens. The name of the second Web Catalog appears in the title bar of the second instance.

- 4** If necessary, reposition both instances of Analytics Catalog Manager on your screen so you can clearly see the title bars of both Analytics Catalog Manager instances.
- 5** To view the items that you can work with, expand the tree structure in the left pane, or double-click an item in the right pane.
- 6** To copy content, highlight the source item in the source (second) Web Catalog and choose Edit > Copy. Then, highlight the corresponding target item in the target (first) Web Catalog and choose Edit > Paste.

You can also use drag-and-drop to copy and paste content.

Updating the Siebel Analytics Web Catalog to a Newer Version

This section is for organizations that have Siebel Analytics applications and have customized Web Catalog content. It explains how to merge your current Web Catalog with a newer version received from Siebel Systems.

NOTE: If you made no changes to the Web Catalog distributed with version 7.5 or 7.7, this section does not apply to you. You can begin using the SiebelAnalytics.webcat Web Catalog distributed with version 7.7.1.

The update is done using Analytics Catalog Manager. The process compares the base Web Catalog distributed with the previous version with your customized Web Catalog to get a baseline of the changes, and then merges your existing Web Catalog content with the content from the previous version. This process preserves any site-specific changes that have been made to your Web Catalog, and allows Siebel Analytics Web administrators to accept or reject specific changes.

The update makes use of three Web Catalogs:

- The *Original Siebel Catalog*, which is the Web Catalog that you received with your currently-installed Siebel Analytics application. For most sites, this is the Web Catalog distributed with version 7.5 or 7.7. It is also distributed at the root level of the installation CD-ROM as the file SiebelAnalytics-n.n-GA.webcat, where n.n is the version number.
- The *Current Release Siebel Catalog*, which is the Web Catalog that is installed with version 7.7.1 as the file SiebelAnalytics.webcat.
- The *Modified Customer Catalog*, which is the Web Catalog that you are currently using. In the following procedure, you will copy and rename this to SiebelAnalytics.webcat.old.

To update the Web Catalog to a newer version

- 1 Make a backup copy of your Modified Customer Catalog, rename it to SiebelAnalytics.webcat.old, and move it to a temporary location.

This is to make sure that a copy of your current Web Catalog is available for use during the upgrade process.

- 2 Install the new software version received from Siebel Systems according to the instructions given in *Siebel Analytics Installation and Configuration Guide*.

This installs the Current Release Siebel Catalog, named SiebelAnalytics.webcat.

(If the software is already installed, you are prompted to uninstall it first. During the uninstall, if you select the option to keep your current Web Catalog, it is copied and renamed to SiebelAnalytics.webcat.old. You can use this Web Catalog, or the copy in the temporary location, during the upgrade process.)

- 3 Make sure that your current Siebel Analytics repository has been migrated to version 7.7.1. For instructions, see *Siebel Analytics Server Administration Guide*.
- 4 Copy the Original Siebel Catalog from the installation CD-ROM into the location that holds your Modified Customer Catalog.

- 5** Open Analytics Catalog Manager and open the Current Release Siebel Catalog, SiebelAnalytics.webcat.
- 6** Choose Tools > Upgrade Catalog.
The Upgrade Current Catalog window opens.
- 7** In the Initial Catalog area, browse to locate the Original Siebel Catalog, SiebelAnalytics-n.n-GA.webcat.
- 8** In the Current Catalog area, browse to locate your Modified Customer Catalog, SiebelAnalytics.webcat.old.
- 9** Click OK.

Analytics Catalog Manager generates a baseline of the changes and compares your existing Web Catalog content with the content in the new version, merges in any changes, produces a request highlighting differences, and allows you to indicate how you want differences handled. If the Web Catalogs have conflicting content, you can choose which Web Catalog the content should be taken from.

The end result is a merged Web Catalog that contains the site-specific changes, as well as new Siebel metadata. When the merge process completes, the Current Release Siebel Catalog that is loaded into Analytics Catalog Manager contains the merged content.

The merge process may take several minutes. A message alerts you when the merge is complete.

NOTE: The log file SiebelAnalyticsMigrationLog.txt holds information about the merge process. This log file is written to the location that holds the Web Catalog. If you see an error logged in the file, this means that the path in question had a problem that did not allow the merge mechanism to resolve the merge. No action was taken. If you want to merge that particular item, go into your original Web Catalog and merge it manually.

- 10** Save the Current Release Siebel Catalog.
This catalog contains the merged content.

Localizing Siebel Analytics Web Catalog Text Strings

For organizations that need to localize text strings in the Web Catalog, this section explains how to export the text strings for translation, and then expose them when translation is complete. You and your localization team are responsible for escaping characters properly and resolving any errors in the translated text strings.

The export process is based on Extensible Markup Language (XML). The export process creates one XML file for every first-level subfolder in the shared folder, in the format `foldernameCaptions.xml`, where `foldername` is the name of the subfolder in the shared folder. Each XML file contains the text strings for all content in the corresponding first-level folder and its subfolders.

For example, if the shared folder in the Web Catalog contains the first-level folders Marketing, Service, and Sales, then the export process creates three XML files:

- MarketingCaptions.xml
- ServiceCaptions.xml
- SalesCaptions.xml

After the content is translated, you will place these folders in the `SiebelAnalyticsData` directory. Their content is loaded when Siebel Analytics Web is started.

To export Web Catalog text strings

- 1** Stop the Analytics Web Server service.
- 2** Use Analytics Catalog Manager to open the Web Catalog that contains the text strings to be localized, and then choose Tools > Localization > Export.
- 3** Browse to select the location in which to write the output, and then click OK.

The export process may take several minutes.

- 4** Save the Web Catalog when prompted.
- 5** When the export process is complete, deliver the output file to your localization team.

You may need to make a copy of every output file for each language to be translated.

You can now restart the Analytics Web Server service and resume using Siebel Analytics Web.

To expose Web Catalog text strings

- 1 Place the translated XML files into their corresponding location in the SiebelAnalyticsData directory:

SiebelAnalyticsData\Web\Res\l_xx\Captions

where xx is the language extension, as shown in the following table.

Language Extension	Language
cs	Czech
da	Danish
de	German
en	English
es	Spanish
fi	Finnish
fr	French
it	Italian
ja	Japanese
ko	Korean
nl	Dutch
pt	Portuguese
pt-br	Brazilian Portuguese
sv	Swedish
zh	Chinese (Simplified)
zh-tw	Chinese (Traditional)

- 2 Restart the Analytics Web Server service to make the translated content available.

Recommendations For Working with the Siebel Analytics Web Catalog

This section gives recommendations for working with Web Catalog content.

CAUTION: Make sure that the Analytics Catalog Manager is accessible only to Siebel Analytics Web administrators. As no login is required, full privileges for operations are granted to anyone who uses it.

- Use Analytics Catalog Manager only when Siebel Analytics is not running. Never make modifications to an in-use Web Catalog.
- Always make backups of the Web Catalogs that you are working with. Also back up the .version file.
- When you want to work with two Web Catalogs, always open the second catalog from the Analytics Catalog Manager instance that you used to open the first catalog.
- When you are copying or pasting content from one Web Catalog to another, you need to stay within the same relative structure. For example, you can copy a request from a User folder to another User folder, but not from a User folder to a Shared folder.
- Copying and pasting into email is not supported.
- Do not attempt to reorder items in the Web Catalog using Analytics Catalog Manager.

Viewing Information About Siebel Intelligence Dashboards

This section explains how to use Analytics Catalog Manager to view information about dashboards. Organizations with Siebel Analytics applications can locate and view information about preconfigured dashboards.

This section contains the following topics:

- [“Exposing Dashboards and Requests in Siebel Analytics” on page 76](#)
- [“Locating Dashboard and Page Names in Siebel Analytics” on page 77](#)

Exposing Dashboards and Requests in Siebel Analytics

Depending on the Analytics options your organization purchased, the Siebel Analytics Web administrator may need to expose them before the associated dashboards and requests can be viewed in Siebel Analytics Web and in Analytics Catalog Manager. This applies to sites that have the following Siebel Analytics applications and options:

- Siebel Sales Analytics, with the Forecasting and Incentive Compensation options.
- Siebel Service Analytics, with the Universal Queuing, Email Response, and Agreements options.
- Siebel Sales Analytics, with the Forecasting and Incentive Compensation options.
- Siebel Partner Analytics, with the Partner Marketing, Partner ERM, and Partner ISS options.

These options need to be exposed using the administration feature in Siebel Analytics Web. For instructions, see *Siebel Analytics Installation and Configuration Guide*.

Locating Dashboard and Page Names in Siebel Analytics

In Analytics Catalog Manager, the Web Catalog distributed with Siebel Analytics applications has the following structure:

Web Catalog > shared folder > Siebel Analytics application name > _Portal folder > dashboard name > dashboard page name

You can view the contents of a dashboard page in XML by clicking the Edit XML button when viewing the properties of a dashboard page.

CAUTION: If you change the XML code, you are changing the representation of the object in the Web Catalog.

Using Analytics Catalog Manager to Rename Items in the Siebel Analytics Web Catalog

You can use Analytics Catalog Manager to rename items in the Web Catalog. This can be useful when you are migrating from a development environment to a production environment.

In production environments, you may prefer to use the Manage Catalog screen in the Siebel Analytics Web user interface to rename items. Doing so allows you to preserve references that other users might have to the prior name of the item. References are not preserved when you use Analytics Catalog Manager to rename items. For more information about the Manage Catalog screen, see [“Administering Items in the Siebel Analytics Web Catalog” on page 78](#).

Example Procedure: Renaming a Shared Siebel Intelligence Dashboard Using Analytics Catalog Manager

The following procedure provides the steps to rename a shared dashboard using Analytics Catalog Manager.

CAUTION: Do not rename the “My Dashboard” dashboards in the Users folder.

To rename a shared dashboard using Analytics Catalog Manager

- 1** Stop the Siebel Analytics Web Server service.
- 2** Make backup copies of your Web Catalog and the version file.
For more information about the version file, see [“How the Siebel Analytics Web Catalog Backup Process Works” on page 61](#).
- 3** Use Analytics Catalog Manager to open the Web Catalog and navigate to the dashboard you want to rename, for example, shared folder > _portal folder > dashboard name.

- 4 Right-click the dashboard name, choose Rename, and type a new name for the dashboard.
- 5 Save the Web Catalog.
- 6 Restart the Analytics Web Server service.

Administering Items in the Siebel Analytics Web Catalog

You administer shared Web Catalog folders through the Manage Catalog screen of Siebel Analytics Web. You can view folders and contents including hidden items, and create, rename, copy, move, and delete folders and contents. You can also take ownership of an item. (Taking ownership of an item allows only you to make changes to it. This is useful if a user needs assistance with, for example, a request.)

For information about changing permissions to an item in the Web Catalog, see ["About Setting Siebel Analytics Web Permissions" on page 94](#).

To display the shared Web Catalog folders

- 1 In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2 Click the link Manage Analytics Catalog.
The Manage Catalog screen appears.
- 3 Click the Shared Folder link.

To show hidden items

- Select the Show Hidden Items check box.

This allows you to see the following hidden items:

- `_Portal`
- `_Filters`
- `_Prefs`
- `_Alerts`
- `_iBots`
- `_Delivers`

NOTE: The availability of the Show Hidden Items check box is controlled by the See Hidden Items privilege. For more information, see ["Default Siebel Analytics Web Privilege Assignments" on page 100](#).

To create a new folder

- Click the link Create New Folder and follow the instructions on the screen.

To view the contents of a folder

- Click the name of the folder to see its content.

To take ownership of an item

- 1 Navigate to the item.
- 2 Click the Properties icon for the item.
The Item Properties screen appears.
- 3 If you have the appropriate authority, you can take ownership of the item or folder by clicking one of the following links:
 - Take Ownership of this item
 - Take Ownership of this item and all subitems

To rename a folder or an item

- 1 Navigate to the folder or item that you want to rename.
- 2 Click the Rename icon.
The Rename Item screen appears.
- 3 Type a new name for the item.
You can also type a description.
- 4 To preserve references that other users might have to the prior name of the item, select the following option:
Preserve references to the old name of this item
If you do not select this option, users referencing this item are no longer able to see it.
- 5 Click the Rename button.

To delete a folder or an item

- 1 Navigate to the folder that you want to delete.
- 2 Click the Delete icon for the folder.
The Confirm Item Deletion screen appears.

NOTE: When deleting shared folders or items, be aware that other users who have added shared items to their personal dashboards will no longer have access to them.

- 3 To confirm the delete, click Yes.

To copy or move an item

- 1** Navigate to the item.
- 2** Click Copy/Move icon for the item.
The Copy/Move Item Here screen appears.
- 3** Follow the instructions given on the screen.
 - To create a new folder, click the link Create New Folder and follow the instructions on the screen.
- 4** To show hidden items, select the Show Hidden Items check box.

This allows you to see the following hidden items:

- `_Portal`
- `_Filters`
- `_Prefs`
- `_Alerts`
- `_iBots`
- `_Delivers`

NOTE: The availability of the Show Hidden Items check box is controlled by the See Hidden Items privilege. For more information, see ["Default Siebel Analytics Web Privilege Assignments"](#) on page 100.

- 5** Click the Copy/Move Item Here button when you are done.

7

Managing Siebel Analytics Web Security

This chapter explains how to set up Siebel Analytics Web security so that users have only:

- Access to items in the Web Catalog that are appropriate to them.
- The ability to perform actions that are appropriate to them.

Use this chapter if your organization uses Siebel Analytics Stand-Alone or if your organization uses Siebel Analytics applications, but has created additional content outside of the applications.

This chapter contains the following topics:

- [“Overview of Siebel Analytics Web Security” on page 82](#)
- [“Types of Siebel Analytics Web Groups” on page 84](#)
- [“Administering Siebel Analytics Web Groups” on page 85](#)
- [“About Siebel Analytics Web User Authentication” on page 89](#)
- [“About Siebel Analytics Web Groups and Siebel Analytics Session Variables” on page 90](#)
- [“Inheritance of Siebel Analytics Web Permissions and Privileges” on page 91](#)
- [“About Setting Siebel Analytics Web Permissions” on page 94](#)
- [“Setting Siebel Analytics Web Permissions Through the Administration Screen” on page 96](#)
- [“Setting Siebel Analytics Web Permissions Through Analytics Catalog Manager” on page 97](#)
- [“About Setting Siebel Analytics Web Privileges” on page 99](#)
- [“Setting Siebel Analytics Web Privileges” on page 99](#)
- [“Default Siebel Analytics Web Privilege Assignments” on page 100](#)
- [“Guidelines for Configuring Siebel Analytics Web Security for the Web Catalog and Dashboards” on page 102](#)

Overview of Siebel Analytics Web Security

This section provides an overview of Siebel Analytics Web security. It contains the following topics:

- [“Where Siebel Analytics Web Security Settings Are Made” on page 82](#)
- [“Your Security Goals in Siebel Analytics Web” on page 82](#)
- [“About Access Control and Permissions in Siebel Analytics Web” on page 83](#)
- [“About User Rights and Privileges in Siebel Analytics Web” on page 83](#)
- [“About User Authentication in Siebel Analytics Web” on page 84](#)

Where Siebel Analytics Web Security Settings Are Made

Security settings that affect Siebel Analytics Web are made in the following Siebel Analytics components:

- **Server Administration Tool.** This is where you perform the following tasks:
 - Set permissions for business models, tables, columns, and subject areas.
 - Specify database access for each user.
 - Specify filters to limit the data accessible by users.
 - Set authentication options.

For more information, see *Siebel Analytics Server Administration Guide*.

- **Siebel Analytics Web.** This is where you set permissions to Web Catalog items, including dashboards, and the privilege to perform actions such as edit views, create iBots, and create prompts.
- **Catalog Manager.** This is where you set permissions to Web Catalog items, including dashboards.

Your Security Goals in Siebel Analytics Web

Your main security goals are to make sure that:

- Only appropriate people can log on and access Siebel Analytics Web. This is achieved by assigning logon rights and authenticating users through the Siebel Analytics Server. For more information about authentication, see [“About Siebel Analytics Web User Authentication” on page 89](#).
- Employees can access only the data that is appropriate to them. This is achieved by applying access control in the form of permissions.
- Employees have the ability to perform only actions that are appropriate to them. This is achieved by applying user rights in the form of privileges.

About Access Control and Permissions in Siebel Analytics Web

Access control defines the ability of an account to access a shared Web Catalog item. Catalog items are folders and requests, where folders are application folders, dashboard folders, and dashboard page folders.

An account is one of the following:

- An individual user.
- A Web Group that has one or more users as members.

Permissions describe the type of access to an object that an account is permitted. Examples are Read and Full Control.

Each Web Catalog item has an access control list that defines which accounts have which permissions to access the item. An access control list has the general form shown in [Table 4](#).

Table 4. Access Control List For a Catalog Item

Account	Permission
Web Group 1	Read
Web Group 3	Full Control
Web Group 8	Read
User 4	Read
User 9	Full Control
User 11	Full Control

For more information about permissions, see [“About Setting Siebel Analytics Web Permissions”](#) on page 94.

About User Rights and Privileges in Siebel Analytics Web

Privileges are the actions that users have the right to perform in Siebel Analytics Web. Example privileges are “Edit system-wide column formats” and “Create iBots.”

Privileges are managed by associating them with accounts, that is, individual users or Web Groups. A specific account is either granted or denied a specific privilege. These associations are created in privilege assignment tables.

The general form of a privilege assignment table is shown in [Table 5 on page 84](#). The Web Groups in the right column are granted the privileges in the left column.

Table 5. Privilege Assignment Table

Privilege	Accounts That Have Been Granted the Privilege
Privilege 1	Web Group 2, Web Group 4
Privilege 2	Web Group1, Web Group 3
Privilege 3	Web Group 1, user 3
Privilege 4	Web Group 1, user 1, user 4, user 6
Privilege 5	Web Group 2, Web Group 3, user 4

For more information about privileges, see [“About Setting Siebel Analytics Web Privileges” on page 99](#).

About User Authentication in Siebel Analytics Web

Authentication is the process of using a username and password to identify a someone who is logging on. Authenticated users are then given appropriate authorization to access a system, in this case Siebel Analytics Web. Siebel Analytics Web does not have its own authentication system; it relies on the authentication system built into the Siebel Analytics Server.

For more information about authentication, see [“About Siebel Analytics Web User Authentication” on page 89](#).

Types of Siebel Analytics Web Groups

Web Groups are defined by the system or by a Siebel Analytics Web administrator. When a user is assigned to a Web Group, the user becomes a member of that group. Web Group membership is used to determine the permissions and privileges that are associated with a user, either by explicit assignment or inheritance.

Web Groups can also be thought of as roles for users because they avoid ambiguity about which defaults, preferences, and so on, to assign directly to the user.

This section contains the following topics:

- [“System-Defined Web Groups in Siebel Analytics Web” on page 84](#)
- [“Administrator-Defined Web Groups in Siebel Analytics Web” on page 85](#)

System-Defined Web Groups in Siebel Analytics Web

System-defined Web Groups are preconfigured and required for successful Siebel Analytics Web operations. There are three types of system-defined Web Groups:

- **Everyone.** By default, all users belong to the Everyone group. This is why the group does not appear on the Groups and Users screen of the application.
- **Authenticated Users.** When a user is authenticated by the Analytics server, the user automatically becomes a member of the Authenticated Users group. The Authenticated Users group is itself a member of the Everyone group.
- **Web Administrators.** Members of the Web Administrators group are users who are Siebel Analytics Web administrators. The default member of this group is the Siebel Analytics Web administrator. By default, only members of the Web Administrators group have access to administrative functions, but this can be changed by changing privilege assignments.

Administrator-Defined Web Groups in Siebel Analytics Web

Administrator-defined Web Groups are created by the Siebel Analytics Web administrator. You can create an unlimited number of Web Groups in Siebel Analytics Web.

NOTE: For organizations that have Siebel Analytics applications, preconfigured groups are set up with preconfigured responsibilities. For more information, see *Siebel Analytics Installation and Configuration Guide*.

The Web Groups that you define should be used to categorize users who require similar access to dashboards and content. You should plan your Web Catalog folder structure and Web Groups together to create a coherent security model. For more information about Web Catalog structure, see [Chapter 6, "Administering the Siebel Analytics Web Catalog."](#) For more information about how Web Group membership can be passed from the Siebel Analytics Server, see ["About Siebel Analytics Web User Authentication" on page 89.](#)

Administering Siebel Analytics Web Groups

When you create a Web Group, a group folder is automatically created in the Web Catalog. All members of the Web Group are given Read permissions to this folder.

To create a Web Group

- 1 In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2 Click the following link:
Manage Web Groups and Users
- 3 Under Existing Web Groups, scroll down and click the following link:
Create a new Web Group
The Create Web Group screen appears.

- 4 Enter a name for the group in the Group Name text box.

The name of the Web Group must not match the name of any user who will log on to Siebel Analytics Web. This match is not case sensitive. For example, the user name FOO2 matches the Web Group named foo2 or FoO2. If a user and a Web Group share the same name, the user receives an Invalid Account message when attempting to log on to Siebel Analytics Web.

NOTE: If the name of a Siebel Analytics Server group (which is set up in the Siebel Analytics Administration Tool) matches the name of a Web Group, members of the Siebel Analytics Server group automatically become members of the Web Group when they log on to Siebel Analytics Web. Their membership ceases when they log off. The name of the user never appears to a Siebel Analytics Web administrator as a member of the Web Group. The user appears only as a member of the Authenticated Users group. If you prefer to use Web Group names that match Siebel Analytics Server group names, but want users to be viewable as members of the group, with persistent group membership, you must explicitly add the users to the Web Group using the Web Security: Groups and Users screen.

- 5 (Optional.) Enter a password for the group in the Password text box, and type the password again in the Verify Password text box.

Users are prompted for the password when they attempt to join the group.

- 6 In the Dashboard Name text box, type a name for the dashboard.

You can assign an existing dashboard to the Web Group or create a new dashboard for the Web Group. Whichever option you choose, all members of the Web Group are granted Read access to the designated, default dashboard. If you do not want to create a dashboard now, you can create one later from the Manage Dashboards screen.

If you do create a new, empty dashboard, it is created within a new, like-named shared folder. Group members will have Read permission to this folder.

- 7 In the Dashboard Builder box, specify the name of the user or group that has permission to change the contents of the dashboard. Separate multiple entries with a comma, for example, user1,salesgroup.

- 8 Click Finished.

NOTE: Siebel Analytics Web automatically gives a newly created Web Group Read permission to the automatically created group folder. For manually created group folders, you should set the permissions to the Group folder for the appropriate groups to Read.

To delete a Web Group

- 1 In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2 Click the following link:
Manage Web Groups and Users

- 3 Under Existing Web Groups, in the Web Groups table, locate the group you want to delete and click the Delete icon.

The Confirm Group Deletion screen appears.

- 4 Click Yes to confirm the delete.
- 5 In the Web Security: Groups and Users screen, click Finished.

NOTE: The procedure for deleting a Web Group does not delete any group definitions in a Siebel Analytics Repository.

To add a user or group to an existing group

- 1 In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2 Click the following link:
Manage Web Groups and Users
- 3 Under Existing Web Groups, in the Web Groups table, locate the group whose membership you want to change.
- 4 Click the Edit icon.
The Edit Web Group screen appears.
- 5 In the Group Membership area, click the link Add New Member.
The Add Member to Group screen appears.
- 6 In the Member Name text box, type the name of the user or group you want to add and click the Add Member button.
The Edit Web Group screen appears.
The Group Membership area now shows the list of the current members of the group.
- 7 Click Finished.

To delete a user or group from an existing group

- 1 In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2 Click the following link:
Manage Web Groups and Users

- 3 Under Existing Web Groups, in the Web Groups table, locate the group whose membership you want to change and click the Edit icon.

The Edit Web Group screen appears.

- 4 Under Group Membership, in the Members table, locate the member you want to delete and click the Remove icon.
- 5 (Optional.) At the Edit Web Group screen, change the password for the group.
- 6 Click Finished.

NOTE: You cannot delete system-defined Web Groups or the user name Administrator.

To change the password for a group

- 1 In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2 Click the following link:
Manage Web Groups and Users
- 3 Under Existing Web Groups, in the Web Groups table, locate the group whose password you want to change and click the Edit icon.
The Edit Web Group screen appears.
The Password and Verify Password boxes are blank.
- 4 Under Group Properties, in the Password box, type the new password.
- 5 In the Verify Password box, type the password a second time to verify it.
- 6 Click Finished.

To delete a user from Siebel Analytics Web

- 1 Under Authenticated Web Users, in the Web User and Group Membership table, locate the user you want to delete and click the Delete icon.
The Confirm User Deletion screen appears.
- 2 Click Yes to confirm the delete.
- 3 In the Web Security: Groups and Users screen, click Finished.

NOTE: The procedure for deleting a user from Siebel Analytics Web does not delete any user definitions in a Siebel Analytics Repository. If the user logs on again, their Siebel Analytics Web entry is recreated.

About Siebel Analytics Web User Authentication

When users log on, they are authenticated by the Siebel Analytics Server using the authentication method specified in the Siebel Analytics Server configuration file NQSConfig.INI.

This section briefly describes the authentication methods that are relevant to Siebel Analytics Web users, in the context of Siebel Analytics Web. It contains the following topics:

- [“Siebel Analytics LDAP or ADSI Authentication” on page 89](#)
- [“Siebel Analytics External Table Authentication” on page 89](#)
- [“Siebel Analytics Database Authentication” on page 90](#)
- [“Siebel Analytics Internal Authentication” on page 90](#)

For detailed information about authentication options, see *Siebel Analytics Server Administration Guide*.

Siebel Analytics LDAP or ADSI Authentication

If you are using LDAP or ADSI authentication to provide Siebel Analytics Server access control, you may also configure your LDAP or ADSI server to provide other security information. For example, you could configure the name that is displayed in the Welcome text when the user logs on to Siebel Analytics Web, and is specific to the Web Groups to which the user belongs. This information is contained in LDAP variables, which are passed to the Analytics server session variables during the process of user authentication.

The variable USER is a system session variable that is used with LDAP or ADSI authentication. Whenever users log on to Siebel Analytics Web, their usernames and passwords are passed to the LDAP or ADSI server for authentication. After successful authentication, other system or non-system session variables for each user can be populated from information returned by the LDAP or ADSI server.

For more information about session variables, see [“About Siebel Analytics Web Groups and Siebel Analytics Session Variables” on page 90](#).

Siebel Analytics External Table Authentication

If you are using an external database table for authentication, the table can contain additional access control information. This includes the name that is displayed in the Welcome text when the user logs on to Siebel Analytics Web, and the Web Groups to which the user belongs.

Whenever users log in, their usernames and passwords are authenticated through SQL that queries this database table for authentication. After successful authentication, the results of this SQL query can be used to populate other system and non-system session variables for each user.

For more information about session variables, see [“About Siebel Analytics Web Groups and Siebel Analytics Session Variables” on page 90](#).

Siebel Analytics Database Authentication

The Siebel Analytics Server can authenticate users through database logons. When a user attempts to log on to Siebel Analytics Web, the Analytics server attempts to use the logon name and password to connect to the authentication database, using the first connection pool associated with it. If this connection succeeds, the user is considered to be authenticated successfully.

Database authentication provides no mechanism to return additional access control information, such as the user's display name or Web Group membership. If you are using database authentication, alone or in conjunction with external table authentication, you need to explicitly add users to the appropriate Web Group.

NOTE: Siebel Delivers does not work with database authentication. For more information, see ["About Siebel Delivers iBots and Impersonation"](#) on page 43.

Siebel Analytics Internal Authentication

The Siebel Analytics Server internal authentication method has no way to return additional access control information. If you are using Analytics server internal authentication, you need to explicitly add users to the appropriate Web Group, because the GROUP variable is not used with internal authentication.

About Siebel Analytics Web Groups and Siebel Analytics Session Variables

If the Siebel Analytics Server is using an external table or LDAP server for authentication, you must configure system session variables in the repository.

A session variable block contains the SQL statement that is issued when each session begins. This block can contain system session variables with fixed meanings (such as USER, GROUP, DISPLAYNAME, and WEBGROUP) and other non-system session variables unique to your particular environment. See *Siebel Analytics Server Administration Guide* for additional information about using session variables.

You should also create a Web group to match each possible value returned in the GROUP or WEBGROUPS variable for which you want to control privileges and permissions to Siebel Analytics Web components and requests.

This section contains the following topics:

- ["About the Siebel Analytics GROUP Session Variable"](#) on page 91
- ["About the Siebel Analytics WEBGROUPS Session Variable"](#) on page 91
- ["Setting Permissions and Privileges in Siebel Analytics Web"](#) on page 91

About the Siebel Analytics GROUP Session Variable

The GROUP variable contains one or more group names, separated by semicolons, that are also used by the Analytics server for security and content filtering. In many cases, these same groups are sufficient to control access to Siebel Analytics Web content. Siebel Analytics applications have been preconfigured to use this GROUP variable technique to inherit group memberships from the Analytics server.

About the Siebel Analytics WEBGROUPS Session Variable

The WEBGROUPS session variable allows greater flexibility because you can define Web Groups that categorize the roles, or classes, of Web users. For example, you might create the following groups:

- A Basic group that can only access the dashboard.
- A Standard group that has minimal access to Siebel Answers.
- A Power Users group that has full access to Siebel Answers and minimal access to iBots (Siebel Delivers).
- An Administrative group with full access to all features.

Setting Permissions and Privileges in Siebel Analytics Web

When you have set up the Web Groups, create a Web Catalog folder structure and assign appropriate privileges and permissions to each group. Keep in mind that each user can be associated with multiple roles by being a member of multiple Web Groups. Although WEBGROUPS can be used to control access to Web Catalog content (permissions), usually GROUP controls content and WEBGROUPS controls the ability to perform actions (privileges).

NOTE: Some GROUPs may not have corresponding Web content. In this case, when you create the group, you can delete the group folder created for the group in the /Shared folder, and give the group permission to the other group folders and subject area folders as appropriate (see Chapter 6, "Administering the Siebel Analytics Web Catalog" for more information).

For more information about the sequence in which to set up security, see "Guidelines for Configuring Siebel Analytics Web Security for the Web Catalog and Dashboards" on page 102.

For more information about permissions, see "About Setting Siebel Analytics Web Permissions" on page 94.

For more information about privileges, see "About Setting Siebel Analytics Web Privileges" on page 99.

Inheritance of Siebel Analytics Web Permissions and Privileges

Permissions and privileges can be assigned to users directly or through membership in groups. From another perspective, permissions and privileges can be assigned explicitly or effectively. Effective permissions and privileges are assigned indirectly through Web Group inheritance, which is the recommended way to set up your security. Permissions and privilege inheritance occurs when one Web Group is a member of another Web Group.

This section contains the following topics:

- [“Rules For Inheritance in Siebel Analytics Web” on page 92](#)
- [“Example of Inherited Privileges in Siebel Analytics Web” on page 93](#)

Rules For Inheritance in Siebel Analytics Web

- Any permissions or privileges given explicitly to a user override any permissions or privileges inherited from the Web Group to which the user belongs.

As an example, All Authenticated Users have access to Dashboard X, except for George.

- If a user belongs to two groups and both groups are assigned permissions the least restrictive permissions are given to the user.

For example, if one group allows Read access and another allows Change access, the least restrictive access would be granted; in this example, Change access.

NOTE: The exception to this is if one of the two groups is explicitly denied the permissions, in which case the user is denied.

- If a user belongs to Web Group X, and Web Group X belongs to Web Group Y, any rule assigned to group X overrides any rule assigned to group Y.

For example, if Marketing has Read permissions, Marketing Administrators, which is a member of Marketing, can have Full Control permissions.

- Explicitly denying access takes precedence over any other permissions or privileges.

When assigning permissions or privileges it often useful to look at resolved permissions for users and groups at the bottom of the screen to make sure that everyone is inheriting correctly.

Example of Inherited Privileges in Siebel Analytics Web

Figure 4 shows an example of how privileges are inherited through Web Groups.

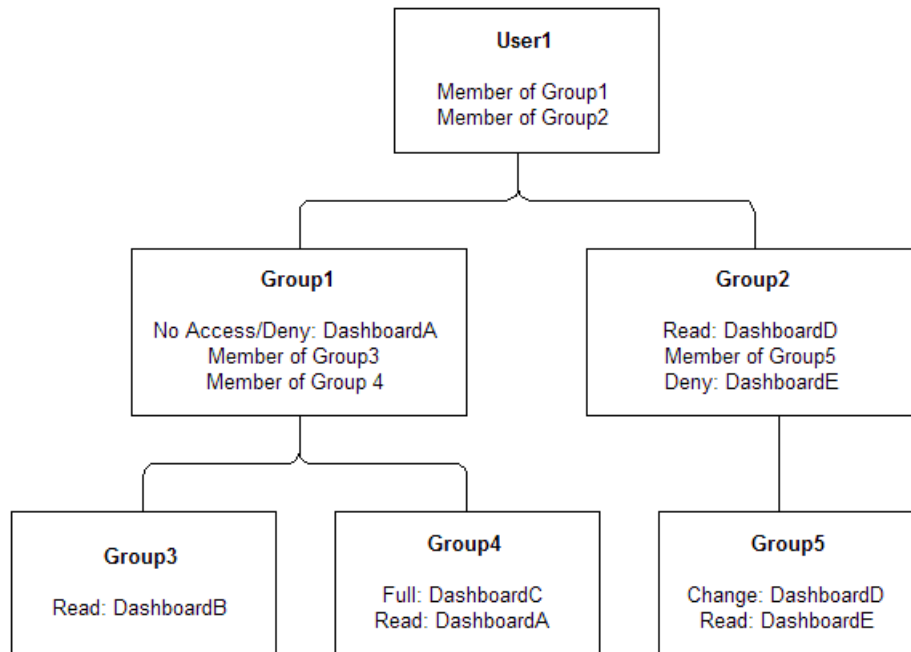


Figure 4. Example of Web Group Privilege Inheritance

In this example:

- User1 is a direct member of Group 1 and Group 2, and is an indirect member of Group 3, Group 4, and Group 5.
- The permissions and privileges from Group 1 are no access to DashboardA, Read access to DashboardB, and Full Control over DashboardC.
- If permissions and privileges are conflicting, the least restrictive level of authority is granted. Therefore, the inherited permissions and privileges from Group 2 include Change and Delete access to DashboardD.
- Specifically prohibiting access always takes precedence over any other settings. Therefore, Group 1's denial of access to DashboardA overrides Group 4's Read access. The result is that Group 1 provides no access to DashboardA. Likewise, Group 5 provides no access to DashboardE because access to it is explicitly denied in Group2.

The total permissions and privileges granted to User1 are as follows:

- No access to DashboardA and DashboardE because access is specifically denied.
- Read access to DashboardB.
- Full Control over DashboardC.
- Change and Delete access to DashboardD.

TIP: It is recommended that you do not add the default Everyone or Authenticated Users Web Groups to any other Web Groups that you create. This makes sure that only the desired Web Groups (and users) have the specified permissions and privileges, by preventing users or authenticated users from unintentionally inheriting permissions and privileges from another Web Group.

About Setting Siebel Analytics Web Permissions

Permissions are used to control access to shared information contained in:

- Siebel Analytics Web Catalog items
- Siebel Intelligence Dashboards

Permissions, which may be explicitly set or inherited, are configured from:

- Siebel Analytics Web Administration screen
- Analytics Catalog Manager

To set permissions in the Web Catalog using Analytics Catalog Manager, Siebel Analytics Web must not be running. Use this option when you are working in a development environment or when you plan to make many changes. You can set permissions from the level of the application all the way down to individual requests in either Siebel Analytics Web or Siebel Analytics Web Catalog.

This section contains the following topics:

- [“Types of Permissions in Siebel Analytics Web” on page 94](#)
- [“Recommendations For Setting Permissions in Siebel Analytics Web” on page 95](#)

Types of Permissions in Siebel Analytics Web

Siebel Analytics Web supports four permissions:

- **No Access.** Access is not allowed for this user or group. Explicitly denying access takes precedence over any other permission.
- **Read.** Authority given to view the contents of the item, folder or dashboard, but cannot make any changes.

- **Change/Delete.** Authority given to view content, and make changes or delete the content.
- **Full Control.** Authority given to view content, make changes or delete the content, set permissions, and delete the item, folder or dashboard.

Recommendations For Setting Permissions in Siebel Analytics Web

Follow these recommendations when setting permissions:

- Assign permissions through Web Group membership, even if you want to assign permissions for a single user. For more information, see ["Types of Siebel Analytics Web Groups" on page 84](#).
- Set the permission to the Group folder for the appropriate groups to Read.
- For groups (or users, if necessary) that are going to be modifying the dashboards and dashboard content accessible to the group, set the permissions for the group to Full Control. This is often a dashboard or content builder group. While allowing change and delete control, Full Control also allows the specified group (or user) to set permissions, and to delete the item, folder, or dashboard.
- For each Subject Area, grant Read permissions to the corresponding Subject Area folder within the Requests folder (and everything it contains). Make sure that the Authenticated Users and Everyone groups have no access effective permission to the Subject Area folder.
- For groups that should be able to save requests for public use against a given Subject Area, grant them Full Control to the Subject Area folder and everything it contains, and likewise for the Common folder. See the Change Item Permissions help for details on managing permissions for folders, items, and dashboards.
- To make sure that only members of the designated Web Groups (or users) have access to Siebel Analytics Web Catalog folders, folder content, and Siebel Intelligence Dashboards, do not set explicit permissions for the default Web Groups Authenticated Users or Everyone.

NOTE: Siebel Analytics Web does not allow you to remove permissions for yourself or for the administrator. This prevents you from locking yourself out of an item, folder, or dashboard.

TIP: If you want to provide a place for all users within a group to share requests with each other, create a folder under the Subject Area folder called, for example, Share or Publish, and give the entire group Change/Delete permission to just that folder.

Setting Siebel Analytics Web Permissions Through the Administration Screen

You can change permissions to Web Catalog items through the Administration screen of Siebel Analytics Web.

To change permissions for a shared dashboard

- 1** In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2** Click the link Manage Intelligence Dashboards.
- 3** In the row of the dashboard for which you want to change permissions, click the Permissions icon. The Change Item Permissions screen appears.
- 4** In the access control list, select a user or group, and click the corresponding link to toggle through the types of permissions.
- 5** Click the following link, if appropriate:
Replace permissions with parent folder's permissions
- 6** Select one or both of the following options, as appropriate:
 - Apply permissions to subfolders
 - Apply permissions to items within folder
- 7** Click Finished.
- 8** In the Manage Dashboards screen, click Finished.

To change permissions for a dashboard page

- 1** In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2** Click the link Manage Intelligence Dashboards.
- 3** In the row of the dashboard for which you want to change permissions, click the Properties icon.
- 4** In the Existing Pages area, identify the page and click the associated Security icon.
- 5** In the access control list, select a user or group, and click the corresponding link to toggle through the types of permissions.

- 6 Click the following link, if appropriate:
Replace permissions with parent folder's permissions
- 7 Select one or both of the following options, as appropriate:
 - Apply permissions to subfolders
 - Apply permissions to items within folder
- 8 Click Finished, and then click either Yes or Yes All to confirm the override of permissions.
- 9 In the Dashboard Properties page, click Finished.
- 10 In the Manage Dashboards page, click Finished.

To change permissions for a shared Web Catalog item

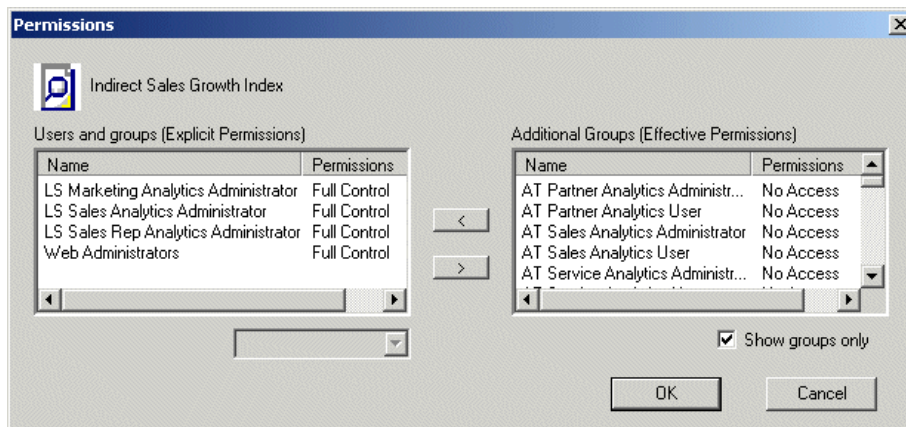
- 1 In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2 Click the link Manage Analytics Catalog.
- 3 Click the Shared Folder link to make sure you are working with shared folders.
- 4 Click a folder link and drill down to the relevant item.
- 5 In the row of the relevant Web Catalog item, click the Permissions icon.
The access control list for the item appears.
- 6 Identify the user or group that has explicit access to this item and whose permission you want to change.
- 7 Click the link next to the group or user until the permission that you want to assign appears.
- 8 Click Finished.
- 9 In the Confirm Override of Permissions section, click Yes to confirm.

Setting Siebel Analytics Web Permissions Through Analytics Catalog Manager

You can change permissions to Web Catalog items through Analytics Catalog Manager. For general information about Analytics Catalog Manager, see [Chapter 6, "Administering the Siebel Analytics Web Catalog."](#)

To set permissions

- 1 Open Analytics Catalog Manager (see “About Siebel Analytics Catalog Manager” on page 66).
- 2 Navigate to an item.
- 3 To review permissions for the item, right-click the item in the Name list and select Permissions.



The Explicit Permissions list on the left side of the window shows the users and groups that have explicit permissions granted to this item. The Effective Permissions list on the right side of the window shows the users and groups that have access granted though group inheritance, and users and groups that have no access to the request.

Permission	What It Means
R	Read permission.
W	Write permission
X	Traverse Folder permission. You can view the folders within this folder.
D	Delete permission.
P	Change Permission authority. You can alter the permissions on the item.
O	Owner permission, also known as Full Control. This includes the permissions in this table and means that you have full control over the item. This is the level of authority granted by default to the preconfigured Administrator user ID.

- 4 If you need to move a user or group into the Explicit Permissions list, select the name in the Effective Permissions list and click the left arrow button (<).

NOTE: To change a permission for user or group, it must be in the Explicit Permissions list. To view groups only, select the option Show groups only.

- 5 Select a user or group in the Explicit Permissions list.
- 6 Select the new permission from the drop-down list following the Explicit Permissions list.
- 7 Click OK to accept the changes.

8 Close the Permissions window.

NOTE: If you move a user or group from the Explicit Permissions list to the Effective Permissions list, the user or group privileges are reset to No Access. To move users or groups from one window to another, highlight them and click the right or left arrow button as appropriate.

About Setting Siebel Analytics Web Privileges

Privileges are the actions that users have the right to perform in Siebel Analytics Web. They are managed by associating them with accounts, that is, individual users or Web Groups. A specific account is either granted or denied a specific privilege. These associations are created in privilege assignment tables.

Like permissions, privileges are either explicitly set or inherited through group membership. Explicitly denying a privilege takes precedence over any granted, inherited privilege. For example, if a user is explicitly denied access to the privilege to edit column formulas in Siebel Answers, but is a member of a group that has inherited the privilege, the user cannot edit column formulas.

Unlike permissions, privileges are more commonly granted to the Everyone system Web Group. This allows users access to common Siebel Analytics Web features and functions.

For a list of some Siebel Analytics Web privileges, see ["Default Siebel Analytics Web Privilege Assignments"](#) on page 100.

Setting Siebel Analytics Web Privileges

The following procedures are used to administer privileges.

To assign a user or group to a privilege

- 1 In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2 Click the Manage Privileges link.
- 3 Locate the privilege you want to change.
- 4 Click the user or Web Group name on the same row as the privilege.

The Privilege screen appears.

The screen contains two tables. The top table lists Web Groups and users with explicitly assigned privileges. The bottom table lists Web groups with inherited access (effective permissions) to this privilege.

- 5 (Optional.) To toggle the display to include users with inherited access, click the following link:
Show users and groups
- 6 In the bottom table, identify the group or user to allow explicit access and click the Add link on the same row.
The Web group or user is added to the top table.

NOTE: By default, a user who creates an item has the permission to change it. However, in some cases, this privilege should be disabled. Make the appropriate changes to deny the target user or group access to the Admin: Catalog Change Permissions privilege.

To change explicit access to a privilege

- 1 In Siebel Analytics Web, do one of the following:
 - If you are running Siebel Analytics stand-alone, click the Admin link.
 - If you are using a Siebel Analytics application, choose View > Site Map and access Analytics Administration.
- 2 Click the Manage Privileges link.
- 3 Locate the privilege you want to change in the upper table.
- 4 Do one of the following:
 - Click the link to toggle between Granted and Denied.
 - Click the Remove Permissions icon to delete explicit access to the privilege. In this case, the Web group or user moves to the bottom table, displaying inherited permissions.
- 5 Click Finished.

Default Siebel Analytics Web Privilege Assignments

Table 6 lists some privileges that can be controlled, along with the Web Group that is granted access to that privilege by default.

These privileges apply to Siebel Analytics Stand-Alone only. If you are using Siebel Analytics applications, see *Siebel Analytics Installation and Configuration Guide* for information about preconfigured privileges, called responsibilities.

Table 6. Privileges and Default Settings for Siebel Analytics Stand-Alone

Component	Privilege Description	Web Group Granted Permission
Access	Access to Siebel Answers	Everyone
	Access to Siebel Delivers and iBots	Everyone
	Access to Siebel Analytics Web Administration	Web Administrators
Admin: Catalog	Change Permissions	Everyone
Admin: General	Manage Sessions	Web Administrator
	Manage Dashboards	Web Administrators
Admin: Security	Manage Web Groups and Users	Web Administrators
	Manage Privileges	Web Administrators
	Take Ownership of Catalog Objects	Web Administrators
Catalog	Personal Storage (My Folders and My Dashboard)	Everyone
Formatting	Edit system-wide column formats	Web Administrators
	Edit personal column formats	No Access
Siebel Answers	Create Views	Everyone
	Create Prompts	Everyone
	Access the Advanced tab	Everyone
	Edit Column formulas	Everyone
	Edit Column filters	Everyone
	Advanced SQL	Everyone
Siebel Delivers and iBots	Retrieve delivery destinations for iBots (system call)	Web Administrators
	Create iBots	Everyone
	Publish iBots for subscription	Everyone
	Deliver iBots to specific or dynamically determined users	Web Administrators
	Chain iBots together	Everyone
	Chain iBots to custom scripts	Web Administrators

Table 6. Privileges and Default Settings for Siebel Analytics Stand-Alone

Component	Privilege Description	Web Group Granted Permission
Subject Area (by its name)	Access within Siebel Answers	Everyone
View: Chart	Add and Edit Chart View	Everyone
View: Column Filter	Add and Edit Column Filter View	Everyone
View: Compound	Add and Edit Compound View	Everyone
View: Filters	Add and Edit Filters View	Everyone
View: Global Filters	Add and Edit Global Filter View	Everyone
View: Image	Add and Edit Image View	Everyone
View: Logical SQL	Add and Edit Logical SQL View	Everyone
View: Narrative	Add and Edit Narrative View	Everyone
View: Pivot Table	Add and Edit Pivot Table	Everyone
View: Question	Add and Edit Question View	Everyone
View: Static Text	Add and Edit Static Text View	Everyone
View: Table	Add and Edit Table View	Everyone
View: Ticker	Add and Edit Ticker View	Everyone
View: Title	Add and Edit Title View	Everyone

Guidelines for Configuring Siebel Analytics Web Security for the Web Catalog and Dashboards

To set up a secure Web Catalog and secure dashboards, you must understand the information presented in the previous chapters, because you will be working with Web Catalog, dashboards, and Web Groups.

This section contains the following topics:

- [“Creating Siebel Analytics Web Groups” on page 103](#)
- [“Setting Up the Siebel Analytics Web Catalog Structure” on page 103](#)
- [“Setting Permissions To Siebel Analytics Web Catalog Items” on page 104](#)
- [“Creating Shared Siebel Intelligence Dashboards” on page 105](#)
- [“Adding Shared Siebel Intelligence Dashboards Pages and Content” on page 105](#)
- [“Adding Shared Siebel Analytics Content” on page 106](#)
- [“Testing the Siebel Intelligence Dashboards” on page 106](#)

- “Setting Up a Virtual Directory For Shared Siebel Analytics Documents” on page 107
- “Releasing Siebel Intelligence Dashboards To the User Community” on page 107

Creating Siebel Analytics Web Groups

When you create a Web Group, a shared Web Catalog group folder is automatically created. For more information about Web Groups, see “Types of Siebel Analytics Web Groups” on page 84. For more information about the group folder, see [Setting Up the Siebel Analytics Web Catalog Structure](#).

Setting Up the Siebel Analytics Web Catalog Structure

The Web Catalog has two main folders:

- **/Shared.** Contains the personal storage and My Dashboards for each user.
- **/User.** Contains shared folders, shared dashboards, and shared dashboard content.

Figure 5 shows the recommended higher-level folder structure for the Web Catalog.

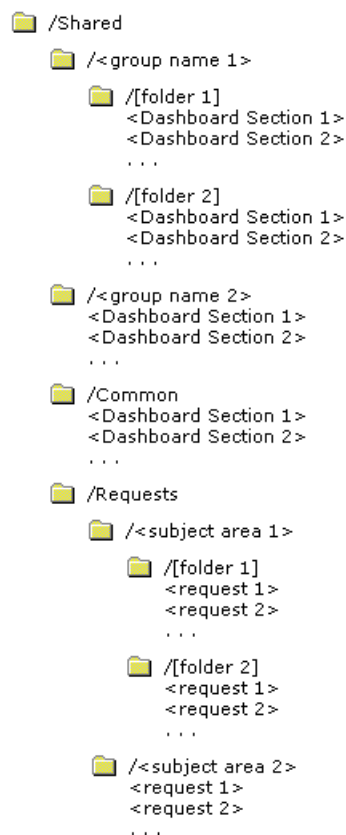


Figure 5. Recommended Catalog Folder Structure

The Web Catalog structure shown in [Figure 5](#) makes it easier for users and administrators to reorganize content and make shared dashboard sections available. This, in turn, facilitates My Dashboard creation by allowing users to select from shared content.

Items shown within brackets ([]) are optional. Items shown within angle brackets (< >) should be replaced with the appropriate name.

Group Folder

When you create a Web Group, the system automatically creates a shared folder for the group. All members of the Web Group are automatically given Read permissions to this folder. These permissions are inherited by any subfolders that you create.

Group folders hold shared dashboard content that pertains to only members of the Web Group. The shared content can be further organized into subfolders under the Group folder.

NOTE: You may want to remove this folder and grant group permissions to other folders if there is no group-specific content.

Common Folder

Dashboard sections that are shared across groups are saved in a Common folder under the /Shared folder. Content can be organized into subfolders under the Common folder.

Requests Folder

When you create requests in Siebel Answers that you want to share, save them in a Requests folder in the /Shared folder.

Create a folder for each subject area in the Requests folder for storing requests against that subject area. This allows you to manage permissions at the level of the subject area. If two or more subject areas are closely related, so that users with permission to one would almost always have permission to the other, you could create a single folder to store requests against both subject areas.

NOTE: If a user is given permission to a request in the Web Catalog that references a Subject Area to which the user does not have permission, the Siebel Analytics Server still prevents the user from executing the request.

In cases where you have requests that span subject areas (requests that involve SQL subqueries), you can put them in the folder for any of the subject areas, or create a new folder for users that have permission to these subject areas.

For more information about working with the Web Catalog, see [Chapter 6, "Administering the Siebel Analytics Web Catalog."](#)

Setting Permissions To Siebel Analytics Web Catalog Items

Before setting permissions to the Web Catalog items you have created, review the information in ["About Setting Siebel Analytics Web Permissions" on page 94.](#)

Creating Shared Siebel Intelligence Dashboards

After setting up the Web Catalog structure and setting permissions, you can create shared dashboards and content for reuse by others. If you did not specify a dashboard when creating a group, you can create one now, selecting the appropriate group folder.

The advantage to creating shared dashboards is that sections that are created in the shared dashboard are actually shortcuts to folders in the /Shared folder. As such, you can remove them and add them again in a different column, page, or even a different dashboard. Users can create a My Dashboard from existing shared sections by clicking the Add Folder link and selecting the appropriate folder from the /Shared/Group or /Shared/Common folders in the Web Catalog.

If you plan to allow multiple users to modify the Web Group's default dashboard, consider putting these users into another group. For example, suppose you create a Web Group called Sales and create a default dashboard called SalesHome. Of the 40 users that are members of the Sales group, suppose that there are three who need to have the ability to create and modify content for the SalesHome dashboard. It is recommended that you create a SalesAdmin group, with the same permissions of the primary Sales group. Add the three users who are allowed to make changes to the SalesHome dashboard and content to this new SalesAdmin group, and give this group the appropriate permissions to the Web Catalog. This allows them to create and modify content for the SalesHome dashboard. If a user no longer requires the ability to modify dashboard content, you can change the user's group membership to Sales. If an existing Sales group member needs to have the ability to create dashboard content, the user's group membership can be changed to SalesAdmin.

Dashboards are stored in a special folder, _Portal, that is hidden (unless the option to show hidden items is checked when working with the Web Catalog). The hidden _Portal folder is located directly underneath a group folder. Because the dashboard is contained in the Group folder, all the permissions you set to the group folder are inherited.

You can create multiple dashboards within a group folder, each of which has its own folder in the /_Portal folder, named from the dashboard name that you assign.

Underneath the specific dashboard folder, for example, /_Portal/SalesGroup Dashboard, are the pages for the dashboard.

For more information about creating shared dashboards, see ["Creating and Deleting Shared Siebel Intelligence Dashboards" on page 49](#).

Adding Shared Siebel Intelligence Dashboards Pages and Content

After you have created dashboards, you can add pages and content.

Adding Pages and Content

For information about adding pages and columns, see *Siebel Analytics User Guide*.

Adding Sections

A section is a folder, or a shortcut to a folder, that appears within a dashboard. For the procedure for adding sections to a dashboard, see ["Creating and Deleting Shared Siebel Intelligence Dashboards" on page 49](#).

When adding requests from Siebel Answers to a section, do one of the following:

- Include requests previously saved to the Subject Area folders.
- Create a new request, save it in the appropriate Subject Area folder, and add it to the shared section using the Existing Request link.

This technique is preferred for several reasons. The permissions on the Subject Area folders automatically filter requests from the dashboard from users that might have dashboard permission, but not permission to certain subject areas. It is easy to reference the same request in multiple dashboard sections, you can change it once, and have it reflected in all sections.

If you are working with content that is specific to a number of group folders, you might want to create a new folder directly underneath the /Shared folder to use, and set permissions to the new folder to Read for the appropriate groups.

Adding Shared Siebel Analytics Content

You can create shared content that can be used within shared and My Dashboard sections. For example, you could create a library of images by creating a folder called Images in the /Shared/Common folder. Add this folder as a section in a dashboard, perhaps the My Dashboard of the administrator (although it does not really matter because once you place the images in the section you can remove it from the dashboard). Remember, it is a shared section, so the folder still exists in the shared portion of the Web Catalog. Edit the section and click the Image link to add each image that you want in your library.

NOTE: If there are a number of libraries that you want to make available for sharing, you might want to create folders within the /Common folder called /Sections, and /Content or /Libraries, so it is easier distinguish when using the common sections and content in other dashboards. To use the shared content in a section of My Dashboard, the user can edit the desired section, click the link Item from Catalog, navigate to the /Shared/Common/Images folder, and click the image to include.

This same mechanism should be used for any logos, images, scripts, links, copyrights, and so on, that might be used in more than one dashboard or dashboard section. This allows you to change the item in one location and have it immediately reflected in all dashboards.

In this version of Siebel Analytics Web, the links Existing Request and Item from Catalog function identically. They allow you to choose any item, including existing requests, from the Web Catalog. This places a shortcut to the item you select in the section.

Testing the Siebel Intelligence Dashboards

Before releasing dashboards and content to the user community, perform some tests.

To test the dashboard

- 1 Verify that users with appropriate permissions can correctly access it and view the intended content.
- 2 Verify that users without appropriate permissions cannot access the dashboard.
- 3 Verify that styles and skins are displayed as expected, and that other visual elements are as expected.

- 4 Correct any problems you find and test again, repeating this process until you are satisfied with the results.

Setting Up a Virtual Directory For Shared Siebel Analytics Documents

It is recommended that you set up a virtual directory on the Web server for shared documents. Name the directory /DashboardFiles and map it to a shared network directory of the same name.

This allows users with the appropriate permissions to publish files to this folder, and reference these files by their relative URL names rather than by their fully qualified network share names, for example, /DashboardFiles/AnnualReport.doc instead of \\SharedServer\CommonShare\DashboardFiles\AnnualReport.doc.

Releasing Siebel Intelligence Dashboards To the User Community

After testing is complete, notify the user community that the dashboard is available, providing the relevant network address.

8

Customizing the Siebel Analytics Web User Interface

This chapter describes how to customize the appearance of the Siebel Analytics Web user interface.

NOTE: In Siebel Analytics Web, customization of user interface elements and appearance is accomplished by modifying registry entries, XML message files, and styles and skins, and not through the use of JavaScript. You should not modify JavaScript files located in the folder Web\App\Res in the Siebel Analytics Web installation directory. This is because the objects and methods in these scripts may change, and because these files may be replaced when upgrading. (In a dashboard, users with the appropriate permissions can customize an individual dashboard section by adding HTML to it. This HTML can include JavaScript. For more information, see *Siebel Analytics User Guide*.)

This chapter contains the following topics:

- [“Modifying Siebel Analytics Web User Interface Styles” on page 109](#)
- [“Specifying Defaults for Siebel Analytics Web Styles and Skins” on page 111](#)
- [“Customizing Siebel Analytics Web Non-Dashboard Components” on page 112](#)
- [“Customizing the Siebel Analytics Web User Interface Using XML Message Files” on page 113](#)
- [“Frequently Customized Siebel Analytics Web User Interface Messages” on page 118](#)
- [“Customizing the Appearance of the Siebel Analytics Web Logon Screens” on page 119](#)

Modifying Siebel Analytics Web User Interface Styles

You can modify the Siebel Cascading Style Sheets (CSS) files and the images stored in the default installation directory to create a custom user interface. The default images and style sheets are located in the Web\App\Res\s_Siebel7 folder in the Siebel Analytics installation directory. Contained within this directory are the relevant subdirectories (b_mozilla_4.0, b_nscp, Charts, Images, Maps, Meters, PopBin, Portal, and Views) for the current Siebel style.

Web developers who work with and understand style sheets can modify the default Siebel styles.

NOTE: Modifications to the PopChart appearance files used in charting are not supported by Siebel Systems.

This section contains the following topics:

- [“Working with Cascading Style Sheets to Modify Default Siebel Analytics Web Styles” on page 110](#)
- [“About Cascading Style Sheet Attributes and Siebel Analytics Web” on page 110](#)
- [“Creating a New Dashboard Style for Siebel Analytics Web” on page 111](#)
- [“Example: Customizing the Dashboard Banner Image in Siebel Analytics Web” on page 111](#)

Working with Cascading Style Sheets to Modify Default Siebel Analytics Web Styles

Web developers who work with and understand style sheets can modify the default Siebel styles. There are three files that affect most of the dashboard user interface:

- **PortalBanner.css.** Influences the overall appearance of a dashboard's top section. This includes the dashboard's names, links, and so on.
- **PortalContent.css.** Influences the overall appearance of a dashboard's main content area.
- **Views.css.** Corresponds to each of the Siebel Analytics request views (Title, Table, Pivot Table, Chart, Narrative, Ticker, and so on).

To see an example default Siebel 7 style sheet

- 1 Right-click the dashboard and select View Source to view the Web page within a text editor.

There are several CSS files referenced within the header of the Web page (<HEAD>. . .</HEAD>).

- 2 Perform a Find within the document and search for the keyword "class."

There is a class variable for each available attribute from within one of the CSS files.

The first class that appears is the PortalBody class (<body class="PortalBody">). If you open up the PortalContent.css file, you see a corresponding section for PortalBody. For example:

```
.PortalBody {
    font-family: Verdana, Arial, Sans-serif;
    font-size: 9pt;
    background-color: #FFFFFF;
    margin: 0 0 2 0;
}
```

You could modify the background color of the dashboard page by changing, for example, the hexadecimal color from #FFFFFF (white) to the color of your choice. If you were to save this change, you could go back to the Web browser and click the Refresh button to see the change.

You can change the various CSS classes to adjust the overall look of any Siebel Analytics application. This can be a tedious process, but after you have a good understanding of the available or most commonly used classes, you can perform a find and replace within the text editor to make mass changes to a style.

About Cascading Style Sheet Attributes and Siebel Analytics Web

Cascading style sheets allow Web developers to have control over any object within Siebel Analytics. You can change images, backgrounds, font colors and sizes, table cell gridlines and cell padding, and so on.

For more information about cascading style sheets, you can consult a resource such as the Microsoft Developer Network (MSDN).

Creating a New Dashboard Style for Siebel Analytics Web

The easiest way to create a new style is to copy the s_Siebel7 style folder \\SiebelAnalytics\Web\App\Res\s_Siebel7 and paste it into the data directory at the location \\SiebelAnalyticsData\Web\Res. Copying to the data directory rather than to the main installation directory prevents any customized CSS files and images from being overwritten during a software upgrade.

After the style has been copied, rename the directory from s_Siebel7 to a name that has meaning to you (such as s_ProspectName).

The b_mozilla_4.0 directory contains the important files for making quick changes to the dashboards.

NOTE: The Analytics Web Server service must be restarted before you can see the new style sheet from the Dashboard Properties screen.

To create a new style

- 1 Copy the s_Siebel7 directory.
- 2 Paste it to the Res directory in the SiebelAnalyticsData directory and give it a meaningful name.
- 3 Make and save your modifications.

The style sheet becomes available in the Dashboard Properties screen when the Analytics Web Server service is restarted.

Example: Customizing the Dashboard Banner Image in Siebel Analytics Web

The image bg_Banner.gif image is referenced on the top section of dashboards. Developers can open the bg_Banner.gif file and make changes, or delete and recreate a new bg_Banner.gif file.

Specifying Defaults for Siebel Analytics Web Styles and Skins

You can specify which style and skin to use when users choose the default style at the Dashboard Properties screen in Siebel Intelligence Dashboards by adding entries to the Windows registry or the Siebel Analytics Web configuration file instanceconfig.xml:

- ["Specifying Which Siebel Analytics Web Style Folder To Use" on page 112](#)
- ["Specifying Which Siebel Analytics Web Skins Folder To Use" on page 112](#)

If users do not make a choice, or if these entries are not present in the Windows registry or in the file instanceconfig.xml, the Siebel Systems styles and skins are used. These styles and skins are located in the s_Siebel7 and sk_Siebel7 folders in the \Web\App\Res folder in the Siebel Analytics Web installation directory.

For information about working in the Windows registry or the configuration file instanceconfig.xml, see ["Making Siebel Analytics Web Configuration Changes" on page 14](#).

Specifying Which Siebel Analytics Web Style Folder To Use

You can specify which style folder to use in the \Web\App\Res folder when users select the Default option from the Styles drop-down list at the Dashboard Properties screen in Siebel Intelligence Dashboards. If your style folder begins with the characters s_, such as s_TestStyle, omit those characters from the entry.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7  
DefaultStyle    TestStyle
```

- instanceconfig.xml example:

```
<DefaultStyle>TestStyle</DefaultStyle>
```

Specifying Which Siebel Analytics Web Skins Folder To Use

To specify the skins folder that is paired with the style folder you selected as described in [“Specifying Which Siebel Analytics Web Style Folder To Use” on page 112](#), add the following entry. If your skins folder begins with the characters sk_, such as sk_TestSkin, omit those characters from the entry.

- Windows registry example:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.7  
DefaultSkin    TestSkin
```

- instanceconfig.xml example:

```
<DefaultSkin>TestSkin</DefaultSkin>
```

Customizing Siebel Analytics Web Non-Dashboard Components

Non-dashboard components include Siebel Answers, Siebel Delivers, and Siebel Analytics Web Administration. The CSS files for these components are stored in the sk_ directory within the main installation directory (\\SiebelAnalytics\Web\App\Res\sk_Siebel7). The location b_mozilla_4.0 contains the relevant CSS files that correspond to Siebel Answers, Siebel Delivers, and Siebel Analytics Web Administration, and so on.

Use the same logic that is described in [“Modifying Siebel Analytics Web User Interface Styles” on page 109](#) to make modifications to the non-dashboard components of the Siebel Analytics user interface.

The non-dashboard components are controlled globally. Users cannot toggle between multiple user interfaces for the non-dashboard components.

Customizing the Siebel Analytics Web User Interface Using XML Message Files

This section explains how to customize text elements in message files to manage the default appearance and behavior of the Siebel Analytics Web user interface using XML strings.

NOTE: The intent of this section is to allow organizations that have XML expertise to perform additional customization. If you do not have this expertise, contact Siebel Systems' Services organization, or enlist the assistance of a third party, to help you with customization.

This section contains the following topics:

- ["About the Siebel Analytics Web User Interface XML Message Files" on page 113](#)
- ["How Siebel Analytics Web XML Message Files Are Structured" on page 113](#)
- ["Customizing Siebel Analytics Web XML Messages" on page 114](#)
- ["Resolution of Siebel Analytics Web XML Message Name Tags" on page 115](#)
- ["Sample Siebel Analytics Web XML Template" on page 115](#)
- ["Sample Siebel Analytics Web CustomMessages.xml File" on page 116](#)

About the Siebel Analytics Web User Interface XML Message Files

You can customize many of the text elements that appear in Siebel Answers, Siebel Delivers, and on dashboard pages. Examples of text elements include the content of text strings, the text for prompts such as the names of links and buttons, and the text of error and informational messages that are displayed to users as the result of an action.

These text elements are contained in external message files that are distributed with Siebel Analytics Web. The message files are in XML format. Language-specific messages are located in the folder Web\App\Res\|_xx\Messages in the Siebel Analytics Web installation directory, where xx is the language identifier of the selected locale (for example, for english-usa, the identifier is en). Language-independent messages are located in the folder Web\App\Res\Messages in the Siebel Analytics Web installation directory.

You should not edit the message files directly because any changes would not be retained when you install newer versions or service releases. For more information, see ["Customizing Siebel Analytics Web XML Messages" on page 114](#).

How Siebel Analytics Web XML Message Files Are Structured

The name of a particular message file indicates the kind of content that it holds. For example, messages in the file LogonMessages.xml hold message content related to the act of logging on and off the system. Within each XML file, the WebMessage name= tags define the names of the messages. These tags are called *message identifiers*.

A particular message may also reference the content of another message by using a MessageRef tag. For example, the following message in the file LogonMessages.xml references the value of another message:

```
<WebMessage name="kmsgAuthenticateNotLoggedInToLogOnClickHere">
  <HTML>
    You are not currently logged in to the
  <MessageRef name="kmsgProductServer" />
```

The entry `<MessageRef name="kmsgProductServer" />` in the previous message indicates that the name of the server is taken from the value of the `kmsgProductServer` message identifier. This message is located in the file `ProductMessages.xml`, and its value is Siebel Analytic Server:

```
<WebMessage name="kmsgProductServer" CRC="nnnnnnnnnnnnnnnnnnnn">
  <TEXT>Siebel Analytic Server</TEXT>
```

Some messages, such as those that contain copyright information and product names, are protected and cannot be changed. If you look in the file `ProductMessages.xml`, you see text preceding the `WebMessage` tags indicating that the associated names cannot be changed.

Customizing Siebel Analytics Web XML Messages

This section explains how to change the content of unprotected messages and provides several examples. The intent is to show you how to alter the text of messages, and not to teach you XML.

To customize messages

- 1 For the messages you want to customize, create like-named message identifiers and customize their text.
- 2 Create a custom messages folder named `CustomMessages`.

NOTE: Organizations that have Siebel Analytics applications may already have a file present in this folder. This file enables Analytics support for Siebel Analytics applications, and should not be modified, moved, or deleted.

- 3 Place the messages in one or more XML files in the `CustomMessages` folder, and then place the `CustomMessages` folder in this location:

```
\\SiebelAnalyticsData\Web\Res\l_xx
```

where `SiebelAnalyticsData` is the name of the data folder created during the installation process, and `xx` is the language identifier of the selected locale (for example, for `english-usa`, the identifier is `en`).

If you are not concerned with multiple languages, place the folder in the `l_en` folder. Messages default to `l_en` if a language-specific version is not found. You need to create the `l_xx` folder in the `analyticsRes` folder.

- 4 Restart Siebel Analytics Server.

You can create as many XML files in the CustomMessages folder as you like, or you can create just one XML file that holds customized messages, for example, CustomMessages.xml.

NOTE: If you plan to support multiple languages, it is recommended that you place control messages, which are messages that are not translated, into one file named CustomControlMessages.xml. Place messages that are translated into another file named, for example, CustomUIMessages.xml. This allows you to place localized versions of the CustomUIMessages.xml file in each language folder as appropriate, such as \SiebelAnalyticsData\Web\analyticsRes\l_de\CustomMessages, \SiebelAnalyticsData\Web\analyticsRes\l_fr\CustomMessages, and so on.

Resolution of Siebel Analytics Web XML Message Name Tags

During initialization, the Analytics Web Server replaces the WebMessage name default text with text from equivalently named tags in any customized XML file, based on the following precedence order, from highest to lowest:

- XML in \SiebelAnalyticsData\Web\Res\l_xx\CustomMessages folder (language-specific folders).
- XML in \SiebelAnalyticsData\Web\Res\l_en\CustomMessages folder (for language-specific user logons if WebMessage name tags reside here, but are not in language-specific files).
- XML in \SiebelAnalyticsData\Web\Res\CustomMessages folder.
- XML in \SiebelAnalytics\Web\App\Res\l_xx\Messages folder.
- XML in \SiebelAnalytics\Web\App\Res\Messages folder.

As an example, when Siebel Analytics Web starts up, it first reads the messages in the folder Web\App\Res\l_xx\Messages in the installation directory, and then reads the messages in the folder \SiebelAnalyticsData\Web\Res\l_xx\CustomMessages. It replaces the default text for those messages with the customized text. If you attempt to alter the text of a protected message, a message is displayed in its place indicating that you attempted this.

Sample Siebel Analytics Web XML Template

The following is a sample template for a CustomMessages.xml file in the folder \SiebelAnalyticsData\Web\analyticsRes\l_xx\CustomMessages. An example CustomMessages.xml file follows the template.

Every message begins with a <WebMessage name=> tag and ends with a </WebMessage> tag. The message text that you can customize is contained between <TEXT> tags or <HTML> tags. To suppress the display, delete the text between the tags.

```
<?xml version="1.0" encoding="utf-8"?>
```

```
<webMessageTables>
```

```
  <webMessageTable system="Custom Messages">
```

```
    <!-- The name of a message must match the name of the message you are overriding. -->
```

```
<WebMessage name="kmsgExampleOverrideMessage">
  <!-- A message can have TEXT and/or HTML versions of it. It is not necessary
to have both. (TEXT will be automatically converted to HTML when necessary). -->

  <TEXT>Example message.</TEXT> <!-- Format used in a text only output -->
  <HTML><b>Example message with bold HTML tags.</b></HTML> <!-- Format used
in an HTML output -->

</WebMessage>
</WebMessageTable>
</WebMessageTables>
```

To create a sample template

- 1** Replicate the sample template in a text editor.
- 2** Name the file CustomMessages.xml (or any name you choose).
- 3** Place the file into the CustomMessages folder you have created in the appropriate \SiebelAnalyticsData\Web\analyticsRes\l_xx folder.

Sample Siebel Analytics Web CustomMessages.xml File

The following example shows four customized messages placed in the CustomMessages.xml file.

```
<?xml version="1.0" encoding="utf-8"?>
<WebMessageTables>

<WebMessageTable system="Custom Messages">

  <!-- First message -->
  <WebMessage name="kmsgAuthenticateRemembermyIDandpassword">
    <TEXT>Remember my signon name and password.</TEXT>
  </WebMessage>

  <!-- Second message -->
  <WebMessage name="kkmsgPrivilegeDisplayAccountUnknown">
```

```
<TEXT>Unknown Account (<Param insert="1"/>). Call the Help Desk at extension 9999 to set up a new account.</TEXT>
```

```
</WebMessage>
```

```
<!-- Third message --
```

```
<WebMessage name="kmsgWelcomeFrameCreateNewRequest">
```

```
<HTML>Create a <b>new request</b> by clicking on a Subject Area below. After creating the request, click on the <b>Done</b> button at the bottom of the page.</HTML>
```

```
</WebMessage>
```

```
<!-- Fourth message -->
```

```
<WebMessage name="kmsgUIAdmin">
```

```
<HTML></HTML>
```

```
</WebMessage>
```

```
</WebMessageTable>
```

```
</WebMessageTables>
```

- The message identifier of the first message being customized is "kmsgAuthenticateRemembermyIDandpassword". The default text for this message is located in the file LogonMessages.xml in the folder Web\App\Res\l_xx\Messages in the installation directory.
- The message identifier of the second message being customized is "kmsgPrivilegeDisplayAccountUnknown". The default text for this message is located in the file ViewMessages.xml in the folder Web\App\Res\l_xx\Messages in the installation directory. This message contains a variable, (<Param insert="1"/>).

NOTE: If you are customizing a message that contains a variable, do not alter the variable. In the UNIX environment, be careful to preserve the case of the message name being customized.

- The message identifier for the third message being customized is "kmsgWelcomeFrameCreateNewRequest". The default text for this message is located in the file SearchSysMessages.xml in the folder Web\App\Res\l_xx\Messages in the installation directory. This message is in HTML format and uses an HTML tag () to display text in bold letters.

- The message identifier for the fourth message being customized is "kmsgUIADMIN". The default text for this message is located in the file UIMessages.xml in the folder Web\App\Res\l_xx\Messages in the installation directory. This message is in HTML format. This message identifier displays the Admin link at the top of each Siebel Answers, Siebel Delivers, or dashboard page. Deleting the Admin text between the <HTML> and </HTML> tags suppresses the display of the link.

Frequently Customized Siebel Analytics Web User Interface Messages

Messages that are frequently customized are located in the file UIMessages.xml. This file contains text strings for display elements and for links throughout the user interface.

For example, the following messages contain the text for the links Admin, Alerts!, and Answers in the user interface. You can customize the text, or delete the text to suppress the display of the link.

```
<webMessage name="kmsgUIAdmin">
  <HTML>Admin</HTML>
</webMessage>
```

```
<webMessage name="kmsgUIAlerts">
  <HTML>Alerts!</HTML>
</webMessage>
```

```
<webMessage name="kmsgUIAnswers">
  <HTML>Answers</HTML>
</webMessage>
```

For example, users can export the data for a request to a Microsoft Excel file. If you do not want to support the download to Excel option, you can remove the link.

To remove the Download link

- 1 Open the ViewsControlMessages.xml file.
- 2 Copy the following message to the CustomMessages.xml file:

```
<webMessage name="kmsgEVCDownloadLinks">
  <HTML>
  <a insert="1">
```

```
<MessageRef name="kmsgEVCLinkDownloadExcel" />
</a>

<a insert="2">
  <MessageRef name="kmsgEVCLinkDownloadData" />
</a>
</HTML>
```

- 3 Delete the first message identifier anchor:

```
<a insert="1">
  <MessageRef name="kmsgEVCLinkDownloadExcel" />
</a>
```

- 4 Save the CustomMessages.xml file.

For more information about the CustomMessages.xml file, see ["Sample Siebel Analytics Web CustomMessages.xml File" on page 116](#).

Customizing the Appearance of the Siebel Analytics Web Logon Screens

Users must log on to Siebel Analytics Web to gain access to Siebel Intelligence Dashboards, Siebel Answers, and other Siebel Analytics Web components. The logon process provides a user interface to the Analytics server authentication process.

When Siebel Analytics Web is accessed, the user is presented with the default Siebel Analytics Web logon screen. The user must enter an appropriate Siebel Analytics user name and password. When authentication is complete, the user gains access to the appropriate Siebel Analytics Web components, and the user's default dashboard displays. For more information, see ["About Siebel Analytics Web User Authentication" on page 89](#).

To customize the appearance of the logon screens

- Override the relevant messages in the file LogonControlMessages.xml.

NOTE: The Not Logged On screen (kmsgAuthenticateNotLoggedOn), used for session timeout, appears only when users are not logged on and attempt to access a URL that does not support direct logon. For example, suppose a user accesses Siebel Answers and clicks the Log Off link. If the user clicks the browser's Back button and then clicks the My Account link, the user receives the Not Logged On screen.

For general information about customization the user interface with XML messages, see ["Customizing the Siebel Analytics Web User Interface Using XML Message Files"](#) on page 113.

NOTE: This feature does not allow the Siebel Analytics Web administrator to control how users are actually authenticated. For information about authentication options, see ["About Siebel Analytics Web User Authentication"](#) on page 89.

9

Integrating Siebel Analytics Web Into Corporate Environments Using HTTP

This chapter explains the HTTP methods that you can use to integrate Siebel Analytics Web into your corporate environment. Siebel Analytics Web provides entry points for most functionality exposed in the system. Calls can be made through HTTP using a simple URL syntax or JavaScript commands. In UNIX, interfaces are exposed through a Java Servlet. This chapter contains the following topics:

- [“Incorporating Siebel Analytics Results Into External Portals or Applications Using the Go URL” on page 121](#)
- [“Referencing Dashboard Content in External Portals or Applications Using the Siebel Analytics Web Dashboard URL” on page 125](#)
- [“Using the Siebel Analytics Web Go URL To Issue SQL and Pass Filters” on page 126](#)
- [“Example of a Siebel Analytics Third-Party SQL Tool Integration” on page 131](#)

Incorporating Siebel Analytics Results Into External Portals or Applications Using the Go URL

This section describes how to use the Siebel Analytics Web Go URL to incorporate results into external portals or applications. It contains the following topics:

- [“About the Siebel Analytics Web GO URL” on page 121](#)
- [“Structure of the Basic Siebel Analytics Web Dashboard URL” on page 125](#)
- [“Optional Parameters for the Siebel Analytics Web Go URL” on page 122](#)

About the Siebel Analytics Web GO URL

The Siebel Analytics Web Go URL command is for use in incorporating specific Siebel Analytics results into external portals or applications. The Go URL is used when you add a result to your favorites, or add a link to a request to your dashboard or an external Web site. It has a number of forms and optional arguments that can be used to control its behavior.

You can post the Go URL as a Form or issue it as a URL. If you are issuing parameters as part of a URL, they need to be escaped properly. You need to replace spaces with plus (+) signs, and so on. For example, to pass East Region as a value, type East+Region.

When called from within a Siebel Analytics Web screen, such as a dashboard or an HTML result view, the URL should begin with the following characters:

```
saw.d11?Go
```

When called from another screen on the same Web server, the URL should begin with the following characters:

```
/Analytics/saw.d11?Go
```

When referenced from a screen on a different server (or sent through email, and so on), the URL should begin with the fully qualified server name or IP address:

```
http://server_name_or_ip_address/Analytics/saw.d11?Go
```

To test these commands, you can enter the fully qualified version into the Address field in Internet Explorer.

Structure of the Basic Siebel Analytics Web Go URL

The basic Go URL command needs the full Web Catalog path to the request you want to execute. It returns the default result view, as defined in the request.

For example, the following go URL command returns the default result view as defined in the request, where SB2 is the name of the request to execute.

```
saw.d11?Go&Path=/Shared/Test/SB2
```

Optional Parameters for the Siebel Analytics Web Go URL

You can modify the behavior of the Go URL command by adding one or more of the following parameters. If an invalid URL is specified (for example, you type a parameter incorrectly), the browser displays a "The page cannot be found" error with the detailed text of "HTTP 400 - Bad Request."

NOTE: In parameter descriptions, SB2 is the name of the request to execute.

- **User ID and Password.** If omitted, the user is prompted for user ID and password information, unless the user chose the option to have logon information remembered when last logged on.

This is the format, where uuu is the user ID and ppp is the password:

```
&NQUser=uuu&NQPassword=ppp
```

Example:

```
saw.d11?Go&Path=/Shared/Test/SB2&NQUser=user1&NQPassword=rock
```

This logs on as user1 with a password of rock, and executes the request.

- **Link Options.** The results will include links.

This is the format:

&Options=x

The x can be one or more of the following letters:

Letter	Link
m	Modify Request
f	Printer Friendly
d	Download to Excel
r	Refresh Results

Example:

saw.d11?Go&Path=/Shared/Test/SB2&Options=md

This displays results with the links Modify Request and Download.

- **Printer Friendly.** Results are in a printer-friendly format, without the paging controls, hot links, and so on.

This is the format:

&Action=print

Example:

saw.d11?Go&Path=/Shared/Test/SB2&Action=Print

- **Application Friendly.** Results are displayed in an application-friendly format, such as for Microsoft Excel, without the paging control, hot links, the Powered by Siebel Analytics phrase, and so on.

This is the format:

=&Action=Extract

Example:

saw.d11?Go&Path=/Shared/Test/SB2&Action=Extract

The Extract action also acts as a Navigate action (see ["Passing Filters to the Siebel Analytics Web Go URL Through a URL \(Navigation\)" on page 127](#)) so you can filter the results that are returned by the call.

- **Specific View.** This shows an individual result view rather than the default compound view.

This is the format, where xx is the name of the view:

```
saw.d11?Go&Path=/Shared/Test/SB2&ViewName=xx
```

Example:

```
saw.d11?Go&Path=/Shared/Test/SB2&ViewName=Chart
```

Assuming that the request contains a Chart view named Chart, this displays just the Chart view.

- **Specific Style.** This shows the results using a specified style. If the style does not exist, the default is used.

This is the format, where xx is the name of the style:

```
saw.d11?Go&Path=/Shared/Test/SB2&Style=xx
```

Example:

```
saw.d11?Go&Path=/Shared/Test/SB2&Style=Lime
```

This uses the style named Lime to show the results.

- **Result Format.** This controls the format of the results.

This is the format, where xx is XML or HTML:

```
saw.d11?Go&Path=/Shared/Test/SB2&Format=xx
```

Example:

```
saw.d11?Go&Path=/Shared/Test/SB2&Format=XML
```

This shows results in XML.

Displaying All Records in a Table

There are two ways to display all the records in the table:

- Set the Rows per Page property on the Table view to 10,000, and then use the basic Go. This is the easier of the two methods.
- Issue the following URL, assuming the View you want to control is called Table.

```
saw.d11?Go&Path=/Shared/Test/SB2&Action=Scroll&P5=-1&viewID=go~Table
```

Referencing Dashboard Content in External Portals or Applications Using the Siebel Analytics Web Dashboard URL

This section describes how to use the Siebel Analytics Web Dashboard URL. It contains the following topics:

- [“About the Siebel Analytics Web Dashboard URL” on page 125](#)
- [“Structure of the Basic Siebel Analytics Web Dashboard URL” on page 125](#)
- [“Optional Parameters for the Siebel Analytics Web Dashboard URL” on page 126](#)

About the Siebel Analytics Web Dashboard URL

The Siebel Analytics Web Dashboard URL is for use in incorporating or referencing the content of a specific Siebel Intelligence Dashboard in external portals or applications. It has a number of forms and optional arguments that can be used to control its behavior.

You can post the Dashboard URL command as a Form or issue it as a URL. If you are issuing parameters as part of a URL, they need to be escaped properly. You need to replace spaces with plus (+) signs, and so on. For example, to pass East Region as a value, type East+Region.

When called from within a Siebel Analytics Web screen, such as a dashboard or an HTML result view, the URL should begin with this:

```
saw.d11?Dashboard
```

When called from another screen on the same Web server, the URL should begin with this:

```
/Analytics/saw.d11?Dashboard
```

When referenced from a screen on a different server (or sent through email, and so on), the URL should begin with the fully qualified server name or IP address:

```
http://server_name_or_ip_address/Analytics/saw.d11?Dashboard
```

To test these commands, you can enter the fully qualified version into the Address field in Internet Explorer.

Structure of the Basic Siebel Analytics Web Dashboard URL

The basic Dashboard URL command needs no parameters. It displays the user’s default portal, after authenticating the user.

This is the format:

```
saw.d11?Dashboard
```

Optional Parameters for the Siebel Analytics Web Dashboard URL

You can modify the behavior of the dashboard URL command by adding one or more of the following parameters. If an invalid URL is specified (for example, you type a parameter incorrectly), the browser returns a "The page cannot be found" error with detailed text of "HTTP 400 - Bad Request."

NOTE: In parameter descriptions, SB2 is the name of the request to execute.

User ID and Password. If omitted, the user is prompted for user ID and password information, unless the user chose the option to have logon information remembered when last logged on. If using a Session ID or Ticket, pass it as the NQUser parameter.

This is the format, where uuu is the user ID, and ppp is the password:

```
&NQUser=uuu&NQPassword=ppp
```

Example:

```
saw.d11?Go&Path=/Shared/Test/SB2&NQUser=user1&NQPassword=rock
```

This logs on as user1 with a password of rock, and displays the dashboard.

PortalPath. This parameter allows you to direct the user to a specific dashboard. If the user does not have permission to the dashboard, an Access Denied error is returned.

This is the format, where ppp is the fully qualified path of the dashboard in the Web Catalog, and x+x is the name of the dashboard to display.

```
saw.d11?Dashboard&PortalPath=/Shared/Test/_Portal/x+x&NQUser=sessionid
```

Example:

```
saw.d11?Dashboard&PortalPath=/Shared/Test/_Portal/Sales+Dashboard&NQUser=sessionid
```

This authenticates the user using the provided session ID, and displays the Sales Dashboard.

Using the Siebel Analytics Web Go URL To Issue SQL and Pass Filters

This section explains how to use the Go URL command to issue SQL, and how to pass filters to be used for navigation. It contains the following topics:

- ["Issuing SQL Using the Siebel Analytics Web Go URL" on page 126](#)
- ["Passing Filters to the Siebel Analytics Web Go URL Through a URL \(Navigation\)" on page 127](#)

Issuing SQL Using the Siebel Analytics Web Go URL

The Go URL command can be used to issue Siebel Analytics SQL. These forms of the Go URL return tabular results. The basic options from &Style= and &Options= can be used here as well.

To issue Siebel Analytics's simplified SQL, include the escaped SQL as a parameter to the Go URL. For example:

```
saw.d11?Go&SQL=select+Region,Dollars+from+SuppliersSales
```

where the FROM clause is the name of the Subject Area to query.

Alternatively, the command IssueRawSQL can be used to bypass the Web processing and issue SQL directly against the Analytics Server.

Passing Filters to the Siebel Analytics Web Go URL Through a URL (Navigation)

The Go URL can also be used to pass context such as filters to a destination request. This is done by adding additional parameters to the call. You need to make sure that any columns you are passing are set up in the destination with Is Prompted filters, or specific default filters.

Navigation Parameters

The basic syntax of the navigation command is the same as presented in the section ["Structure of the Basic Siebel Analytics Web Dashboard URL" on page 125](#), but with the addition of the Action=Navigate parameter, and then population of the P1 - Pn parameters, as necessary.

&Action=Navigate

&P0=n where n is the number of columns you wish to filter, currently 1 - 6.

&P1=op where op is one of the following operators.

Operator	Meaning
eq	Equal to or in.
neq	Not equal to or not in.
lt	Less than.
gt	Greater than.
ge	Greater than or equal to.
le	Less than or equal to.
bwith	Begins with.
ewith	Ends with.
cany	Contains any (of the values in &P3).
call	Contains all (of the values in &P3).
like	You need to type %25 in place of the usual % wildcard. See the examples that follow.
top	&P3 should contain 1+n, where n is the number of top items you want to see.
bottom	&P3 should contain 1+n, where n is the number of bottom items you want to see.
bet	Between (&P3 must have two values).
null	Is null (&P3 must be 0 or omitted).
nnul	Is not null (&P3 must be 0 or omitted).
&P2=ttt.ccc	In this parameter, ttt is the table name and ccc is the column name. If the table or column contains spaces, it must be quoted with double-quotes. Spaces should be escaped as %20, for example, Measures."Dollar%20Sales".
&P3=n+xxx+yyy+...+zzz	In this parameter, n is the number of values, and xxx, yyy, and zzz are the actual values. NOTE: If the value of P3 begins with a numeric character, the entire value must be enclosed in quotes. For example: saw.d11?Go&Path=/Shared/Test/ SB2&Action=Navigate&P0=1&P1=top&P2=Customers.Region&P3="7west"

NOTE: The settings for &P1,&P2, and &P3 are repeated for &P4-P6, &P7-P9, &P8-P10, &P11-P13,

&P14-P16, and &P17-P19 as necessary, depending on the value of &P0.

Navigation Examples

This returns records for the East and Central regions:

```
saw.dll?Go&Path=/Shared/Test/  
SB2&Action=Navigate&P0=1&P1=eq&P2=Customers.Region&P3=2+Central+East
```

This returns records for like Regions E....t:

```
saw.dll?Go&Path=/Shared/Test/  
SB2&Action=Navigate&P0=1&P1=like&P2=Customers.Region&P3=1+E%25t
```

This returns the top two regions by dollars sold:

```
saw.dll?Go&Path=/Shared/Test/  
SB2&Action=Navigate&P0=1&P1=top&P2="Sales%20Facts".Dollars&P3=1+2
```

This is an example where the number of arguments is not included in the syntax:

```
saw.dll?Go&Path=/Shared/Test/  
SB2&Action=Navigate&P0=1&P1=top&P2=Customers.Region&P3=Central
```

NOTE: You can omit the number of arguments only if just one argument value is included.

This returns records with between 2,000,000 and 2,500,000 in sales:

```
saw.dll?Go&Path=/Shared/Test/  
SB2&Action=Navigate&P0=1&P1=top&P2="Sales%20Facts".Dollars&P3=2+2000000+2500000
```

This returns records for Regions beginning with the letter E:

```
saw.dll?Go&Path=vate&P0=1&P1=bwith&P2=Customers.Region&P3=1+E
```

This returns records for Regions containing the letter E and having more than 20 million in sales:

```
saw.dll?Go&Path=/Shared/Test/  
SB2&Action=Navigate&P0=2&P1=cany&P2=Customers.Region&P3=1+e&P4=gt&P5="Sales%20Fact  
s".Dollars&P6=1+20000000
```

Siebel Analytics Web navigation is currently supported from charts, table and pivot table views, HTML views, and external applications and Web pages. The destination search should have filters defined on columns for which it wants to receive context. These can be specific filters or, usually, the Is Prompted filter. In addition to the Table.Column value specifically referenced in the navigation call, all filters from the source request that have corresponding table.columns in the destination, are applied to the destination. Therefore, the appropriate context from a source can be passed to the destination.

Navigation From Charts

From the chart properties screen, check the Navigate radio button and enter the full path to the saved search or portal that you are interested in the field provided, for example:

```
/shared/topaz/performance/transaction details
```

Navigation Using JavaScript

Navigation can currently be accomplished using the custom text/date formatter for a column. The central concept is that you add a column you want to navigate from to your search. You then choose Custom Text Format from the properties for the column, and enter HTML that calls one of the two provided JavaScript functions. This technique can be used to perform many actions, including sorting columns, calling custom JavaScript functions, and so on.

Siebel Analytics Web includes two JavaScript functions that enable navigation from Table and Pivot views: GoNav and PortalNav. (These functions are located in /res/mozilla/viewhelper.js if you are interested in seeing what they do.) The former handles navigation to a specific search. The latter handles navigation to a specific dashboard. A description of their syntax follows, along with example Custom Text formats that you can use to accomplish navigation.

NOTE: Siebel Analytics Web is standardized on the class=Nav, in order to control the look of the navigable text using the style sheet.

function GoNav(sPath,sTbl,sCol,sVal,sTarget) where

sPath = the catalog path of the destination search.

sTbl = the logical table name to filter.

sCol = the logical column name to filter.

sVal = the value to filter by.

sTarget (optional) = "_blank" to open a new browser window with the results.

Sample Custom Text Format for GoNav Call (include the quotes):

```
"<font class=nav onclick=\"JavaScript:GoNav('/shared/topaz/performance/transaction details','Transaction','Quality','@');\">\"@\"</font>\";@
```

function PortalNav(sPortal,sTbl,sCol,sVal)

sPortal = the catalog path of the destination portal.

sTbl = the logical table name to filter.

sCol = the logical column name to filter.

sVal = the value to filter by.

Sample Custom Text Format for PortalNav Call (include the quotes):

```
"<font class=nav onclick=\"JavaScript:PortalNav('/shared/topaz/_portal/transaction analysis','Transaction','Type','@');\">\"@\"</font>\"
```

Navigation From HTML Results

This is the same as described in [“Navigation Using JavaScript” on page 130](#), but rather than using a custom formatter, type in the HTML syntax with static values in place of the @ signs.

Example of a Siebel Analytics Third-Party SQL Tool Integration

This section illustrates the requirements for integrating a third-party SQL tool with Siebel Analytics by describing an example integration, using Microsoft Access. Because Siebel Analytics is designed as a middleware platform for enterprise data access and integration, common report writers and business intelligence tools can communicate natively with the Siebel Analytics Server.

Most third-party SQL tools require the user to include join conditions within queries, in order to avoid cross-joins. A cross-join occurs when a request does not have a WHERE clause, which, in turn creates a Cartesian product of the tables involved in the join. The size of a Cartesian product is the number of rows in the first table multiplied by the number of rows in the second table.

To integrate Microsoft Access with the Siebel Analytics Server, the Siebel Analytics Server administrator must expose the keys within the Presentation layer of the Siebel Analytics Administration Tool.

Example of integrating a third-party SQL tool

- 1** Drag and drop the keys from the Business Model and Mapping layer to the Presentation layer and save the repository.
- 2** Open Microsoft Access, select the option Blank Access Database, type the name siebel-analytics.mdb when prompted, and click the Create button.
- 3** After creating the new Microsoft Access database, right-click in the white section of the screen and select Link Tables.
- 4** From the Files of Type drop-down list box, select ODBC Databases.
The Select a Source Dialog appears, and prompts you for a Data Source Name.
- 5** Click the Machine Data Source tab, locate the Analytics_Web DNS, and click OK.
The Siebel Analytics Server requires a login.
- 6** Type your user ID and password.
The Import Objects dialog box appears.
- 7** Click the Select All button, or highlight the desired logical tables from Siebel Analytics.
The import may take a while to complete.
- 8** When the import completes, right-click in the white section of the screen and select Relationships.
 - a** Add the desired tables and drag and drop the keys from the dimension tables (Period, Market, Product) to the fact table (Sales Measures).
 - b** Drag and drop Period Key over perkey, and repeat for each corresponding key, to create the joins.

Now, you can test and run a request.

- 9** Select Create query in Design view from the Queries button:
 - a** Select Markets, Products and Sales Facts.
 - b** Add Region, Brand, Units and Dollars, respectively, then click the Run button.

10 Working with Data and Managing the Web Catalog Using Siebel Analytics Web SOAP API

This chapter describes the Siebel Analytics Web implementation of the Simple Object Access Protocol (SOAP) application programming interface to extract and deliver data and manage content in the Siebel Analytics Web Catalog.

This chapter contains the following topics:

- [“Overview of the Siebel Analytics Web SOAP API” on page 133](#)
- [“Summary of Web Services and Methods Supported by the Siebel Analytics Web SOAP API” on page 135](#)
- [“Using Item Signatures in the Siebel Analytics Web SOAP API” on page 138](#)
- [“Overview of the Siebel Analytics Web HtmlViewService Service” on page 139](#)
- [“Accessing the Siebel Analytics Web SOAP Services Interface” on page 140](#)
- [“Description of Structures in the Siebel Analytics Web SOAP API” on page 141](#)
- [“Description of Methods in the Siebel Analytics Web SOAP API” on page 148](#)
- [“Format of Returned Recordsets in the Siebel Analytics Web SOAP API” on page 177](#)
- [“Code Example for Writing Web Catalog Information To XML Files Using the Siebel Analytics Web SOAP API” on page 178](#)

Overview of the Siebel Analytics Web SOAP API

SOAP (Simple Object Access Protocol) is a World Wide Web Consortium (W3C) recommendation for an XML protocol for exchanging information on the Web. The Siebel Analytics Web implementation of SOAP allows you to perform two types of functions:

- Extract results from Siebel Analytics Web and deliver them to external applications.
- Perform some Web Catalog management functions.

NOTE: Security information management is not supported in the Siebel Analytics Web SOAP API. For information about managing security, see [“Managing Siebel Analytics Web Security” on page 81](#).

The Siebel Analytics Web SOAP API allows external applications such as J2EE and .NET to use Siebel Analytics as an analytical calculation and data integration engine. It provides a set of Web services that allow external applications to communicate with the Siebel Analytics Web server. You can use the Siebel Analytics Web SOAP API to extract results from Siebel Analytics Web and deliver them to external applications and Web application environments. You can reference a saved report or send the criteria for the report to Siebel Analytics Web. You can also use the Siebel Analytics Web SOAP API to incorporate third-party application content on a Siebel Intelligence Dashboard.

NOTE: Spaces within paths must be substituted with the HTML attribute %20.

The formal definition of Siebel Analytics Web SOAP services can be retrieved in WSDL (Web Services Definition Language) format. Proxy classes for the services are generated automatically.

The XML Schema Definition (XSD) file for the services is the file SawServices.xsd is located in the \Web\App\Wsd\Schema directory in the Siebel Analytics installation directory. The XSD file is used internally and cannot be used separately. You can access the WSDL document through the following Siebel Analytics Web SAW URL:

`http://somehost/analytics/saw.d11?WSDL`

The Siebel Analytics Web SOAP API has been tested with Apache Axis and the Microsoft .NET framework.

For more information about the SOAP recommendation, consult a reference such as the Microsoft Developer Network or the W3C Web site.

Summary of Web Services and Methods Supported by the Siebel Analytics Web SOAP API

This section provides a summary of the Web Services and the methods supported by each service.

- **SAWSessionService.** Defines authentication services such as logon and logoff, and other session-related services. Supported methods include:
 - **logon()**
Authenticates the user.
 - **logoff()**
Logs the user off Siebel Analytics Web.
 - **getCurUser()**
Gets the current user ID for the session.
 - **keepAlive()**
Instructs Siebel Analytics Web not to end particular sessions due to inactivity.
 - **impersonate()**
Logs on and then impersonates the user.
- **HtmlViewService.** Allows the embedding of Siebel Analytics Web results in third-party dynamic Web pages and portal frameworks. Supported methods include:
 - **startPage()**
Creates a new page object and returns its ID.
 - **endPage()**
Destroys a server page object and all data associated with it.
 - **addReportToPage()**
Adds results to an HTML page.
 - **getHeadersHTML()**
Gets HTML to include in the <HEAD> section.
 - **getCommonBodyHTML()**
Gets HTML to include in the <BODY> section.
 - **getHTMLForReport()**
Gets HTML to display a particular set of results.

- `setBridge()`

Specifies a bridge URL to receive communications. Can be useful when the Siebel Analytics Web server and the user's Web server reside on different machines or when you want to modify the results in your application development environment.

For more information, see "[Overview of the Siebel Analytics Web HtmlViewService Service](#)" on page 139.

- **XMLView Service.** Retrieves results from Siebel Analytics Web in XML format. One method is supported:

- `getResults()`

Returns the report results, in XML format.

- **ReportEditingService.** Merges parameters and Siebel Analytics Web data to create and return the results. Supported methods include:

- `applyReportParams()`

Applies report parameters to the report object and returns the results.

- `generateReportSQL()`

Retrieves the SQL query a given report.

- **WebCatalogService.** Provides methods for navigating and managing the Web Catalog, and reading and writing Web Catalog objects in XML format. Supported methods include:

- `copyItem()`

Copies an object from one location to another in the Web Catalog.

- `createFolder()`

Creates a new folder in the Web Catalog.

- `createLink()`

Creates a link to the Web Catalog.

- `deleteItem()`

Deletes an object from the Web Catalog.

- `getItemInfo()`

Gets Web Catalog information for an object.

- `getSubItems()`

Gets the collection of child subitems for an object in the Web Catalog.

- `moveItem()`

Moves an object in the Web Catalog to a different location in the catalog.

- `writeSavedFilter()`

Writes a filter to the Web Catalog.

- `readObject()`
Reads an object from the Web Catalog.
- `removeFolder()`
Deletes a folder from the Web Catalog.
- `setItemProperty()`
Sets a property for an object in the Web Catalog.
- `writeObject()`
Writes an object to the Web Catalog.
- `writeReport()`
Writes a set of results to the Web Catalog.
- `writeDashboard()`
Writes a dashboard object to the Web Catalog.
- `writeDashboardPrompt()`
Writes a dashboard prompt to the Web Catalog.
- `writeDashboardPage()`
Writes a dashboard page to the Web Catalog.
- `writeSavedFilter()`
Writes a filter to the Web Catalog.

NOTE: Access rights to Web Catalog content are enforced when using the Siebel Analytics Web SOAP API. For example, if the user name used to establish the SOAP session does not have access to certain Siebel Answers content in the Web Catalog, the content is not accessible using the Siebel Analytics Web SOAP API.

Using Item Signatures in the Siebel Analytics Web SOAP API

Each object has its own signature. Signatures are used in conjunction with writing objects. You need to use the appropriate signature when writing objects. The signatures used by the various methods are provided in the method descriptions given in this chapter.

The following example code writes a generic object to set the signatures.

```
If (signature == "queryitem1")
{
    ws.writeReport(o,name,true,true,session);
}
else if (signature == "dashboarditem1")
{
    ws.writeDashboard(o,name,true,true,session);
}
else if (signature == "dashboardpageitem1")
{
    ws.writeDashboardPage(o,name,true,true,session);
}
else if (signature == "globalfilteritem1")
{
    ws.writeDashboardPrompt(o,name,true,true,session);
}
else if (signature == "filteritem1")
{
    ws.writeSavedFilter(o,name,true,true,session);
}
else if (signature == "COxmlDocument1")
{
    ws.writeObject(o,name,true,true,session);
}
```

```
else  
{  
    ws.writeObject(o,name,true,true,session);  
}
```

Overview of the Siebel Analytics Web HtmlViewService Service

The HtmlViewService service allows the embedding of Siebel Analytics Web HTML results in third-party dynamic Web pages, such as Active Server Pages (ASP) or JavaServer Pages (JSP), and portal frameworks. The embed process merges Siebel Analytics Web content with the content of third-party Web pages.

HTML methods extract fragments of HTML code that can be inserted in third-party Web pages. The HTML code excerpts and desired page locations are described in [Table 7](#).

Table 7. HTML Code Fragments and Page Locations for the HtmlViewService Service

HTML Code Fragment	Desired Page Location
Header	Should be inserted in the <HEAD> section of an HTML page. The code contains links to common JavaScript files and style sheets.
Report Objects	Can be inserted anywhere in the <BODY> section.
Common Body	Should be inserted in the <BODY> tag after all report links. The code contains hidden HTML elements that are used to implement drilldown links.

For each returned report object, the HTML code fragment contains a callback link that is followed automatically when the Web page is loaded by the browser. The code fragment does not contain the full user interface definition of the report. While the report is being constructed by Siebel Analytics Web, the user sees the Siebel Analytics Web "Searching..." image (the default image is a spinning arrow) embedded on the third-party Web page.

For smooth report transitioning, Siebel Analytics Web tracks the Analytics reports that have been added to a third-party Web page by maintaining information in an internal logical page object during the construction of the third-party Web page. The HtmlViewService service methods explicitly refer to the internal logical page by its ID.

About HtmlViewService Bridging and Callback URLs

To embed a report with active drilldown links, the HtmlViewService service allows the Web browser to issue callback requests from embedded reports to the Siebel Analytics Web server. Although it is possible to route requests directly to the Siebel Analytics Web server, in many cases it is preferable to route requests through the Web server that originally serviced the third-party page. Also, in situations where Siebel Analytics Web and the third-party Web server do not belong to the same Domain Name Service (DNS) domain, users may see JavaScript errors related to browser security constraints for cross-domain scripting.

To avoid these issues, you can use the `setBridge()` method to modify callback URLs to point to the third-party Web server. Be aware that a Web component executed by the third-party Web server to reroute requests to Siebel Analytics Web is not provided. This function would need to be fulfilled by the third-party application. For more information about the `setBridge()` method, see ["Specifying an Bridge URL Using the setBridge\(\) Method in the Siebel Analytics Web SOAP API" on page 158](#).

Accessing the Siebel Analytics Web SOAP Services Interface

You can access the Siebel Analytics Web SOAP services interface on any platform on which a SOAP client library and tools are available. The steps to access the SOAP services depend on your programming environment.

Example of Accessing the Siebel Analytics Web SOAP API From Microsoft Visual Studio

The following procedure provides the steps to access the SOAP services from Microsoft Visual Studio.

To access the SOAP services from Microsoft Visual Studio

- 1** Open your project in Microsoft Visual Studio.
- 2** In the Solution Explorer, expand the solution node, right-click References, and choose Add Web Reference.

The Add Web Reference dialog box appears.

- 3** In the URL field, type the URL to access the Siebel Analytics Web (SAW) WSDL document.

The following URL is an example URL to access the SAW WSDL document:

```
http://localhost/analytics/saw.dll?WSDL
```

- 4** Click Go.

The found services and methods appear in the Add Web Reference dialog box window.

- 5** Click the Add Reference button.

The Add Web Reference dialog box closes, and the node that represents the added Web reference appears in the Solution Explorer pane.

- 6 To see the added classes and methods, right-click the node and choose the following option:
View in Object Browser
The classes and methods appear in the Object Browser window.
- 7 Begin using the classes in your program.
For a code example, see ["Code Example for Writing Web Catalog Information To XML Files Using the Siebel Analytics Web SOAP API"](#) on page 178.

Description of Structures in the Siebel Analytics Web SOAP API

This section describes the structures in the Siebel Analytics Web SOAP API. There are three kinds of structures:

- Structures that are common to all services in the Siebel Analytics Web SOAP API.
- Structures in the HtmlViewService service.
- Structures in the WebCatalogService service.

NOTE: This document uses JavaScript-like syntax to describes structures. The exact syntax and implementation depends on the SOAP code generation tool and the target language used by your application development environment.

This section contains the following topics:

- ["Performing Operations on Columns in Results Using the Expression Structure in the Siebel Analytics Web SOAP API"](#) on page 142
- ["Referencing a Report Using the ReportRef Structure in the Siebel Analytics Web SOAP API"](#) on page 142
- ["Referencing a Variable in a Report Using the Variable Structure in the Siebel Analytics Web SOAP API"](#) on page 143
- ["Replacing Filters and Variables in a Report Using the ReportParams Structure in the Siebel Analytics Web SOAP API"](#) on page 143
- ["Defining HTML Display Options for Results Using the ReportHTMLOptions Structure in the Siebel Analytics Web SOAP API"](#) on page 145
- ["Storing Web Catalog Information About an Object Using the ItemInfo Structure in the Siebel Analytics Web SOAP API"](#) on page 146
- ["Denoting Named Properties Using the NameValuePair Structure in the Siebel Analytics Web SOAP API"](#) on page 147
- ["Specifying Information for a Web Catalog Object Using the CatalogObject Structure in the Siebel Analytics Web SOAP API"](#) on page 147

Performing Operations on Columns in Results Using the Expression Structure in the Siebel Analytics Web SOAP API

The Expression structure performs operations on columns in results returned in XML format. The Expression structure holds arithmetic and logical expressions in results. Each expression operates on a column in the results and produces one of the standard SQL data types as the result, such as numeric, character string, or Boolean.

The Expression structure is common to all services in the Siebel Analytics Web SOAP API. Expression() is an object reference and has no members.

Referencing a Report Using the ReportRef Structure in the Siebel Analytics Web SOAP API

The ReportRef structure references a report, in one of the following ways:

- The location of the report in the Web Catalog.
- The ReportDef object that defines the report. This field should always be null.
- The XML that defines the report.

NOTE: Only one of the fields in the ReportRef fields should be populated.

The ReportRef structure is common to all services in the Siebel Analytics Web SOAP API.

Fields in the ReportRef Structure

Field	Description
String reportPath	A string value that provides the path to the report in the Web Catalog.
ReportDef reportDef	Should be set to NULL.
String reportXML	A string value that contains the XML that defines the report.

Referencing a Variable in a Report Using the Variable Structure in the Siebel Analytics Web SOAP API

The Variable structure references a variable in the report and replaces it with another variable.

The Variable structure is common to all services in the Siebel Analytics Web SOAP API.

Fields in the Variable Structure

Field	Description
String name	A character string that contains the name of the variable to replace.
String valueXml	The data type of the new variable, such as string, integer, or Boolean, or an Expression structure.
String value	The XML representation of the new variable, encoded as a character string.

NOTE: If name or valueXml is populated, this field must be null.

Replacing Filters and Variables in a Report Using the ReportParams Structure in the Siebel Analytics Web SOAP API

The ReportParams structure replaces existing filters and variables in a report.

The ReportParams structure is common to all services in the Siebel Analytics Web SOAP API.

Fields in the ReportParams Structure

Field	Description
Object[] filterExpressions	An array of Siebel Analytics Web filter expressions or their character string representations, in the form Object[] filter_expression, filter_expression ...
Variable [] variables	An array of Siebel Analytics Web variables represented as character strings, in the form Variable [] variable, variable ...
NameValuePair[] nameValues	Should be set to NULL. This field is for internal use only.
TemplateInfo[] templateInfos	Should be set to NULL. This field is for internal use only.

Table 8 shows how filter expressions are applied to a report.

Table 8. How Filter Expressions Are Applied to a Report in the Siebel Analytics Web SOAP API

Step	Internal Processing
1	Obtains XML representations of the report and each filter expression.
2	For each expression element, locates the child node of the type sqlExpression (the type is determined by the value of the xsi:type attribute), and references its inner text.
3	In the report XML, locates all nodes that also have a child node of type sqlExpression where the inner text matches that located in the preceding step.
4	Replaces all nodes found in Step 3 with the expression from Step 2.

Table 9 shows how variables are applied to a report.

Table 9. How Variables Are Applied to a Report in the Siebel Analytics Web SOAP API

Step	Internal Processing
1	Obtains XML representations of the report.
2	For each variable, locates all nodes in the report XML that have a type of variable, attribute scope equal to report, and inner text that matches the variable name.
3	Replaces each node located in Step 2 with the new variable value.

Defining HTML Display Options for Results Using the ReportHTMLOptions Structure in the Siebel Analytics Web SOAP API

The ReportHTMLOptions structure defines options for displaying results on an HTML page.

The ReportHTMLOptions structure is used in the HtmlViewService service. For information about the HtmlViewService service, see ["Overview of the Siebel Analytics Web HtmlViewService Service" on page 139](#).

Fields in the ReportHTMLOptions Structure

Field	Description
Boolean enableDelayLoading	<p>A Boolean value, 1 (true) or 0 (false).</p> <p>When set to true, the Siebel Analytics Web server is not required to provide results immediately, and may display a message indicating that it is waiting for results.</p> <p>NOTE: The value is always assumed to be true, even when set to false.</p> <p>Using enableDelayLoading can be useful when results may take some time to obtain but you want to provide immediate feedback.</p>

Storing Web Catalog Information About an Object Using the ItemInfo Structure in the Siebel Analytics Web SOAP API

The ItemInfo structure contains Web Catalog information about an object.

The ItemInfo structure is used in the WebCatalogService service.

Fields in the ItemInfo Structure

Field	Description
String path	The path to the object in the Web Catalog.
String type	A character string that indicates the type. Valid values are: <ul style="list-style-type: none">■ Folder■ Link■ Object■ Missing■ NoAccess
DateTime lastModified	The date and time that the object was last modified, in DateTime format.
DateTime created	The date and time that the object was created (saved) in the Web Catalog, in DateTime format.
DateTime accessed	The data and time that the object was last accessed by a user, in DateTime format.
String signature	The signature of the Web Catalog object. For more information about signatures, see "Using Item Signatures in the Siebel Analytics Web SOAP API" on page 138 .
NameValuePair[] itemProperties	An array of object properties.

Denoting Named Properties Using the NameValuePair Structure in the Siebel Analytics Web SOAP API

The NameValuePair structure denotes named properties such as COLOR=RED.

The NameValuePair structure is used in the WebCatalogService service.

Fields in the NameValuePair Structure

Field	Description
String name	A character string that contains the name of the property, such as COLOR.
String value	A character string that contains the value, such as RED.

Specifying Information for a Web Catalog Object Using the CatalogObject Structure in the Siebel Analytics Web SOAP API

The CatalogObject structure retrieves or specifies all information for a particular Web Catalog object in a single call.

The CatalogObject structure is used in the WebCatalogService service.

Fields in the CatalogObject Structure

Field	Description
ItemInfo itemInfo	Web Catalog information about the object, supplied in the ItemInfo common structure. For information about the ItemInfo structure, see "Storing Web Catalog Information About an Object Using the ItemInfo Structure in the Siebel Analytics Web SOAP API" on page 146.
Object catalogObject	A character string that contains an XML representation of the object, or the object itself. When this field is the object itself, the SOAP engine you are using should be able to provide automatic serialization to and deserialization from the XML.

Description of Methods in the Siebel Analytics Web SOAP API

This section describes the methods in the Siebel Analytics Web SOAP API. Methods are described using JavaScript-like syntax and standard types. The exact signature of generated classes and methods depends on the SOAP code generation tool and the target language used by your application development environment.

For an overview of services and methods, see [“Overview of the Siebel Analytics Web SOAP API” on page 133](#).

This section contains the following topics:

■ **SawSessionService Methods**

- [“Authenticating a User Using the logon\(\) Method in the Siebel Analytics Web SOAP API” on page 150](#)
- [“Logging a User Off Using the logoff\(\) Method in the Siebel Analytics Web SOAP API” on page 150](#)
- [“Getting the Current User Name Using the getCurUser\(\) Method in the Siebel Analytics Web SOAP API” on page 151](#)
- [“Keeping Inactive Sessions Alive Using the keepAlive\(\) Method in the Siebel Analytics Web SOAP API” on page 151](#)

■ **HtmlViewService Methods**

- [“Creating a New Page Object Using the startPage\(\) Method in the Siebel Analytics Web SOAP API” on page 152](#)
- [“Destroying a Page Object Using the endPage\(\) Method in the Siebel Analytics Web SOAP API” on page 153](#)
- [“Adding Results to an HTML Page Using the addReportToPage\(\) Method in the Siebel Analytics Web SOAP API” on page 153](#)
- [“Getting HTML to Include in the <HEAD> Section Using the getHeadersHTML\(\) Method in the Siebel Analytics Web SOAP API” on page 155](#)
- [“Getting HTML to Include in the <BODY> Section Using the getCommonBodyHTML\(\) Method in the Siebel Analytics Web SOAP API” on page 156](#)
- [“Getting an HTML Excerpt to Display in Results Using the getHTMLForReport\(\) Method in the Siebel Analytics Web SOAP API” on page 157](#)
- [“Specifying an Bridge URL Using the setBridge\(\) Method in the Siebel Analytics Web SOAP API” on page 158](#)

■ **XmlViewService Methods**

- [“Getting the Results of a Report Using the getResults\(\) Method in the Siebel Analytics Web SOAP API” on page 159](#)

■ **ReportEditingService Methods**

- "Applying Parameters to a Report Using the applyReportParams() Method in the Siebel Analytics Web SOAP API" on page 160
- "Retrieving the SQL for a Report Using the generateReportSQL() Method in the Siebel Analytics Web SOAP API" on page 161

■ **WebCatalogService Methods**

- "Copying an Object in the Web Catalog Using the copyItem() Method in the Siebel Analytics Web SOAP API" on page 162
- "Creating a Folder in the Web Catalog Using the createFolder() Method in the Siebel Analytics Web SOAP API" on page 163
- "Creating a Link to the Web Catalog Using the createLink() Method in the Siebel Analytics Web SOAP API" on page 164
- "Deleting an Object From the Web Catalog Using the deleteItem() Method in the Siebel Analytics Web SOAP API" on page 165
- "Getting Web Catalog Information for an Object Using the getItemInfo() Method in the Siebel Analytics Web SOAP API" on page 166
- "Getting Child Subitems for a Web Catalog Object Using the getSubItems() Method in the Siebel Analytics Web SOAP API" on page 167
- "Moving a Web Catalog Object Using the moveItem() Method in the Siebel Analytics Web SOAP API" on page 168
- "Reading a Web Catalog Object Using the readObject() Method in the Siebel Analytics Web SOAP API" on page 169
- "Deleting a Web Catalog Folder Using the removeFolder() Method in the Siebel Analytics Web SOAP API" on page 170
- "Setting a Property for a Web Catalog Object Using the setItemProperty() Method in the Siebel Analytics Web SOAP API" on page 170
- "Writing an Object to the Web Catalog Using the writeObject() Method in the Siebel Analytics Web SOAP API" on page 171
- "Writing Results to the Web Catalog Using the writeReport() Method in the Siebel Analytics Web SOAP API" on page 172
- "Writing a Dashboard Object to the Web Catalog Using the writeDashboard() Method in the Siebel Analytics Web SOAP API" on page 173
- "Writing a Dashboard Prompt to the Web Catalog Using the writeDashboardPrompt() Method in the Siebel Analytics Web SOAP API" on page 174
- "Writing a Dashboard Page to the Web Catalog Using the writeDashboardPage() Method in the Siebel Analytics Web SOAP API" on page 175
- "Writing a Filter to the Web Catalog Using the writeSavedFilter() Method in the Siebel Analytics Web SOAP API" on page 176

Authenticating a User Using the logon() Method in the Siebel Analytics Web SOAP API

The logon() method in the SAWSessionService service authenticates the user. If authentication fails, an exception is thrown. The logon method returns the session ID and sets an HTTP session cookie. The session ID is used in other SOAP API calls to identify your SOAP session.

Description of Parameters in the logon() Method

The logon() method parameters are described in the following table.

Parameter	Description
String username	A character string that contains the user name to authenticate.
String password	A character string that contains the password for the user. If there is no password, leave this field empty (void).

Logging a User Off Using the logoff() Method in the Siebel Analytics Web SOAP API

The logoff() method in the SAWSessionService service logs the user off Siebel Analytics Web.

Description of Parameters in the logoff() Method

The logoff() method parameters are described in the following table.

Parameter	Description
String sessionID	<p>A string value that contains the session ID to log off from the SOAP session.</p> <p>The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.</p>

Getting the Current User Name Using the getCurUser() Method in the Siebel Analytics Web SOAP API

The getCurUser() method in the SAWSessionService service gets the current user name for the session.

Description of Parameters in the getCurUser() Method

The getCurUser() method parameters are described in the following table.

Parameter	Description
String sessionID	A character string that identifies the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Keeping Inactive Sessions Alive Using the keepAlive() Method in the Siebel Analytics Web SOAP API

The keepAlive() method in the SAWSessionService service instructs Siebel Analytics Web not to end particular Siebel Analytics Web user sessions due to inactivity. The effect of this call on session lifetime is the same as if those users performed an activity in the browser such as clicking a report, or invoking a SOAP call.

For more information about ending Siebel Analytics Web user sessions due to inactivity, see ["Setting the Time to Log Users Off Siebel Analytics Web Automatically" on page 23](#).

Description of Parameters in the keepAlive() Method

The keepAlive() method parameters are described in the following table.

Parameter	Description
String [] sessionID	An array of character strings that contains the session IDs to remain logged on.

Impersonating a User Using the impersonate() Method in the Siebel Analytics Web SOAP API

The impersonate() method in the SAWSessionService service logs on and impersonates the user. This method is useful when you need to create sessions for multiple users and have only the administrator's name and password. You do not need to use the (logon) method if you use the impersonate() method.

This method returns the session ID and sets an HTTP session cookie. If user authentication or impersonation fails, an exception is thrown.

Description of Parameters in the impersonate() Method

The impersonate() method parameters are described in the following table.

Parameter	Description
String name	A character string that contains the user name to log on and authenticate.
String	A character string that contains the password for the user. If there is no password for the user, leave this field empty (void).
String	A character string that contains the user name to impersonate the authenticated user.

Creating a New Page Object Using the startPage() Method in the Siebel Analytics Web SOAP API

The startPage() method in the HtmlViewService service creates a new page object and returns its ID.

For information about the HtmlViewService service, see ["Overview of the Siebel Analytics Web HtmlViewService Service" on page 139](#).

Description of Parameters in the startPage() Method

The startPage() method parameters are described in the following table.

Parameter	Description
String clientIP	A character string that contains the IP address of the client running the browser. NOTE: This parameter is not used.
String sessionID	A character string that contains the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Destroying a Page Object Using the endPage() Method in the Siebel Analytics Web SOAP API

The endPage() method in the HtmlViewService service destroys the Siebel Analytics Web server page object and all data associated with it.

For information about the HtmlViewService service, see ["Overview of the Siebel Analytics Web HtmlViewService Service" on page 139](#).

Description of Parameters in the endPage() Method

The endPage() method parameters are described in the following table.

Parameter	Description
String pageID	A character string that contains the name of the page.
String sessionID	A character string that identifies the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Adding Results to an HTML Page Using the addReportToPage() Method in the Siebel Analytics Web SOAP API

The addReportToPage() method in the HtmlViewService service adds results to an HTML page.

For information about the HtmlViewService service, see ["Overview of the Siebel Analytics Web HtmlViewService Service" on page 139](#).

Description of Parameters in the addReportToPage() Method

The addReportToPage() method parameters are described in the following table.

Parameter	Description
String pageID	A character string page ID returned by the startPage() method. For information about the startPage () method, see "Creating a New Page Object Using the startPage() Method in the Siebel Analytics Web SOAP API" on page 152 .
String reportID	A character string that identifies the report containing the results to add to the page. It should be used to reference this report in subsequent SOAP calls; for example, corresponding user interface elements generated by the Siebel Analytics Web server would reference the same ID.

Parameter	Description
ReportRef report	<p>The report definition, supplied in the ReportRef common structure.</p> <p>For more information, see “Referencing a Report Using the ReportRef Structure in the Siebel Analytics Web SOAP API” on page 142.</p>
ReportParams reportParams	<p>The filters or variables to apply to the report before execution, supplied in the ReportParams common structure.</p> <p>For more information, see “Replacing Filters and Variables in a Report Using the ReportParams Structure in the Siebel Analytics Web SOAP API” on page 143.</p> <p>This parameter is optional.</p>
ReportHTMLOptions options	<p>The display options to apply to the report after execution, supplied in the ReportHTMLOptions structure.</p> <p>For more information, see “Defining HTML Display Options for Results Using the ReportHTMLOptions Structure in the Siebel Analytics Web SOAP API” on page 145.</p> <p>This parameter is optional.</p>
String sessionID	<p>A character string that identifies the session ID.</p> <p>The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.</p>

Getting HTML to Include in the <HEAD> Section Using the getHeadersHTML() Method in the Siebel Analytics Web SOAP API

The getHeadersHTML() method in the HtmlViewService service gets HTML to include in the <HEAD> section.

For information about the HtmlViewService service, see ["Overview of the Siebel Analytics Web HtmlViewService Service" on page 139](#).

Description of Parameters in the getHeadersHTML() Method

The getHeadersHTML() method parameters are described in the following table.

Parameter	Description
String pageID	A character string page ID returned by the createPage() method. For information about the startPage () method, see "Creating a New Page Object Using the startPage() Method in the Siebel Analytics Web SOAP API" on page 152 .
String sessionID	A character string that identifies the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Getting HTML to Include in the <BODY> Section Using the getCommonBodyHTML() Method in the Siebel Analytics Web SOAP API

The getCommonBodyHTML() in the HtmlViewService service method gets HTML to include in the <BODY> section.

For information about the HtmlViewService service, see ["Overview of the Siebel Analytics Web HtmlViewService Service" on page 139](#).

Description of Parameters in the getCommonBodyHTML() Method

The getCommonBodyHTML() method parameters are described in the following table.

Parameter	Description
String pageID	A character string page ID returned by the createPage() method. For information about the startPage () method, see "Creating a New Page Object Using the startPage() Method in the Siebel Analytics Web SOAP API" on page 152
String sessionID	A character string that identifies the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Getting an HTML Excerpt to Display in Results Using the getHTMLForReport() Method in the Siebel Analytics Web SOAP API

The getHTMLForReport() method in the HtmlViewService service gets an HTML excerpt to display the results for a particular report. Before issuing this call, use the addReportToPage method to add the results to an HTML page.

For more information about the addReportToPage method, see ["Adding Results to an HTML Page Using the addReportToPage\(\) Method in the Siebel Analytics Web SOAP API" on page 153.](#)

For information about the HtmlViewService service, see ["Overview of the Siebel Analytics Web HtmlViewService Service" on page 139.](#)

Description of Parameters in the getHTMLForReport() Method

The getHTMLForReport() method parameters are described in the following table.

Parameter	Description
String pageID	A character string page ID returned by the createPage() method. For information about the startPage () method, see "Creating a New Page Object Using the startPage() Method in the Siebel Analytics Web SOAP API" on page 152
String pageReportID	A character string ID returned by the addReportToPage() method. For information about the addReportToPage method, see "Adding Results to an HTML Page Using the addReportToPage() Method in the Siebel Analytics Web SOAP API" on page 153.
String sessionID	A character string that identifies the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Specifying an Bridge URL Using the setBridge() Method in the Siebel Analytics Web SOAP API

The setBridge() method in the HtmlViewService service specifies a bridge URL to receive communications. Specifying a bridge URL can be useful when the Siebel Analytics Web server and the user's Web server reside on different machines, or when you want to modify the results in your application development environment.

After the setBridge() method is called, all requests from the client browser to the Siebel Analytics Web server are sent to the bridge URL, which then forwards requests to the Siebel Analytics Web server.

For information about the HtmlViewService service, see ["Overview of the Siebel Analytics Web HtmlViewService Service" on page 139](#).

Description of Parameters in the setBridge () Method

The setBridge() method parameters are described in the following table.

Parameter	Description
String bridgeURL	The bridge URL.
String sessionID	A character string that contains the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Usage Notes for the setBridge () Method

It is your responsibility to make sure that the client browser provides a handler to the bridge URL in the form of a Java servlet, an Active Server Pages (ASP) page, a Common Gateway Interface (CGI), an Internet Server application programming interface (ISAPI), or an equivalent application.

You must also perform the following tasks:

- Decode the path of the requested Siebel Analytics Web resource in the RedirectURL parameter of the request character string. For information about the RedirectURL parameter, see ["How Callback URLs Are Replaced Using the Setbridge \(\) Method" on page 158](#).
- Forward all other request parameters, together with all headers and the request body, to the bridge URL.
- Copy the response from the Siebel Analytics Web server to the response stream.

How Callback URLs Are Replaced Using the Setbridge () Method

The new callback URL is based on the bridge URL, with the addition of a RedirectURL parameter. The value of the RedirectURL parameter should be the original value of the URL, encoded using standard URL encoding rules.

Internally, Siebel Analytics Web usually uses relative URLs for callback links. For example, if the original callback link is `saw.dll?Go` and the bridge URL is `http://myserver/myapplication/sawbridge`, the new callback URL is `http://myserver/myapplication/sawbridge?RedirectURL=saw.dll%3fGo`.

Getting the Results of a Report Using the `getResults()` Method in the Siebel Analytics Web SOAP API

The `getResults` method in the `XmlViewService` service returns the report results, in XML format.

Description of Parameters in the `getResults` Method()

The `getResults()` method parameters are described in the following table.

Parameter	Description
ReportRef report	The report definition, supplied in the ReportRef common structure. For more information, see "Referencing a Report Using the ReportRef Structure in the Siebel Analytics Web SOAP API" on page 142.
String outputFormat	A character string that identifies the output format of the returned report object. Valid values are: <ul style="list-style-type: none">■ "urn: SAWRowset/data" This value returns rows without metadata.■ "urn: SAWRowset/schema" This value returns metadata only.■ "urn: SAWRowset/both" This value returns both rows and metadata.
Boolean encodeInString	A Boolean value, 1 (true) or 0 (false). When set to true (the usual value), it indicates that the returned report object is encoded as a character string.
ReportParams reportParams	The filters or variables to apply to the report before execution, supplied in the ReportParams common structure. For information about the ReportParams structure, see "Replacing Filters and Variables in a Report Using the ReportParams Structure in the Siebel Analytics Web SOAP API" on page 143. This parameter is optional.
String sessionID	A character string that contains the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Applying Parameters to a Report Using the `applyReportParams()` Method in the Siebel Analytics Web SOAP API

The `applyReportParams()` method in the `ReportEditingService` service applies report parameters to the report and returns the results.

Description of Parameters in the `applyReportParams` Method()

The `applyReportParams()` method parameters are described in the following table.

Parameter	Description
ReportRef object	The path to the report definition, supplied in the ReportRef common structure. For information about the ReportRef structure, see "Referencing a Report Using the ReportRef Structure in the Siebel Analytics Web SOAP API" on page 142.
ReportParams reportParams	The filters or variables to apply to the report before execution, supplied in the ReportParams common structure. For more information, see "Replacing Filters and Variables in a Report Using the ReportParams Structure in the Siebel Analytics Web SOAP API" on page 143. This parameter is optional.
Boolean encodeInString	A Boolean value, 1 (true) or 0 (false). When set to true, it indicates that the returned report object is encoded as a character string.
String sessionID	A character string that identifies the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Retrieving the SQL for a Report Using the generateReportSQL() Method in the Siebel Analytics Web SOAP API

The generateReportSQL() method in the ReportEditingService service retrieves the logical SQL query for a given report.

Description of Parameters in the generateReportSQL Method()

The generateReportSQL() method parameters are described in the following table.

Parameter	Description
ReportRef reportRef	The path to the report definition supplied in the ReportRef common structure. For more information, see "Referencing a Report Using the ReportRef Structure in the Siebel Analytics Web SOAP API" on page 142.
ReportParams reportParams	The path to the filters or variables to apply to the report before execution, supplied in the ReportParams common structure. For more information, see "Replacing Filters and Variables in a Report Using the ReportParams Structure in the Siebel Analytics Web SOAP API" on page 143. This parameter is optional.
String sessionID	A character string that identifies the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Copying an Object in the Web Catalog Using the `copyItem()` Method in the Siebel Analytics Web SOAP API

The `copyItem()` method in the `WebCatalogService` service copies an object from one location in the Web Catalog to another location in the Web Catalog.

Description of Parameters in the `copyItem()` Method

The `copyItem()` method parameters are described in the following table.

Parameter	Description
String <code>pathSrc</code>	The current path to the object in the Web Catalog.
String <code>pathDest</code>	The location in the Web Catalog where the object should be copied.
String <code>sessionID</code>	A character string that identifies the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Creating a Folder in the Web Catalog Using the createFolder() Method in the Siebel Analytics Web SOAP API

The createFolder() method in the WebCatalogService service creates a new folder in the Web Catalog.

Description of Parameters in the createFolder() Method

The createFolder() method parameters are described in the following table.

Parameter	Description
String path	The location in the Web Catalog where the folder should be created, including the name of the new folder.
Boolean createIfNotExists	A Boolean value, 1 (true) or 0 (false). When set to true, the folder object is created in the Web Catalog if it does not already exist. When set to false, the folder object is not recreated if it already exists.
String sessionID	A character string that identifies the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Creating a Link to the Web Catalog Using the createLink() Method in the Siebel Analytics Web SOAP API

The createLink() method in the WebCatalogService service creates a link to the Web Catalog.

Description of Parameters in the createLink() Method

The createLink() method parameters are described in the following table.

Parameter	Description
String sPath	The path to the parent object in the Web Catalog.
String sTargetPath	The location in the Web Catalog to which the link being created should refer.
Boolean overwriteIfExists	A Boolean value, 1 (true) or 0 (false). When set to true, the link is overwritten if it already exists in the Web Catalog. When set to false, the link is not overwritten if it already exists in the Web Catalog.
String sessionID	A character string that identifies the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Deleting an Object From the Web Catalog Using the deleteItem() Method in the Siebel Analytics Web SOAP API

The deleteItem() method in the WebCatalogService service deletes an object from the Web Catalog.

To delete a folder, see ["Deleting a Web Catalog Folder Using the removeFolder\(\) Method in the Siebel Analytics Web SOAP API"](#) on page 170.

Description of Parameters in the deleteItem() Method

The deleteItem() method parameters are described in the following table.

Parameter	Description
String path	The path to the object in the Web Catalog.
String sessionID	A character string that identifies the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Getting Web Catalog Information for an Object Using the getItemInfo() Method in the Siebel Analytics Web SOAP API

The getItemInfo() method in the WebCatalogService service gets Web Catalog information for an object.

Description of Parameters in the getItemInfo() Method

The getItemInfo() method parameters are described in the following table.

Parameter	Description
String path	The path to the object in the Web Catalog.
Boolean resolveLinks	A Boolean value, 1 (true) or 0 (false). When set to true, and the path in the Web Catalog refers to a link, information is retrieved for the object pointed to by the link.
String sessionID	A character string that identifies the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Getting Child Subitems for a Web Catalog Object Using the getSubItems() Method in the Siebel Analytics Web SOAP API

The getSubItems() method in the WebCatalogService service gets the collection of child subitems for an object in the Web Catalog.

Description of Parameters in the getSubItems() Method

The getSubItems() method parameters are described in the following table.

Parameter	Description
String path	The path to the parent object in the Web Catalog.
String mask	The mask that indicates the child subitems to retrieve. The mask character must be an asterisk (*). If you specify a single asterisk, all child subitems are retrieved.
Boolean resolveLinks	A Boolean value, 1 (true) or 0 (false). When set to true, and the path in the Web Catalog refers to a link, information is retrieved for the child subitems of the object pointed to by the link.
NameValuePair[] itemInfoFilters	This parameter is for internal use only and should be set to NULL.gftb
String sessionID	A character string that identifies the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Moving a Web Catalog Object Using the `moveItem()` Method in the Siebel Analytics Web SOAP API

The `moveItem()` method in the `WebCatalogService` service moves an object in the Web Catalog to a different location in the Web Catalog.

Description of Parameters in the `moveItem()` Method

The `moveItem()` method parameters are described in the following table.

Parameter	Description
String <code>pathSrc</code>	The current path to the object in the Web Catalog.
String <code>pathDest</code>	The location in the Web Catalog where the object should be moved.
String <code>sessionID</code>	A character string that identifies the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Reading a Web Catalog Object Using the readObject() Method in the Siebel Analytics Web SOAP API

The readObject() method in the WebCatalogService service reads an object from the Web Catalog and returns CatalogObject structure.

For a description of the CatalogObject structure, see ["Specifying Information for a Web Catalog Object Using the CatalogObject Structure in the Siebel Analytics Web SOAP API" on page 147](#)

Description of Parameters in the readObject() Method

The readObject() method parameters are described in the following table.

Parameter	Description
String path	The location where the retrieved object should be placed.
Boolean returnXmlString	<p>A Boolean value, 1 (true) or 0 (false).</p> <p>When set to true, the catalogObject field returned in the CatalogObject structure is a character string that contains the XML representation of the object stored in the Web Catalog.</p> <p>When set to false, the SOAP client needs to analyze the xsi:type attribute of the root node of the returned XML to determine the type of object to create. If the xsi:type attribute is unknown, an exception may be thrown depending on the SOAP client's implementation.</p>
String sessionID	<p>A character string that identifies the session ID.</p> <p>The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.</p>

Deleting a Web Catalog Folder Using the `removeFolder()` Method in the Siebel Analytics Web SOAP API

The `removeFolder()` method in the `WebCatalogService` service deletes a folder and its contents from the Web Catalog.

To delete an object other than a folder and its contents, see ["Deleting an Object From the Web Catalog Using the `deleteItem\(\)` Method in the Siebel Analytics Web SOAP API"](#) on page 165.

Description of Parameters in the `removeFolder()` Method

The `removeFolder()` method parameters are described in the following table.

Parameter	Description
String path	The path to the folder in the Web Catalog.
String sessionID	A character string that identifies the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Setting a Property for a Web Catalog Object Using the `setItemProperty()` Method in the Siebel Analytics Web SOAP API

The `setItemProperty()` method in the `WebCatalogService` service sets a property for an object in the Web Catalog.

Description of Parameters in the `setItemProperty()` Method

The `setItemProperty()` method parameters are described in the following table.

Parameter	Description
String path	The path to the object in the Web Catalog.
String name	A character string that contains the name of the property to set.
String value	A character string that contains the new setting for the property.
String sessionID	A character string that contains the session ID. The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.

Writing an Object to the Web Catalog Using the writeObject() Method in the Siebel Analytics Web SOAP API

The writeObject() method in the WebCatalogService service writes an object to the Web Catalog in XML format.

Description of Parameters in the writeObject() Method

The writeObject() method parameters are described in the following table.

Parameter	Description
CatalogObject object	<p>The object to write to the Web Catalog, supplied in the CatalogObject structure. For information about the CatalogObject structure, see "Specifying Information for a Web Catalog Object Using the CatalogObject Structure in the Siebel Analytics Web SOAP API" on page 147.</p> <p>All fields of object.itemInfo are ignored, except for the array of item properties, which are applied to the object. The signature of the resulting document is always COXMLDocument1.</p>
String path	The location in the Web Catalog where the object should be written.
Boolean resolveLinks	<p>A Boolean value, 1 (true) or 0 (false).</p> <p>When set to true, and the path in the Web Catalog refers to a link, the object is written to the location pointed to by the link.</p>
Boolean allowOverwrite	<p>A Boolean value, 1 (true) or 0 (false).</p> <p>When set to true, if the object already exists in the Web Catalog, it will be overwritten.</p> <p>When set to false, if the object already exists in the Web Catalog, it will not be overwritten.</p>
String sessionID	<p>A character string that contains the session ID.</p> <p>The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.</p>

Writing Results to the Web Catalog Using the writeReport() Method in the Siebel Analytics Web SOAP API

The writeReport() method in the WebCatalogService service writes a set of results to the Web Catalog.

Description of Parameters in the writeReport() Method

The writeReport() method parameters are described in the following table.

Parameter	Description
CatalogObject object	<p>The object to write to the Web Catalog, supplied in the CatalogObject structure. For information about the CatalogObject structure, see "Specifying Information for a Web Catalog Object Using the CatalogObject Structure in the Siebel Analytics Web SOAP API" on page 147.</p> <p>All fields of object.itemInfo are ignored, except for the array of item properties, which are applied to the object. The signature of the resulting document is always queryitem1.</p>
String path	The location in the Web Catalog where the results should be written.
Boolean resolveLinks	<p>A Boolean value, 1 (true) or 0 (false).</p> <p>When set to true, and the path in the Web Catalog refers to a link, the results are written to the location pointed to by the link.</p>
Boolean allowOverwrite	<p>A Boolean value, 1 (true) or 0 (false).</p> <p>When set to true, if the results already exist in the Web Catalog, they will be overwritten.</p> <p>When set to false, if the results already exist in the Web Catalog, they will not be overwritten.</p>
String sessionID	<p>A character string that contains the session ID.</p> <p>The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.</p>

Writing a Dashboard Object to the Web Catalog Using the writeDashboard() Method in the Siebel Analytics Web SOAP API

The writeDashboard() method in the WebCatalogService service writes a dashboard object to the Web Catalog.

Description of Parameters in the writeDashboard() Method

The writeDashboard() method parameters are described in the following table.

Parameter	Description
CatalogObject object	<p>The dashboard object to write to the Web Catalog, supplied in the CatalogObject structure. For information about the CatalogObject structure, see "Specifying Information for a Web Catalog Object Using the CatalogObject Structure in the Siebel Analytics Web SOAP API" on page 147.</p> <p>All fields of object.itemInfo are ignored, except for the array of item properties, which are applied to the object. The signature of the resulting document is always dashboarditem1.</p>
String path	The location in the Web Catalog where the dashboard object should be written.
Boolean resolveLinks	<p>A Boolean value, 1 (true) or 0 (false).</p> <p>When set to true, and the path in the Web Catalog refers to a link, the dashboard object is written to the location pointed to by the link.</p>
Boolean allowOverwrite	<p>A Boolean value, 1 (true) or 0 (false).</p> <p>When set to true, if the dashboard object already exists in the Web Catalog, it will be overwritten.</p> <p>When set to false, if the dashboard object already exists in the Web Catalog, it will not be overwritten.</p>
String sessionID	<p>A character string that contains the session ID.</p> <p>The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.</p>

Writing a Dashboard Prompt to the Web Catalog Using the writeDashboardPrompt() Method in the Siebel Analytics Web SOAP API

The writeDashboardPrompt() method in the WebCatalogService service writes a dashboard prompt to the Web Catalog.

Description of Parameters in the writeDashboardPrompt() Method

The writeDashboardPrompt() method parameters are described in the following table.

Parameter	Description
CatalogObject object	<p>The dashboard prompt object to write to the Web Catalog, supplied in the CatalogObject structure. For information about the CatalogObject structure, see "Specifying Information for a Web Catalog Object Using the CatalogObject Structure in the Siebel Analytics Web SOAP API" on page 147.</p> <p>All fields of object.itemInfo are ignored, except for the array of item properties, which are applied to the object. The signature of the resulting document is always globalfilteritem1.</p>
String path	<p>The location in the Web Catalog where the dashboard prompt should be written.</p>
Boolean resolveLinks	<p>A Boolean value, 1 (true) or 0 (false).</p> <p>When set to true, and the path in the Web Catalog refers to a link, the dashboard prompt is written to the location pointed to by the link.</p>
Boolean allowOverwrite	<p>A Boolean value, 1 (true) or 0 (false).</p> <p>When set to true, if the dashboard prompt already exists in the Web Catalog, it will be overwritten.</p> <p>When set to false, if the dashboard prompt already exists in the Web Catalog, it will not be overwritten.</p>
String sessionID	<p>A character string that contains the session ID.</p> <p>The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.</p>

Writing a Dashboard Page to the Web Catalog Using the writeDashboardPage() Method in the Siebel Analytics Web SOAP API

The writeDashboardPage() method in the WebCatalogService service writes a dashboard page to the Web Catalog.

Description of Parameters in the writeDashboardPage() Method

The writeDashboardPage() method parameters are described in the following table.

Parameter	Description
CatalogObject object	<p>The dashboard page object to write to the Web Catalog, supplied in the CatalogObject structure. For information about the CatalogObject structure, see "Specifying Information for a Web Catalog Object Using the CatalogObject Structure in the Siebel Analytics Web SOAP API" on page 147.</p> <p>All fields of object.itemInfo are ignored, except for the array of item properties, which are applied to the object. The signature of the resulting document is always dashboardpageitem1.</p>
String path	The location in the Web Catalog where the dashboard page should be written.
Boolean resolveLinks	<p>A Boolean value, 1 (true) or 0 (false).</p> <p>When set to true, and the path in the Web Catalog refers to a link, the dashboard page is written to the location pointed to by the link.</p>
Boolean allowOverwrite	<p>A Boolean value, 1 (true) or 0 (false).</p> <p>When set to true, if the dashboard page already exists in the Web Catalog, it will be overwritten.</p> <p>When set to false, if the dashboard page already exists in the Web Catalog, it will not be overwritten.</p>
String sessionID	<p>A character string that contains the session ID.</p> <p>The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.</p>

Writing a Filter to the Web Catalog Using the writeSavedFilter() Method in the Siebel Analytics Web SOAP API

The writeSavedFilter() method in the WebCatalogService service writes a filter to the Web Catalog.

Description of Parameters in the writeSavedFilter() Method

The writeSavedFilter() method parameters are described in the following table.

Parameter	Description
CatalogObject object	<p>The filter object to write to the Web Catalog, supplied in the CatalogObject structure. For information about the CatalogObject structure, see "Specifying Information for a Web Catalog Object Using the CatalogObject Structure in the Siebel Analytics Web SOAP API" on page 147.</p> <p>All fields of object.itemInfo are ignored, except for the array of item properties, which are applied to the object. The signature of the resulting document is always savedfilteritem1.</p>
String path	The location in the Web Catalog where the filter should be written.
Boolean resolveLinks	<p>A Boolean value, 1 (true) or 0 (false).</p> <p>When set to true, and the path in the Web Catalog refers to a link, the filter is written to the location pointed to by the link.</p>
Boolean allowOverwrite	<p>A Boolean value, 1 (true) or 0 (false).</p> <p>When set to true, if the filter already exists in the Web Catalog, it will be overwritten.</p> <p>When set to false, if the filter already exists in the Web Catalog, it will not be overwritten.</p>
String sessionID	<p>A character string that contains the session ID.</p> <p>The session ID is usually returned by the logon call. If the SOAP client engine can handle HTTP cookies, you can omit the session ID or set it to null.</p>

Format of Returned Recordsets in the Siebel Analytics Web SOAP API

The following is the basic structure for Siebel Analytics Web rowset XML output:

```
<Recordset xmlns="Siebel Analytics NS" >
  <xsd::schema xsd = ...>
    .
    .
  </xsd::schema>
  <row>
    <column1>value1</column1>
    <column2>value2</column2>
  </row>
  <row>...</row>
  <row>...</row>
</Recordset>
```

Each row element holds the contents of one SQL record. Child elements of the row contain values of record fields.

The recordset XML may optionally include XSD schema that describe the format of row elements.

Code Example for Writing Web Catalog Information To XML Files Using the Siebel Analytics Web SOAP API

This section provides an example of C# code that uses the Siebel Analytics Web SOAP API. The code extracts Web Catalog information and writes it to XML files.

NOTE: Some code that appears on a single line in an application development environment may appear on more than one line when the code is printed or viewed online because of page or window size limitations.

```
using System;
using System.IO;
using System.Web;

using CatalogExport.SAWServices;

namespace CatalogExport
{
    /// <summary>
    /// Summary description for Class1.
    /// </summary>
    class CatalogExport
    {
        static private System.Net.CookieContainer cookies = new
System.Net.CookieContainer ();
        static private SAWSessionService m_session = new SAWSessionService ();
        static private WebCatalogService m_webCatalogService = new webCatalogService();
        static int m_nCurFileIndex=0;
        static StreamWriter m_curFile = null;
        static int m_nFileMaxLen=1024*1024*5;
        static String m_strExportDir=null;
        static String m_strFilePrefix="catalog";

        static void openFile()
        {
            if (m_curFile== null || m_curFile.BaseStream.Length > m_nFileMaxLen)
            {
                if (m_curFile != null )
                {
                    m_curFile.WriteLine("</CatalogRoot>");
                    m_curFile.Close();
                }
                String strNewPath = m_strExportDir + "\\\" + m_strFilePrefix +
(++m_nCurFileIndex) + ".xml";
                m_curFile = new StreamWriter(strNewPath);
                m_curFile.WriteLine("<CatalogRoot>");
            }
        }
        /// <summary>
        /// The main entry point for the application.
        /// </summary>
    }
}
```

```
[STAThread]
static void Main(string[] args)
{
    String strURL="http://localhost/analytics/saw.dll";
    String strUser="Administrator";

    String strPWD="";

    for (int i=0;i<args.Length;++i)
    {
        if (args[i].Equals("/URL"))
            strURL = args[++i];
        else if (args[i].Equals("/USER"))
            strUser = args[++i];
        else if (args[i].Equals("/PWD"))
            strPWD = args[++i];
        else if (args[i].Equals("/DIR"))
            m_strExportDir = args[++i];
        else if (args[i].Equals("/?"))
        {
            printUsage();
            return;
        }
    }

    if (m_strExportDir == null)
    {
        printUsage();
        return;
    }
    Directory.CreateDirectory(m_strExportDir);
    //let all services use the same cookie container - so all of them
    //would have access to Session cookie
    m_WebCatalogService.CookieContainer = cookies;
    m_session.CookieContainer = cookies;
    m_session.Url = strURL + "?SoapImpl=nQSessionService";
    m_WebCatalogService.Url = strURL + "?SoapImpl=webCatalogService";
    String sessionID = m_session.logon(strUser,strPWD);
    try
    {
        processCatalogFolder("/",sessionID);
    }
    finally
    {
        if (m_curFile != null )
        {
            m_curFile.WriteLine("</CatalogRoot>");
            m_curFile.Close();
        }
    }
}

static void processCatalogFolder(string path,string sessionID)
```

```
{
    ItemInfo[] arrChilds =
m_WebCatalogService.getSubItems(path,"*",false,null,sessionID);
    foreach (ItemInfo info in arrChilds)
    {
        switch (info.type)
        {
            case ItemInfoType.Folder:
                try
                {
                    processCatalogFolder(info.path,sessionID);
                }
                catch (Exception e)
                {
                    Console.WriteLine(e.Message);
                }

                continue;
            case ItemInfoType.Object:
                {
                    if (!isKnownSignature(info.signature))
                        continue;
                    openFile();
                    CatalogObject co =
m_WebCatalogService.readObject(info.path,true,sessionID);
                    m_curFile.WriteLine("<CatalogObj path=\"\" +
HttpUtility.HtmlEncode(info.path) + \"\" signature=\"\" + info.signature + \"\">");
                    m_curFile.WriteLine(co.catalogObject.ToString());
                    m_curFile.WriteLine("</CatalogObj>");
                    break;
                }
            }
        }
    }

}

static bool isKnownSignature(string strSignature)
{
    return strSignature=="dashboardpageitem1" ||
           strSignature=="dashboarditem1" ||
           strSignature=="queryitem1" ||
           strSignature=="dashboarditem1" ||
           strSignature=="globalfilteritem1" ||
           strSignature=="filteritem1" ||
           strSignature=="COXMLDocument1";
}

static void printUsage()
{
    Console.WriteLine("CatalogExport /DIR exportdir [/USER username] [/PWD
password] [/URL serverurl]");
}
}
}
```

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