



Siebel Installation Guide for UNIX: Servers, Mobile Web Clients, Tools

Version 7.7, Rev. B
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What's New in This Release

Siebel Installation Guide for UNIX: Servers, Mobile Web Clients, Tools is a new book in version 7.7, covering the installation of all essential core Siebel Enterprise products, including servers, Siebel Mobile Web Clients, Siebel Tools, and Reports Server.

What's New in the Siebel Installation Guide for UNIX: Servers, Mobile Web Clients, Tools, Version 7.7 Rev. B

[Table 1](#) lists changes in this version of the documentation to support release 7.7 of the software.

Table 1. What's New in Siebel Installation Guide for UNIX, Version 7.7 Rev. B

Topic	Description
"Editing the siebel.ini Files for Unattended Installation" on page 60	Added information about the function of the <code>InstallLocation</code> parameter in the <code>siebel.ini</code> file.
"Editing the siebel.ini Files for Console Mode Installation" on page 74	Corrected example values for <code>siebel.ini</code> parameters used for configuration, in sections whose names include <code>RunAfter</code> .
"Siebel Gateway Name Server Installation Requirements" on page 80 "Siebel Server Installation Requirements" on page 94	Revised the stated disk space requirement for installation on AIX.
"Reviewing the Installation for Siebel Server" on page 107 "Verifying the Siebel Client Directory Structure" on page 193 "Verifying the Siebel Tools Directory Structure" on page 210	Added notes about virus checking and SRF files.
"Verifying the ODBC Data Source for Oracle" on page 110 "Verify Siebel Tools ODBC Data Sources" on page 212	Clarified Oracle version applicability for the following ODBC settings: <code>PacketSize</code> , <code>EnableScrollableCursors</code> , <code>ColumnsAsChar</code> , <code>ColumnSizeAsCharacter</code> .
"Synchronizing Siebel Server Components" on page 112	Updated the section about Siebel Server component synchronization requirements.

Table 1. What's New in Siebel Installation Guide for UNIX, Version 7.7 Rev. B

Topic	Description
"Creating Tableowner and Administrator Accounts" on page 133	Modified the section describing how to use the grantusr.sql script for Oracle deployments.
"Reviewing the Log Files for the DB Server Installation" on page 141	Modified the section about reviewing log files.
"Creating a New Virtual Directory" on page 168	Corrected the syntax described for the ConnectString parameter in the eapps.cfg file.
"Troubleshooting Siebel Web Server Extension Installation" on page 177	
Chapter 11, "Installing the Siebel CORBA Object Manager"	Corrected the Siebel SupportWeb reference for more information about the status of the CORBA Object Manager.
"Installing the ChartWorks Server" on page 225	Added mention of the file used for installing ChartWorks Server on HP-UX.
"Preinstallation Tasks for the Siebel Reports Server" on page 231	Added Internet connectivity requirement for installing Actuate Active Portal JSP and Reports View Adapter for Siebel. Added default port number information for Actuate modules.

What's New in the Siebel Installation Guide for UNIX: Servers, Mobile Web Clients, Tools, Version 7.7 Rev. A

Table 2 lists changes in this version of the documentation to support release 7.7 of the software.

Table 2. What's New in Siebel Installation Guide for UNIX, Version 7.7 Rev. A

Topic	Description
"Selecting Your Media for Installation" on page 27	Sections have been enhanced to clarify options and requirements for installing Siebel software and for creating a network image of Siebel installation files.
"Creating a Network Image" on page 30	
Chapter 7, "Installing the Siebel Database Server"	Siebel Database Server installation information is consolidated in this chapter for Oracle and IBM DB2 UDB platforms.
"How to Implement Clustering with the Siebel Reports Server" on page 247	Siebel Reports Server clustering information is provided.
"Uninstalling the Siebel Reports Server" on page 264	Siebel Reports Server uninstallation information for UNIX has been corrected.

What's New in the Siebel Installation Guide for UNIX: Servers, Mobile Web Clients, Tools, Version 7.7

Table 3 lists changes in this version of the documentation to support release 7.7 of the software.

Table 3. New Product Features in Siebel Installation Guide for UNIX, Version 7.7

Topic	Description
Load balancing and clustering	<p>Resonate Central Dispatch is no longer supported.</p> <p>For information about options for load balancing Siebel applications, and about clustering your deployment for failover, see <i>Deployment Planning Guide</i>.</p>
"Selecting Your Media for Installation" on page 27	Siebel eBusiness Applications and Siebel Industry Applications are now delivered on DVDs and FTP-downloadable media, simplifying installation.
"Validating the Integrity of Files" on page 28	The Cyclic Redundancy Checksum (CRC) utility helps you to validate any Siebel application files you may have downloaded over the Internet.
"Creating a Network Image" on page 30	The new Image Creator utility lets you create a network image from DVDs or FTP files to perform an installation without having to insert or swap media. This utility can be used for each Siebel product for which there is a DVD or an FTP location on Siebel SupportWeb.
"Configuring Oracle for Siebel Applications" on page 50	Siebel eBusiness Applications and Siebel Industry Applications now support Oracle 9i's Cost-Based Optimizer.
Chapter 9, "Installing the Siebel Mobile and Dedicated Web Clients"	<p>Presence of MFC is no longer a requirement for installation of Mobile and Dedicated Web Clients.</p> <p>MDAC is required by, and installed with, Dedicated Web Clients that connect to Microsoft SQL Server. It is not required on the client machine for any other Siebel Web Client type.</p>
Chapter 11, "Installing the Siebel CORBA Object Manager"	CORBA Object Manager is not supported for Siebel 7.7 GA, but will be supported again with a fix pack following the GA release.
Chapter 14, "Installing the Siebel Reports Server"	Siebel Reports Server (Actuate 7) can now be installed through the new Siebel Reports Server installer, rather than by installing each related Actuate product individually.
Chapter 15, "Verifying Your System Using the Environment Verification Tool"	With the EVT utility, you can verify that operating system parameter and third-party product requirements have been met after installing and configuring the Siebel application.
Appendix C, "Demo Users in the Siebel Sample Database"	List of demo users defined in the Siebel Sample Database.

2

Preparing for Installation

This chapter describes how to prepare for installing Siebel eBusiness Applications software. It also introduces you to the Deployment Planning Worksheet, an integral part of the installation process. It includes the following topics:

- “About Installing Maintenance Releases” on page 15
- “How to Use This Guide If Your Database Is IBM DB2 UDB for z/OS and OS/390” on page 16
- “How This Guide Refers to Your Installation Directories” on page 16
- “Process of Installing Siebel eBusiness Applications” on page 17
- “Deployment of Siebel 7.7 Gateway Name Server Versus Siebel 6 Gateway” on page 18
- “Preparing the Hardware” on page 19
- “Planning the Siebel Directory Structure” on page 19
- “Selecting Your Media for Installation” on page 27
- “Media Contents” on page 29
- “Creating a Network Image” on page 30

Before proceeding, go to [Appendix A, “Deployment Planning Worksheet,”](#) and make a copy of the worksheet. Using the copy, the person in charge of the deployment effort should fill out the first section. Members of the team should fill out the information in the sections for which they are responsible.

As you work through the preparation steps in this chapter, you will be prompted to record information you will need while installing and configuring Siebel eBusiness Applications.

In subsequent chapters, you will be prompted to refer to the Deployment Planning Worksheet for specific information about your site and deployment. You will also use it to record other important information for future installations, upgrades, reconfiguration, and expansion of your deployment.

About Installing Maintenance Releases

Maintenance releases (sometimes called patches) or other interim releases from Siebel Systems are sometimes available. Such releases are installed on top of your existing base installation. The version 7.7 products described on the *Siebel Bookshelf* are the base products. The procedures in this book are for installing the base product.

For patch installation instructions, refer to the *Maintenance Release Guide* for the patch. This document is available on Siebel SupportWeb.

How to Use This Guide If Your Database Is IBM DB2 UDB for z/OS and OS/390

This guide describes installation of core Siebel products, including the Siebel Database Server for each supported RDBMS, with the exception of DB2 UDB for z/OS and OS/390. Customers for DB2 UDB for z/OS and OS/390 will require not only this guide (*Siebel Installation Guide* for the operating system you are using), but also *Implementing Siebel eBusiness Applications on DB2 UDB for z/OS and OS/390*, available on the *Siebel Bookshelf*.

From an installation standpoint, *Implementing Siebel eBusiness Applications on DB2 UDB for z/OS and OS/390* starts where [Chapter 6, "Installing the Siebel Server,"](#) ends. *Implementing Siebel eBusiness Applications on DB2 UDB for z/OS and OS/390* includes, but is not limited to, topics such as special security issues for this RDBMS, installing the Siebel Schema, performance guidelines for use of this RDBMS with Siebel eBusiness Applications, and specific procedures for moving data from development to production.

Although *Implementing Siebel eBusiness Applications on DB2 UDB for z/OS and OS/390* contains some information (for example, security) that is not covered elsewhere on the *Siebel Bookshelf*, readers should still consult appropriate *Siebel Deployment Documentation Suite* books, such as the *Security Guide for Siebel eBusiness Applications*, because this suite of books contains important information that helps you to deploy the Siebel applications.

How This Guide Refers to Your Installation Directories

This guide uses the following variable-naming conventions to refer to the installation directories either created by the installers or to which users navigate to access files and executable programs.

`$SIEBEL_ROOT`. Generally, this refers to the main directory in which software for each Siebel Server Enterprise entity has been installed. The UNIX Enterprise Server component installers use `/siebel` as the default for `$SIEBEL_ROOT`.

`$SIEBEL_HOME`. The installation or root directory for Siebel eBusiness Applications software in general or the Siebel Gateway Name Server or the Siebel Server, depending on the context. Many scripts contain variables with this name; its meaning is most often derived from the context.

`$SIEBSRVR_ROOT`. The installation or root directory for Siebel Server.

`$SIEBEL_SERVER_ROOT`. This term is sometimes used within executable programs such as the `siebel_server` script, as a synonym for `$SIEBEL_HOME`.

`$SWEAPPS_ROOT`. The directory into which you install the Siebel Web Server Extension (SWSE).

`$SIEBEL_CLIENT_ROOT`. The directory into which you install the Siebel Mobile Web Client.

Process of Installing Siebel eBusiness Applications

The server installation process requires multiple tasks that you should perform in the following sequence. This sequence is also illustrated in [Figure 1 on page 18](#).

- 1** Planning your deployment. See [Deployment Planning Guide](#).
- 2** Determining your load-balancing strategy. See [Deployment Planning Guide](#).
- 3** Determining your media for installation. See ["Selecting Your Media for Installation" on page 27](#) in this chapter.
- 4** (Optional) Installing and configuring any server clustering software you intend to use. See [Deployment Planning Guide](#).
- 5** Creating your database instance. See [Chapter 3, "Guidelines for Configuring the RDBMS."](#)
- 6** Installing required third-party products. See [System Requirements and Supported Platforms](#) on Siebel SupportWeb and [Siebel eBusiness Third-Party Bookshelf](#).
- 7** (Optional) Installing Search Server. See [Siebel Search Administration Guide](#).
- 8** Creating the File System. See ["Creating a File System" on page 24](#) in this chapter.
- 9** Creating the required Siebel accounts. See ["Creating the Siebel Service Owner Account" on page 26](#) in this chapter.
- 10** Installing and configuring the Siebel Gateway Name Server. See ["Installing the Siebel Gateway Name Server" on page 79](#).
- 11** Creating the Siebel Enterprise Server and installing and configuring a Siebel Server. See [Chapter 6, "Installing the Siebel Server."](#)
- 12** Synchronizing server component definitions, using Server Manager. See [Siebel System Administration Guide](#).
- 13** Installing and configuring the Siebel Database Server. See [Chapter 3, "Guidelines for Configuring the RDBMS,"](#) and [Chapter 7, "Installing the Siebel Database Server."](#)
- 14** Installing your Web server and Siebel Web Server Extension. See [Chapter 8, "Installing the Siebel Web Server Extension."](#)
- 15** Installing Siebel Mobile Web Client or Dedicated Web Client. See [Chapter 9, "Installing the Siebel Mobile and Dedicated Web Clients."](#)
- 16** Installing Siebel Tools. See [Chapter 10, "Installing Siebel Tools."](#)
- 17** (Optional) Installing additional Siebel Servers, if required. See [Chapter 6, "Installing the Siebel Server."](#)
- 18** (Optional) Installing Siebel CORBA Object Manager. See [Chapter 11, "Installing the Siebel CORBA Object Manager."](#)
- 19** (Optional) Installing Siebel EAI connector software. See [Chapter 12, "Installing Siebel eAI Connector Software."](#)
- 20** (Optional) Installing the ChartWorks Server. See [Chapter 13, "Installing the ChartWorks Server."](#)

21 Installing and configuring Siebel Reports Server. See Chapter 14, "Installing the Siebel Reports Server."

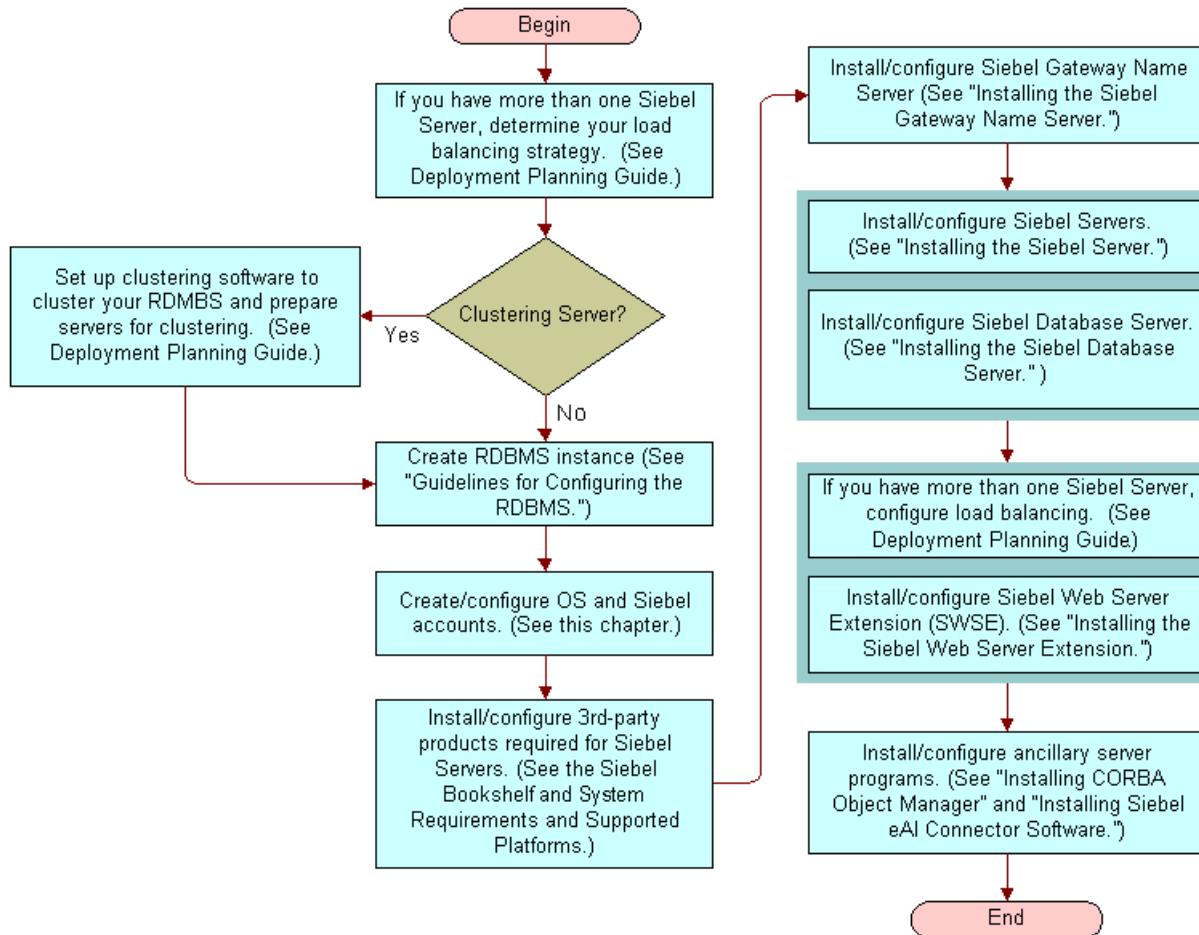


Figure 1. Sequence of Siebel eBusiness Applications Server Software Installation

Deployment of Siebel 7.7 Gateway Name Server Versus Siebel 6 Gateway

The differences between deployment recommendations for the Siebel Gateway Name Server in Siebel 7.7 versus Siebel 6 are described in this topic.

Deployment of Siebel 6 Gateway

In Siebel 6, the installer assumed that the Name Server and Central Dispatch Scheduler were located on the same server. If you selected the Use Resonate box during installation, the Siebel Gateway installer looked for Central Dispatch software on the local server. This situation forced the Siebel Gateway Name Server to colocate with either the Central Dispatch Scheduler (the default assumption) or a load-balanced Siebel Server.

When high availability was required by the Name Server, the Name Server could be clustered using Microsoft Cluster Service in a server pair. However, Central Dispatch could not be part of the cluster. Because Central Dispatch was colocated on the same server as the Name Server, this situation forced customers to resort to installer workarounds to separate Central Dispatch from the Siebel Gateway Name Server. This action is not required in Siebel 7.x.

Deployment of Siebel 7.0 and 7.5 Gateway Name Server

In Siebel 7.0.x and 7.5.x, the Name Server installer does not look for local installation of the Central Dispatch software. You can, as a result, pick the Siebel Gateway deployment that best suits your needs. Also, Siebel eBusiness Applications do not support any clustering technology on the server with Central Dispatch components, whether these are the Central Dispatch Scheduler or a load-balanced Siebel Server. This change results from the complexity of clustering a Central Dispatch server, but also due to the fact that Central Dispatch provides the same type of failover capability as the clustering technology.

This restriction does not necessarily increase the hardware requirement for the Siebel Gateway when Name Server high availability is required.

For details on Siebel 7.0 or 7.5 deployment, refer to the respective Bookshelf for that version.

Deployment of Siebel 7.7 Gateway Name Server

In Siebel 7.7, Resonate Central Dispatch is not used for implementing load balancing. Consequently, the Siebel Gateway Name Server installer does not look for a local installation of Central Dispatch. As a result, you can pick the Siebel Gateway Name Server deployment that best suits your needs.

Preparing the Hardware

Verify that the hardware you have chosen meets all requirements for running your Siebel eBusiness Applications as well as the required third-party software. Also verify that the hardware is able to support the Siebel File System, the Siebel Gateway Name Server, the Siebel Server, the Siebel Database Server, and the Siebel Tools administrator's workstation. For size limitations and information on required third-party software, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

Planning the Siebel Directory Structure

You must plan where to install the various Siebel components on your servers. Also plan how to install multiple versions, if your organization requires multiple versions for testing purposes.

Installing Multiple Versions of Siebel eBusiness Applications

Multiple versions of Siebel components can be installed on the same machine.

- If you install multiple versions of the Siebel Gateway Name Server on the same machine, you must install them in different directories and assign unique port numbers.
- If you install multiple versions of the Siebel Server on the same machine, you must install them in different directories.
- If you install multiple versions of the Siebel Web Server Extension (SWSE) on the same machine, you must install them in different directories. Additional configuration steps are required.

For more information about configuring SWSE, see Technical Note 456 on Siebel SupportWeb.

You should use a naming convention that reflects the components and the version number being installed.

Installing Multiple Components of the Same Version of Siebel eBusiness Applications

The Enterprise Server entities—the Siebel Gateway Name Server, Siebel Server, and Siebel Database Server—are installed by default under a common directory, referred to as *SIEBEL_ROOT*. In fact, there is no choice when you install the Siebel Database Server. It is automatically installed in the same directory as the Siebel Server. The *SIEBEL_ROOT* directory is created during the installation of the first Enterprise Server entity (for example, the Siebel Gateway Name Server) on a machine.

The component installers use *siebel* as the default for *SIEBEL_ROOT*, except when installing the Siebel Gateway Server, Siebel Server, Database Server, or EAI connectors simultaneously. These servers and connectors are installed as subdirectories under the same root directory. You should install all other products in their own root directory to prevent potential conflicts.

CAUTION: Although you cannot install additional products into a root directory after applying a patch, you can install additional languages into a root directory. However, you must reapply the patch after you install additional languages.

Installing Siebel CORBA Object Manager

Consider installing the Siebel CORBA Object Manager component on a dedicated machine. The Siebel CORBA Object Manager can be installed on a machine that also supports the Siebel Enterprise Server components. However, for best performance, you should install the Siebel CORBA Object Manager onto a dedicated machine.

Record the directory names you decide on in your copy of the Deployment Planning Worksheet in Appendix A, "Deployment Planning Worksheet."

NOTE: Both the Siebel CORBA Object Manager and the Application Object Manager (a component of the Siebel Server) use configuration files located in *\$SIEBEL_ROOT/bin*. If you install the Siebel CORBA Object Manager in a *\$SIEBEL_ROOT* directory also used by the Siebel Server, be sure that you create uniquely named configuration files for the two types of Object Manager if their configurations differ. For information about how to register a configuration file with the appropriate component, see *Siebel System Administration Guide*.

The Language in Which the Installer and Configuration Wizard Run

When you launch the Siebel Enterprise Server installer or the Siebel Software Configuration Wizard, it launches in the appropriate language for the locale of your operating system, if this language and locale are supported by Siebel Systems. For this reason, make sure you have the locale of your operating system set to the desired choice of your language. If the current locale is not supported, then, when you launch the installer or Configuration Wizard, you are prompted for the language in which to install or configure.

For a list of supported locales for your UNIX operating system, see ["Locale Configuration on Your UNIX Operating System" on page 21](#).

Locale Configuration on Your UNIX Operating System

To successfully run Siebel eBusiness Applications on UNIX, you have to configure the appropriate locales on your operating system for the language you will run the applications in. In some cases, you may need to install additional content on your system in order to support the locale. See [Table 4](#) for LANG or LC_ALL settings on different UNIX platforms for supported languages or locales.

Table 4. Lang or LC_ALL Settings for Supported Languages or Locales

Language or Locale	Siebel Language Code	UNIX		
		Solaris	AIX	HP-UX
Arabic (Saudi Arabia)	ARA	ar_SA.UTF-8	AR_SA.UTF-8	ar_SA.utf8
Chinese (Simplified)	CHS	zh_CN.UTF-8	ZH_CN.UTF-8	zh_CN.utf8
Chinese (Traditional)	CHT	zh_TW.UTF-8	ZH_TW.UTF-8	zh_TW.utf8
Czech	CSY	cs_CZ.UTF-8	CS_CZ.UTF-8	cs_CZ.utf8
Danish	DAN	da_DK.UTF-8	DA_DK.UTF-8	da_DK.utf8
Dutch	NLD	nl_NL.UTF-8	NL_NL.UTF-8	nl_NL.utf8
English (United States)	ENU	en_US.UTF-8	EN_US.UTF-8	en_US.utf8
Finnish	FIN	fi_FI.UTF-8	FI_FI.UTF-8	fi_FI.utf8
French (France)	FRA	fr_FR.UTF-8	FR_FR.UTF-8	fr_FR.utf8
German (Germany)	DEU	de_DE.UTF-8	DE_DE.UTF-8	de_DE.utf8
Hebrew	HEB	iw_IL.UTF-8	IW_IL.UTF-8	iw_IL.utf8
Italian	ITA	it_IT.UTF-8	IT_IT.UTF-8	it_IT.utf8
Japanese	JPN	ja_JP.UTF-8	JA_JP.UTF-8	ja_JP.utf8

Table 4. Lang or LC_ALL Settings for Supported Languages or Locales

Language or Locale	Siebel Language Code	UNIX		
		Solaris	AIX	HP-UX
Korean	KOR	ko_KR.UTF-8	KO_KR.UTF-8	ko_KR.utf8
Portuguese (Brazil)	PTB	pt_BR.UTF-8	PT_BR.UTF-8	pt_BR.utf8
Portuguese (Portugal)	PTG	pt_PT.UTF-8	PT_PT.UTF-8	pt_PT.utf8
Spanish (Modern)	ESN	es_ES.UTF-8	ES_ES.UTF-8	es_ES.utf8
Swedish	SVE	sv_SE.UTF-8	SV_SE.UTF-8	sv_SE.utf8
Thai	THA	th_TH.UTF-8	TH_TH.UTF-8	th_TH.utf8

Setting Permissions and Ownership

- Before you install each server component discussed in this guide, set umask to 027 on the installation directory of that machine. Changing this setting eliminates other permissions, including group write permissions.
This action also sets the default permissions, so that all files and directories created afterwards have rwxr-x--- permissions.
Siebel Service Owner should have all permissions. However, the user group should have read and execute (for directory access) permissions only.
- Before installing any Siebel server software, a user with root permissions must create the directory /var/adm/siebel. This directory is different from the directory into which the Siebel products are installed and must be created for every Siebel product that uses the Siebel installer. The user running the Siebel installer must have write permissions to this directory or the installation fails.
If the /var/adm/siebel directory structure does not exist, the installer will try to create it. Because it is not recommended to install Siebel products as root, a user with root permissions must first create this directory and verify that the correct permissions are set for the installer to write to this directory.

Installing from a Remote Server

If you are installing from a remote server, you must set the \$DISPLAY variable to display the installation user interface on your local machine. For example:

```
export DISPLAY myworkstation:0.0
```

or

```
setenv DISPLAY myworkstation:0.0
```

where:

myworkstation = The machine name or IP address of your local workstation

You may be able to test that your display works correctly on your local workstation by entering:

```
xclock
```

You can also verify the IP address by entering:

```
echo $DISPLAY
```

If the clock does not appear on your local workstation, then issue the following command on your local machine:

```
xhost +
```

Server Names Naming Conventions

When planning server names, especially in a heterogeneous server environment (where you have different operating systems, such as Windows and UNIX), consider the following:

- Siebel Server and Enterprise Server names must be unique on the Siebel Gateway Name Server machine.
- Siebel Server and Siebel Enterprise names must each be no longer than 12 characters.
- Names can contain only alpha characters, numerals, underscores, or a combination thereof, and must not contain spaces, brackets, or special characters.
- Names must lead with an alpha character.
- If you are operating a heterogeneous server environment, use the naming conventions that apply to creating server names under UNIX. This is also a good practice if you may deploy a heterogeneous server environment in the future.

File and Directory Naming Conventions

Because all versions of the UNIX operating system are case-sensitive, if you are running your Siebel eBusiness Applications under UNIX, use lowercase for all filenames, directory names, path names, parameters, flags, and command-line commands, unless you are instructed otherwise.

Directory names or filenames may not contain special characters, such as apostrophes, accents, number signs, ampersands, or spaces. You can use underscores to separate words if needed.

Creating a File System

The *Siebel File System* is a shared directory that is network-accessible to the Siebel Server. The file system may be installed on the same server as a Siebel Server or Siebel Database Server, or it may be on another network server that can share the directory, so that it is available to the Siebel Server.

NOTE: If the operating systems of the two machines for the Siebel Server and the File System are different—for example, one Windows and one UNIX—you may need to deploy a third-party cross-platform file system mounting tool to allow both machines to share the directory. Refer to your cross-platform mounting software documentation for details.

Because it is possible that two Siebel Server instances will execute simultaneously on the same node, you must create a unique mount point for the sharable file system.

The recommended configuration is to mount the sharable file system in the same directory that is used to mount the dedicated VxFS file system for the VCS service group. A service group is a collection of resources working together to provide application services to client. For example, if the VxFS file system that supports the first Siebel Server instance is mounted on /SiebelServer1, then the mount point for the sharable file system could be /SiebelServer1/SiebelFileSystem.

NOTE: You should mount the sharable file system one directory level lower than the VxFS file system mount. This means that you must mount the VxFS file system before the sharable file system.

When you install each Siebel Server, you are prompted for the local mount point directory of the Siebel File System. Be sure to explicitly specify the unique mount point for each Siebel Server instance. Do not use the default values or those from a previous Siebel Server installation.

When deploying a Siebel component on a specific Siebel Server instance, it may be necessary in some circumstances to override the component's attribute that specifies the directory for the Siebel File Server. Such overrides apply only to components that require access to the Siebel File Server.

NOTE: You must create a separate file system for each Siebel Enterprise Server. For example, if you have development and test databases, you must have two separate Siebel Enterprise Servers, and therefore two Siebel File Systems.

Each Siebel Server accesses its Enterprise's Siebel File System by means of a dedicated server component, called File System Manager (FSM). Individual Web clients need no direct knowledge of the location of the Siebel File System, because they connect directly with the appropriate Siebel Server to request file uploads or downloads. File System Manager then processes these requests through interaction with the Siebel File System directory. For more information about File System Manager, see *Siebel System Administration Guide*.

NOTE: The Siebel File System can be defined at the Enterprise level, Siebel Server level, and component level. In a mixed Siebel Server environment, you must individually modify the file system parameter at the Siebel Server and the component level if the file system location is different from the default (Enterprise) location using the server manager. This modification is necessary because of the drilling mechanism of parameters in the siebns.dat. Parameters' setting go from Enterprise to Server to component and then to task. If you do not change the File System at the component level, it will get the value from the Server (if it has been set there) or from the Enterprise (the default).

Because File System Manager is the sole access mechanism to the Siebel File System, only the user with administrative privileges for the Siebel Server should have access privileges to the file system directories. This precaution protects the Siebel File System from direct physical access by all other users.

When using Siebel Mobile Web Client in connected mode (known in this case as the Dedicated Web Client), you may, in some cases, want to connect directly to the Siebel File System. For examples of these cases, their potential ramifications, and for client setup instructions in each case, see [Chapter 9, "Installing the Siebel Mobile and Dedicated Web Clients."](#)

Naming the File System Directory

The filename must be alphanumeric and cannot contain special characters or spaces. Underscores are permitted. Also, each filename must begin with an alpha character. For example, name the directory something like:

/server/siebel or /server/siebel/filesystem

NOTE: Do not specify ..//att at the end of the directory string. In other words, never specify a File System location such as /server/siebel/att. Because Siebel Server installation automatically creates a subdirectory called ..//att (attachments) under the File System directory, if you give a directory this name yourself, File System Manager will be unable to locate the correct subdirectory.

The remainder of this document refers to this directory as:

/SiebelFS/siebel7x

where:

SiebelFS = The host name of the machine (assuming that a dedicated machine is used for the Siebel File System) and *siebel7x* is the name of the shared directory.

You need to specify the shared directory when installing the Siebel Server. The shared directory must be available to all Siebel Servers in the Enterprise. You may need to use a file sharing tool to access this directory.

As part of the Siebel Server installation, File System Manager generates a set of subdirectories under the Siebel File System root directory, as described in [Table 5](#).

Table 5. FSM Subdirectories

Subdirectory	Purpose
att	Main subdirectory for attachments
atttmp	Temporary directory for attachments
cms	Siebel Smart Answer files
red	Rule edit cache (used by Siebel Configurator)
sme	Siebel Marketing cache files
Marketing	Main subdirectory for Siebel Marketing
ssp	Session preferences
eim	Siebel transaction files for EIM
userpref	Siebel user preferences

For more information about these subdirectories, see *Siebel System Administration Guide*.

Use the following procedures to set up the Siebel File System.

To set up the Siebel File System

- 1 Create the directory on the server and record the path in the copy you made of [Appendix A, "Deployment Planning Worksheet."](#)
- 2 Using the appropriate administrative tools for your UNIX platform, set permissions for the Siebel administrator to access the directory and subdirectories to 700.
NOTE: Only the Siebel administrator for the Siebel Server should have access privileges to the Siebel File System.
- 3 Grant access to each Siebel Server and client for the appropriate group.

Remember to install the third-party software required to view standard attachment types, such as MS Word, Excel, or Lotus Notes on the client machines that will be running the Siebel Mobile Web Client or Siebel Dedicated Web Client.

If an appropriate GUI-based administrative tool does not exist on your platform, you can use the chmod and chgrp utilities to set these parameters. Consult your UNIX platform documentation for more information.

Clustering Prerequisites for the File System

If you will be operating this File System as part of a cluster, you must install it on a clustered disk drive in the same cluster resource group in which the Siebel File System Service resource will run. For information about clustering your servers, see *Deployment Planning Guide*.

Creating the Siebel Service Owner Account

The Siebel Enterprise Server requires that you create a standard UNIX system user account. This account must be defined on each Siebel Server in your Enterprise under which Siebel processes and components operate.

Use the following guidelines to create the Siebel service owner account:

- The Siebel service owner account must be defined or available on each applicable server machine: on the Siebel Gateway Name Server, on each Siebel Server in the Enterprise, and on any machine on which the Siebel File System exists.
- Create the account at the network level, using an appropriate administration tool for your UNIX platform, so that the same account can be used for all UNIX servers within the Siebel Enterprise Server. Make sure that the numeric values for uid and gid match across the various machines.
- Determine what the account name and password will be, and record this information in your copy of the Deployment Planning Worksheet. (For security reasons, you may prefer not to record the password.) See [Appendix A, "Deployment Planning Worksheet."](#) See also *Security Guide for Siebel eBusiness Applications*.

- The account password should not require a change on next logon and must be set not to expire.
- The account name or password cannot contain any spaces.

Planning RDBMS Installation and Configuration

Note the following guidelines for installing and configuring your chosen Relational Database Management System (RDBMS).

- Make sure that this release of Siebel eBusiness Applications supports the exact version of your chosen RDBMS, as specified in *System Requirements and Supported Platforms* on Siebel SupportWeb, and that the RDBMS has been installed on the machine to be dedicated as the Siebel Database Server. This server will hold the database tables containing your business data, such as sales (personnel, territories, opportunities, and activities), marketing, and customer service information.
- Determine certain details about your RDBMS configuration for completion of the Deployment Planning Worksheet, located in [Appendix A, "Deployment Planning Worksheet."](#)
 - Verify that the network names of the servers that will support the Siebel Database Server and Siebel File System are properly recorded in your copy of the Deployment Planning Worksheet. Use the machine names, not the IP addresses, for the Siebel File System names. IP addresses are not supported.
 - Siebel installer creates the ODBC data source name during installation, and the name is *Siebsrvr_enterprise*. For example, if your Siebel Enterprise Server name is the default, *siebel*, the ODBC data source name will be *Siebsrvr_siebel*. Using this pattern, determine what your ODBC data source name will be and fill in your copy of the Deployment Planning Worksheet accordingly.

Planning Database Connectivity

Use the version of the ODBC driver listed in *System Requirements and Supported Platforms* on Siebel SupportWeb for your chosen RDBMS for both Siebel Web clients and Siebel Servers.

In an enterprise-level deployment, configure the Siebel Web Clients, Siebel Servers, and Siebel Database Servers to use only the TCP/IP protocol for ODBC connectivity, not named pipes. Only in the case of smaller deployment (100 users or less), in which the database and the Siebel Server reside on the same machine, should you set ODBC configuration to use named pipes to possibly enhance performance.

Selecting Your Media for Installation

You can install the Siebel eBusiness Applications using one of the following methods:

- Installing directly from the DVDs.
- Installing from a network image. You create a network image from the DVD files or using files downloaded from Siebel SupportWeb using FTP. See ["Creating a Network Image" on page 30](#).

NOTE: For system-wide installation in unattended mode, you must create a network image.

Downloading the Files Using FTP

You can download the files required for installation from SupportWeb. After you have downloaded the files, you can validate the integrity of the files using the Cyclic Redundancy Checksum (CRC) utility. For more information on this utility, see ["Validating the Integrity of Files" on page 28](#).

Compressed media (TAR files) should be downloaded to a central network location.

NOTE: When you untar TAR files, the base files must be uncompressed before the language files to preserve the integrity of the CRC files.

Validating the Integrity of Files

If you download a Siebel distribution from SupportWeb or copy it to a hard disk from the distribution DVD, you may want to verify that the distribution was copied correctly and that no files were lost or corrupted. Siebel Systems provides the Cyclic Redundancy Checksum (CRC) utility, a command-line utility, for this purpose.

The utility computes checksums on the copied files and compares them to the checksums of the distribution files. The checksums for the distribution files are contained in a signature file, *crc.txt*, which is also included in the distribution. The utility verifies that no files were lost or corrupted.

When you run the Siebel installation program from the distribution DVD, you do not need to validate the integrity of the files it installs on your system.

Prerequisites

- You must have the required version of the Java Runtime Environment (JRE) installed. For information on the JRE requirements and supported version, see *System Requirements and Supported Platforms* on Siebel SupportWeb and see *Siebel System Administration Guide*.
- The system file path must include the JRE.

To validate downloaded files

- 1 On the system where you have downloaded or copied the distribution files, open a command-line window.
- 2 In the command-line window, navigate to the *UNIX_OS/Server/Siebel_Enterprise_Server* directory.

where:

UNIX_OS = Your UNIX operating system, such as AIX, Solaris, or HPUX (for HP-UX)

- 3 Run the following command to validate all the files in the distribution:

```
java -jar cksum.jar -validate -r crc.txt > log.txt
```

where:

log.txt = The name of the output file and the location (if you want to save it in a different directory)

This command validates the files (except *siebel.ini*) and logs the output to the file *log.txt*.

4 To view the help file for the cksum utility, run the following command:

```
java -jar cksum.jar -h
```

5 Use a text editor to open and review *log.txt*.

- If the copied files match the distribution files, the log file reports Validation Successful.
- If the copied files do not match the distribution files, the log file reports an error.

6 If the log file reports that the validation was not successful, download or copy the distribution again.

7 Navigate to directories representing additional installable modules, then repeat [Step 3 on page 28](#) through [Step 6 on page 29](#) for each module.

Media Contents

The Siebel products are provided on media that include base, encryption, and Language Extension Pack (LEP) files. Base or encryption media require one or more Language Packs for successful installation.

While installation of base and LEP media are required, the use of encryption media is optional.

Base Media

The base media for Siebel products include files distributed on multiple DVDs or compressed files obtained using FTP. The DVD or FTP files are divided by platform, product category, and product name. Language support is delivered separately through LEP media. Media platforms consist of the following:

- Windows
- HP-UX
- AIX
- Solaris

Encryption or Add-On Media

This media includes one DVD or multiple compressed FTP files that may be required for base products.

The media provides encryption support for server and client products, and is installed following installation of the base product.

NOTE: Encryption and add-on media is available only in the U.S., due to export restrictions, and can be used with any language supported by Siebel Systems. These files also can be installed on the client.

Language Pack Media

DVDs supporting a number of languages are available, with one DVD used to install each language. These Language Packs are also available as multiple FTP compressed files, which, when recombined, provide equivalent features to the DVD media.

NOTE: For Siebel Industry Applications, the Windows and UNIX Language Packs are on different DVDs.

Ancillary Media

Ancillary components often support multiple languages on the same media.

NOTE: Ancillary components used with Siebel applications, such as Siebel Reports Server, cannot be copied using the Siebel Network Image Creator and must be copied directly to a separate network location.

Creating a Network Image

As an alternative to installing directly from the DVDs, you can create a network image for Siebel applications, by using one of the following methods:

- Copying DVDs directly to a central network location. See "[Copying DVDs Directly to a Central Network Location](#)" on page 30.
- Expanding the FTP files downloaded from Siebel SupportWeb. See "[Expanding Compressed Media into a Network Location](#)" on page 31.
- Using the Network Image Creator utility to copy Siebel installation files to a central network location. See "[Using the Image Creator Utility](#)" on page 32.

Copying DVDs Directly to a Central Network Location

You can mount and copy the entire set of DVDs to a central network location, or you can copy selected portions of the DVDs, while preserving the directory structure for the desired products and languages for your business needs. The following procedure explains how to copy the files to a central network location.

NOTE: Siebel DVD media support Rock Ridge extensions. On some UNIX operating systems, such as HP-UX, the mount command requires the -o rr switch to mount Rock Ridge-compliant media properly. For more information, consult the manpages of your operating system for the mount CDFS command.

In the procedure below, you mount the DVD media, then copy all the components needed for your installation to a share created for the network image.

To copy required files to a central network location

- 1 Create a target installation directory from which to stage system-wide installations, for example, /my_server/image.

CAUTION: When you create a network image for Siebel Mobile Web Client or Siebel Tools installation files, the target directory structure must not include the word *disk1* anywhere in the directory path.

When you untar TAR files, the base files must be uncompressed before the language files to preserve the integrity of the CRC files.

- 2 Insert the appropriate DVD for the Siebel applications into the DVD drive of the chosen server, and mount this DVD:

- *Siebel eBusiness Applications, Base Applications for UNIX_OS*
- *Siebel Industry Applications, Base Applications for UNIX_OS*

where:

UNIX_OS = Your UNIX operating system, such as AIX, HP-UX, or Solaris

NOTE: The volume label for the DVD is *seaUNIX_OSunibase* (for Siebel eBusiness Applications) or *siaUNIX_OSunibase* (for Siebel Industry Applications), where *UNIX_OS* is aix, hpx, or sol.

- 3 Navigate to the root directory of the DVD and copy all the platforms, product types, and products, including subdirectories, as reflected by the directory names on the DVD, to the target installation directory you created in [Step 1 on page 31](#).

For example, to copy the base files for Siebel Enterprise Server, navigate to the root directory of the DVD and copy the directory structure containing *UNIX_OS/Server/Siebel_Enterprise_Server* to /my_server/image. The resulting directory will be /my_server/image/*UNIX_OS/Server/Siebel_Enterprise_Server*.

where:

UNIX_OS = Your UNIX operating system, such as AIX, Solaris, or HPUX (for HP-UX)

- 4 Repeat [Step 3 on page 31](#) for the appropriate files for the languages you want to install.

Expanding Compressed Media into a Network Location

To extract the compressed media (TAR files) to the central network image location, use a utility native to your platform that supports preservation of the original directory structure.

If you are downloading both Windows and UNIX files, make sure you have set up separate network locations to copy the files into, from the respective FTP locations.

NOTE: All required components, such as Language Packs and encryption packs, should be extracted to a common location (per platform). Doing this keeps installation programs from querying users for an installation location later in the installation process.

To untar files

- Use the following command to untar files.

```
tar -xf file_name
```

where:

file_name = The file you want to expand

Using the Image Creator Utility

To facilitate installation, you may choose to create a network image using the Image Creator utility. The Image Creator utility creates a network image from physical DVDs, allowing you to streamline your installation process and complete the installation process without physically inserting and swapping DVDs.

As an alternative, you can copy the DVDs directly to a network location, as described in ["Copying DVDs Directly to a Central Network Location" on page 30](#).

NOTE: The Image Creator utility is run in GUI mode, but installations from a network image can be launched in GUI, console, or unattended modes, depending on the platform.

You can use the Image Creator utility to create the network image for multiple languages and the following Siebel products:

- Siebel Enterprise Server
- Siebel Web Server Extension
- Siebel CORBA Object Manager
- Siebel Mobile Web Client and Dedicated Web Client
- Siebel Tools

NOTE: The Image Creator only creates a network image for the platform from which the utility is launched. For example, if it is launched on Windows, it creates only a network image for Windows and, if it is launched on HP-UX, it creates only a network image for HP-UX, and so on.

To create a network image

- 1 Insert the appropriate DVD for the Siebel applications into the DVD drive of the chosen server, and mount this DVD:

- *Siebel eBusiness Applications, Base Applications for UNIX_OS*
- *Siebel Industry Applications, Base Applications for UNIX_OS*

where:

UNIX_OS = Your UNIX operating system, such as AIX, HP-UX, or Solaris

NOTE: The volume label for the DVD is *seaUNIX_OSunibase* (for Siebel eBusiness Applications) or *siaUNIX_OSunibase* (for Siebel Industry Applications), where *UNIX_OS* is aix, hpx, or sol.

2 On this DVD, navigate to the directory *UNIX_OS/Deployment_Tools/Siebel_Imagecreator* and invoke the ImageCreator executable program.

where:

UNIX_OS = Your UNIX operating system, such as AIX, Solaris, or HPUX (for HP-UX)

The Welcome to the InstallShield Wizard for the Siebel Image Creator Utility screen appears.

3 Click Next.

The Product Selection screen appears.

4 Select all products for which you want to create a network image, and click Next.

The Destination Directory screen appears.

5 Specify the directory in which you want to create the network image (for example, */my_server/sea77_image*), or browse to the location, and click Next.

CAUTION: When you create a network image for Siebel Mobile Web Client or Siebel Tools installation files, the target directory structure must not include the word *disk1* anywhere in the directory path.

NOTE: You need to create separate network locations for each operating system platform and run the Image Creator utility for each operating system platform.

The screen that appears next depends on the products you selected in [Step 4 on page 33](#). The screen prompts you to insert the DVD of the product for which you want to create a network image and instructs you to navigate to *setupUNIX_OS*.

The screen that appears prompts you to insert the base applications DVD, as listed in [Step 1 on page 32](#), then navigate to the appropriate location. If you selected SWSE, for example, navigate to *UNIX_Server/Siebel_Web_Server_Extension/setupUNIX_OS*.

6 Insert the requested DVD into the drive and type in or browse to the directory path of the requested *setupUNIX_OS* on the DVD.

Each product installation image is placed into its own subdirectory under the directory you specify. For example, if you specify */my_server/sea77_image* as the destination directory and you select the products Siebel Enterprise Server and Siebel Web Server Extension, their installation images are installed into the following directories respectively: */my_server/sea77_image/ses* and */my_server/sea77_image/eapps*.

The Language Selection screen appears.

7 Specify the language or languages that you want to include in the network image of the selected product and click Next.

- If you selected multiple products in [Step 4 on page 33](#), the next screen that appears prompts you to insert the base DVD for the next product you selected. Proceed to [Step 8 on page 33](#).
- If you only selected one product in [Step 4 on page 33](#), proceed to [Step 9 on page 34](#).

8 Repeat [Step 5 on page 33](#) through [Step 7 on page 33](#) for each product and language you want to install.

The InstallShield Wizard displays a message indicating that installation was successful.

- 9 Click Finish to exit the InstallShield Wizard.

3

Guidelines for Configuring the RDBMS

This section provides guidelines for creating and configuring third-party databases. After you create the database, use the scripts in the Siebel Database Server to load the Siebel table definitions into the database. It includes the following topics:

- “Process of Configuring IBM DB2 UDB for Siebel Applications” on page 35
- “Process of Configuring Oracle for Siebel Applications” on page 36
- “Configuring IBM DB2 UDB for Siebel Applications” on page 36
- “Creating DB2 UDB Database Objects” on page 43
- “Creating the DB2 UDB Database” on page 49
- “Managing DB2 UDB Table Fragmentation” on page 49
- “Configuring Oracle for Siebel Applications” on page 50
- “Creating Oracle Database Objects” on page 53
- “Real Application Clusters Support for Oracle 9i” on page 57
- “Guidelines for Ongoing Oracle Administration” on page 57

Process of Configuring IBM DB2 UDB for Siebel Applications

Configuring an IBM DB2 UDB database requires multiple tasks that you should perform in the following sequence:

- 1 “Configuring IBM DB2 UDB for Siebel Applications” on page 36.
 - a “Preventing DB2 UDB from Running Out of ODBC Statement Handles” on page 36.
 - b “Increasing the Number of DB2 UDB User Processes Under AIX” on page 37.
 - c “Guidelines for the DB2 UDB Database Manager Configuration Parameters” on page 37.
 - d “Setting DB2 UDB Configuration Parameters” on page 40.
- 2 “Creating DB2 UDB Database Objects” on page 43.
 - a “Setting Up DB2 UDB Bufferpools” on page 44.
 - b “Creating DB2 UDB Tablespaces” on page 45.
 - c “Overriding Default DB2 UDB Storage Parameters” on page 46.
 - d “Selecting a Language for DB2 UDB” on page 48.
- 3 “Creating the DB2 UDB Database” on page 49.

Process of Configuring Oracle for Siebel Applications

Configuring an Oracle database requires multiple tasks that you should perform in the following sequence:

- 1** "Configuring Oracle for Siebel Applications" on page 50.
- 2** "Creating Oracle Database Objects" on page 53.
 - a** "Creating Oracle Tablespaces" on page 53.
 - b** "Creating Temporary Oracle Tablespaces" on page 54.
 - c** "Selecting a Language for Oracle" on page 55.
 - d** "Defining Oracle Rollback Segments" on page 55.
 - e** "Partitioning an Oracle Database" on page 56.

Configuring IBM DB2 UDB for Siebel Applications

This section contains guidelines for obtaining optimal performance from the DB2 Universal Database for use with Siebel eBusiness Applications.

These guidelines will be useful to a broad segment of customers. However, you should choose values for the parameters described in this guide that reflect conditions in your particular environment. See your IBM DB2 UDB technical documentation for additional information.

CAUTION: Never make changes to your Siebel Database schema unless instructed on how to do so for a specific purpose by Siebel eBusiness Applications documentation. Otherwise, you may corrupt your entire system and thereby render it unsupportable.

When you use DB2 UDB, the DB2 UDB Application Development Client must be installed on your database server. Verify that the Application Development Client is installed before proceeding. For more information, see the *Upgrade Guide*.

Preventing DB2 UDB from Running Out of ODBC Statement Handles

DB2 UDB can quickly run out of ODBC statement handles, depending on the number of business objects your enterprise uses. Because it is difficult to know how many business objects your users actually use, you should increase this number automatically each time you install the DB2 UDB client, or when rebinding database utilities.

Increase the number of CLI packages to 6 by rebinding the CLI packages, using the special DB2 CLIPKG bind option.

To rebind the CLI packages

- 1 Navigate to sqllib/bnd in the DB2 instance home directory, using a method appropriate to your operating system.
- 2 Connect to the DB2 UDB database.
- 3 Enter the following command:

```
db2 bind @db2cli.1st blocking all grant public clipkg 6
```

For more information about the DB2 bind command and the CLIPKG option, see *DB2 UDB Administration Guide*.

Increasing the Number of DB2 UDB User Processes Under AIX

When you reach about 400 concurrent database users running under AIX, the connection to DB2 may fail. To avoid this problem, reset the maximum number of user processes parameter on your AIX server.

To reset the parameter

- 1 Log on to the server as AIX system administrator.
- 2 Navigate to `$SIEBEL_HOME` (Siebel Server root directory) and source environment variables, using one of the following commands, depending on the type of shell you use:

Korn or Bourne shell

```
. ./siebenv.sh
```

TIP: Make sure there is a space between the initial period and `./siebenv.sh`.

C shell

```
source siebenv.csh
```

- 3 Execute the following command to review the options:

```
smitty chgsys
```

- 4 Select Maximum number of processes and reset the default (512) to a larger number; for example, 10,000, to avoid imposing an upper limit on the number of processes that a single user can spawn.

Guidelines for the DB2 UDB Database Manager Configuration Parameters

You can set the database configuration parameters using the `update database manager configuration` command of the DB2 Command Line Processor or using the DB2 Control Center.

See the IBM DB2 technical documentation for more information on modifying the database configuration parameters.

[Table 6](#) describes DB2 database manager configuration parameters that differ from the default settings. Set these parameters for each DB2 instance. Use the configuration information in [Table 6](#) for the listed parameters. For parameters not listed in this table, accept the default settings.

Table 6. DB2 Database Manager Configuration Parameters

Parameter	Explanation	Setting/Comment
SHEAPTHRES	Sort heap threshold (4 KB)	200000 Deployments with 3,000 or more concurrent users and using over 5 GB of RAM can increase this to 300000.
DIR_CACHE	Directory cache support	YES
ASLHEAPSZ	Application support layer heap size	15
RQRIOBLK	Maximum requester I/O block size (bytes)	65535
MON_HEAP_SZ	Database monitor heap size (4 KB)	128 (minimum)
QUERY_HEAP_SZ	Query heap size (4 KB)	16384
KEEPFENCED	Keep Fenced process (replaces KEEPDARI in DB2 v7)	YES
KEEPDARI	Keep DARI process (only for DB2 v7)	YES
MAXAGENTS	Maximum number existing agents	20000 (minimum)
NUM_INITAGENTS	Initial number agents in pool	10
NUM_POOLAGENTS	Number of agents in the agent pool kept active at all times	80
MAX_COORDAGENTS	Maximum number coordinating agents	MAXAGENTS
INDEXREC	Index re-creation time	RESTART
MAX_QUERYDEGREE	Maximum query degree of parallelism	Between 1 and 6
INTRAPARALLEL	Enable intra-partition parallelism	NO

DB2set Parameters

Use the db2set command to set the parameters (for example, db2set DB2_HASH_JOIN = NO) referenced in [Table 7](#).

Table 7. db2set Parameters

Parameter	Explanation	Setting
DB2MEMDISCLAIM	For AIX only. When set to YES, DB2 agents explicitly request that the database server disassociate the reserved paging space from freed memory. Affects how DB2 frees shared memory.	YES
DB2MEMMAXFREE	For AIX only. Max. amount of unused memory in bytes retained by DB2 processes. It affects how DB2 frees shared memory and causes DB2 to release memory as soon as the size of the DB2 agent goes above the listed value.	3000000
DB2_HASH_JOIN	Turns off hash joins in the optimizer.	NO
DB2_RR_TO_RS	Improves DB2 v7 performance with Siebel eBusiness Applications. This parameter does not apply to DB2 v8. NOTE: Set to YES only in production environment servers.	YES
DB2_MMAP_WRITE	AIX Only. Recommended setting only; you should evaluate this setting for your particular configuration and environment.	OFF
DB2_MMAP_READ	AIX Only. Recommended setting only; you should evaluate this setting for your particular configuration and environment.	OFF
DB2_CORRELATED_PREDICATES	When set to YES, the optimizer is able to determine whether predicates in a query are related, which permits DB2 to calculate the filter factor more accurately.	YES
DB2_INDEX_2BYTEVARLEN	If you use DB2 v7, set this parameter to ON. Otherwise, you will not be able to create indexes with columns greater than 255 bytes. You do not need to set this parameter for DB2 v8 because DB2 v8 supports type-2 indexes.	ON
DB2_PIPELINED_PLANS	Tells the DB2 optimizer to favor pipeline execution plans—plans that are left deep and have no temporary result sets.	ON
DB2_INTERESTING_KEYS	Limits the number of execution plans generated by the DB2 optimizer.	ON

Table 7. db2set Parameters

Parameter	Explanation	Setting
DB2_PARALLEL_IO	Useful when using RAID devices. For more information, see your DB2 vendor documentation.	*
DB2_STRIPED_CONTAINERS	Useful when using RAID devices. For more information, see your DB2 vendor documentation.	ON
EXTSHM	This parameter only applies to AIX. Use this parameter only when you have the DB Server and the Siebel Server on the same AIX machine. For more information, see "When to Set the EXTSHM Parameter" on page 40 .	ON
DB2ENVLIST	When starting a DB2 UDB server and running EXTSHM, EXTSHM must be part of the DB2 environment. This parameter must be set when the database is created.	EXTSHM
DB2_NO_PKG_LOCK	To bind the Siebel package with siebbind, this package must be off.	OFF

When to Set the EXTSHM Parameter

The EXTSHM parameter must be set when the DB2 UDB database is created and must be included in the script that starts it. The parameter also must appear in the sqllib/db2profile file for the DB2 UDB server.

Additionally, you should include this parameter in the script that starts the DB2 client.

After changing any of these settings, you must perform a db2stop, then db2start, to implement the changes in your DB2 UDB database.

Setting DB2 UDB Configuration Parameters

The database configuration parameters can be set using the update database configuration command of the DB2 Command Line Processor or using the DB2 Control Center.

See the IBM DB2 technical documentation for more information on modifying the database configuration parameters.

[Table 8](#) describes DB2 database configuration parameters that differ from the default settings. However, these descriptions are guidelines only.

Set these parameters for *each* database within an instance on which you run your Siebel application. For other parameters, accept the default settings.

Table 8. DB2 UDB Configuration Parameters

Parameter	Explanation	Setting
DFT_DEGREE	Degree of parallelism (1=turn query parallelism off).	1
DFT_QUERYOPT	Default query optimization class. This parameter only takes effect on the DB server and affects the Siebel server components, such as EIM or Siebel Remote. Queries run through the UI are not affected by this setting. They take the value of the Siebel system preference DB2: Default Opt Level or you can override them at the Business Component level using Siebel Tools.	3
DBHEAP	Database heap (4 KB).	7429 (32-bit) 10000 (64-bit)
CATALOGCACHE_SZ	Catalog cache size (4 KB).	5558 (32-bit) 8000 (64-bit)
LOGBUFSZ	Log buffer size (4 KB).	On AIX, 128 (32-bit) 512 (64-bit)
UTIL_HEAP_SZ	Utilities heap size (4 KB).	5000 (32-bit) 10000 (64-bit)
LOCKLIST	Maximum storage for lock list (4 KB).	25000 (The setting should never be smaller than this, but may be increased.)
APP_CTL_HEAP_SZ	Maximum applications control heap size (4 KB). Controls the number of users that can be included within one connection to the database.	900 For customers using Siebel connection pooling feature, for best scalability, increment the parameter by 1200 for each 10 users per connection.

Table 8. DB2 UDB Configuration Parameters

Parameter	Explanation	Setting
SORTHEAP	Sort list heap (4 KB). Lower values should be used for development environments; higher values for production. However, increasing this value can lead to insufficient memory on the DB server. Also this parameter may need to be set below the recommended range if you have a high number of Siebel users. Therefore, you need to always monitor DB server memory and performance to find the best setting for your environment.	1000-5000
STMTH HEAP	Minimum setting. If needed this parameter should be incremented in 1048 blocks.	40960
STAT_HEAP_SZ	Statistics heap size (4 KB).	14000 (32-bit) 16000 (64-bit)
MAXLOCKS	Percentage of lock lists per application.	20 (32-bit) 30 (64-bit)
LOCKTIMEOUT	Lock time out (seconds).	300
CHNGPGS_THRESH	Changed pages threshold.	30
NUM_IOCLEANERS	Number of asynchronous page cleaners.	Number of CPUs.
INDEXSORT	Index sort flag.	YES
SEQDETECT	Sequential detect flag.	YES
DFT_PREFETCH_SZ	Default prefetch size (4 KB).	32
LOGRETAIN	Sequential or circular log files.	RECOVERY Set this parameter to RECOVERY in a <i>production environment</i> . Otherwise, you will lose data should your database crash. When LOGRETAIN is set to RECOVERY, you must also activate USEREXIT or implement another method to manage the archived logs, so that LOGPATH does not fill up.
MAXAPPLS	Maximum number of active applications.	Twice the number of users.
AVG_APPLS	Average number of active applications.	Depends on the environment.

Table 8. DB2 UDB Configuration Parameters

Parameter	Explanation	Setting
MAXFILOP	Maximum DB files open per application.	500
LOGFILSIZ	Log file size (4 KB).	20000
LOGPRIMARY	Number of primary log files.	25-50 The value of LOGPRIMARY and LOGSECOND together may not exceed 128.
LOGSECOND	Number of secondary log files.	Up to 103 The value of LOGPRIMARY and LOGSECOND together may not exceed 128.
ESTORE_SEG_SZ	Deployments with servers with more than 4 GB of RAM can take advantage of this extended storage parameter. Use of this parameter also improves application sorting. Attach 4-KB and 16-KB buffer pools.	Initially 16000 but can be up to 65536.
NUM_ESTORE_SEGS	See explanation of ESTORE_SEG_SZ.	Initially 16
SOFTMAX	Percent log file reclaimed before soft checkpoint.	80
APPLHEAPSZ	Default application heap (4 KB).	2500
PCKCACHESZ	Package cache size (4 KB).	40000
NUM_IOSERVERS	Number of disks on which the database resides.	Number of disks.

Creating DB2 UDB Database Objects

To help you automate database instance creation, Siebel Systems provides sample scripts (CrBlankDB2UDBSiebelDEMO.sql and CrBlankDB2UDBSiebelDEMOPostCrDB.sql), located in the \$SIEBEL_ROOT/dbsrvr/DB2UDB directory. Use these scripts as a reference to create scripts based on your deployment's requirements to create database objects. Prior to using the scripts, make sure you read the CrBlankDB2UDBSiebelDEMOReadMe.txt.

Use a small, nonproduction environment for testing purposes.

After you install the Siebel Database Server files on the Siebel Server machine (described in DB2 UDB sections of [Chapter 7, "Installing the Siebel Database Server"](#)), you may modify the database table and index creation scripts to specify the file group names you created for Siebel tables and indexes. For more information, see ["Overriding Default DB2 UDB Storage Parameters" on page 46](#).

Log Space Guidelines

You must create database transaction logs large enough to support various large transactions used by the Siebel software. On DB2 UDB, three parameters affect the amount of log space reserved:

LOGFILSIZ. The size of the log file.

LOGPRIMARY. The number of log files to preallocate and use.

LOGSECOND. Extra log files that are allocated only if they are needed for a large transaction.

To run on a large system, create approximately 1 GB of total log space. Create 25-50 primary log files of 32 MB each. These tasks are accomplished by setting the LOGFILSIZ database configuration parameter to 20000 and the LOGPRIMARY parameter to 25-50. In addition, to support very large transactions, set the LOGSECOND parameter to 128 minus the value of LOGPRIMARY.

Smaller systems may use less log space.

Log File Archiving Guidelines

The database parameter LOGRETAIN is not enabled by default; this parameter may be important to you. When LOGRETAIN is set to OFF, the log files are reused in a circular fashion, and roll-forward recovery cannot be used. When LOGRETAIN is set to RECOVERY, all log files are kept on the system for the administrator to archive and delete.

If LOGRETAIN is set to NO, you can do only backup (restore) recovery and cannot do roll-forward recovery. This may have implications for your disaster recovery process related to your production Siebel Database Servers.

Have your database administrator (DBA) review the setting for this parameter as well as USEREXIT parameter. For more information on these parameters, see IBM documentation.

Setting Up DB2 UDB Bufferpools

A *bufferpool* is an area of main system memory that is used for holding pages of data that have been fetched from the tablespace. In DB2 UDB, each tablespace is associated with a bufferpool. Adding more space to a bufferpool enhances the performance of the database.

You must have at least three bufferpools for the Siebel tablespaces. You can use the default bufferpool (called IBMDEFAULTTBP) to buffer data pages from all the Siebel 4-KB tablespaces.

You must also create additional bufferpools with 16-KB and 32-KB page sizes for sorting and other SQL processing. A sample configuration is shown in [Table 9](#).

Table 9. Sample Bufferpool Configuration

Bufferpool	Suggested Bufferpool Size	Page Size
IBMDEFAULTTBP	50% of available memory	4 KB

Table 9. Sample Bufferpool Configuration

Bufferpool	Suggested Bufferpool Size	Page Size
BUF32K	32 MB	32 KB
BUF16K	25% of available memory	16 KB

Different operating systems support different maximum amounts of DB2 addressable memory. Depending on the memory configuration of a given server, the suggested pool sizes for IBMDEFAULTTBP and BUF16K bufferpools may exceed these maximums, requiring you to allocate a smaller percentage. To determine optimal bufferpool sizes, use DB2 monitoring features.

Creating DB2 UDB Tablespaces

The Siebel Database Server installation process specifies the tablespaces in which to store your Siebel tables and indexes.

A Siebel DB2 database requires at least four tablespaces using database-managed space (DMS). Each tablespace can have one or more tablespace containers to store the data. You should create a *minimum* of four DB2 tablespaces to hold your tables and indexes—a 4-KB, a 16 KB, and a 32-KB tablespace, for your various sized tables, and an additional tablespace to hold your indexes. The tablespaces must be created as database-managed space.

Use a small, nonproduction environment for testing purposes.

Observe the following guidelines when creating tablespaces:

- Create at least four DB2 tablespaces for tables of various sizes as shown in [Table 10](#). Using the default tablespace names is recommended.

Table 10. DB2 Tablespace Values for Both Non-Unicode and Unicode-Enabled Databases

DB2 Tablespace Name	Bufferpool Name	Recommended Value	Description
Non-Unicode-Enabled Database			
SIEBEL_4K	IBMDEFAULTTBP	2 GB	Tablespace name for tables with row sizes of at most 4005 bytes.
SIEBEL_16K	BUF16K	300 MB	Tablespace name for tables with row sizes from 4006 bytes through 16,293 bytes.
SIEBEL_32K	BUF32K	100 MB	Tablespace name for tables with row sizes greater than 16,293 bytes.
Unicode-Enabled Database			
SIEBEL_4K	IBMDEFAULTTBP	3 GB	Tablespace name for tables with row sizes of at most 4005 bytes.

Table 10. DB2 Tablespace Values for Both Non-Unicode and Unicode-Enabled Databases

DB2 Tablespace Name	Bufferpool Name	Recommended Value	Description
SIEBEL_16K	BUF16K	700 MB	Tablespace name for tables with row sizes from 4006 bytes through 16,293 bytes.
SIEBEL_32K	BUF32K	100 MB	Tablespace name for tables with row sizes greater than 16,293 bytes.

- Create additional tablespaces as required for individual tables, such as S.Dock_Txn_Log. If you expect to have large, heavily used tables, put these in their own tablespace.
- Create at least a 4-KB, 16-KB, and 32-KB temporary tablespace to use for sorting and other SQL processing as described in the following sections. If you do not create them, your database will experience serious performance and stability problems. Use system-managed space (SMS) for all temporary tablespaces. These temporary tablespaces should also be expandable to 2 GB for storage purposes.
- If you intend to use the DB2 Load utility to populate EIM tables, this method makes the tablespace in which the EIM table resides unavailable for the duration of the load. Placing the EIM tables in one or more separate tablespaces allows concurrent activity on the database while the load utility is running.

Be sure to record the tablespace names on the [Appendix A, "Deployment Planning Worksheet."](#)

- To override default storage parameters, such as the tablespace definitions, see ["Overriding Default DB2 UDB Storage Parameters" on page 46](#).

Overriding Default DB2 UDB Storage Parameters

Siebel Systems provides the option of overriding default storage parameters, such as the tablespaces you created using the instructions under ["Creating DB2 UDB Tablespaces" on page 45](#), in which specific tables or indexes are created. To override these defaults, edit the ddl.ctl file located in the dbsrvr/DB2UDB directory.

NOTE: The ddl.ctl file should be modified only by a qualified DBA.

For each Siebel table, you can specify a tablespace by using the Table Space parameter. In the following example, the tablespace for the table S_APP_VIEW is set to DATA1.

As provided by Siebel Systems, the .ctl file does not set storage parameters for the objects it creates, so they default to the parameters of the tablespaces in which they are created. However, the Table Space parameter will work under the following conditions:

- The table does not yet exist (for example, when you are performing a new database installation).
- The table needs to be rebuilt, in other words, there are schema changes made to the table such that an ALTER TABLE command is not sufficient to implement the schema changes, requiring that the Siebel application drop and re-create the table.

As shown in the following example, you can use the Table Space parameter to set storage parameters for specific tables.

```
[Object 219]
Type = Table
Name = S_APP_VIEW
Column 1 = ROW_ID VARCHAR(15) NOTNULL
Column 2 = CREATED TIMESTAMP NOTNULL DEFAULT %NOW%
Column 3 = CREATED_BY VARCHAR(15) NOTNULL
Column 4 = LAST_UPD TIMESTAMP NOTNULL DEFAULT %NOW%
Column 5 = LAST_UPD_BY VARCHAR(15) NOTNULL
Column 6 = DCKING_NUM NUMERIC(22,7) DEFAULT 0
Column 7 = MODIFICATION_NUM NUMERIC(10,0) NOTNULL DEFAULT 0
Column 8 = CONFLICT_ID VARCHAR(15) NOTNULL DEFAULT '0'
Column 9 = NAME VARCHAR(50) NOTNULL
Column 10 = DESC_TEXT VARCHAR(255)
Column 11 = LOCAL_ACCESS_FLG CHAR(1)
Table Space = data1
```

The following example illustrates how to override the defaults for specific tables and indexes.

```
[Object 7135]
Type = Table
Name = S_EVT_ACT
Group = Activity-1
Append Mode = Yes
Column 1 = ROW_ID WVARCHAR(15) NOTNULL
Column 2 = CREATED TIMESTAMP NOTNULL
DEFAULT %NOW%
Column 3 = CREATED_BY WVARCHAR(15) NOTNULL
Column 4 = LAST_UPD TIMESTAMP NOTNULL
DEFAULT %NOW%
Column 5 = LAST_UPD_BY WVARCHAR(15) NOTNULL
Column 6 = DCKING_NUM NUMERIC(22,7) DEFAULT 0
Column 7 = MODIFICATION_NUM NUMERIC(10,0) NOTNULL
DEFAULT 0
Column 8 = CONFLICT_ID WVARCHAR(15) NOTNULL
DEFAULT '0'
Column 9 = ACTIVITY_UID WVARCHAR(30) NOTNULL
DEFAULT 'x'
...
Column 166 = TODO_CD WVARCHAR(30)
Column 167 = USER_MSG_ID WVARCHAR(15)
Column 168 = WC_START_VIEW WVARCHAR(250)
Column 169 = WC_TYPE_CD WVARCHAR(30)
```

```
[Object 7136]
Type = Index
Name = S_EVT_ACT_F1
Table = S_EVT_ACT
Column 1 = CON_PRDINT_ID ASC
Index Space = S_EVT_ACT_TBS_IDX
```

```
[Object 7137]
```

```

Type = Index
Name = S_EVT_ACT_F10
Table = S_EVT_ACT
Allow Reverse Scans = Yes
Column 1 = TARGET_OU_ID ASC
Column 2 = APPT_START_DT DESC
Column 3 = ROW_ID ASC

[Object 7138]
Type = Index
Name = S_EVT_ACT_F11
Table = S_EVT_ACT
Column 1 = PAR_EVT_ID ASC
Index Space = S_EVT_ACT_TBS_IDX

```

Selecting a Language for DB2 UDB

As part of database creation, you must create and set the language characteristics of your database, even if you deploy in only one language. To do this, you must know which of the Siebel-supported languages your database runs, the codeset your database uses, the territory (also called the locale) for your language (such as Canadian French), and the collating sequence your users prefer. For production DB2 database servers, you can use any collating sequences, but, for development only, IDENTITY collating sequence is supported.

Setting the language characteristics of the database is part of the sample script in the `$SIEBEL_ROOT/dbsrvr/DB2UDB` directory.

CAUTION: When creating a Unicode-enabled database, make sure you set the parameter `DB2_INDEX2BYTEVARLEN` to `ON`, or your database creation will fail.

For supported Siebel language code, territory, and codeset for your database, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

Codeset

DB2 distinguishes between a code page (also known as a character set) and a codeset. A *codeset* is defined as a textual string that describes the character encoding standard used for the database, whereas a *code page* is a numeric representation of the same standard.

Territory

The *territory*, or region, is a combination of the language and the locale; for example, French would be a language example, while Canada or France would be locales in which French is used with regional differences.

Sort Order

The sort order is specified during the initial installation of a database and defines the way in which the database sorts character data. Sort order support depends on both the code page of the database and whether it will be used in a development or a production environment. For more information on supported sort orders, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

Development Environment Databases. Repository object names in your development database must sort in the same order that they would under the UTF-16 binary sort order, because Siebel Tools uses this sort order internally. Otherwise, repository merges during future upgrades of the Siebel Database will fail. This failure occurs because, in the UTF-16 binary sort order, codepoints U+E000 to U+FFFF sort after codepoints U+10000 to U+10FFFF, whereas, in Unicode codepoint order, they sort before. For information on production environment database restrictions, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

Creating the DB2 UDB Database

If you are installing a Unicode database, you must enter UTF-8 as the codeset and retain the hyphen. UTF-8 is the parameter used for Unicode implementation on DB2, although the actual processing will use UCS-2. When you specify UTF-8 as the encoding for the VARCHAR type, the encoding for the VARGRAPHIC type is automatically set to UCS-2, even though the UCS-2 is not specified as the parameter.

Verify that your data is exported and imported correctly.

To create the DB2 database

- 1 Locate the primary (base) language your database will use, the territory for your language, and the applicable codeset. See *System Requirements and Supported Platforms* on Siebel SupportWeb for the values that apply to your language.
- 2 Using the DB2 UDB Command Line Processor, enter the following command:

`db2 create database dbname using codeset territory collate using identity`

where:

dbname = The alias for your database

codeset = The textual representation of your code page

territory = The territory for the language your database runs in under that codeset

Managing DB2 UDB Table Fragmentation

No strict guidelines can be offered as to which tables and indexes may be fragmented due to the variety in application and customer operation variables at any given customer site. However, database administrators (DBAs) should pay attention to the status of large or heavily used tables, because fragmentation of these tables can affect performance significantly. For a list of these Siebel tables, see the *Deployment Planning Guide*.

You should not reorganize S_ESCL_LOG, S.Dock_INIT_ITEM, S_ESCL_ACTN_REQ, S_APSSVR_REQ, and all S.Dock_INITM_%%tables (where %% is a digit), because these tables are defined to be in append mode.

Use the following strategy to manage table fragmentation:

- Run REORGCHK on heavily used tables, and then review the resulting reports and extract list of any fragmented objects.
- Based on the results of REORGCHK, reorganize any tables, as needed, by running REORG TABLE. For details on how to reorganize tables or indexes, see FAQ 2072 and FAQ 2073 on Siebel SupportWeb.
- After table reorganization, update statistics by using the runstats utility on any reorganized tables with the following minimum parameters:

```
runstats on table tablename with distribution and detailed indexes all shrlevel change
```

You may add other parameters as required, but use the shrlevel change parameter to allow concurrent access to your tables while runstats executes.

CAUTION: Because the runstats utility overwrites statistics loaded by Siebel applications, if you use runstats, you should always execute loadstats.sql afterwards, using either DB2 CLP or odbcsql. Otherwise, valuable statistics will be lost.

To run loadstats.sql using odbcsql, use the following command:

```
odbcsql /s DATASOURCE_NAME /u username /p password /v separator /siebsrvr_root/  
dbsrvr/db2udb/loadstats.sql TABLEOWNER_NAME
```

Configuring Oracle for Siebel Applications

This section contains guidelines for obtaining optimum performance from an Oracle database. Refer to your Oracle technical documentation for additional information.

NOTE: When Siebel Database Server scripts are executed in an Oracle database, sequences are generated with the CACHE option. Do not drop these sequences and regenerate them with the NOCACHE option, or performance may be adversely affected and database contention may occur.

Configuring Settings in init.ora File

The init.ora file contains parameters that have a major impact on the performance of Siebel applications.

Use the following settings only as guidelines for your initial configuration. Your final settings will vary based on the hardware configuration, the number of users, and the type of workload.

CAUTION: Never make changes to your Siebel Database schema unless instructed on how to do so for a specific purpose by Siebel eBusiness Applications documentation. Otherwise, you may corrupt your entire system and thereby render it unsupportable.

In the init.ora file, Oracle provides default parameter values for small, medium, and large database configurations. Unless the configuration parameters are specified in the following settings, set them to the large database values. Refer to your Oracle documentation for detailed descriptions of each of the parameters and their effects on database performance and system resource utilization.

Brief descriptions of these parameters follow:

- **OPTIMIZER_MODE.** Select the appropriate optimizer by setting this parameter.
 - For Oracle 9*i* installations, only the Cost-Based Optimizer (CBO) is supported. Set OPTIMIZER_MODE to CHOOSE.
 - For Oracle 8*i* installations, only the Rule-Based Optimizer (RBO) is supported. Set OPTIMIZER_MODE to RULE.
- **NOTE:** When upgrading your Siebel eBusiness Applications to version 7.7 on Oracle, RBO mode must be used in all cases. For Oracle 9*i* installations, you set the optimizer to RBO for the upgrade, then set it back to CBO after the upgrade. See the *Upgrade Guide*.
- **OPTIMIZER_MAX_PERMUTATIONS.** Applies to Oracle 9*i*. Set this parameter to 100. This parameter restricts the number of permutations of the tables the optimizer considers in queries with joins.
- **OPTIMIZER_INDEX_COST_ADJ.** Applies to Oracle 9*i*. Set this parameter to 1. Use it to tune the optimizer to use index access path over a full table scan.
- **DB_BLOCK_BUFFERS(8*i*) or DB_CACHE_SIZE(9*i*).** The minimum recommended value is 10,000 blocks (assuming a block size of 8 KB). This yields 80 MB of block buffers. If significant I/O activity occurs, you can increase this value, if enough RAM is available.
In a production system, it is recommended that you assign this parameter a minimum value of 400 MB. Also, your system should have a minimum of 1 GB RAM.
- **SHARED_POOL_SIZE.** Start with a minimum value of 200 MB in your production environment. A DBA should adjust this value upward based on the available physical memory of the hardware and performance.

Siebel eBusiness Applications make heavy demands on the dictionary cache for columns. In Oracle, you cannot explicitly set the size of the column cache. Instead, column cache is set as a fixed percentage of the shared pool size. By setting a large shared_pool_size, you set a large column cache size.

The number of repositories active in your Siebel schema also adds to dictionary overhead because Siebel eBusiness Applications maintains a record for each column in each table for each repository. As a result, if you have six active repositories, the Siebel dictionary is six times larger than it needs to be.

- **DB_FILE_MULTIBLOCK_READ_COUNT.** The database buffer cache parameter dictates the number of data blocks read in a single Oracle I/O operation during a table scan.

For most implementations, this value should be set between 16 and 32 blocks and adjusted as necessary. You may want to set an initial value of 32. To reduce I/O overhead, this parameter should ideally be between 64 and 256 KB, depending on the tables undergoing scanning, the number of disk drives and devices, the tablespace structure, and other variables.

To optimize performance during upgrades, this value should be set higher than for installation or daily operation and the parameter ARCHIVE_LOGGING should be switched off.

- **SORT_AREA_SIZE.** This value is specified in bytes, and may be adjusted according to the number of users, the amount of RAM available, and the size of sorted queries. You should start with an initial value of 1,000,000 (1 MB).Optimal performance can be achieved for the Dictionary Managed TEMP tablespaces if the extents are uniform and a multiple of the SORT_AREA_SIZE.
- **SORT_AREA_RETAINED_SIZE.** Use the default recommended by Oracle. See Oracle documentation for details.
- **CURSOR_SHARING.** This parameter is set to EXACT by default and you should not change it unless directed by Siebel Technical Support.
- **OPEN_CURSORS.** This parameter controls the amount of spaces that should be reserved for the maximum number of cursors (a cursor being the same as an open query). The minimum open cursor requirement for Oracle support is 1000 and the maximum is 2000. This parameter may be adjusted according to observed usage patterns.

Setting this number higher than 2000 commits more memory for the database server, thereby affecting performance. Setting it lower than 1000 can cause an error that prevents you from continuing.

- **DB_BLOCK_SIZE.** Small block size leads to high levels of row chaining and large numbers of levels in B*tree indexes, creating serious performance problems. Set the block size to a minimum of 8 KB to prevent excessive row chaining and performance degradation with EIM.
- **NLS_SORT.** The sort order is specified during the initial installation of a database and defines the way in which the database sorts character data. Sort order support depends on both the code page of the database and whether it will be used in a development or a production environment.
 - **Development environment databases.** Repository object names in your development database must sort using binary sort order. Siebel Tools uses this sort order internally. Otherwise, repository merges during future upgrades of the Siebel Database will fail.
 - **Production environment databases.** Refer to Oracle documentation for guidelines on setting this parameter for production databases. For information on production environment database restrictions, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

You should specify the same sort order at the database client level, so that output there does not need to be resorted.

Customers are responsible for verifying that their data is exported and imported correctly.

- **NLS_DATE_FORMAT.** Set the NLS_DATE_FORMAT parameter as needed. (The default setting is DD-MON-YY.) For information about the formats supported, consult your Oracle documentation.

Creating Oracle Database Objects

To help you automate database instance creation, Siebel Systems provides sample scripts (CrBlankOracleSiebelDEMO.sql and CrBlankOracleSiebelDEMOPostCrDB.sql), located in the \$SIEBEL_ROOT/dbsrvr/Oracle directory. Use these scripts as a reference to create scripts based on your deployment's requirements to create database objects. Before using the scripts, make sure you read the file CrBlankOracleSiebelDEMOReadMe.txt.

Use a small, nonproduction environment for testing purposes.

After you install the Siebel Database Server files on the Siebel Server machine (described in the Oracle sections of [Chapter 7, "Installing the Siebel Database Server"](#)), you may modify the database table and index creation scripts to specify the file group names you created for Siebel tables and indexes. For more information, see ["Overriding Oracle Default Storage Parameters" on page 56](#).

Sizing Redo Logs

If redo logs are too small, frequent log switches occur, creating resource-intensive Oracle checkpointing in which all dirty buffers are flushed. Although a range of 10 to 15 minutes or longer for log switching is preferable under a normal OLTP (Online Transaction Processing) load, during periods of heavy DML (Data Manipulation Language) activity (for example, during large EIM loads or upgrades), the logs may switch more frequently than every two minutes. However, when this occurs, overall database performance will suffer as a result.

You can check the frequency of this operation either in the alert log or by querying v\$loghist. It is best to use verification when there is the greatest activity and the heaviest load on the database.

If this activity occurs too frequently, drop and recreate individual redo log groups with larger sizes.

To achieve optimum performance, placing subsequent log file groups on alternative devices is critical. This precaution prevents the archiver process (ARCH) and the log writer process (LGWR) from competing for I/Os on the same device, because ARCH reads from the previous group, while LGWR is writing to the current group. This process causes the read-write head of the device to move back and forth, contributing to inefficient I/O. When log file groups are located on separate devices, the speed of both processes improves as they do not contend for the same hardware resource.

Collecting Optimizer Statistics for Oracle 9i

Collect statistics for the tables, indexes, and histograms for the columns where the data shape is skewed. For details on how to collect these statistics, see Oracle administration manuals.

Creating Oracle Tablespaces

Initial (Minimum) tablespace allocation recommendation is as follows:

- Data—5 GB
- Index—5 GB
- Rollback segment—1 GB

This allocation is enough for a fresh installation of Oracle 8i (non-Unicode-enabled) or Oracle 9i (Unicode- or non-Unicode-enabled).

The following additional guidelines should help you in creating tablespaces:

- To improve performance on your production system, create at least two tablespaces for Siebel implementation—one for indexes and one for data.
- Distribute objects that you anticipate to be large or points of contention by creating additional separate tablespaces (preferably on separate disk devices).
- Be sure that you, or whoever is responsible for setting up permissions, grants the Siebel tableowner account the privilege and sufficient quota to create tables and indexes in these tablespaces.

Besides the tableowner, the database User ID used for Siebel Marketing also requires additional rights at the database level within the OLTP schema. You must grant drop table, drop index, create table, and create index rights to this user. For more details, see *Siebel Marketing Installation and Administration Guide*.

- Set storage parameters for your data and index tablespaces. The Siebel installation procedure does not set storage parameters for the objects it creates. The storage configuration for each objects follows the default storage parameters of its tablespace.

In a development or test environment, multiple Siebel eBusiness Applications installations can coexist on one Oracle instance. Each Siebel installation can be installed under one tableowner. For example, more than one test environment can share one Oracle instance.

Sizing the Oracle Database

Use these guidelines to do initial sizing of your Oracle database:

- Set the initial extent to a very small size (the minimum is one database block), so that empty tables and indexes do not consume large amounts of space. For example, start with either two or four blocks (in other words, 16 KB or 32 KB with an 8-KB block size). This allocation promotes less fragmentation.

Even if you have 10,000 objects, this number of objects uses only 312 MB, which is far less space required than for some standard office software packages.

- Set the default next extent for your data and index tablespaces to a minimum of 100 KB.
- Monitor object growth and fragmentation carefully and alter the storage parameters as required.

Creating Temporary Oracle Tablespaces

All user temporary tablespace definitions should be modified from the default of SYSTEM to the name of the temporary tablespace; for example, TEMP or TEMP_TS. Otherwise, SORT operations interfere with Oracle dictionary management.

To find out which users are assigned to which temporary tablespaces, query the TEMPORARY_TABLESPACE column of DBA_USERS, and if any users are assigned to a tablespace other than the one allocated for temporary sort-type operations, correct the situation.

Selecting a Language for Oracle

When creating your database, you must specify the character set at the database level. You specify other language characteristics at the database client level. For information about setting database client language parameters, see the Oracle sections in [Chapter 7, "Installing the Siebel Database Server."](#)

To specify character set of your database

- Run the following command to specify character set for your database:

```
CREATE DATABASE INSTANCE_NAME CHARACTER SET CHARACTER_SET_NAME
```

where:

INSTANCE_NAME = The name of your Oracle instance

CHARACTER_SET_NAME = The textual name of the character set you want to run; for example, WE8MSWIN1252.

National character sets are not required for Siebel installation because the Siebel application does not use the three data types, which can store data in the national character set (NCHAR, NVARCHAR2, NCLOB.)

Sort Order and Date Format

Follow Oracle's guidelines for client-level settings for the NLS_SORT and NLS_DATE_FORMAT parameters.

Defining Oracle Rollback Segments

Rollback segments (RBS) are used when a process is performing inserts, updates, or deletions (DML).

Oracle assigns each transaction to a rollback segment. As a rule of thumb, the total number of rollback segments required should be based on four concurrent transactions per rollback segment. However, database administrators should monitor their database and configure rollback segments based on the requirements of the Siebel applications running.

Use the following guidelines to make sure there are sufficient rollback segments for large implementations:

- Create multiple rollback segments, each with multiple extents, at least, initially.
- Calculate 5-10 active transactions (user activity consisting of an insert, update, or deletion) per extent, and from 2-6 extents per rollback segment.

Use the following guidelines to make sure there are sufficient rollback segments for smaller implementations:

- Create a single, much larger rollback segment for Siebel Server components, such as Enterprise Integration Manager (EIM). Siebel Server components can point directly to this rollback segment when performing long-running queries.
- To promote optimal system performance, create your rollback segments in a dedicated tablespace on a dedicated disk. Rollback segments typically support high I/O rates, so this action improves system performance measurably.

Partitioning an Oracle Database

Siebel eBusiness Applications do not currently support Oracle partitioning. Siebel 6 and Siebel 7 development-to-production migration and version upgrade processes do not recognize partitioning. Therefore, do not propagate existing partitioning definitions to the new environment.

Overriding Oracle Default Storage Parameters

Siebel Systems provides the option of overriding the default storage parameters, such as the tablespaces in which specific tables or indexes are created. To override these parameters, appropriately edit the `ddl.ctl` file located in the `dbsrvr/oracle` directory.

NOTE: The `ddl.ctl` file should be modified only by a qualified DBA.

For each Siebel object (table or index), you can specify a tablespace by using the `Table Space` parameter. In the following example, the tablespace for the table `S_APP_VIEW` is set to `DATA1`. As provided by the Siebel application, the `.ctl` file does not set storage parameters for the objects it creates, so that they default to the parameters of the tablespaces in which they are created. However, the `Table Space` parameter only works under the following conditions:

- The table does not yet exist (for example, when you are performing a new database installation).
- The table needs to be rebuilt, in other words, there are schema changes made to the table such that an `ALTER TABLE` command is not sufficient to implement the schema changes, requiring that the Siebel application drop and recreate the table.

The following example illustrates the use of the `Table Space` parameter to set storage values for specific tables.

```
[Object 219]
Type = Table
Name = S_APP_VIEW
Column 1 = ROW_ID VARCHAR(15) NOTNULL
Column 2 = CREATED TIMESTAMP NOTNULL DEFAULT %NOW%
Column 3 = CREATED_BY VARCHAR(15) NOTNULL
Column 4 = LAST_UPD TIMESTAMP NOTNULL DEFAULT %NOW%
Column 5 = LAST_UPD_BY VARCHAR(15) NOTNULL
Column 6 = DCKING_NUM NUMERIC(22,7) DEFAULT 0
Column 7 = MODIFICATION_NUM NUMERIC(10,0) NOTNULL DEFAULT 0
Column 8 = CONFLICT_ID VARCHAR(15) NOTNULL DEFAULT '0'
```

```

Column 9 = NAME VARCHAR(50) NOTNULL
Column 10 = DESC_TEXT VARCHAR(255)
Column 11 = LOCAL_ACCESS_FLG CHAR(1)
Table Space = data1

```

If you use locally managed tablespaces and want to change the storage parameters, see your Oracle technical documentation.

Real Application Clusters Support for Oracle 9i

Siebel 7.7 supports Oracle database server running in an Active/Passive RAC (Real Application Clusters) failover configuration using Oracle 9i feature called primary/secondary instance configuration. This feature is currently only supported in two-node environment, one being active and the other being passive. For more information about this feature, see Oracle documentation *Real Application Clusters Concepts*. See also *Deployment Planning Guide*.

Guidelines for Ongoing Oracle Administration

After your Siebel eBusiness Applications installation is up and running, monitor the following areas on a regular basis:

- **Insertion rates on tables.** You will probably want to set the INITRANS value for tables with high insertion rates to a value higher than 1; a typical setting is 4. This parameter determines how many simultaneous inserts can occur on the database blocks that store data for those tables and, therefore, can affect performance in an intensive data-entry environment. Use multiple freelists for the table S_DOCK_TXN_LOG, because this table receives numerous inserts.
- **SGA cache hits.** Determine whether SGA parameters need to be adjusted for your system.
- **The extents used by each object.** A large number of extents on a table or index creates response time degradation for transactions that access the table or index.
- **Siebel tables that are subject to frequent INSERT and DELETE operations.** This transaction mixture can cause some databases to become fragmented over time.

You should monitor the space utilization and fragmentation of these tables and perform regular database maintenance procedures as recommended by your database vendor. The following list contains the names of the tables you should monitor.

```

S_DOCK_TXN_LOG
S_DOCK_TXN_LOGT
S_DOCK_TXN_SET
S_DOCK_TXN_SETT
S_DOCK_INST
S_DOCK_INIT_ITEM

```

- **Rollback segments.** Make sure that you have enough segments available and that they are the optimum size for the most common operations.

4

Non-GUI Installation

This chapter provides instructions for installing without the installation GUI, that is, by using unattended mode or console mode. It includes the following topics:

- “About Installing in Unattended and Console Mode” on page 59
- “Process of Unattended Installation and Configuration” on page 59
- “Console Mode Installation and Configuration” on page 73
- “Process of Installing in Console Mode” on page 74
- “Combining Console Mode and Unattended Mode Installation” on page 76
- “Additional Flags for Installation Commands” on page 77

Instructions for installing in GUI mode are provided in subsequent chapters.

About Installing in Unattended and Console Mode

For performance or security reasons, you may choose to install the Siebel eBusiness Applications servers using one of these modes instead of GUI. You should use one of these modes for security or performance reasons in the following kinds of situation:

- **Unattended mode.** Use unattended installation mode if user input of configuration parameters during the installation is not allowed in your environment.
- **Console mode.** Use console installation mode when installing multiple servers simultaneously.

Use console installation mode when installing over a WAN. Installing in GUI mode over a WAN can use large amounts of bandwidth resulting in undesirable lag times during installation. The console installation provides a text-only interface that lets you bypass the Java-based GUI.

NOTE: If you are using X-connectivity software to access a UNIX machine from a Windows machine, you might experience unexpected exiting or hanging by the installer. If this is the case, try using a later version of the X-connectivity software; for example, if you are using Exceed, make sure you are using Exceed 8.0 or greater. For details on installing in console mode, see “Installing in Console Mode” on page 75.

Process of Unattended Installation and Configuration

In some secure computing environments, user input of installation and configuration parameters during the installation is not allowed. In this case, you can run the installation process in *unattended mode*.

Unattended installation prepackages the required installation and configuration parameters so that you only need to execute a command to perform installation.

NOTE: Unattended installation provides no feedback or error notification; therefore, it is vital that you test your configuration in a development environment before system-wide deployment in a production environment.

The unattended installation process requires multiple tasks that you should perform in the following sequence:

- 1 “Editing the *siebel.ini* Files for Unattended Installation” on page 60.
- 2 “Console Mode Installation and Configuration” on page 73.

Editing the *siebel.ini* Files for Unattended Installation

Before starting installation, you must modify portions of multiple *siebel.ini* files, as described in the procedures that follow:

- One *siebel.ini* file is for the main installer, and is located in *UNIX_OS/Server/Siebel_Enterprise_Server*, where *UNIX_OS* is either AIX, Solaris, or HPUX (for HP-UX).
- Additional *siebel.ini* files are for configuration of individual modules. For example, *siebel.ini* files for individual configuration of Siebel Gateway Name Server and Siebel Server are located in the following places:
 - *UNIX_OS/Server/Siebel_Enterprise_Server/gtwysrvrcfg/siebel.ini* (for Siebel Gateway Name Server)
 - *UNIX_OS/Server/Siebel_Enterprise_Server/siebsrvrcfg/siebel.ini* (for Siebel Server)where *UNIX_OS* is either AIX, Solaris, or HPUX (for HP-UX).

To modify the *siebel.ini* file for the main installer

- 1 Using a text editor, modify the *siebel.ini* file for the appropriate product. The locations of *siebel.ini* files are listed below.

NOTE: Make a copy of each *siebel.ini* file you plan to modify, and save it in a unique location that identifies the module it pertains to. Preserve these copies in case you may need them for later reference.

- **Siebel Enterprise Server.** *UNIX_OS/Server/Siebel_Enterprise_Server/siebel.ini*.
- **Siebel Web Server Extension.** *UNIX_OS/Server/Siebel_Web_Server_Extension/siebel.ini*.
- **Siebel CORBA Object Manager.** *UNIX_OS/Server/Siebel_CORBA_Object_Manager/siebel.ini*.

where:

UNIX_OS = Your UNIX operating system, such as AIX, Solaris, or HPUX (for HP-UX).

CAUTION: When you modify a *siebel.ini* file, make sure that you enter the correct values, because your entries are not validated by the installer.

- 2 In the siebel.ini file, locate the [Dialog] section and set all keys, except the ones starting with *uninst*, to no. This will disable all prompts.
- 3 Locate the [Behavior] section and set silent to yes. This logs all errors instead of displaying them.
- 4 Locate the [Defaults.*] section and set the values appropriate to your installation:
 - a Set those products you want to install under [Defaults.ProductSelection].
 - b Locate the [Defaults.LanguageSelection] and set the languages you want to install to yes. For example, if you want to install both U.S. English and French, then include the following lines:

```
[Defaults.LanguageSelection]
ENU = yes
FRA = yes
```

- 5 If you are installing from files that were copied directly from the DVD, then also include lines like the following (also in the section [Defaults.LanguageSelection]), to indicate the locations of the executable files for the Language Packs you are installing. The `InstallLocation` key is not necessary if you are installing from a network image.

```
[ENU]
InstallLocation = ENU_Location

[FRA]
InstallLocation = FRA_Location
```

For example, the values could be set to values similar to the following (for Solaris):

```
[ENU]
InstallLocation = install_location/All_English_LEP/solaris/
Server\Siebel_Enterprise_Server/enu

[FRA]
InstallLocation = install_location/All_French_LEP/solaris/Server/
Siebel_Enterprise_Server/fra
```

- 6 Locate the [Defaults.Unix] section and set the `RootDirectory` to the product installation root directory.
- 7 Locate the [RunAfter.Unix] section and update the relevant subsections as follows:
 - [ConfigGtwysrvr]


```
Condition = $(GatewaySelected)=yes, $(Patch)=no
Execute = $(JavaHome)/bin/java
Arg = -cp $(CDPPath)/gtwysrvrcfg/setup.jar run -args SS_SETUP_INI= Full path to
the modified configuration ini file, including the filename
StringTable=$(UninstallPath)/table.txt
```

- [ConfigSiebsrvr]


```
Condition = $(SiebelSelected)= yes, $(Patch)=no
Execute = $(JavaHome)/bin/java
Arg = -cp $(CDPath)/siebsrvrcfg/setup.jar run -args SS_SETUP_INI=Full path to the
modified configuration ini file, including the filename
StringTable=$(UninstallPath)/table.txt
```

CAUTION: Do not modify the table.txt file.
- [Config.SWSE.Unix]


```
Condition = $(Patch)=no
Execute = $(JavaHome)/bin/java
Arg = -cp $(CDPath)/config/setup.jar run -args SS_SETUP_INI=Full path to the
modified configuration ini file, including the filename
StringTable=$(UninstallPath)/table.txt
```
- [Config.CorbaOM.UNIX]


```
Condition = $(Patch)=no
Execute = $(JavaHome)/bin/java
Arg = -cp $(CDPath)/config/setup.jar run -args SS_SETUP_INI=Full path to the
modified configuration ini file, including the filename
StringTable=$(UninstallPath)/table.txt
```

NOTE: For more details on parameters in the configuration files, see “Configuration File (siebel.ini) Parameter Values” on page 64.

Modifying the siebel.ini File for Individual Server Configuration

Follow this procedure for configuring individual modules such as Siebel Gateway Name Server or Siebel Server.

To modify the siebel.ini file for individual server configuration

- 1 Using a text editor, modify the appropriate siebel.ini file or files as listed below:

NOTE: Make a copy of each siebel.ini file you plan to modify, and save it in a unique location that identifies the module it pertains to. Preserve these copies in case you may need them for later reference.

- **Siebel Gateway configuration.** *UNIX_OS/Server/Siebel_Enterprise_Server/gtwysrvrcfg/siebel.ini*.
- **Siebel Server configuration.** *UNIX_OS/Server/Siebel_Enterprise_Server/siebsrvrcfg/siebel.ini*.
- **Siebel Web Server Extension configuration.** *UNIX_OS/Server/Siebel_Web_Server_Extension/config/siebel.ini*.
- **Siebel CORBA Object Manager configuration.** *UNIX_OS/Server/Siebel_CORBA_Object_Manager/config/siebel.ini*.

CAUTION: When you modify a siebel.ini file, make sure that you enter the correct values, because your entries are not validated by the installer.

- 2 Set all keys in the [Dialog.Config] section to no.
- 3 Locate [Behavior] section and set silent to yes. This logs all errors instead of displaying them.
- 4 Set all values in [Defaults.Config] to the appropriate values.

The PrimaryLanguage and OMLanguages entries should be set to the three-letter language code (lowercase) for the desired language. For example, you should add PrimaryLanguage=enu for U.S. English. Language codes are listed at the end of the siebel.ini file.

NOTE: For configuration values, refer to “[Configuration File \(siebel.ini\) Parameter Values](#)” on page 64.

Running the Installation from the Command Line

After you have modified the appropriate siebel.ini files in the previous procedure, run the unattended installation from the command line. However, before running an unattended installation, be aware of the following guidelines:

- Any data entry error that you make during installation is captured in the installation log file log.txt, located in the \$SIEBEL_ROOT directory. Consider using the -log *logfile* option to create an additional setup initialization log file.
- You must have a network image created to use for installation. For more details on creating a network image, see “[Creating a Network Image](#)” on page 30.

NOTE: These instructions are for installing the Siebel Enterprise Server using unattended mode. Installation in unattended mode of other server products is similar.

To install in unattended mode

- Navigate to the *UNIX_OS/Server/Siebel_Enterprise_Server* directory and enter:

```
setupUNIX_OS -args SS_SETUP_INI=main_installer_siebel.ini_path
```

where:

- *UNIX_OS* (for the command) = Your UNIX operating system, such as aix, solaris, or hp.
- *UNIX_OS* (for the directory path) = Your UNIX operating system, such as AIX, Solaris, or HPUX (for HP-UX).
- *main_installer_siebel.ini_path* = The full path, including the filename, to the main installer siebel.ini file.

NOTE: If you directly copied DVD content (rather than using the network image utility, as described under “[Creating a Network Image](#)” on page 30), you might need to include the following in the command line: *LanguageDir=language_directory_parent*, which specifies the full path to the directory *immediately above* the language directory.

For example, for German (DEU) on Solaris:

```
setupsol -args SS_SETUP_INI=seasolunibase/solaris/Server/Siebel_Enterprise_Server/  
siebel.ini
```

Configuration File (siebel.ini) Parameter Values

This section illustrates the valid parameter values for the siebel.ini files. Some of the settings, including component groups shown in [Table 11](#), require numeric input.

Sample gtwysrvrcfg/siebel.ini

```
[Defaults.Config]
PrimaryLanguage = enu
GatewayPort = 2320
Autostart = Y
```

Table 11. Siebel Gateway Component Keys

Component Key	Required?
Primary Language	Y
GatewayPort	Y
Autostart	Y

Sample siebsrvrcfg/siebel.ini

```
[Defaults.Config]
; Enterprise configuration
PrimaryLanguage = enu
OMLanguages = enu
GatewayName = sdce420s049
GatewayPort = 2320
ComponentGroups = 1;13;18;20;21;23;24;26
ReviewEnterprise =
EnterpriseName = siebel
FileSystem = /vol1/bit/build/18104/fs
EnterpriseDescription = Siebel Enterprise
SynchMgrPort = 40400
DataMatching = 3
DatabaseType = 1
DatabaseNameConnectionString = sdce420s049_inst11
TableOwner = ora002
Db2SqlId =
DatabaseUsername = sadmin
DatabasePassword = sadmin
ChartServer = smqalcn57
ChartImageFormat = 1
EncryptionType = 1

; Server Configuration
ServerName = sdce420s049
ServerDescription = Siebel Server
```

```

Db2Directory =
SynchMgrPortOverride = No
OverridePortNum =
SearchServer = 3
FulcrumDirectory =
RemoteSearchServerHostname =
RemoteSearchServerPortNumber =
Autostart = Y
StartServer = N

; SSL Configuration
DeploySSL = Y
SSLConfigType = 1
CertificateFileName = /export/home/cert.txt
CACertificateFileName = /export/home/cacert.txt
PrivateKeyFileName = /export/home/key.txt
PrivateKeyFilePassword =
PeerAuthentication = N
ValidatePeerCertificate = N

```

Table 12 displays the Siebel Server component keys in the siebel.ini file. It also indicates whether the keys are always required and the conditions in which keys may be required. If a key is required, then there must be a corresponding value in the siebel.ini file.

Table 12. Siebel Server Component Keys

Component Key	Required?	Condition When Required
PrimaryLanguage	Y	
GatewayPort	Y	
ComponentGroups	N	
ReviewEnterprise	N	If installing a second server with the same Enterprise.
EnterpriseName	Y	
Filesystem	Y	
EnterpriseDescription	N	
OMLanguages	N	If multiple Language Packs are installed.
Db2SqlId	N	If DB2 is selected.
SynchMgrPort	N	Default = 40400
DataMatching	Y	
DatabaseType	Y	
DatabaseNameConnectionString	Y	
TableOwner	Y	

Table 12. Siebel Server Component Keys

Component Key	Required?	Condition When Required
DatabaseUsername	Y	
DatabasePassword	Y	
ChartServer	N	
ChartImageFormat	Y	
EncryptionType	Y	
ServerName	Y	
ServerDescription	N	
Db2Directory	Y	
SynchMgrPortOverride	N	
OverridePortNum	N	SynchMgrPortOverride = Y
SearchServer	Y	
FulcrumDirectory	N	SearchServer = 1
RemoteSearchServerHostname	N	SearchServer = 2
RemoteSearchServerPortNumber	N	SearchServer = 2
Autostart	Y	
StartServer	Y	
DeploySSL	Y	
SSLConfigType	N	DeploySSL = Y. Possible values: 1 (enterprise configuration) or 2 (server configuration).
CertificateFileName	N	DeploySSL = Y
CACertificateFileName	N	DeploySSL = Y
PrivateKeyFileName	N	DeploySSL = Y
PrivateKeyFilePassword	N	
PeerAuthentication	N	DeploySSL = Y. Possible values: Y or N.
ValidatePeerCertificate	N	DeploySSL = Y. Possible values: Y or N.

Component Group Mapping

The following list provides the number corresponding to each Siebel Server component group within the siebel.ini file:

- 1 = Assignment Management
- 2 = Communications Management
- 3 = Content Center
- 4 = Sales Credit Assignment

5 = Dun and Bradstreet
6 = Data Quality
7 = Siebel Dynamic Commerce
8 = Enterprise Application Integration
9 = Field Service
10 = Incentive Compensation
11 = Marketing Object Manager
12 = Marketing Server
13 = Siebel Remote
14 = Siebel Anywhere
15 = Siebel To Siebel Connector
16 = SAP Connector
17 = Oracle Connector
18 = Siebel Sales
19 = Sales Hierarchy Service
20 = Siebel echannel
21 = Siebel Call Center
22 = Siebel Core Reference Application
23 = Siebel ISS
24 = Siebel Employee Relationship Management
25 = Siebel wireless
26 = Workflow Management
27 = Handheld Synchronization
28 = Forecast Service Management
29 = PIM Server Integration Management
30 = Siebel eAutomotive
31 = Siebel High Tech Industrial Manufacturing
32 = Siebel Life Sciences
33 = Siebel CME
34 = Siebel Loyalty
35 = Siebel Loyalty Engine
36 = Siebel eHospitality
37 = Siebel Industry Marketing
38 = Siebel eConsumerSector
39 = Handheld Synchronization SIA
40 = Siebel Financial Services
41 = Siebel Public Sector
42 = Siebel Universal Customer Master

DataMatching Mapping

1 = Siebel Data Quality Matching
2 = Siebel Data Quality Connector
3 = None

DatabaseType Mapping

1 = Oracle Database 9i Enterprise Edition (CBO)
2 = Oracle Database 8i Enterprise Edition (RBO)
3 = IBM DB2 UDB for Windows and UNIX
4 = IBM DB2 UDB for z/OS and OS/390

ChartImageFormat Mapping

```
1 = png
2 = gif
3 = jpeg
```

EncryptionType Mapping

```
1 = NONE
2 = RSA
```

SearchServer Mapping

```
1 = Configure this server as a Search Server
2 = Configure this server to point to a Remote Search Server
3 = Skip
```

Sample for Siebel_Web_Server_Extension/config/siebel.ini

```
[Defaults.Config]
PrimaryLanguage = enu
webServerDirectory = /usr/IBMIHS
SelectLoadBalancer = 1, 2 or 3
SingleServerHostname =
SingleServerPort =
ThirdpartyHostname =
ThirdpartyPort =
VirtualHostsFile =
CompressionType = 1
EncryptionType = 1
WebServerHttpPort = 80
WebServerHttpsPort = 443
WebUpdateKey = test
EmployeeUsername = sadmin
EmployeePassword = db2
ContactUsername = guestcst
ContactPassword = ldap
RestartWebServer = N
```

Table 13 displays the Siebel Web Server Extension (SWSE) component keys in the siebel.ini file. It also indicates whether the keys are always required and the conditions in which keys may be required. If a key is required, then there must be a corresponding value in the siebel.ini file.

Table 13. SWSE Component Keys

Component Key	Required?	Condition When Required
PrimaryLanguage	Y	
WebServerDirectory	Y	
CompressionType	Y	
EncryptionType	Y	

Table 13. SWSE Component Keys

Component Key	Required?	Condition When Required
WebServerHttpPort	Y	
WebServerHttpsPort	Y	
WebUpdateKey	Y	
EmployeeUsername	Y	
EmployeePassword	Y	
ContactUsername	Y	
SelectLoadBalancer	Y	
SingleServerHostname	N	If SelectLoadBalancer = 1
SingleServerPort	N	If SelectLoadBalancer = 1
ThirdpartyHostname	N	If SelectLoadBalancer = 2
ThirdpartyPort	N	If SelectLoadBalancer = 2
VirtualHostsFile	N	If SelectLoadBalancer = 3
ContactPassword	Y	
RestartWebServer	Y	

Load Balancing Configuration Mapping

- 1 = Single Siebel Server in the Enterprise
- 2 = Use a Third Party Load Balancer
- 3 = Use the Built in Load Balancing Capability of the Siebel Web Server Extension

CompressionType Mapping

- 1 = none
- 2 = zlib

EncryptionType Mapping

- 1 = none
- 2 = RSA

Sample for Siebel_CORBA_Object_Manager/config/siebel.ini

```
[Defaults.Config]
PrimaryLanguage = enu
DatabaseType = 3
Db2ConnectionString = db2x2026
OracleConnectionString =
TableOwner = siebel
```

Table 14 displays the Siebel CORBA Object Manager component keys in the siebel.ini file. It also indicates whether the keys are always required and the conditions in which keys may be required. If a key is required, then there must be a corresponding value in the siebel.ini file.

Table 14. Siebel CORBA Object Manager Component Keys

Component Key	Required?	Condition When Required
PrimaryLanguage	Y	
DatabaseType	Y	
Db2ConnectionString	N	DatabaseType = 1 or 2
oracleConnectionString	N	DatabaseType = 3 or 4
TableOwner	Y	

DatabaseType Mapping

1 = Oracle Database 9i Enterprise Edition (CBO)

2 = Oracle Database 8i Enterprise Edition (RBO)

3 = IBM DB2 UDB for Windows and UNIX

4 = IBM DB2 UDB for z/OS and OS/390

Sample for Optional Components

Anything not specifically defined in [Module.os] is a required component.

Siebel\SRVR	= Siebel Server Executable
Siebel\SRVRCOMPS	= Siebel Server Core Components
Siebel\SIEBREMOTE	= Siebel Remote Components
Siebel\SIEBSRVR	= Application Object Manager
Siebel\FIELDSVC	= Siebel Field Service Components
Siebel SDQCONNECTOR	= Siebel Data Quality Connector
Db	= Siebel Database support files
Db\FILES	= Siebel Sample Database
Db\DB2UDB	= IBM DB2 UDB for Unix and Windows
Db\ORACLE	= Oracle Database Enterprise Edition

Installing the Reports Server in Unattended Mode

This section provides instructions for installing Reports Server without the installation GUI, using unattended mode.

NOTE: For more information about installing Reports Server, see Chapter 14, “Installing the Siebel Reports Server.” In particular, review the information presented in “Preinstallation Tasks for the Siebel Reports Server” on page 231.

Editing the siebel.ini Files for Reports Server

Before starting the Reports Server installation, you must modify portions of the siebel.ini file, as described in the following section. After you are done with the installation, you can perform configuration in GUI mode as described later on in this chapter.

To modify the siebel.ini file for the main installer

- 1 Using a text editor, modify the siebel.ini file for the Siebel Reports Server.

NOTE: Make a copy of each siebel.ini file you plan to modify, and save it in a unique location that identifies the module it pertains to. Preserve these copies in case you may need them for later reference.

■ **Siebel Reports Server.** *UNIX_OS/Server_Ancillary/actuate/siebel.ini.*

where:

UNIX_OS = The type of UNIX you are installing

CAUTION: When you modify a siebel.ini file, make sure that you enter the correct values, because your entries are not validated by the installer.

- 2 Locate the [Dialog.ActuateServer.Unix] section.

Using the following as an example, change the values to reflect your configuration requirements:

```
[Dialog.ActuateServer.Unix]
Readme = no
LocaleTimeZone = no
PMDHostPort = no
iServerHostPort = no
EncyclopediaVolume = no
AutoStart = no
AdminPassword = no
MgmtConsoleHTTPPort = no
```

- 3 Locate the [Defaults.ActuateServer.Unix] section.

Using the following as an example, change the values to reflect your configuration requirements:

```
[Defaults.ActuateServer.Unix]
Locale = 21
TimeZone = 19
PMDHost = machine_name
PMDPort = 8100
iServerHost = machine_name
iServerPort = 8000
EncyclopediaVolume = volume_name
AutoStart = Auto
AdminPassword =
MgmtConsoleHTTPPort = 8900
```

4 Locate the [Dialog.ActuatePortal.Unix] section.

Using the following as an example, change the values to reflect your configuration requirements:

```
[Dialog.ActuateActivePortal.Unix]
License = no
LocaleTimeZone = no
HTTPPort = no
EncyclopediaVolume = no
iServerHostPort = no
PMDHostPort = no
```

5 Locate the [Defaults.ActuateActivePortal.Unix] section.

Using the following as an example, change the values to reflect your configuration requirements:

```
[Defaults.ActuateActivePortal.Unix]
Locale = 21
TimeZone = 19
HTTPPort = 8700
Encyclopediavolume = volume_name
iServerHost = machine_name
iServerPort = 8000
PMDHost = machine_name
PMDPort = 8100
```

If you are installing iServer in the same installation, the following parameters should have the same values as in [Defaults.ActuateServer.Unix]:

```
Locale
TimeZone
Encyclopediavolume
iServerHost
iServerPort
PMDHost
```

[Table 15](#) displays the Reports Server component keys in the siebel.ini file. It also indicates whether the keys are always required and the conditions in which keys may be required. If a key is required, then there must be a corresponding value in the siebel.ini file.

Table 15. Reports Server Component Keys

Component Key	Required?	Condition When Required
Locale	Y	Specify the numeric code for the locale you require. For locale mappings, see the file locale.txt. This file is located in the directory Server_Ancillary/actuate/iServer on the DVD from which you installed the Siebel applications.
TimeZone	Y	Specify the numeric code for the time zone you require. For time zone mappings, see the file timezone.txt. This file is located in the directory Server_Ancillary/actuate/ iServer on the DVD from which you installed the Siebel applications.
PMDHost	Y	
PMDPort	Y	
iServerHost	Y	
iServerPort	Y	
Encyclopediavolume	Y	
AutoStart	Y	If installing iServer and Management Console. Auto = automatic startup Manual = manual startup
AdminPassword	N	
MgmtConsoleHTTPPort	Y	If installing iServer and Management Console.
HTTPPort	Y	If installing ActivePortal.

Console Mode Installation and Configuration

Installing the Siebel Server and related server products over a WAN can use large amounts of bandwidth resulting in undesirable lag times in installation. The Siebel console installation provides a text-only installation that lets you bypass the Java-based GUI for faster performance.

The prompts for the console mode of installation are identical to those of the Java-based GUI. However, because the console mode of installation does not provide GUI controls, such as a Browse button, you must substitute appropriate command-line responses instead of the displayed GUI responses, such as *Click Next*.

Process of Installing in Console Mode

Console-mode installation requires two tasks:

- 1 “Editing the *siebel.ini* Files for Console Mode Installation” on page 74.
- 2 “Installing in Console Mode” on page 75.

Editing the *siebel.ini* Files for Console Mode Installation

Before starting the installation, you must disable portions of *siebel.ini* file.

After you finish the installation, launch the configuration in console mode from the configuration subdirectory (such as *Siebel_Enterprise_Server/gtwysrvrcfg*) and launch the installation and server configuration wizards separately.

To modify the *siebel.ini* file

- 1 Using a text editor, modify the appropriate *siebel.ini* file or files as listed below:

NOTE: Make a copy of each *siebel.ini* file you plan to modify, and save it in a unique location that identifies the module it pertains to. Preserve these copies in case you may need them for later reference.

- **Siebel Enterprise Server.** *UNIX_OS/Server/Siebel_Enterprise_Server/siebel.ini*.
- **Siebel Web Server Extension.** *UNIX_OS/Server/Siebel_Web_Server_Extension/siebel.ini*.
- **Siebel CORBA Object Manager.** *UNIX_OS/Server/Siebel_CORBA_Object_Manager/siebel.ini*.

CAUTION: When you modify a *siebel.ini* file, make sure that you enter the correct values, because your entries are not validated by the installer.

- 2 Locate the [RunAfter.Unix] section and change the values for the following parameters:

- Siebel Enterprise Server
ConfigGtwysrvr = no
ConfigSiebsrvr = no
- Siebel Web Server Extension
Config.SWSE.Unix = no
- Siebel CORBA Object Manager
Config.CorbaOM.UNIX = no

Installing in Console Mode

The following procedures describe the installation of the Siebel application in console mode.

NOTE: Because there is no Browse button in console mode, you should note the paths for both your base DVD and your language DVD installation executable programs, so that you can enter this information when prompted (for example, /dvdrom/UNIX_OS/Server/Siebel_Enterprise_Server/setupUNIX_OS).

To install in console mode

1 If you are installing from DVD, insert the appropriate DVD for the Siebel applications into the DVD drive of the chosen server, and mount this DVD:

- *Siebel eBusiness Applications, Base Applications for UNIX_OS*
- *Siebel Industry Applications, Base Applications for UNIX_OS*

where:

UNIX_OS = Your UNIX operating system, such as AIX, HP-UX, or Solaris

NOTE: The volume label for the DVD is *seaUNIX_OSunibase* (for Siebel eBusiness Applications) or *siaUNIX_OSunibase* (for Siebel Industry Applications), where *UNIX_OS* is aix, hpx, or sol.

2 Navigate to the main installer directory, such as *UNIX_OS/Server/Siebel_Enterprise_Server*.

where:

UNIX_OS = Your UNIX operating system, such as AIX, Solaris, or HPUX (for HP-UX)

3 Execute the following command:

```
./setupUNIX_OS -is:javaconsole -console -args
SS_SETUP_INI=main_installer_siebel.ini_path
```

where:

- *UNIX_OS* = Your UNIX operating system, such as aix, hp, or sol.
- *main_installer_siebel.ini_path* = The full path, including the filename, to the main installer siebel.ini file that you edited using the procedures in ["Editing the siebel.ini Files for Console Mode Installation" on page 74](#).

NOTE: There should be no spaces before and after the equals sign in the command.

You can append additional flags to your command. For more information, see ["Additional Flags for Installation Commands" on page 77](#).

The console mode installation script appears. See the module-specific installation chapters later in this guide regarding the definition of specific prompts.

4 Launch the configuration in console mode or GUI mode.

- To launch it in console mode, see ["Configuring the Siebel Application in Console Mode" on page 76](#).
- To launch it in GUI mode, see subsequent chapters in this guide.

Configuring the Siebel Application in Console Mode

After installation, you must start the configuration utility.

To run the configuration utility

- 1** Launch the configuration utility in console mode from the *UNIX_OS/Server/Siebel_Enterprise_Server/language* subdirectory on the DVD or network image.
 - **Siebel Gateway Name Server.** *UNIX_OS/Server/Siebel_Enterprise_Server/gtwysrvrcfg*
 - **Siebel Server.** *UNIX_OS/Server/Siebel_Enterprise_Server/siebsrvrcfg*
 - **Siebel Web Server Extension.** *UNIX_OS/Server/Siebel_Web_Server_Extension/config*
 - **Siebel CORBA OM.** *UNIX_OS/Server/Siebel_CORBA_Object_Manager/config*

where:

- *UNIX_OS* = Your UNIX operating system, such as AIX, Solaris, or HPUX (for HP-UX)

- 2** Enter the following command on a single input line:

```
setupUNIX_OS -is:javaconsole -console -args StringTable=SIEBEL_ROOT/_uninst/product_directory/table.txt
```

where:

- *UNIX_OS* = Your UNIX operating system, such as aix, hp, or sol
- *product_directory* = The subdirectory where the product is installed, such as ses (for Siebel Enterprise Server), eappweb (for Siebel Web Server Extension), and so on

NOTE: There should be no spaces before and after the equals sign in the command.

Combining Console Mode and Unattended Mode Installation

If you want to run the installation and configuration together and not have to turn off the configuration settings in the *siebel.ini* file, you can combine console mode and unattended mode installation as described in the following procedure.

To combine console and unattended installation

- 1** Provide default values in *gtwysrvrcfg/siebel.ini* and *siebsrvrcfg/siebel.ini*, as described under ["Configuration File \(siebel.ini\) Parameter Values" on page 64](#).

2 Modify the [ConfigGtwysrvr] and [Configsiebsrvr] sections of the main siebel.ini file for the Siebel Enterprise Server installer, as follows:

[ConfigGtwysrvr]

```
Condition = $(GatewaySelected)=yes,$(Patch)=no
Execute = $(JavaHome)/bin/java
Arg = -cp $(CDPath)/gtwysrvrcfg/setup.jar run -args SS_SETUP_INI=Full path to your
modified gtwysrvrcfg configuration ini file, including the filename
StringTable = $(UninstallPath)/table.txt
```

[Configsiebsrvr]

```
Condition = $(SiebelSelected)= yes,$(Patch)=no
Execute = $(JavaHome)/bin/java
Arg = -cp $(CDPath)/siebsrvrcfg/setup.jar run -args SS_SETUP_INI=Full path to your
modified siebsrvrcfg configuration ini file, including the filename
StringTable = $(UninstallPath)/table.txt
```

3 Execute the following command:

```
./setupUNIX_OS -is:javaconsole -console -args
SS_SETUP_INI=main_installer_siebel.ini_path
```

where:

- *UNIX_OS* = Your UNIX operating system, such as aix, hp, or sol.
- *main_installer_siebel.ini_path* = The full path, including the filename, to the main installer siebel.ini file that you edited using the procedures in ["Editing the siebel.ini Files for Console Mode Installation" on page 74](#).

Additional Flags for Installation Commands

You may optionally append any of the following flags to your installation command:

■ *-is:log logfile*

where:

logfile = The full path name and the name of the file to be generated (for example, /usr/tmp/gateway.log)

Generates an additional log file. The logging information in the file is limited to initialization errors, such as JVM. Use this flag for debugging or for troubleshooting when you cannot invoke the installation process.

NOTE: The default log file that records status errors during installation is created in the *\$SIEBEL_ROOT* directory.

■ *-is:javaconsole -console*

Generates a script-type (non-GUI) installation. This method is most useful when installing over a WAN. For more information, see ["Console Mode Installation and Configuration" on page 73](#).

■ **`-is:tempdir temp_directory_location`**

Directs the installer to the location to install the temporary files. For example, if the default directory (/var/tmp for HP-UX and Solaris or /tmp for AIX) does not have the required free space, you can designate another location.

This chapter explains how to install and configure the Siebel Gateway Name Server under UNIX, using the GUI installation method. It includes the following topics:

- “Process of Installing the Siebel Gateway Name Server” on page 79
- “Siebel Gateway Name Server Installation Requirements” on page 80
- “Installing and Configuring the Siebel Gateway Name Server” on page 81
- “Postinstallation Tasks for Siebel Gateway Name Server” on page 86
- “Reviewing the Installation for Siebel Gateway” on page 86
- “Verifying the Siebel Gateway Name Server Has Started” on page 88
- “Configuring the Siebel Gateway for Automatic Start” on page 89
- “Troubleshooting Siebel Gateway Name Server Installation” on page 92

For alternative installation methods, refer to [Chapter 4, “Non-GUI Installation.”](#)

For detailed information on the role of the Siebel Gateway Name Server within the Siebel environment, see *Deployment Planning Guide*.

The installation and configuration of the Siebel Gateway Name Server requires several tasks as listed in the next section.

Process of Installing the Siebel Gateway Name Server

The Siebel Gateway Name Server installation process requires multiple tasks that you should perform in the following sequence:

- 1 Verify Siebel Gateway Name Server installation requirements. For more information, see “[Siebel Gateway Name Server Installation Requirements](#)” on page 80.
- 2 (Optional) Install redundant disk arrays. For more information, see *Deployment Planning Guide*.
- 3 Install and configure the Siebel Gateway Name Server. For more information, see “[Installing and Configuring the Siebel Gateway Name Server](#)” on page 81.
- 4 Review the installation. See “[Reviewing the Installation for Siebel Gateway](#)” on page 86.
- 5 Verify that the Siebel Gateway Name Server is up and running. For more information, see “[Verifying the Siebel Gateway Name Server Has Started](#)” on page 88.
- 6 (Optional) Configure the Siebel Gateway Name Server to start automatically. For more information, see “[Configuring the Siebel Gateway for Automatic Start](#)” on page 89.

Siebel Gateway Name Server Installation Requirements

Review the following guidelines before installing the Siebel Gateway Name Server.

CAUTION: Do not install Siebel eBusiness Applications without first reviewing the *System Requirements and Supported Platforms* on Siebel SupportWeb.

- If the machine on which you are installing the Siebel Gateway Name Server will also support a Siebel Server, you must have all the required third-party products installed for that component, as listed in *System Requirements and Supported Platforms* on Siebel SupportWeb.

NOTE: The Siebel Gateway Name Server and Siebel Server are both installed into a common root, `$SIEBEL_ROOT`.

- If you will be clustering the Gateway Name Server, plan your use of clustering or redundant disk arrays (RAID) to configure against a single point of failure. For more information on this topic, see *Deployment Planning Guide*.
- Each machine that supports a Siebel Server must have TCP/IP network connectivity to the machine on which the Siebel Gateway Name Server will be installed. Verify network connectivity between all such machines, using the ping utility.
- Verify that the network names of the servers that will support the Siebel Gateway Name Server and all Siebel Servers are recorded in [Appendix A, "Deployment Planning Worksheet."](#) You will need this information later when installing the Siebel Servers and Siebel clients.
- Verify that the network adapter is correctly configured to support full duplex Ethernet by verify the following parameters.
 - RJ45 Port Link Status: up
 - Media Speed Selected: 100 Mbps Full Duplex
 - Media Speed Running: 100 Mbps Full Duplex

NOTE: Gigabit Ethernet cards must be set to Auto Configure.

- Install the Siebel Gateway Name Server only once for each Siebel Enterprise Server. If needed, multiple Siebel Enterprises can be supported by a single Siebel Gateway Name Server. It is recommended that you only install one Siebel Gateway Name Server on a machine. If you want to install more than one Siebel Gateway Name Server on a single machine, you must install each on a different port.
- Make sure that the login ID running the installer has write permissions to /tmp (AIX default temporary directory) or /var/tmp (Solaris and HP-UX default temporary directory), as appropriate to your UNIX operating system.
- Verify that you have all the required media, base, language, and so on, or have the appropriate permissions to the network directories where the files reside.
- Verify that you have the following temporary disk space available to the installer:

AIX	200 MB (/tmp)
Solaris	115 MB (/var/tmp)

HP-UX 230 MB (/var/tmp)

- If the set-group-id flag is used, make sure that the installer ID is a member of the group that owns the parent directory (*SIEBEL_ROOT*).
- **Solaris only**
 - Set the TCP ndd variable `tcp_co_min` to the MTU of the NIC. For more details, see <http://sunsolve.sun.com>.
- **AIX only**
 - Verify that the login ID performing installation has permission to run `slibclean` by asking the administrator to change the permission as follows:
`chmod 6555 /usr/sbin/slibclean`
 - You must install X11 filesets, because these are not installed by default.
- **HP-UX only**
 - If the environmental variable `LANG` is set to a directory name that is a symbolic link, the Java installer for Siebel Server will fail. You must reset any existing `LANG` variable to the actual directory that the symbolic link represents.

NOTE: The `LANG` variable cannot be set to `univ.utf8`. This causes the installer to fail.

 - You cannot install additional products into a root directory after applying a patch.

Installing and Configuring the Siebel Gateway Name Server

This section provides instructions for installing and starting the Siebel Gateway Name Server as part of standard Siebel Enterprise Server deployment.

NOTE: The installation should be conducted by a nonroot user for simpler administration and maintenance. However, root access is required if you plan to configure the Siebel Gateway Name Server or Siebel Server for autostart.

To avoid DVD swapping, copy all installation files, including the required language files, to a common installation directory within your system or use the Network Image Creator. For details, see ["Selecting Your Media for Installation" on page 27](#). If you elect not to install directly from DVD, you will not see some of the prompts regarding swapping the DVD in the following procedure.

If you are using X-connectivity software to access a UNIX machine from a Windows machine, you might experience unexpected exiting or hanging by the installer. If this is the case, try using a later version of the X-connectivity software. For Exceed, for example, use version 8.0 or greater. For proper Java GUI display on your local machine, set XTerm display values, using the command `setenv DISPLAY xxx.xxx.xxx:0.0` or `setenv DISPLAY hostname:0.0`. If you observe poor performance or unexpected behavior using an emulator, telnet to the UNIX server and use console mode to perform installation. For details on installing in console mode, see ["Console Mode Installation and Configuration" on page 73](#).

The Siebel Enterprise Server Installer verifies not only that you have the required software for installation of Siebel version you are installing, but that the software is at the version level necessary.

NOTE: The following procedure is for installing the base product. For patch installation instructions, refer to the *Maintenance Release Guide* provided with the patch.

To install the Siebel Gateway Name Server

- 1 If you are installing from DVD, insert the appropriate DVD for the Siebel applications into the DVD drive for the chosen server, and mount this DVD:
 - *Siebel eBusiness Applications, Base Applications for UNIX_OS*
 - *Siebel Industry Applications, Base Applications for UNIX_OS*

where:

UNIX_OS = Your UNIX operating system, such as AIX, HP-UX, or Solaris

NOTE: The volume label for the DVD is *seaUNIX_OSunibase* (for Siebel eBusiness Applications) or *siaUNIX_OSunibase* (for Siebel Industry Applications), where *UNIX_OS* is aix, hpx, or sol.

As a convenience, you may also want to mount the *seaall/anglep* (for Siebel eBusiness Applications) or *siaall/anglep* (for Siebel Industry Applications) DVD, where *lang* is the code for the language you are installing, on a different DVD drive for the same machine.

- 2 Log on to the server, using the Siebel service owner account that you recorded in the copy you made earlier of [Appendix A, "Deployment Planning Worksheet."](#)

CAUTION: If the Siebel Gateway Name Server is installed by root, then only root can stop and start the server. Use a Siebel account that has the correct authorizations to install. For more information on creating Siebel accounts, see "Creating the Siebel Service Owner Account" on [page 26](#).

- 3 Open a new shell and navigate to the root directory of the DVD or to the appropriate network directory, if you are installing from a network image.
- 4 Navigate to *UNIX_OS/Server/Siebel_Enterprise_Server*, where *UNIX_OS* is your UNIX operating system, such as AIX, Solaris, or HPUX (for HP-UX).
- 5 Unset any Siebel-specific environment variables. To view current environment variable settings, enter *env* in the shell window.
- 6 To start the Siebel Gateway Name Server installation process, enter the following command, appending any desired flag described in "[Additional Flags for Installation Commands](#)" on [page 77](#).

```
./setupUNIX_OS
```

where:

UNIX_OS = Your UNIX operating system, such as sol, hp, or aix

The Installer Welcome screen appears.

7 Click Next.

If you have installed other Siebel components on the same machine, the installer displays the message that an existing installation has been found. In such a case, proceed to [Step 8 on page 83](#); otherwise, click Next and proceed to [Step 9 on page 83](#).

8 Depending on whether you want to install a new instance of Siebel software or add a new language to an existing instance, take the appropriate action.

- To install the Siebel Enterprise Server software in a new instance, select None as the default, click Next and proceed to [Step 9 on page 83](#).
- To install a new language in an existing instance, select the displayed instance, click Next, and proceed to [Step 13 on page 84](#).

See also ["Guidelines for Installing Multiple Language Packs on the Siebel Server" on page 95](#) for important additional information on this topic.

The Installer Path screen appears.

9 Enter the fully qualified path to the installation directory that you recorded in a copy of [Appendix A, "Deployment Planning Worksheet,"](#) or click Browse to choose a different directory.

NOTE: The directory name should be standard alphanumeric characters, including the underscore. No other characters or spaces are allowed.

10 Click Next.

The Installer Product Selection screen appears.

11 Select the Gateway Name Server and click Next.

Other components can be installed later. If you choose to install additional products at the same time as the Siebel Gateway Name Server, it is not necessary to enter some of the same information, such as language choice, twice. For this reason, the installation steps described in [Chapter 6, "Installing the Siebel Server,"](#) will not appear in the exact order as described.

NOTE: If you select more than one licensed component at once, the Siebel Enterprise Server (SES) Installer and the Siebel Software Configuration Wizard prompt you for the installation parameters of each component individually and in the sequence required. You should verify that you have all of the preconfiguration steps completed before you begin, or the install may fail.

12 Choose the type of installation to perform from the following options; then click Next to continue.

NOTE: For the Siebel Gateway Name Server, all three options install the same components.

- **Typical.** Installs all Siebel Gateway components.
- **Compact.** Installs only those components necessary to run the Siebel Gateway, but no additional components or help.
- **Custom.** Lets you customize your installation by choosing the specific components you want to install.

The Install Selected Language Packs screen appears.

13 Choose the language or languages to be installed and click Next.

Servers are installed, at a minimum, with the primary (base) language in which the server will be run. This is the primary (base) language for your Enterprise Server. Optionally, you can install one or more additional languages.

When installing languages at a later date, you must also reinstall any patches installed on the directory.

NOTE: In a Unicode-enabled database environment, you can install any of the available Siebel Language Packs. In a non-Unicode database environment, you must consider the correlation of the Language Packs you want to install and the characters supported by your database code page. For example, in a Western European code page database, you can only install Western European Language Packs, such as English, French, Spanish, or German Language Packs. In a Japanese code page database, you can only install Japanese or English Language Packs.

For a list of supported code pages and encoding strategies, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

The Installer Verification screen appears.

14 Click Next to copy the files for the selected product into the installation location.

The Installer Progress screen appears.

The installer proceeds to install the specified files. After the files have been copied to the installation location, this message appears:

Setup did not find the *7ang* language pack on the current media. Please insert the DVD containing the *7ang* language pack and select the *setupUNIX_OS* file from the *7ang* folder.

where:

lang = The code for the language you are installing, such as *enu* for U.S. English.

UNIX_OS = Your UNIX operating system, such as *aix*, *hp*, or *sol*.

NOTE: For Siebel Industry Applications, the Windows and UNIX Language Packs are on different DVDs.

15 Remove the current DVD from the drive and insert the appropriate Language Pack DVD.

A message box appears, titled *Navigate to the Executable* on the *lang* Language Pack DVD, and displays a file called *siebel.ini*. However, you do not need to do anything with this file.

Clear the filter dialog box, if needed, to be sure that you can see the appropriate files.

16 Open `setupUNIX_OS` under `UNIX_OS/Server/Siebel_Enterprise_Server/lang` directory.

where:

`UNIX_OS` (for the command) = Your UNIX operating system, such as aix, solaris, or hp

`UNIX_OS` (for the directory path) = Your UNIX operating system, such as AIX, Solaris, or HPUX (for HP-UX)

`lang` = The language code for the language you are installing, such as enu for U.S. English

A message appears, stating that language files are being installed.

When installation of all the language files has been completed, the installer prompts you again for the base DVD:

Please re-insert the base DVD and browse to the `setupUNIX_OS` file to enable setup to continue.

17 Navigate again to the base DVD mount point on the network, locate `Siebel_Enterprise_Server/setupUNIX_OS`, and click OK.

The Installer Progress screen appears and displays the progress of the installation followed by additional configuration screens.

Which screen appears next depends on whether you are installing one or multiple languages.

- If you are installing more than one language, the Primary Language screen appears. Proceed to [Step 18 on page 85](#).
- If you are installing only one language, the Gateway Port screen appears. Proceed to [Step 19 on page 85](#).

18 Select the primary (base) language and click Next.

NOTE: This is the primary (base) language for your enterprise—the language in which you want your Siebel Server to run and which you normally want to read messages.

The Port Number screen appears.

19 Accept the default Gateway Port Number or change it and click Next.

NOTE: You may select any port number (lower than 32767) that is free and you are not planning to use for any other process. However, if a firewall is configured between your Web clients and your Siebel Gateway Name Server, you must first open your chosen port on the firewall.

The Installer Autostart screen appears.

20 Choose whether the Siebel Gateway Name Server should autostart on restart, or not, and then click Next.

If you will be clustering this Siebel Gateway Name Server, do not configure it for automatic start; otherwise, select automatic start. The automatic start setting programs the Siebel Gateway Name Server to accept additional configuration instructions to start automatically each time the host machine restarts. To actually implement automatic start-up, you must also complete the configuration steps described in ["Configuring the Siebel Gateway for Automatic Start" on page 89](#).

The Installer Configuration Verification screen appears.

21 Verify the Siebel Gateway Name Server settings and click Next to accept, or Back to go back and change a setting.

CAUTION: Your installation process may vary from the procedure provided in this section depending on what components you have selected to install. For example, you may have elected to install the Siebel Gateway Name Server and the Siebel Server at the same time. In this instance, the installer will skip from this point in the Siebel Gateway Name Server installation to Step 2 on page 99 (in Chapter 6, "Installing the Siebel Server").

The Finish screen appears.

22 To complete the installation, click Finish.

To verify the installation

- 1** Navigate to the `$SIEBEL_ROOT/gtwysrvr/bin`.
- 2** Using an editor like vi, open the `base.txt` file. It lists the type of installation just completed, for example:

7.7 [18104]

Postinstallation Tasks for Siebel Gateway Name Server

Perform the following tasks after running the Siebel Gateway Name Server installation program:

- "Reviewing the Installation for Siebel Gateway" on page 86
- (Optional) "Configuring the Siebel Gateway for Automatic Start" on page 89

Reviewing the Installation for Siebel Gateway

After the installation and configuration has concluded, the following Siebel Gateway Name Server files should now exist under the `$SIEBEL_ROOT` directory you specified during the installation.

`_uninst/`

`ses/`
`uninstall.ksh`

`gtwysrvr/`

`admin/`
`base.txt`
`bin/`

```
dbtemp1/  
enu.txt  
input/  
install_script/  
lib/  
locale/  
log/  
objects/  
output/  
siebenv.csh  
siebenv.sh  
sqltemp1/  
sys/  
temp/  
upgrade/  
upgrade.log
```

_uninst. The files required to uninstall the program. It contains uninstall information for all products installed into the top-level directory (*\$SIEBEL_ROOT*).

ses. Contains files required to uninstall the product.

uninstall.ksh. Uninstallation script for UNIX.

gtwysrvr. Top-level directory for Siebel Gateway Name Server.

admin. The template files used for scripts that control the running and configuration of the Siebel Gateway Name Server.

bin. Siebel Gateway Name Server start script, stop script, and executable programs.

dbtempl. Dictionary and local database files required by Siebel Remote for regional users and mobile Web users.

input. Contains files related to Siebel Remote.

install_script. Contains files used by the UNIX installer.

lib. Siebel Gateway Name Server program library files.

locale. Language-specific files and scripts. These are not configurable.

log. Siebel Gateway Name Server logs.

objects. Empty directory. When you install the Siebel Server into the same root directory, that installation procedure populates this directory with a *language* subdirectory (such as enu for U.S. English) with a corresponding Siebel repository file (siebel.srf).

output. Contains files related to Siebel Remote.

siebenv.csh. C shell variant of the Siebel script for setting environment variables on the server.

siebenv.sh. Bourne shell and Korn shell variant of the Siebel script for setting environment variables on the server.

sqltemp. Empty directory. When you install the Siebel Server into the same root directory, that installation procedure populates this directory with SQL files, containing SQL templates that can be used to create SQL statements the Siebel Server will use to perform specific database operations.

sys. The backing files and Service entry files used by the Siebel Gateway Name Server and server control utilities. Do not edit or modify these files unless instructed to do so by Siebel Technical Support.

temp. Stores temporary files generated by the Siebel Gateway Name Server.

upgrade. Files and scripts related to version upgrades of Siebel eBusiness Applications. Also holds temporary, backup, and state log files used during an upgrade.

upgrade.log. Upgrade log file.

Verifying the Siebel Gateway Name Server Has Started

If, during configuration, you selected manual start for the Siebel Gateway Name Server, you must make sure that the Siebel Gateway Name Server is started every time you:

- Install and configure a new Siebel Server component.

- Operate a Siebel eBusiness application.

To verify that the Siebel Gateway Name Server has started

- Navigate to the `$SIEBEL_ROOT/gtwysrvr` directory and source the Siebel environmental variables. Choose the appropriate command for your UNIX shell or its variant.

Korn or Bourne shell

```
. ./siebenv.sh
```

TIP: Make sure there is a space between the initial period and `./siebenv.sh`.

C shell

```
source siebenv.csh
```

This sets the Siebel environment variables and path information required to use Siebel utilities.

TIP: To configure the Siebel environment shell script to source automatically whenever a Siebel administrator logs on, specify the shell as the default for administrator accounts. Then, add this command to the start-up file for the administrator's account.

To verify that the Siebel Gateway Name Server is running

- Enter `list_ns`

You should receive a response similar to this:

```
started at Fri Mar 19 15:33:26 2004, pid: 4024, autostart: yes
```

If the Siebel Gateway Name Server is stopped, do the following:

- Execute the `start_ns` command to start the Siebel Gateway Name Server. For details, see *Siebel System Administration Guide*.
- Execute `list_ns` to verify that it is operating correctly.

Configuring the Siebel Gateway for Automatic Start

If, during installation, you elected automatic restart of the Siebel Gateway Name Server, you need to complete the procedure that follows to enable it.

NOTE: The process should be run as the user who installed the Siebel Gateway Name Server.

To configure the Siebel Gateway Name Server for Autostart on HP-UX

- 1 Log on as root to the machine on which the Siebel Gateway Name Server was installed.

2 Copy the file `siebel_server` to the `/sbin/init.d` directory, as follows:

```
cp $SIEBEL_ROOT/bin/siebel_server /sbin/init.d
```

where:

`$SIEBEL_ROOT` = The full path to the Siebel root directory

3 If you have not already done so, using any text editor, edit `/sbin/init.d/siebel_server` and replace `$SIEBEL_GATEWAY_ROOT` with the actual path to the Siebel Gateway Name Server installation directory.

4 Set the appropriate permissions by executing the following command:

```
chmod 755 /sbin/init.d/siebel_server
```

5 Create a soft link to `/sbin/rc3.d/S720siebel_server` from `/sbin/init.d/siebel_server` by executing the following command:

```
ln -s /sbin/init.d/siebel_server /sbin/rc3.d/S720siebel_server
```

6 Create a soft link to `/sbin/rc2.d/K320siebel_server` from `/sbin/init.d/siebel_server` by executing the following command:

```
ln -s /sbin/init.d/siebel_server /sbin/rc2.d/K320siebel_server
```

If Siebel Gateway Name Server was installed as a nonroot user, continue with [Step 7 on page 90](#); otherwise, you have completed this process.

7 Create or edit `/etc/init.d/siebel` to add the following line:

```
/usr/bin/su - $SIEBEL_ACCOUNT -c "/sbin/init.d/siebel_server $1"
```

where:

`SIEBEL_ACCOUNT` = The user account installing Siebel applications

8 Remove `/sbin/rc3.d/S720siebel_server` and `/sbin/rc2.d/K320siebel_server`, if they already exist.

9 Execute the following commands:

```
chmod 755 /sbin/init.d/siebel
```

```
ln -s /sbin/init.d/siebel /sbin/rc3.d/S720siebel
```

```
ln -s /sbin/init.d/siebel /sbin/rc2.d/K320siebel
```

To configure the Siebel Gateway Name Server for Autostart on Solaris

1 Log on as root to the machine on which the Siebel Gateway Name Server was installed.

2 Copy the file `siebel_server` to the `/etc/init.d` directory, as follows:

```
cp $SIEBEL_HOME/bin/siebel_server /etc/init.d
```

where:

`$SIEBEL_HOME` = The full path to the Siebel root directory

3 Using any text editor, edit /etc/init.d/siebel_server so that *\$SIEBEL_GATEWAY_ROOT* is pointing to the actual path to the Siebel Gateway Name Server installation directory.

4 Set the appropriate permissions by executing the following command:

```
chmod 755 /etc/init.d/siebel_server
```

5 Create a soft link to /etc/rc3.d/S72siebel from /etc/init.d/siebel_server by executing the following command.

```
ln -s /etc/init.d/siebel_server /etc/rc3.d/S72siebel
```

6 Create a soft link to /etc/rc2.d/K32siebel from /etc/init.d/siebel_server by executing the following command:

```
ln -s /etc/init.d/siebel_server /etc/rc2.d/K32siebel
```

If Siebel Gateway Name Server was installed as a nonroot user, continue with [Step 7 on page 91](#); otherwise, you have completed this process.

7 Create or edit /etc/init.d/siebel to add the following line:

```
/usr/bin/su - SIEBEL_ACCOUNT -c "/etc/init.d/siebel_server $1"
```

where:

SIEBEL_ACCOUNT = The user account installing Siebel applications

8 Remove /etc/rc3.d/S72siebel and /etc/rc2.d/K32siebel, if they already exist.

9 Execute the following commands:

```
chmod 755 /etc/init.d/siebel
```

```
ln -s /etc/init.d/siebel /etc/rc3.d/S72siebel
```

```
ln -s /etc/init.d/siebel /etc/rc2.d/K32siebel
```

To configure the Siebel Gateway Name Server for Autostart on AIX

1 Log on as root to the machine on which the Siebel Gateway Name Server was installed.

2 Execute the following command on a single line:

```
mkitab "sieb_gtwyns:2:wait:su - SIEBEL_ACCOUNT -c \\"$SIEBEL_HOME/bin/  
siebel_server start\\""
```

where:

SIEBEL_ACCOUNT = The user account installing Siebel product

\$SIEBEL_HOME = The installation directory for the Siebel Gateway Name Server

3 Verify if the file /etc/rc.shutdown exists. If it does not exist, create it and change the permissions:

```
touch /etc/rc.shutdown  
chmod 744 /etc/rc.shutdown
```

4 Edit the file /etc/rc.shutdown by adding the following command to it:

```
su - $SIEBEL_ACCOUNT -c "$SIEBEL_HOME/bin/siebel_server stop"
```

where:

SIEBEL_ACCOUNT = The user account installing Siebel product

\$SIEBEL_HOME = The installation directory for the Siebel Gateway Name Server

5 Save and close the file.

You have now enabled the Siebel Gateway Name Server to start automatically when you restart your server and to stop automatically when you shut down.

NOTE: Remember that the Siebel Gateway Name Server must be the first service to start up, and the last to be shut down, among all the servers in the Siebel Enterprise served by that Siebel Gateway Name Server.

6 You are now ready to proceed with the Siebel Server installation.

Troubleshooting Siebel Gateway Name Server Installation

This section describes potential errors that can result from a faulty installation or configuration.

Problem: The Siebel Gateway Name Server does not start.

Solution: Failure to start the Siebel Gateway Name Server can be caused by a number of problems including, but not limited to, an incorrectly set LD_LIBRARY_PATH (Solaris), SHLIB_PATH (HP-UX), or LIBPATH (AIX), incorrect permissions set on shared libraries, or missing shared libraries. You can use the ldd command to show missing libraries. You should also check the siebelenv.csh and siebelenv.sh files and make sure that *\$SIEBEL_HOME/lib* is set before LD_LIBRARY_PATH (Solaris), SHLIB_PATH (HP-UX), or LIBPATH (AIX). Also make sure that *\$SIEBEL_HOME/lib* is included. If there are library conflicts, set *\$SIEBEL_HOME/lib* as the first element of the shared library path environment variable.

6

Installing the Siebel Server

This chapter describes the tasks involved in installing the Siebel Server software and in configuring the Siebel Enterprise Server. It includes the following topics:

- “Process of Installing the Siebel Server” on page 93
- “Siebel Server Installation Requirements” on page 94
- “Configuring Database Connectivity” on page 97
- “Verifying Network Connectivity for the Siebel Server Machine” on page 97
- “Installing and Configuring the Siebel Server” on page 98
- “Postinstallation Tasks for Siebel Server” on page 106
- “Reviewing the Installation for Siebel Server” on page 107
- “Verifying the ODBC Data Source for DB2 UDB” on page 109
- “Verifying the ODBC Data Source for Oracle” on page 110
- “Troubleshooting the ODBC Data Source Connection” on page 111
- “Establishing Network Connectivity for Mobile Users” on page 112
- “Synchronizing Siebel Server Components” on page 112
- “Setting the Siebel Server Locale” on page 112
- “Disabling Language-Specific Application Object Managers” on page 115
- “Installing Additional Siebel Servers Within an Existing Siebel Enterprise Server” on page 116
- “Configuring Siebel Server Autostart on AIX” on page 118
- “Configuring Siebel Server Autostart on HP-UX and Solaris” on page 119
- “Managing Environment Variables” on page 122
- “Troubleshooting Siebel Server Installation” on page 124

For alternative installation methods, refer to [Chapter 4, “Non-GUI Installation.”](#)

When you install the first Siebel Server in your deployment, you automatically configure the Siebel Enterprise Server. All subsequent Siebel Servers installed in this Siebel Enterprise Server must connect to the same database.

Process of Installing the Siebel Server

The Siebel Server installation process requires multiple tasks that you should perform in the following sequence:

- 1 Review deployment requirements. See [“Siebel Server Installation Requirements” on page 94.](#)

- 2 Verify the Siebel Database Server access. See “[Configuring Database Connectivity](#)” on page 97.
- 3 Verify Siebel Server network access. See “[Verifying Network Connectivity for the Siebel Server Machine](#)” on page 97.
- 4 Install and configure the Siebel Server. See “[Installing and Configuring the Siebel Server](#)” on page 98.
- 5 Perform postinstallation tasks. See “[Postinstallation Tasks for Siebel Server](#)” on page 106.

Siebel Server Installation Requirements

Review the following requirements for Siebel Server installation:

- A Siebel Gateway Name Server must be installed and running to configure a Siebel Server.
- Be sure that all machines on which the Siebel Server will be installed meet the hardware and software requirements detailed in *System Requirements and Supported Platforms* on Siebel SupportWeb. The Siebel Enterprise Server Installer verifies not only that you have the required software for installation of Siebel 7.x, but that the software is the necessary version level.
- Every Siebel Server supported by a given Siebel Database Server must belong to the same Siebel Enterprise Server, regardless of the platform on which the Siebel Servers are operating. When you install the first Siebel Server within a Siebel Enterprise Server, you will be automatically prompted to configure the Siebel Enterprise Server. Additional Siebel Servers installed in that Siebel Enterprise Server automatically inherit its parameters.
- The Siebel Server software needs to be installed only once on each machine. However, you may configure as many Siebel Servers as you want to operate from that single software installation by using the `config_server` script. See “[Installing Additional Siebel Servers Within an Existing Siebel Enterprise Server](#)” on page 116.
- When you choose which component groups to enable on the first Siebel Server, subsequent Siebel Servers inherit the same ones. For this reason, you should enable all the component groups for your environment and then disable specific component groups on each individual Siebel Server that does not need that particular component group. If you forget to enable a component group during initial installation and configuration of the software, you must enable it manually later on using Server Manager.
- Depending on the requirements of your business, you may deploy one or more Siebel Enterprise Servers. If you intend to configure multiple Siebel Enterprise Servers on a single machine in your development or test environment, you should issue a command similar to `unsetenv $SIEBEL_ROOT` (where `$SIEBEL_ROOT` is the environment variable for the installation root directory) to specify a unique `$SIEBEL_ROOT` for each Siebel Enterprise Server. For information on deploying multiple Siebel Enterprise Servers, see *Deployment Planning Guide*.

NOTE: Configuring multiple Siebel Enterprise Servers on a single machine is not supported for the production environment.

- Verify that you have all the required DVDs, for base and language. Or, verify that you have appropriate permissions to the network directories where the files reside in a network image.

Clustering Requirements for the Siebel Server

The Siebel installer allows you to install all servers at once for which you have a license. If you will be operating certain servers as part of a cluster, you must install and configure the Siebel Gateway Name Server and the Siebel Server on separate resource groups. For information about clustering, see *Deployment Planning Guide*.

Language Locale Requirements

Make sure you have the appropriate locales on the machines on which you intend to deploy Siebel Server. Siebel log and configuration files use UTF-8 with Byte Order Mark as the default encoding. If these files contain any non-ASCII characters, proper viewing and editing requires a UTF-8 locale. For more information on supported locales, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

The language locale can affect how time is displayed. For more information, see *Global Deployment Guide*.

NOTE: Make sure the locale you are using matches the locale set at your operating system level. For details, see “[Locale Configuration on Your UNIX Operating System](#)” on page 21.

Guidelines for Installing Multiple Language Packs on the Siebel Server

If you will be installing multiple language versions of Siebel eBusiness Applications on your Siebel Servers, review the following configuration guidelines:

- You run the Siebel Enterprise Server Software Configuration Wizard only once for each Siebel Server. Do not use this wizard to reconfigure an existing server.
- When you configure a server, you have the option of creating Application Object Managers (AOMs) for every language that has been installed on that server.
- AOMs are created when you run the Configuration Wizard, based on the Language Packs you have installed. Because the AOMs are created from a file (omdefs.dat or omdefs_sia.dat) installed as part of the Siebel Language Packs, they are created only for languages for which a Language Pack has been installed. (The file omdefs_sia.dat is used for Siebel Industry Applications.) However, you can manually create AOMs for languages that have not been installed. To do this, use Server Manager in GUI or command-line mode, or create and import a modified omdefs.dat or omdefs_sia.dat file. For information about importing such a file, see *Global Deployment Guide*.
- When new AOM components are created, they are automatically assigned to every server and they attempt to run on every server with the parent component group assigned and enabled. For information about server component groups and their member components, see [Appendix B, “Enabling Server Components.”](#) See also *Siebel System Administration Guide*.
- When you add a new server, it will inherit every component group and every AOM by default.
- If multiple languages are installed, you will be prompted for the primary (base) language. This is the primary (base) language for your Enterprise—the language in which you want your Siebel Server to run and in which you normally want to read messages. If you want to change the language in which you bring your server up, you must change this language.

For deployment scenarios for installation of multiple languages on your Siebel Servers, see *Global Deployment Guide*.

Adding a New Product to an Existing Installation

When you add a new product to an existing installation, it is vital that you install the same set of languages for the new product. For example, do this when adding a Siebel Server to the same directory in which you have installed a Siebel Gateway Name Server.

You also need to make sure that for any new Siebel Server you install the new installation is at the same patch level as the Gateway before starting the Siebel Server process.

Because both products share the same root directory, they are treated by the installer as one product in terms of patches and the addition of new languages.

After an installation directory is patched, a new product cannot be added to that directory. In that case, install the product in a new installation directory.

Hummingbird SearchServer

Any Siebel Server can also be configured to execute searching or can be pointed to another remote SearchServer to handle search execution tasks. If you want a server to function as a SearchServer, you must install Hummingbird SearchServer before installing the Siebel Server on that machine. For more information about Hummingbird SearchServer, see *Siebel Search Administration Guide*.

Database Requirements

Make sure your database administrator has installed the RDBMS your site will be using. During installation of the Siebel Server, you must have an established connection to that database for installation to be successful. For more information, see [Chapter 3, "Guidelines for Configuring the RDBMS."](#)

The RDBMS you are using must support the same languages and code pages that you will install on the Siebel Servers. To see the code pages and languages supported for both Siebel Servers and for Siebel Database Servers, refer to *System Requirements and Supported Platforms* on Siebel SupportWeb.

Third-Party Applications

Make sure that you have already installed the appropriate version of all third-party software products required. Otherwise, the Required Software Components prompt appears. For more information, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

Temporary Disk Space

The Siebel Server installer requires the following temporary disk space for the installation:

AIX: 200 MB (/tmp)

Solaris: 115 MB (/var/tmp)

HP-UX: 230 MB (/var/tmp)

Configuring Database Connectivity

Oracle. Verify that the Oracle Net8 or Net9 database connectivity software, as appropriate, is installed on each machine, according to the Oracle documentation. For database connectivity software requirements, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

On the Solaris platform, when using an Oracle 8*i* database, use the HOSTNAME ADAPTER technique for name resolution which bypasses the tnsnames.ora file. This method prevents a known limitation of Solaris that causes Siebel Application Object Managers to intermittently report a Login Failed error when the open File Descriptor limit of 256 is reached. For details, see Alert 881 on Siebel SupportWeb. This limitation does not apply to Oracle 9*i* on Solaris platform.

Siebel Server connections to the Oracle Database are made through dedicated server processes rather than through Oracle MTS; the use of MTS may negatively affect performance.

Use the Oracle Net8 (or Net9) Easy Configuration utility to define a database alias with the proper connection information for your Siebel Database Server. Record the connect string in [Appendix A, "Deployment Planning Worksheet."](#) You specify this connect string when installing the Siebel Server.

NOTE: Siebel applications support the Oracle 32-bit client. Therefore, if you have installed the Oracle 64-bit client on your Siebel Server, you must add \$ORACLE_HOME/lib32 instead of \$ORACLE_HOME/lib to your LD_LIBRARY_PATH (Solaris), SHLIB_PATH (HP-UX), or LIBPATH (AIX) variables.

DB2 UDB for Windows and UNIX. Define a database alias with the proper connection information for your database. This alias will be the connect string used when installing the Siebel Server. Record the connect string in [Appendix A, "Deployment Planning Worksheet."](#) You specify this connect string when installing the Siebel Server.

Use either the DB2 Client Configuration Assistant or the Command Line Processor (CLP) to define your database alias. For more information, see *DB2 Universal Database for UNIX* or *IBM DB2 Universal Database Command Reference*.

DB2 UDB for z/OS and OS/390. For information on configuring database connectivity for DB2 UDB for z/OS and OS/390, see *Implementing Siebel eBusiness Applications on DB2 UDB for z/OS and OS/390*.

Verifying Network Connectivity for the Siebel Server Machine

The Siebel Server must have network access to other Siebel Enterprise components, such as the Siebel Gateway Name Server, and the Siebel Database server. Use the following procedure to verify that the Siebel Server can access the Siebel Enterprise.

For information on verifying network connectivity for DB2 UDB for z/OS and OS/390, see *Implementing Siebel eBusiness Applications on DB2 UDB for z/OS and OS/390*.

To verify network connectivity for the Siebel Server

- 1 Verify network connectivity to the Siebel Gateway Name Server and Siebel Database Server from the Siebel Server machine, using the test utility for your network type.

For TCP/IP networks, use the ping utility to verify network connectivity to the Siebel Database Server and Siebel Gateway Name Server.

- 2 Verify connectivity to the Siebel Database Server:

- **Oracle.** Use the tnsping utility and Net8 or Net9 database alias, as appropriate to your database, from a Command Prompt window to make sure that you can connect to the database, using the network connect string that you defined.
- **DB2 UDB for Windows and UNIX.** Open a db2 command window to make sure that you can connect to your database.

- a Enter:

`db2 connect to database_alias user user_ID using password`

where:

database_alias = Your database alias

user_ID = A valid user name on DB2

password = The appropriate password for that *user_ID* is in the preceding example

If your connection is valid, you should see a message that looks like the following:

The connection test is successful

```
Database Server      = DB2/AIX|Solaris x.x.x
SQL authorization ID = SADMIN
Database alias       = NAME
```

If your connection is not valid, verify your configuration.

- b To close the connection, type db2 terminate.

- 3 Provide a network connection from the Siebel Server to the file system.

- 4 Verify that the file system directory is visible and that the Siebel service owner account can copy files to and from it.

If you are clustering the Siebel File System, use the Network IP resource or Network Hostname Resource assigned to that Cluster File Share.

Installing and Configuring the Siebel Server

This topic explains how to run the installation wizard for installing and configuring the Siebel Server.

There are several prerequisites for launching the installation wizard:

- Review the Siebel Server deployment requirements. See “[Siebel Server Installation Requirements](#)” on page 94.
- Verify database connectivity. See “[Configuring Database Connectivity](#)” on page 97 and “[Verifying Network Connectivity for the Siebel Server Machine](#)” on page 97.
- Prepare for the installation. See “[Siebel Server Installation Requirements](#)” on page 94.

In most cases, the installation should be performed by a nonroot user for simpler administration and maintenance. However, root access is required if you plan to configure the Siebel Gateway Name Server or Siebel Server for auto-start. To avoid DVD swapping, copy all installation files, including the required language files, to a common installation directory within your system or use the Network Image Creator. For more information, see “[Selecting Your Media for Installation](#)” on page 27. If you elect to do so, note that you may not get some of the prompts regarding swapping the DVD in the following procedure.

NOTE: In a Unicode-enabled database environment, you can install any available Siebel Language Pack. In a non-Unicode database environment, you must consider the correlation of the Language Packs you want to install and the characters supported by your database code page. For example, in a Western European code page database, you can install only Western European Language Packs, such as for English, French, Spanish, or German. In a Japanese code page database, you can install only Japanese or English Language Packs.

If you are using X-connectivity software to access a UNIX machine from a Windows machine, you might experience unexpected exiting or hanging by the installer. If this is the case, try using a later version of the X-connectivity software. For Exceed, for example, use Exceed 8.0 or greater. For proper Java GUI displays on your local machine, set XTerm display values, using the command `setenv DISPLAY xxx.xxx.xxx:0.0` or `setenv DISPLAY hostname:0.0`. If you observe poor performance or unexpected behavior using an emulator, telnet to the UNIX server and use console mode to perform installation. For details on installing in console mode, see “[Console Mode Installation and Configuration](#)” on page 73.

NOTE: The following procedure is for installing the base product. For patch installation instructions, refer to the *Maintenance Release Guide* provided with the patch.

To install and configure a Siebel Server

- 1 Stop all Siebel Server processes except the one for Siebel Gateway Name Server.
- 2 **(AIX only)** Verify that the login ID performing installation has permission to run `slibclean` by asking the administrator to change the permission as follows:
`chmod 6555 /usr/sbin/slibclean`
- 3 If you are installing from DVD, insert the appropriate DVD for the Siebel applications into the DVD drive of the chosen server, and mount this DVD:
 - *Siebel eBusiness Applications, Base Applications for UNIX_OS*

- *Siebel Industry Applications, Base Applications for UNIX_OS*

where:

UNIX_OS = Your UNIX operating system, such as AIX, HP-UX, or Solaris

NOTE: The volume label for the DVD is *seaUNIX_OSunibase* (for Siebel eBusiness Applications) or *siaUNIX_OSunibase* (for Siebel Industry Applications), where *UNIX_OS* is *aix*, *hpx*, or *sol*.

As a convenience, you may also want to mount the *seaall/anglep* (for Siebel eBusiness Applications) or *siaall/anglep* (for Siebel Industry Applications) DVD, where *lang* is the code for the language you are installing, on a different DVD drive for the same machine.

- 4 Log on to the server, using the Siebel user account that you recorded in the copy you made earlier of [Appendix A, "Deployment Planning Worksheet."](#)

If a Siebel Server is installed by root, then only root can stop and start the server. Use a Siebel account other than root that has the correct authorizations to install. For more information on creating Siebel accounts, see ["Creating the Siebel Service Owner Account" on page 26](#).

- 5 Open a new shell and navigate to the root directory of the DVD or to the appropriate network directory, if you are installing from a network image.
- 6 Navigate to the *UNIX_OS/Server/Siebel_Enterprise_Server* directory, where *UNIX_OS* is your UNIX operating system, such as AIX, Solaris, or HPUX (for HP-UX).
- 7 Unset any Siebel-specific environment variables. To view current environment variable settings, enter *set* (Korn shell) or *env* (C shell) in the shell window.
- 8 Verify the directories and permissions to those directories into which you will install the product. You must have write and execute permission.
- 9 To start the Siebel Server installation process, enter the following command, appending any valid flag to it, as described in ["Additional Flags for Installation Commands" on page 77](#).

./setupUNIX_OS

where:

UNIX_OS = Your UNIX operating system, such as *sol* (Solaris), *hp* (HP-UX), or *aix* (AIX)

The Installer Welcome screen appears.

- 10 Click Next.

- 11 Depending on whether you are installing your Siebel Server files for the first time or adding a new language to an existing instance, take the appropriate action, and then click Next:

- To install the server software in a new instance, or to install the Siebel Server in the same location where you previously installed Siebel Gateway Name Server, select None as the default and click Next. Proceed to [Step 12 on page 101](#).
- To install a new language in an existing instance, select the displayed instance and click Next. Proceed to [Step 16 on page 102](#).

See also ["Guidelines for Installing Multiple Language Packs on the Siebel Server" on page 95](#) for important additional information on this topic.

The Installer Path screen appears.

12 Enter the fully qualified path to the installation directory and click Next or choose a different directory by taking the following steps:

- a** Click Browse and navigate to the installation directory.
- b** Record the fully qualified location that you recorded in [Appendix A, "Deployment Planning Worksheet."](#)

The directory name should be standard alphanumeric characters, including the underscore. No other characters or spaces are allowed.

13 Click Next.

The Installer Product Selection screen appears.

14 Choose the server products you want to install, and for which you are licensed, and click Next.

If you install all licensed components at once, the Siebel Enterprise Server Installer and the Siebel Software Configuration Wizard prompts you later for the installation parameters of each component individually and in the sequence required.

The Setup Type screen appears.

15 Choose the type of installation to perform from the following options and click Next to continue:

- **Typical.** Installs all Siebel Server components.
- **Compact.** Installs only those components necessary to run the Siebel Gateway, but no additional components or help. This selection is not supported for the Siebel Server.
- **Custom.** Lets you customize your installation by choosing the specific components you want to install.

The Custom option allows you to clear any specific server components (listed as follows) that you do not want to install:

- Siebel Server Executables
- Siebel Server Core Components
- Siebel Server Remote Components
- Siebel Server Object Manager
- Siebel Field Service Components
- Data Quality Connector

CAUTION: Do not clear Siebel Server Executables, Siebel Server Core Components, or Application Object Manager or your Siebel eBusiness Applications will fail.

The Installer Language Selection screen appears, if you have not installed other components in this directory; otherwise, proceed to [Step 17 on page 102](#).

16 Choose the language or languages to install and click Next.

All servers are installed with at least one primary (base) language. Additional languages can be installed at a later date, if desired. For more information on multilingual deployments, see *Global Deployment Guide* on the *Siebel Bookshelf*.

When installing languages at a later date, you must also reinstall any patches that have been run on the directory.

For a list of supported code pages and encoding strategies, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

The Installer eBriefing screen appears.

17 Choose which, if any, of the eBriefing or eContact products licensed by your organization and click Next.

NOTE: If you choose eBriefing and eContact Services, a license agreement screen appears. If you reject the license agreement, the Configuration Wizard exits.

The Installer Verification screen appears.

18 Verify the products to be installed, the path to the installation location, and the size of the installation, and then click Next.

The installer proceeds to install the specified files. After the specified files have been copied to the installation location, this message appears:

Setup did not find the *7ang* language pack on the current media. Please insert the DVD containing the *7ang* language pack and select the *setupUNIX_OS* file from the *7ang* folder.

where:

lang = The code for the language you are installing, such as *enu* for U.S. English.

UNIX_OS = Your UNIX operating system, such as *aix*, *hp*, or *sol*.

NOTE: For Siebel Industry Applications, the Windows and UNIX Language Packs are on different DVDs.

19 If you have not yet done so, insert the appropriate language DVD into the drive of the machine onto which you are installing the Siebel Server, and navigate to the location of the selected language (Siebel_Enterprise_Server/*lang*), where *lang* stands for the Siebel language code.

NOTE: The volume label for the DVD is either seaall/*anglep* (for Siebel eBusiness Applications) or siaall/*anglep* (for Siebel Industry Applications).

Clear the filter dialog box, if needed, to be sure that you can see the appropriate files.

If you choose to copy the DVD contents to a directory location on the file system, you should mount the host directly, as in the following example:

```
mount host:/directory_on_host /mount_point
```

where:

host = The machine name

directory_on_host = The directory to be mounted

mount_point = The name you want to use for the mount point

20 Select *setupUNIX_OS* and click OK.

When installation of all the language files has been completed, the installer prompts you again for the base DVD:

Please re-insert the base DVD and browse to the "setupUNIX_OS" file to enable setup to continue.

21 Navigate again to the base DVD mount point on the network, locate Siebel_Enterprise_Server/*setupUNIX_OS*, and click OK.

Which screen appears next depends on whether you are installing one or multiple languages.

- If you are installing more than one language, the Primary Language screen appears. Proceed to [Step 22 on page 103](#).
- If you are installing only one language, the Address and Port screen appears. Proceed to [Step 23 on page 103](#).

22 Select the primary (base) language and click Next.

This is the primary (base) language for your enterprise—the language in which you want your Siebel Server to run and which you normally want to read messages.

The Address and Port screen appears.

23 Enter the address and port number of the Siebel Gateway Name Server and click Next.

The Component Groups screen appears.

24 Choose the component groups that you want to be automatically enabled at start-up of the Siebel Server, and then click Next.

For a list of server component groups and their individual components, refer to [Appendix B, "Enabling Server Components."](#)

If Mobile Web Client users must be able to synchronize with this Siebel Server, select Siebel Remote. Likewise, if you have purchased a license for any of the other Siebel product modules listed on this screen, select them now.

The Siebel Enterprise Name screen appears.

25 Enter the name of the new Siebel Enterprise and click Next.

The Siebel File System Path screen appears.

26 Enter the path to the Siebel File System and click Next.

The Description screen appears.

27 Add a brief description of the Siebel Enterprise and click Next.

The Synchronization Manager screen appears.

28 Accept the default port 40400 for the Synchronization Manager, or change it to another port number that is not used, and click Next.

The Data Matching screen appears.

29 Choose the software this installation uses for data matching and click Next.

The Database Selection screen appears.

30 Choose the database for this Enterprise and click Next.

31 Enter the appropriate configuration information for the database you selected and click Next.

- **Oracle (9i or 8i).** Enter the connect string appropriate for connecting to the database and proceed to [Step 34 on page 104](#).
- **DB2 UDB for Windows and UNIX.** Enter the name of the database and proceed to [Step 34 on page 104](#).
- **DB2 UDB for z/OS and OS/390.** Enter the name of the database and proceed to [Step 32 on page 104](#).

32 Enter the DB2 UDB for z/OS and OS/390 database Schema Qualifier or Tableowner.

The SQL ID screen appears.

33 Accept the default or enter a new SQL ID and proceed to [Step 35 on page 104](#).

The Tableowner screen appears.

34 Enter the Tableowner Name for Oracle.

The database username screen appears.

35 Enter the database username.

The database user password screen appears.

36 Enter the database user password and confirm.

The Chart Server screen appears.

37 Enter the Chart Server host name.

The Chart Image Format screen appears.

38 Select the desired Chart Image Format.

The Encryption Type screen appears.

39 Select the Encryption Type.

The Siebel Server name screen appears.

40 Enter a unique name for this Siebel Server.

The Siebel Server Description screen appears.

41 Enter a unique description for this Siebel Server.

If you have selected DB2 in [Step 30 on page 104](#), the DB2 client screen appears. Proceed to [Step 42 on page 105](#); otherwise, proceed to [Step 43 on page 105](#).

42 Enter the full path to the directory where the DB2 client is installed.

The Synch Manager port screen appears.

43 Select whether or not to override the synchmgr static port.

If you select Yes, proceed to [Step 44 on page 105](#); otherwise, proceed to [Step 45 on page 105](#).

The port number override screen appears.

44 Enter a new port number that is not used by any other components.

The Search Server screen appears.

45 Perform one of the following actions, based on your business requirements, and click Next:

- **Configure as a Search Server.** Proceed to [Step 46 on page 105](#).
- **Configure to point to a Remote Search Server.** Proceed to [Step 47 on page 105](#).
- **Skip.** Proceed to [Step 48 on page 105](#).

46 On the Fulcrum screen (for Hummingbird SearchServer), enter the full path to the Fulcrum installation directory and proceed to [Step 48 on page 105](#).

47 On the Remote Search Server screen, enter the hostname and the port number for the Remote Search Server and click Next.

The autostart screen appears.

48 Indicate whether or not this Siebel Server should be enabled for autostart.

The Start the Server screen appears.

49 Indicate whether or not you want to start the server.

The SSL screen appears. For details on SSL, see *Security Guide for Siebel eBusiness Applications*.

50 Select whether or not you want to deploy SSL.

- If no, proceed to [Step 59 on page 106](#).
- If yes, proceed to [Step 51 on page 106](#).

51 On the Configuration Type screen, indicate whether or not you want to configure the Siebel Enterprise SSL, or just the Siebel Server SSL, and click Next.

- **Configure Siebel Enterprise SSL.** If you select this option, click Next and proceed to [Step 52 on page 106](#).
- **Configure Siebel Server SSL.** Proceed to [Step 52 on page 106](#).

52 On the Certificate File Name, enter the full path to the certificate file you have already created and click Next.

The CA File Name screen appears.

53 Enter the full path to the CA certificate file you have already created and click Next.

The Private Key File Name screen appears.

54 Enter the full path to the Private Key File Name and click Next.

The Private Key Password screen appears.

55 Enter the password for the Private Key File and confirm it by reentering it.

The Peer Authentication screen appears.

56 Indicate whether or not you want to implement peer authentication by selecting yes or no.

The Validate Peer Certificate screen appears.

57 Indicate whether or not you want to validate peer certificate.

The wizard displays the configuration parameters you have chosen on previous screen.

58 Review these values for accuracy against the values in your copy of Appendix A, "Deployment Planning Worksheet."

- If you need to correct any values, click Previous to go back and fix the value.
- When you are satisfied, click Next for the wizard to apply the settings.

When configuration activities are completed, a message box appears with the following text:

The configuration changes were applied successfully.

59 To complete the installation, click Finish.

The Finish screen appears. Your installation is not complete if this screen does not appear.

Postinstallation Tasks for Siebel Server

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

- "Reviewing the Installation for Siebel Server" on page 107

- Verifying the ODBC Data Source
 - “Verifying the ODBC Data Source for DB2 UDB” on page 109
 - “Verifying the ODBC Data Source for Oracle” on page 110
 - “Troubleshooting the ODBC Data Source Connection” on page 111
- “Establishing Network Connectivity for Mobile Users” on page 112
- “Synchronizing Siebel Server Components” on page 112
- “Setting the Siebel Server Locale” on page 112
- “Disabling Language-Specific Application Object Managers” on page 115
- “Installing Additional Siebel Servers Within an Existing Siebel Enterprise Server” on page 116
- “Configuring Siebel Server Autostart on AIX” on page 118
- “Configuring Siebel Server Autostart on HP-UX and Solaris” on page 119
- “Managing Environment Variables” on page 122
- “Troubleshooting Siebel Server Installation” on page 124
- (Optional) Configuring your security adapter—see *Security Guide for Siebel eBusiness Applications*

Reviewing the Installation for Siebel Server

The following minimum directories and files are installed for the Typical selection for a Siebel Server installation. Files are installed in the `$SIEBEL_HOME` directory you specified during the installation.

admin. The template files used for scripts that control the running and configuration of Siebel Server.

bin. Binary file directory, containing language subdirectories related to language-specific server components. Also contains files used by Siebel Technical Support for installation workarounds.

classes.

dbtempl. Contains dictionary and local database files required by Siebel Remote for regional users and Mobile Web Client users.

docking. Contains transaction files, visibility, and other databases required by Siebel Remote.

enterprises. Files specific to a particular enterprise; contains a server subdirectory that contains files specific to a particular server (for example, log files).

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

help. Contains help files.

input. Contains files related to Siebel Remote.

install. Contains files used by the UNIX installer.

install_script.

isstempl. Contains templates for Customer Order Management CDA application and engine files for newly created projects. Do not modify any files in the directories `isstempl\lang\EngineSourceFiles` or `isstempl\lang\NewProjectDefault`, unless directed to do so by Siebel Systems engineers.

IVSE.LIC. Merant ODBC Driver license file.

lex. Language-related files.

lib. Library subdirectory. Contains the *.so files used in LDAP or other applications.

locale. Contains language-specific files.

log. Contains client and utility log files.

messages. Contains files related to eBriefings.

msgtempl. Stores language-specific files for mail merge.

mw. Contains MainWin binaries, libraries, and scripts that function as a Windows interface.

nlp. Natural-language processing files.

objects. Siebel Repository directory containing language-specific subdirectories related to language-specific repository files.

NOTE: Monitoring of any SRF file by virus scanning software may significantly degrade Siebel Server performance. If you have virus scanning software installed on your computers, you should configure it to skip SRF files. Because these files are binary data files, the risk of virus infection is low, and so excluding these files from scanning should be acceptable. Alternatively, you may choose to scan SRF files, but less frequently than other files.

output. Contains files related to Siebel Remote.

reports. Contains the report executable programs used by Siebel Proposals to include reports in proposals.

SDQConnector. Contains the DLLs, configuration files, and other files necessary to connect the Siebel Data Quality Universal Connector to one or more external data quality products. An external data quality product is certified through the Siebel Alliance program.

search. Contains the indexes and scripts used to administer and execute Siebel Search and Siebel Advanced Search.

sqltempl. Contains SQL statements used by Siebel Server components. These files should not be modified.

SYBSsa80.

SYBSsa70. Contains SQL Anywhere 7.0 engine and one ODBC driver.

sys. The Service entry files and `odbc.ini` files used by the Siebel Server and server control utilities. Do not edit or modify these files unless instructed to do so by Siebel Support.

tclient. Contains Web server-related files.

temp. Stores temporary files for use by the Siebel Server.

upgrade. Contains files and scripts related to version upgrades of Siebel eBusiness Applications. Also holds temporary, backup, and state log files used during an upgrade.

webmaster. Contains files (including CSS files, IMG files, JS files, and others) that are updated to each Web server when the Web server is restarted, or when an administrator uses the SWE command `UpdateWebImages` to manually refresh the files on the Web server. For more information, see the section about adding a password for updating Web server static files, located in the *Security Guide for Siebel eBusiness Applications*.

webtempl. Contains Siebel Web templates that support the applets and views required for any type of Web client for the Siebel applications.

upgrade.log. Contains information logged from upgrading.

Verifying the ODBC Data Source for DB2 UDB

The Siebel Server installation program automatically creates an ODBC system data source name (DSN) that it uses to connect to the Siebel Database Server. Prior to verifying the Siebel Server ODBC data source, make sure that the Siebel Server service is started.

CAUTION: Do not change the default settings created automatically with the ODBC data source.

To verify the ODBC data source for DB2 UDB for Windows and UNIX and for DB2 UDB for z/OS and OS/390

1 Open the `db2cli.ini` file in the `$SIEBEL_HOME` directory and make sure that there is a section called `[siebsrvr_enterprise name]`, where *enterprise name* is the name given the Siebel Enterprise during installation; its default name is `siebel`.

2 Verify that the following two values are present in the section:

`dbalias = aliasname` (the database alias catalogued for your DB2 UDB for Windows and UNIX or DB2 UDB for z/OS and OS/390 database server)

`txnisolation = 1`

If the section is missing, run the `configdb2` script in `$SIEBEL_HOME/bin` to set it, and then reverify that the section is present.

3 Verify that the `SIEBEL_UNIXUNICODE_DB` environment variable is set to DB2.

NOTE: If you use Siebel Marketing, which requires simultaneous heterogeneous database connectivity, set this variable to ORACLE, regardless of your database platform.

4 Test the connection by navigating to `$SIEBEL_HOME/bin` and entering the command:

`odbcsql /u user_name /p password /s ODBC DSNW`

where:

ODBC DSN = The database connect string

If you do not receive an error message, the ODBC connection is working.

Verifying the ODBC Data Source for Oracle

The Siebel Server installation program automatically creates an ODBC system data source name (DSN) that it uses to connect to the Siebel Database Server. Prior to verifying the Siebel Server ODBC data source, make sure that the Siebel Server service is started.

CAUTION: In general, do not change the default settings created automatically with the ODBC data source. However, if you have upgraded from Oracle 8i to Oracle 9i, or if you have manually created your ODBC, it is critical that you check your ODBC settings, as shown in the following procedure.

To verify the ODBC data source for Oracle

- 1** Navigate to `$SIEBEL_HOME/sys/.odbc.ini`.
- 2** Locate the section of the file containing a reference to `ServerName` and `Driver`.

This section defines the ODBC DSN for Siebel Server. A sample section is represented in the following example. The `ServerName`, `Driver`, `ColumnsAsChar`, and `ColumnSizeAsCharacter` parameters are the most critical for this procedure:

```
[SiebSrvr_Enterprise Name]
Description=Oracle901
ServerName=dvlsun6
Driver=$SIEBEL_HOME/lib/SEor818.so
ColumnsAsChar=1
ColumnSizeAsCharacter=1
```

CAUTION: The `ColumnsAsChar` and `ColumnSizeAsCharacter` parameter settings are required for Oracle 9i, in order for the ODBC driver to behave correctly.

The `ServerName` should be the Oracle connect string you entered while installing the Siebel Server. (To verify this connect string, run `sqlplus`.) The driver should point to `$SIEBEL_HOME/lib/SEor818.so`, allowing you to verify the existence of this file.

- 3** Verify that the `SIEBEL_UNIXUNICODE_DB` environment variable is set to `ORACLE`.

NOTE: If you are using Siebel Marketing, which requires simultaneous heterogeneous database connectivity, you need to set this variable to `ORACLE`, regardless of your database platform.

- 4** Test the connection by navigating to `$SIEBEL_HOME/bin` and entering the command:

```
odbcsql /u user_name /p password /s ODBC DSN
```

where:

ODBC DSN = the database connect string

If you do not receive an error message, the ODBC connection is working.

If your ODBC DSN is not working, the program exits with an error message. For more information, see ["Troubleshooting the ODBC Data Source Connection" on page 111](#).

Troubleshooting the ODBC Data Source Connection

If your connection test for the ODBC data source fails, see *Implementing Siebel eBusiness Applications on DB2 UDB for z/OS and OS/390*.

Oracle

Complete the following instructions to troubleshoot Oracle connection problems on Solaris, AIX, and HP-UX.

If you are unable to verify if your ODBC connection to your Oracle database is working, you should verify that the value of the environment variable **TNS_ADMIN** is the exact path of **tnsnames.ora**.

To troubleshoot a failed ODBC connection on Solaris, AIX, or HP-UX

- 1 Verify that the Oracle connect string entered as part of Siebel Server configuration is valid.
- 2 If the connect string entered is correct, check the **ODBCINI** environment variable to verify that it was set by entering the following command:

```
echo ${ODBCINI}
```

The response should be the following:

```
$SIEBEL_ROOT/sys/.odbc.ini
```

- 3 If the **ODBCINI** environment variable was correctly set, verify that the **.odbc.ini** file is valid by reviewing it for the presence of the following parameters:

```
[siebSrvr_Enterprise Name]
ServerName=ora901
Driver=$SIEBEL_ROOT/lib/sEor818.so
ColumnsAsChar=1
ColumnSizeAsCharacter=1
```

If these parameters are not present, the file is invalid.

CAUTION: The **ColumnsAsChar** and **ColumnSizeAsCharacter** parameter settings are required for Oracle 9i, in order for the ODBC driver to behave correctly.

4 If the .odbc.ini file is valid, verify that the library path includes the path for the ODBC driver on your platform by entering the following command:

Solaris. Use echo \${LD_LIBRARY_PATH}.

AIX. Use echo \${LIBPATH}.

HP-UX. Use echo \${SHLIB_PATH}.

The response should be \$SIEBEL_HOME/lib.

NOTE: Siebel applications support the Oracle 32-bit client. Therefore, if you have installed the Oracle 64-bit client on your Siebel Server, you must add \$ORACLE_HOME/lib32 instead of \$ORACLE_HOME/lib to your LD_LIBRARY_PATH (Solaris), SHLIB_PATH (HP-UX), or LIBPATH (AIX) variables.

5 If the response illustrated for your platform in [Step 4 on page 112](#) was correct and you are verifying a Unicode installation, make sure that the following environment variables are set according to the recommendations from your database platform vendor. These variables should also be set in the siebenv.csh and siebenv.sh scripts.

```
SIEBEL_UNIXUNICODE_DB=ORACLE
```

Establishing Network Connectivity for Mobile Users

Siebel Mobile Web Client users must be able to connect to the Siebel Remote Server, using TCP/IP to synchronize with the master database. Make sure that you have the correct network software and hardware installed to support this connectivity and that your remote users are able to establish a TCP/IP connection to the server, using the ping utility.

See also *Siebel Remote and Replication Manager Administration Guide*.

Synchronizing Siebel Server Components

After you have installed the Siebel Server, you will need to synchronize any batch components before you can operate them. For detailed information about synchronizing batch components, enabling components after installing, and related topics, see *Siebel System Administration Guide*.

Setting the Siebel Server Locale

The code page of the operating system on which your Siebel Server runs must match that of your Siebel Database Server instance. The languages installed on each must also match. To find all the code pages supported by Siebel eBusiness Applications at mid-tier and code pages supported at the database level, refer to *System Requirements and Supported Platforms* on Siebel SupportWeb. For a list of supported locales, see ["Locale Configuration on Your UNIX Operating System" on page 21](#).

You must set up the Siebel Server locale regardless of whether you install only one Language Pack or multiple Language Packs.

Setting the Server Locale for IBM DB2 UDB for Windows and UNIX

You must load database environment variables for either `siebenv.csh` (C shell) or `siebenv.sh` (Korn or Bourne shell), depending on which type of shell your operating system uses. Loading the database environment variables promotes a successful connection to the database.

To set locale parameters

- 1 Enter the following command, depending on your UNIX shell:

Korn or Bourne shell

```
. DB2_installation_path/sql1ib/db2profile
```

C shell

```
source DB2_installation_path/sql1ib/db2cshrc
```

where:

`DB2_installation_path` = the location where DB2 is installed

- 2 Reverify your database connection.

You will also need to set the code page at the database level. For information, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

Setting the Server Locale for IBM DB2 UDB for z/OS and OS/390

The following procedure sets the locale on a Siebel Server machine running UNIX. You must perform this procedure before adding the corresponding language to the Siebel Server.

To set the locale of the Siebel Server

- 1 Make sure the desired locale is available on your system by performing the following command:

```
locale -a
```

- 2 Source the `siebenv` to set the environment variables.

- 3 Check what the locale is set to by entering the following command:

```
locale
```

- 4 If the desired locale is not set, issue the following commands to set it as desired:

C shell

```
setenv LANG locale
```

```
setenv LC_ALL locale
```

Korn shell

```
export LANG =locale
```

```
export LC_ALL=locale
```

where:

locale = the code for the desired locale available on your system

- 5 **For z/OS only.** Make sure that SYSIBM.SYSSTRINGS or UNICODE Conversion Services contains the locale translations as required.

Setting the Server Locale for Oracle

You must load database environment variables for either siebenv.csh or siebenv.sh, depending on which type of shell your operating system uses. Loading the database environment variables promotes a successful connection to the database.

To set locale parameters

- 1 Add the following lines at the beginning of the file:

siebenv.sh

```
NLS_LANG = language_territory.characterset;  
export NLS_LANG
```

siebenv.csh

```
setenv NLS_LANG language_territory.characterset
```

where:

language = the language your server should run in; for example, CANADIAN FRENCH

territory = the territory (locale) operative for that language; for example, CANADA

characterset = set to UTF-8 for Unicode

- 2 Reverify your connection to the database using Oracle's Net8, Net9, or a similar tool.

Disabling Language-Specific Application Object Managers

The installation of each Siebel Language Pack includes language-specific Application Object Managers (AOMs) that do not overwrite those related to other Language Packs you may have already installed.

NOTE: After you install all the Language Packs you require among all the Siebel Servers in your Enterprise, you must install all the same Language Packs among all your Web servers. For more information about this, see [Chapter 8, "Installing the Siebel Web Server Extension."](#)

When you enable a component group for a Siebel Enterprise Server, you automatically enable the language-specific AOMs for that component for all the Siebel Servers in that Siebel Enterprise Server.

If your deployment is multilingual, you must disable the language-specific AOMs that are running by default (such as the AOMs for your primary language) on any Siebel Server that you want to dedicate to a secondary language.

To disable language-specific AOMs on Siebel Servers

- 1 Navigate to `$SIEBEL_HOME/bin`.
- 2 Execute the following command:

```
disable_lang.ksh lang server1 [server2...]
```

where:

lang = language component you want to disable

server1, *server2*, and so on are names of the Siebel Servers on which you want to disable the component.

For example:

```
disable_lang ENU siebsrvr1 siebsrvr2
```

NOTE: Do not place commas between the server names.

If the execution was successful, you should see the `srvmgr` banner, which this script invokes, and a message:

```
connected to 0 servers of n
```

A second message (command completed) appears as many times as you specified servers on which to disable language-specific AOMs.

Installing Additional Siebel Servers Within an Existing Siebel Enterprise Server

Before creating additional Siebel Servers, you should have installed and configured your Web server, and installed and configured the Siebel Web Server Extension (SWSE) plug-in. Doing this allows you to test the connection to the additional servers. For information about installing the SWSE, see [Chapter 8, "Installing the Siebel Web Server Extension."](#)

Use the installer to create additional Siebel Servers in an existing Siebel Enterprise Server, as described in the following procedure. You may also use the `config_server` script to reconfigure existing Siebel Servers.

NOTE: Typically, you create multiple Siebel Servers on one machine only for test or development purposes. In your production environment, it is strongly recommended that you create only one Siebel Server per machine.

To install an additional Siebel Server

- 1** Log on as the Siebel Service Owner to the machine where the Siebel Server software is installed.
- 2** In the shell window, enter `env` and verify that the environment variable `SIEBEL_GATEWAY` is set to the actual Gateway IP address or network name of the Siebel Gateway, and `SIEBEL_ROOT` variable is set to the Siebel root directory.
The `config_server` script uses the values for these environment variables unless they are overridden by command-line arguments. For details on the switches you can use, see [Step 4 on page 116](#).
- 3** If the Siebel environment variables are not set or are set incorrectly, navigate to the `$SIEBEL_HOME` directory and choose the appropriate command for your UNIX shell to source the `siebenv`.

Korn or Bourne shell

```
. ./siebenv.sh
```

Make sure there is a space between the initial period and `./siebenv.sh`.

C shell

```
source siebenv.csh
```

Before sourcing `siebenv`, make sure you have your database environment set up correctly. Specifically, verify that the `LD_LIBRARY_PATH` (Solaris), `SHLIB_PATH` (HP-UX), or `LIBPATH` (AIX) environment variable contains the full path name for your database client library directory. If you do not set up the database environment properly, you will receive an error message.

- 4** Start the Siebel Enterprise Server configuration by entering `config_server`.

The `config_server` script accepts the command-line flags described in [Table 16 on page 117](#).

5 If you did not specify a Siebel Server with a command-line flag, you must choose an existing server to configure or select the option to create a new server:

- If you choose to edit an existing server, it has to be a server that has not been configured yet. You cannot use the wizard to reconfigure an already configured server. To reconfigure a server, you have to uninstall and reinstall the server.
- If you choose to create a new Siebel Server, the config_server script prompts you to choose a new directory for the Siebel Server and to configure it.

CAUTION: You cannot install your second Siebel Server in the same root directory as your first Siebel Server.

6 For the remaining steps you need to follow, see the steps described under “[Installing and Configuring the Siebel Server](#)” on page 98.

The config_server script exits after it completes the chosen task.

Flags for config_server Script

Table 16 lists all the flags you can use with the config_server script to configure a Siebel Server.

Table 16. Config_server Flags

Flag	Parameter	Definition	Description
-r	<i>siebel_root</i>	(Required) The full path to the Siebel root directory	If -r is not specified in your command line, the value of the <code>\$SIEBEL_ROOT</code> environment variable is used, so you have to make sure this environment variable is set prior to executing <code>server_config</code> without the -r switch. If <code>\$SIEBEL_ROOT</code> is set to the Siebel root directory, then there is no need to have the -r switch and value in your command line.
-g	<i>siebel_gateway</i>	(Required) The IP address or network name of the Siebel Gateway Name Server	If -g is not specified in your command line, the value of the <code>\$SIEBEL_GATEWAY</code> environment variable is used, so you have to make sure this environment variable is set prior to executing <code>server_config</code> without the -g switch. If <code>\$SIEBEL_GATEWAY</code> is set to the IP address or network name of the Siebel Gateway Name Server, then there is no need to have the -g switch and value in your command line.

Table 16. Config_server Flags

Flag	Parameter	Definition	Description
-e	<i>enterprise_server</i>	(Optional) The Siebel Enterprise Server in which to operate	If the Enterprise Server is not specified and multiple Siebel Enterprise Servers are defined, you will be prompted with a list of the Siebel Enterprise Servers.
-s	<i>siebel_server</i>	(Optional) The existing Siebel Server to configure	If this Siebel Server is not specified, you will be prompted with a list of all existing Siebel Servers and given the option of defining new ones.

Enabling Siebel Remote for Multiple Siebel Servers on a Machine

When installing multiple Siebel Servers on a single machine, normally only the first Siebel Server installed can be configured to support Siebel Remote. If you need to enable Siebel Remote on each Siebel Server, put these Siebel Servers in separate directories, so that they should not share the same installation files.

Configuring Siebel Server Autostart on AIX

If, during installation, you elected automatic restart of the Siebel Server, you need to complete the procedure that follows to enable it.

To configure Siebel Server to start automatically

- 1 Log on as root to the machine where Siebel Server is installed.
- 2 Navigate to `$SIEBEL_HOME/bin/`.
where:
`$SIEBEL_HOME` = the installation directory for the Siebel Server
- 3 Using any text editor, open the file `siebel_server`, and edit the database environment variable as described in the following:

Oracle

- a Uncomment the line `#ORACLE_HOME=.`
- b Enter the location for `$ORACLE_HOME`.
- c Uncomment the line `#export ORACLE_HOME`.
- d Add the following two lines:

`TNS_ADMIN=$tns_admin`

You will need to ask your database administrator for the value of `$tns_admin`.

```
export TNS_ADMIN
```

DB2

- Add a line to execute the db2profile, for example:

```
. /home/eng-sm/db2v7aix/sql1ib/db2profile
```

You will need to ask your database administrator for the location of *\$db2profile*.

4 Save and close the file.

5 Log on as root and execute the following command on a single line:

```
mktab "start_server:2:wait:su - $SIEBEL_ACCOUNT -c \"\$SIEBEL_HOME/bin/siebel_server start\""
```

where:

SIEBEL_ACCOUNT = The user account installing Siebel product

\$SIEBEL_HOME = The installation directory for the Siebel Server

6 Verify whether or not the file /etc/rc.shutdown exists. If it does not exist, create it and change the permissions:

```
touch /etc/rc.shutdown
chmod 744 /etc/rc.shutdown
```

7 Edit the file /etc/rc.shutdown to add the following command to it:

```
su - $SIEBEL_ACCOUNT -c "\$SIEBEL_HOME/bin/siebel_server stop"
```

where:

SIEBEL_ACCOUNT = The user account installing Siebel product

\$SIEBEL_HOME = The installation directory for the Siebel Server

8 Save and close the file.

Configuring Siebel Server Autostart on HP-UX and Solaris

This section describes how to configure Autostart for your Siebel Servers running on HP-UX or Solaris. The process differs based on whether you installed as root.

Configuring Siebel Server Autostart When Installed as Root on HP-UX and Solaris

If you installed Siebel Server as root, complete one of the procedures that follow to enable Autostart.

Which procedure you use depends on whether or not you previously enabled Autostart when you installed the Siebel Server. This will determine whether a copy of the `siebel_server` script exists in `/sbin/init.d` (on HP-UX) or `/etc/init.d` (on Solaris):

- If your Siebel Gateway Name Server and Siebel Server are on the same machine, use the procedures in ["Configuring Siebel Server Autostart If Autostart Was Enabled Earlier" on page 120](#).
- If your Siebel Gateway Name Server and Siebel Server are on different machines, use the procedures under ["Configuring Siebel Server Autostart If Autostart Was Not Enabled Earlier" on page 120](#).

Configuring Siebel Server Autostart If Autostart Was Enabled Earlier

If you have a copy of the `siebel_server` script in the appropriate location, because Autostart was enabled earlier, complete the appropriate procedure for your platform to configure Autostart.

To configure Siebel Server for Autostart using the `siebel_server` script on HP-UX and Solaris

- 1 Log on as root.
- 2 Using any text editor, edit `/sbin/init.d/siebel_server` (HP-UX) or `/etc/init.d/siebel_server` (Solaris) and set the `$SIEBEL_SERVER_ROOT` to the actual path for the Siebel Server installation directory.
- 3 Save the script and exit the editor.

If you have multiple Siebel Servers on the same machine for which you want to enable automatic start-up, you must edit the `siebel_server` script by adding each new `SIEBEL_ROOT` to the `$SIEBEL_SERVER_ROOT` variable, separated by spaces. For example, suppose that the first Siebel Server is in the `/usr/local/siebel` directory and the second one is in the `/vol1/siebel` directory, then you need to set the `$SIEBEL_SERVER_ROOT` variable in the `siebel_server` script, as follows:

```
$SIEBEL_SERVER_ROOT= "/usr/local/siebel /vol1/siebel"
```

Configuring Siebel Server Autostart If Autostart Was Not Enabled Earlier

If you do not have a copy of the script `siebel_server` in the appropriate location, because Autostart was not enabled earlier, complete the appropriate procedure that follows for your platform to configure your server for Autostart.

To configure the Siebel Server to start automatically under HP-UX

- 1 Log on as root to the machine on which the Siebel Server was installed.
- 2 Copy the `siebel_server` script to the `/sbin/init.d` directory, as shown:

```
cp $SIEBEL_HOME/bin/siebel_server /sbin/init.d
```

- 3 Set the appropriate permissions by executing the command:

```
chmod 755 /sbin/init.d/siebel_server
```

4 Create a soft link to /sbin/rc3.d/S720siebel_server from /sbin/init.d/siebel_server by executing the command:

```
ln -s /sbin/init.d/siebel_server /sbin/rc3.d/S720siebel_server
```

The preceding command assumes that you bring up your Siebel Server in init state 3.

5 Create a soft link to /sbin/rc2.d/K320siebel_server from /sbin/init.d/siebel_server, by executing the command:

```
ln -s /sbin/init.d/siebel_server /sbin/rc2.d/K320siebel_server
```

To configure the Siebel Server to start automatically under Solaris

1 Log on as root to the machine on which the Siebel Server was installed.

2 Copy the siebel_server script to the /etc/init.d directory, as shown:

```
cp $SIEBEL_HOME/bin/siebel_server /etc/init.d
```

3 Set the appropriate permissions by executing the command:

```
chmod 755 /etc/init.d/siebel_server
```

4 Create a soft link to /etc/rc3.d/S72siebel from /etc/init.d/siebel_server, by executing the command:

```
ln -s /etc/init.d/siebel_server /etc/rc3.d/S72siebel
```

The preceding command assumes that you bring up your Siebel Server in init state 3.

5 Create a soft link to /etc/rc2.d/K32siebel from /etc/init.d/siebel_server, by executing the command:

```
ln -s /etc/init.d/siebel_server /etc/rc2.d/K32siebel
```

Configuring Siebel Server Autostart When Not Installed as Root on HP-UX and Solaris

If you installed your Siebel Server as a nonroot user, complete one of the procedures that follow to configure it for Autostart as a nonroot user.

To configure Autostart to run as a nonroot Siebel account user under HP-UX

1 Log on as root.

2 Create or edit /sbin/init.d/siebel to add the following line:

```
/usr/bin/su - $SIEBEL_ACCOUNT -c "/sbin/init.d/siebel_server $1"
```

where:

SIEBEL_ACCOUNT = The user account installing Siebel applications

3 Remove /sbin/rc3.d/S720siebel_server and /sbin/rc2.d/K320siebel_server, if they already exist.

4 Execute the following commands:

```
chmod 755 /sbin/init.d/siebel
ln -s /sbin/init.d/siebel /sbin/rc3.d/S720siebel
ln -s /sbin/init.d/siebel /sbin/rc2.d/K320siebel
```

To configure Autostart to run as nonroot Siebel account user under Solaris

- 1 Log on as root.
- 2 Create or edit /etc/init.d/siebel to add the following line:

```
/usr/bin/su - SIEBEL_ACCOUNT -c "/etc/init.d/siebel_server $1"
```

where:

SIEBEL_ACCOUNT = The user account installing Siebel applications

- 3 Remove /etc/rc3.d/S72siebel and /etc/rc2.d/K32siebel, if they already exist.
- 4 Execute the following commands:

```
chmod 755 /etc/init.d/siebel
ln -s /etc/init.d/siebel /etc/rc3.d/S72siebel
ln -s /etc/init.d/siebel /etc/rc2.d/K32siebel
```

Managing Environment Variables

There are several environment variables that must be properly set for optimal functioning of the Siebel Server, as shown in [Table 17](#). These include:

- Siebel environment variables
- UNIX operating system environment variables

For information on tuning the UNIX kernel and other parameters for Siebel Server optimization, see *Performance Tuning Guide* and Siebel SupportWeb.

Table 17. Setting and Managing Environment Variables

Environment Variable	Purpose	Recommended Siebel Value
ODBCINI	Tells the ODBC driver manager which file to open to look for the ODBC data source and driver information. Set within the Siebel siebenv.sh and siebenv.csh environment variable files, which are created during server installation. Always points to <code>\$SIEBEL_HOME/sys/.odbc.ini</code> .	Do not modify.
SIEBEL_UNIXUNICODE_DB	Controls the ODBC driver manager responsible for connection to the RDBMS. Reset, if necessary, within the siebenv.* file before sourcing it.	Default is DB2. You must reset to ORACLE if your database is Oracle.
LANG	Language environment variable within the siebenv.csh or siebenv.sh file. Sets the Siebel Database Server client environment appropriate to the language of installation.	Set this to the language in which your database runs.

The Siebel environment variables `$SIEBEL_HOME` and `$SIEBEL_ROOT` must be set to enable execution of the Siebel Gateway Name Server and Siebel Server management utilities documented in *Siebel System Administration Guide*.

During the Siebel Gateway Name Server and Siebel Server installation process, the script files siebenv.csh (for the C shell and its variants) and siebenv.sh (for the Bourne and Korn shells and their variants) are automatically created in the `$SIEBEL_HOME` directory. When sourced, these shell scripts set the environment variables.

If you have configured your Siebel Server to start manually, you must source siebenv.* before starting the server. For this reason, you may want to add a call to the appropriate siebenv.* script to the logon files of all Siebel administrator UNIX accounts, so that these variables are set automatically whenever a Siebel administrator logs on.

NOTE: If you want to change the default settings of these environment variables, you must do so before you start the Siebel Server.

UNIX Tuning for Siebel Applications

There are a number of UNIX system environment variables you must set for proper functioning of the Siebel Server. For detailed information on tuning the UNIX kernel and other tunable parameters for Siebel Server optimization, see *Performance Tuning Guide* and Siebel SupportWeb. See also “Language Locale Requirements” on page 95.

The LATCH environment variable controls the number of unnamed synchronization objects allocated per Siebel Server. For details on setting this environment variable, see *Performance Tuning Guide*.

Troubleshooting Siebel Server Installation

Installation problems can be caused by a number of things, but the reasons listed in the following section are the most common:

- **Insufficient user privileges.** For information about setting up appropriate administrative user privileges to install, see [Chapter 2, "Preparing for Installation."](#)
- **Trying to install the Siebel Server out of sequence.** For the required installation sequence, see [Chapter 2, "Preparing for Installation."](#)
- **Failure to install required hardware or software.** Installation errors related to software requirements are logged in the Siebel Enterprise Server installer log file. For prerequisites, see *System Requirements and Supported Platforms* on Siebel SupportWeb.
- **Environment variables not set properly.** For more information about environment variables, see ["Managing Environment Variables" on page 122](#).
- **Faulty network connection.** Sometimes a faulty network connection can result in the system administrator being unable to install to the `$SIEBEL_HOME` directory in which he or she has write privileges. Verify that your network connection is stable.
- **Object Manager does not start.** Heavily used servers running more than 50 instances of Object Manager may experience a condition where some of the Object Managers do not start correctly and log the following error message:

```
Got error 1801210 when dequeuing a connection request (62)
```

This error is rectified by changing TCP stack parameters.

For more information about sizing Application Object Manager components, see *Deployment Planning Guide*, *Performance Tuning Guide*, and SupportWeb.

Problem: The Siebel Server does not start after configuration.

Solution a: Verify that the Siebel Gateway Name Server was started. Start it if it was stopped.

Solution b: Verify that the values input during configuration were valid.

Solution c: Verify that you have sufficient system privileges to start the service. For more information, see [Chapter 2, "Preparing for Installation."](#)

This chapter is written for system administrators who install the Siebel Database Server and for database administrators who assist in this process. It includes the following topics:

- “Process of Installing the Siebel Database Server” on page 125
- “About the Siebel Database Server” on page 126
- “Preinstallation Tasks for the Siebel Database Server Installation” on page 126
- “Siebel Database Server Installation” on page 128
- “Configuring the Siebel Database Server” on page 137
- “Postinstallation Tasks for the Siebel Database Server Installation” on page 147

Process of Installing the Siebel Database Server

The Siebel Database Server (DB Server) installation process requires multiple tasks that you should perform in the following sequence:

Preinstallation Tasks for the DB Server Installation

- 1 Fill out your copy of [Appendix A, “Deployment Planning Worksheet,”](#) with all RDBMS-specific information.
- 2 If you intend to implement load balancing or clustering on this database server, see *Deployment Planning Guide*.
- 3 Perform preinstallation tasks. See “[Preinstallation Tasks for the Siebel Database Server Installation](#)” on page 126.

Install the DB Server

- 1 Create the database instance. See [Chapter 3, “Guidelines for Configuring the RDBMS.”](#)
- 2 Install the Siebel Database Server software. See “[Siebel Database Server Installation](#)” on page 128.
- 3 Review the installation. See “[Reviewing Installation of the Siebel Database Server](#)” on page 132.
- 4 If required for your multilingual deployment, reset the Global Time Zone parameter. See “[Setting Up Your Environment to Support Global Time Zone](#)” on page 133.
- 5 Create the tableowner and administrator accounts. See “[Creating Tableowner and Administrator Accounts](#)” on page 133.

6 (DB2 only) Install stored procedures and user-defined functions. See “[Installing the Stored Procedures and User-Defined Functions on DB2](#)” on page 136.

Configure the DB Server

- 1** Install the Siebel Database Server seed data, tables, and indexes. See “[Installing the DB Server Components](#)” on page 137.
- 2** Review the database installation log for errors. See “[Reviewing the Log Files for the DB Server Installation](#)” on page 141.
- 3** Import the Siebel Repository. See “[Importing the Siebel Repository for the DB Server](#)” on page 143.
- 4** Review the repository import log files for errors. See “[Reviewing the Log Files for Repository Import for the DB Server](#)” on page 146.

Postinstallation Tasks for the DB Server Installation

- 1** Review the system preference settings for Enterprise Database Server code page. See “[Verifying System Preferences for the DB Server](#)” on page 147.
- 2** If you are deploying multiple languages, do the following:
 - Install multilingual seed data. See “[Installing Multilingual Seed Data for the DB Server](#)” on page 149.
 - Import multilingual seed data to your repository table rows. See “[Importing a New Language to the Repository](#)” on page 150.
- 3** Populate the Siebel File System. See “[Populating the Siebel File System for the DB Server](#)” on page 151.

About the Siebel Database Server

The Siebel Database Server stores the data used by Siebel eBusiness Applications. Siebel Dedicated Web Clients (Siebel Mobile Web Clients in connected mode), Siebel Tools Clients, and Siebel Server components connect directly to the database server and make changes in real time. Siebel Mobile Web Clients download a subset of the server data to use locally, periodically synchronizing with the database server through the Siebel Server to update both.

Installation and configuration of the Siebel Database Server software configures the Siebel Database automatically.

Preinstallation Tasks for the Siebel Database Server Installation

Before installing the Siebel Database Server, you must complete the following tasks:

- Obtain the services of a qualified database administrator to assist you with your installation.

- Make sure that the Database instance has been created and is properly configured, as documented in [Chapter 3, "Guidelines for Configuring the RDBMS."](#)
- If this Enterprise will be multilingual, make sure that all the languages that you want the Siebel Database to support are first installed onto the associated Siebel Server.
- Complete the appropriate RDBMS-specific information in your copy of [Appendix A, "Deployment Planning Worksheet,"](#) as shown below.

Oracle

- **Oracle Net8 (or Net9, as appropriate to your database) Connect String.** You need this to connect to your Oracle database.
- **Tableowner Account (Schema) Name and Password.** Oracle requires that you assign a user name and password to any database tables you create. The term *tableowner* refers to the schema that owns the database objects, such as tables, indexes, views, and triggers. Prior to installing the database server, you need to edit the grantusr.sql script and enter this information. SIEBEL is the default Tableowner Account user name and password for Siebel applications.
- **Siebel Data Tablespace.** The name of the default tablespace on the Oracle server where the Siebel data tables are stored.
- **Siebel Index Tablespace.** The name of the default tablespace on the Oracle server where the Siebel indexes are stored.
- Install Oracle database client software onto the machine you intend to use as your Siebel Database Server. Make sure that you have set the ORACLE_HOME variable appropriately before installing the Siebel application.

NOTE: Oracle database client and Oracle database versions must be the same. For supported versions of Oracle, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

DB2

- **Database alias.** This is the appropriate DB2 database alias that you created when you installed the DB2 software.
- **Tableowner/database owner account user name and password.** DB2 requires that you assign a user name and password to each database you create. Before installing the database server tablespaces and indexes, you will be prompted to edit the grantusr.sql script and enter this information. SIEBEL is the default tableowner account user name and password for Siebel applications.
- **Siebel Index Tablespace.** The name of the space on the DB2 server where the Siebel indexes are stored.
- **Siebel 4-KB Tablespace.** The name of the tablespace on the DB2 server where the 4 KB Siebel data tables are stored.
- **Siebel 16-KB Tablespace.** The name of the tablespace on the DB2 server where tables reside whose row length is equal to or greater than 4005 bytes, but less than 16384 bytes.
- **Siebel 32-KB tablespace.** The name of the tablespace on the DB2 server where tables reside whose row length is 32768 bytes.

- In Siebel eBusiness Applications, release 7.x, statistics are generated automatically during table, index, and seed data installation for DB2, and during the repository import process. However, it is recommended that statistics be kept up to date through standard database administration procedures.
- Make sure you have installed the required IBM Fix Pack on your database server machine. For more information, see *System Requirements and Supported Platforms* on Siebel SupportWeb.
- Make sure that IBM DB2 UDB is properly configured and you have allocated disk space appropriate to your installation requirements.

Siebel Database Server Installation

Installation of the Siebel Database Server software provides files with which to install database components and to import the Siebel Repository. Installation of the Siebel Database Server software consists of the following tasks:

- “[Installing the Siebel Database Server](#)” on page 128
- “[Reviewing Installation of the Siebel Database Server](#)” on page 132
- “[Setting Up Your Environment to Support Global Time Zone](#)” on page 133
- “[Creating Tableowner and Administrator Accounts](#)” on page 133
- “[Configuring the Siebel Database Server](#)” on page 137

Installing the Siebel Database Server

Complete the steps that follow to complete installation of the Siebel Database Server (sometimes referred to here as *DB Server*).

NOTE: You can have only one database per Siebel Enterprise Server. You must already have a Siebel Server installed on the computer on which you will install the Siebel Database Server.

To avoid DVD swapping, copy all installation files, including the required language files, to a common installation directory within your system, or use the Network Image Creator. For more information, see “[Creating a Network Image](#)” on page 30. If you elect not to install directly from DVD, you will not see some of the prompts regarding swapping the DVD in the following procedure.

NOTE: The following procedure is for installing the base product. For patch installation instructions, refer to the *Maintenance Release Guide* provided with the patch.

To install the Siebel Database Server software

- 1 If you are installing from DVD, insert the appropriate DVD for the Siebel applications into the DVD drive, and mount this DVD:
 - *Siebel eBusiness Applications, Base Applications for UNIX_OS*

■ *Siebel Industry Applications, Base Applications for UNIX_OS*

where:

UNIX_OS = Your UNIX operating system, such as AIX, HP-UX, or Solaris

NOTE: The volume label for the DVD is *seaUNIX_OSunibase* (for Siebel eBusiness Applications) or *siaUNIX_OSunibase* (for Siebel Industry Applications), where *UNIX_OS* is *aix*, *hpx*, or *sol*.

- 2 Navigate to the root directory of the DVD or to the appropriate network directory, if you are installing from a network image.

As a convenience, you may also want to mount the *seaall/anglep* (for Siebel eBusiness Applications) or *siaall/anglep* (for Siebel Industry Applications) DVD, where *lang* is the code for the language you are installing, on a different DVD drive for the same machine.

- 3 Verify the directories and permissions to those directories into which you will install the product. You must have write and execute permission.
- 4 Navigate to *UNIX_OS/Server/Siebel_Enterprise_Server* and open a new shell.
- 5 Unset any Siebel-specific environment variables. To view current environment variable settings, enter *env* in the shell window.
- 6 To start the Siebel Database Server file installation, enter the following command, appending any flags you may also want to use, as described in ["Combining Console Mode and Unattended Mode Installation" on page 76](#).

```
./setupUNIX_OS
```

The Welcome to InstallShield Wizard for Siebel Enterprise Server screen appears.

- 7 Click Next.

Because you have already installed the Siebel Server on the same machine, the installer displays the message that an existing installation has been found.

- 8 Depending on whether you are installing your Siebel Database Server for the first time or adding a new language to an existing instance, take the appropriate action:
 - To install the server software in a new instance, select None as the default and click Next. Proceed to [Step 9 on page 129](#).
 - To install a new language in an existing instance, select the displayed instance and click Next. Proceed to [Step 13 on page 131](#).

See also ["Guidelines for Installing Multiple Language Packs on the Siebel Server" on page 95](#) for important additional information on this topic.

NOTE: You must install the Siebel Database Server in the same directory in which you installed the Siebel Server.

The Installer Path screen appears.

- 9 Enter the fully qualified path to the installation directory, then click Next.

The installer prompts you to select the product that you want to install.

10 Select from the following options, then click Next:

- Install all the components at once for which your organization has a license by selecting all the check boxes.
- Select just the Siebel Database Server at this time for installation and configuration. (You will install and configure the other server components individually later.)

NOTE: If you install all licensed components at once, the installer and the Siebel Software Configuration Wizard prompt you for the installation parameters of each component individually and in the sequence required.

The installer prompts you to select the type of installation setup you prefer.

11 Choose the type of Siebel Database Server installation to execute from the following options, then click Next:

- **Typical.** Installs all Siebel Database Server components.
- **Compact.** Not supported. There is no compact installation option for the database server.
- **Custom.** Lets you customize your installation by choosing the specific components you want to install.

CAUTION: If you select Custom installation, make sure that you also select Sample Database support the first time you install the software. When Sample Database support is installed, additional files are copied to a directory in the Siebel File System after configuration. These files are required to read attachments. For more information, see “Populating the Siebel File System for the DB Server” on page 151.

For a list of the installable components, see the following table.

Installation Setup	Products
Typical or Custom	<p>The following components are installed with a Typical installation, and can be selected individually in a Custom installation:</p> <ul style="list-style-type: none"> ■ Sample Database support—File attachments for Siebel seed data. ■ Oracle Database Enterprise Edition—Database scripts for the Siebel Database on Oracle. ■ IBM DB2 UDB for UNIX and Windows—Database scripts for the Siebel Database on DB2 UDB for UNIX and Windows. ■ IBM DB2 UDB for OS/390 and z/OS—Database scripts for the Siebel Database on DB2 UDB for z/OS and OS/390. See also <i>Implementing Siebel eBusiness Applications on DB2 UDB for z/OS and OS/390</i>.

- If you chose the Custom installation type, proceed to [Step 12 on page 130](#).
- If you chose the Typical installation type, proceed to [Step 13 on page 131](#).

12 If you chose Custom, select the database platform components that you want to install, as described in the table in [Step 11 on page 130](#), and click Next.

13 Choose the Language Pack or Packs you are installing for the Siebel Database Server and click Next.

All servers are installed, at a minimum, with the primary language in which the server will be run. This is the primary (base) language for your Enterprise Server. Optionally, you can install one or more additional languages.

When installing languages at a later date, you must also reinstall any patches (maintenance releases) that have been run on the directory.

NOTE: In a Unicode-enabled database environment, you can install any of the available Siebel Language Packs. In a non-Unicode database environment, you must consider the correlation of the Language Packs you want to install and the characters supported by your database code page. For example, in a Western European code page database, you can only install Western European Language Packs, such as English, French, Spanish, or German Language Packs. In a Japanese code page database, you can only install Japanese or English Language Packs.

For supported code pages and encoding strategies, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

The installer displays the location into which it will install the Siebel Database Server and any other servers you have elected to install. It also displays the file size.

14 Review your installation selections. If you want to make changes, click Back. To proceed with installation, click Next.

The installer proceeds to install the specified files. After the files have been copied to the installation location, this message appears:

Setup did not find the *7ang* Language pack on the current media. Please insert the DVD containing the *7ang* language pack and select the *setupUNIX_OS* file from the *7ang* folder.

where:

lang = The code for the language you are installing, such as *enu* for U.S. English.

UNIX_OS = Your UNIX operating system, such as *aix*, *hp*, or *sol*.

NOTE: For Siebel Industry Applications, the Windows and UNIX Language Packs are on different DVDs.

15 Mount to the appropriate Language Pack DVD (*seaall/anglep* for Siebel eBusiness Applications or *siaall/anglep* for Siebel Industry Applications) and click OK.

A dialog box appears, displaying a file called *siebel.ini*. However, you do not need to do anything with this file.

16 Clear the filter dialog box, if needed, to be sure that you can see the appropriate files.

17 Open `setupUNIX_OS` under the `UNIX_OS/Server/Siebel_Enterprise_Server/lang` directory, where `UNIX_OS` is your UNIX operating system, such as aix, hp, or sol, and `lang` is the code for the Language Pack you are installing, such as FRA for French.

A message appears, stating that language files are being installed.

When installation of all the language files has been completed, the installer prompts you again for the base DVD.

Please re-insert the base DVD and browse to `setupUNIX_OS` file to enable setup to continue.

where:

`UNIX_OS` = Your UNIX operating system, such as aix, hp, or sol.

18 Navigate again to the base DVD mount point on the network, locate `UNIX_OS/Server/Siebel_Enterprise_Server/setupUNIX_OS`, and click OK.

After all server files specified have been installed, the installer displays the message:

The InstallShield Wizard has successfully installed the Siebel Enterprise Server. Click Finish to exit the wizard.

19 Click Finish.

20 Proceed to “[Reviewing Installation of the Siebel Database Server](#)” on page 132.

If you would like to view events that occurred during the installation, you can access the log generated by the installer at `$SIEBEL_ROOT/log.txt`.

Reviewing Installation of the Siebel Database Server

Review the directory structure created by the Siebel Database Server installation, as illustrated in this section. The example that follows results from a Custom installation.

The database server subdirectory is located under the `DBSRVR_ROOT` directory within the Siebel Server root directory you specified during the installation; for example, `$SIEBEL_ROOT/dbsrvr`.

db_server (oracle or db2udb). Scripts specific to your database, including upgrade scripts for previous versions of Siebel applications.

siebproc (DB2 only).

aix. User Defined Functions (UDFs) and stored procedures for DB2 on AIX systems.

hpx. UDFs and stored procedures for DB2 on HP-UX.

solaris. UDFs and stored procedures for DB2 on Solaris.

win32. UDFs and stored procedures for DB2 on Windows.

linux. UDFs and stored procedures for DB2 on Linux.

sqlproc (DB2 only). Contains subdirectories that contain the SAR (stored procedure archive) files for all supported OS platforms installed on the server.

upgrade. Directories containing files to enable upgrade from specific versions of Siebel eBusiness Applications supported for upgrade to the current release.

language. Contains language- and database-specific files for the ancestor repository and supporting files. For example, ENU would contain language-specific U.S. English files, or DEU would contain German-language-specific files.

files (Oracle only). This directory contains sample file attachments and is created if you install Sample File Attachments. These files should be copied to the appropriate subdirectory of the Siebel File System. See ["Populating the Siebel File System for the DB Server" on page 151](#).

Setting Up Your Environment to Support Global Time Zone

Global deployments typically span multiple time zones, making it difficult to manage time-sensitive information that must be exchanged among customers and employees working around the world. You can use the Global Time Zone feature to monitor the transfer of tasks between sites in different time zones.

The Global Time Zone feature converts and stores date and time data, using the Universal Time Zone (UTC) standard, which is equivalent to Greenwich Mean Time, but without daylight savings time.

You also need to make sure that time on all your machines are in sync by using a common NTP server for time synchronization.

If you intend to operate your deployment with the Global Time Zone feature enabled, you must also set the operating system of your database servers to UTC time, or its equivalent. It is recommended that you change the time zone for the hosted application and not for the entire server. To change the operating system time, consult the vendor documentation for your operating system. For more information on enabling Global Time Zone, see *Global Deployment Guide*.

For restrictions on installing and configuring UTC on DB2 UDB for z/OS or OS/390, see *Implementing Siebel eBusiness Applications on DB2 UDB for z/OS and OS/390*.

NOTE: The Global Time Zone parameter (Universal Time Coordinated system preference) is enabled (set to TRUE). If you do not want to enable the Global Time Zone feature, you must reset this parameter to FALSE by navigating to Administration - Application > System Preferences.

Creating Tableowner and Administrator Accounts

Create the tableowner and administrator accounts according to the guidelines provided for each database platform in this section.

Oracle

Before configuring the Siebel Database Server, your database administrator must review and modify (if necessary) the `grantusr.sql` script. The administrator must then execute the `grantusr.sql` script against your Siebel Database Server to create the Siebel tableowner (default: `SIEBEL`), Siebel administrator (default: `SADMIN`), `LDAPUSER` accounts, and the role `sse_role`, and grant them the appropriate privileges.

Before executing `grantusr.sql`, the database administrator should copy the following command in the script, so it is defined once for each tablespace (for data or indexes) in your Siebel implementation:

```
alter user SIEBEL quota unlimited on tablespace_name;
```

If necessary, the quota value can be adjusted to an appropriate value for each corresponding tablespace.

The `grantusr.sql` script is located in the `$/SIEBEL_ROOT/dbsrvr/oracle` subdirectory.

The `grantusr.sql` script performs the following functions:

- Creates the role `sse_role` and grants `create session` privilege to this role.
- Creates the user `SIEBEL` (the Siebel tableowner) and grants other appropriate privileges to `SIEBEL`.
- Creates the users `SADMIN` and `LDAPUSER` and grants the role `sse_role` to them.

The default user name and password for the logon are listed in the `grantusr.sql` script. If you want another logon, edit the `grantusr.sql` script and change all the references to your preferred name. However, keep in mind that the length and allowable characters for the login ID and password depend on the rules of your underlying RDBMS platform. For instructions, see your Oracle documentation.

CAUTION: It is strongly recommended not to change the name of the Siebel administrator account, `SADMIN`. This account must be created for you to log onto Siebel eBusiness Applications as the Siebel administrator. For information about changing the password for this account, see the *Security Guide for Siebel eBusiness Applications*.

To run the `grantusr.sql` script on Oracle

- 1 Run the `grantusr.sql` script from SQL*Plus, using an account with DBA privileges, and using the following command:

```
@/$/SIEBEL_ROOT/dbsrvr/oracle/grantusr.sql
```

NOTE: You must specify the full path to the file above.

- 2 Type the tablespace name listed in [Appendix A, "Deployment Planning Worksheet."](#)

DB2

Your database administrator must manually create the Siebel tableowner account (default: `SIEBEL`), the Siebel administrator account (default: `SADMIN`), and the `sse_role` group. The database administrator must then add the Siebel administrator account to the `sse_role` group at the operating system level.

You can add users to the installation group `sse_role` group and permit them to use administrative commands to start, stop or otherwise administer the Siebel Server or components. However, you must change the permissions on the directory to enable write access, using the following command:

```
chmod -R 775 $SIEBEL_ROOT
```

NOTE: On Solaris, the `sse_role` group cannot be created using the `admintool`, due to the use of an underscore in the name. Instead, use the command `groupadd sse_role` to create the `sse_role` group and ignore the warning: `groupadd: sse_role name should be all lower case or numeric.`

After your database is created and before it is configured, execute the `grantusr.sql` script against your database server to grant the appropriate privileges to these users. The `grantusr.sql` script must be run before you configure the Siebel Database Server. The `grantusr.sql` script is located in the `$SIEBEL_ROOT/dbsrvr/db2udb` subdirectory.

Your database administrator should review and run this script, which performs the following functions:

- Grants the appropriate permissions to the Siebel tableowner account that will own all the database objects for your Siebel deployment.
- Creates a role (`sse_role`) with `create session` privileges.

You cannot create the `LDAPUSER` account by running `grantusr.sql`. This account must belong to the `sse_role` group and be created by the database administrator or the UNIX network administrator, as appropriate. For more information about LDAP security adapter authentication, see *Security Guide for Siebel eBusiness Applications*.

CAUTION: It is strongly recommended not to change the name of the Siebel administrator account, `SADMIN`. This account must be created for you to log onto Siebel eBusiness Applications as the Siebel administrator. For information about changing the password for this account, see the *Security Guide for Siebel eBusiness Applications*.

To run the `grantusr.sql` script on DB2

- 1 Run the `grantusr.sql` script, using an account with DBA privileges.

The usual DB2 System Administration account will be called `db2inst1` for this procedure.

- 2 Enter the following commands:

```
db2 connect to DB2database_alias user instance_owner_username using password
```

```
db2 -vf $SIEBEL_ROOT/dbsrvr/db2udb/grantusr.sql
```

where:

DB2database_alias = The DB2 alias you use

instance_owner_username = The login ID of the instance owner

password = The password for the database instance (length and allowable characters depend on the rules of your underlying RDBMS platform)

SIEBEL_ROOT = The full path to the Siebel root directory

The script prompts you for the default tablespace in which your Siebel objects are to be created.

- 3 Enter the tablespace name you recorded in the copy you made of [Appendix A, "Deployment Planning Worksheet."](#)

Tableowner and Administrator Account for Siebel Marketing

If you are planning to use Siebel Marketing, grant drop table, drop index, create table, and create index rights at the database level within the OLTP schema to the tableowner or the database user ID used for Siebel Marketing. For more information, see *Siebel Marketing Installation and Administration Guide*.

Installing the Stored Procedures and User-Defined Functions on DB2

To install the stored procedures and user-defined functions on your Siebel Database Server, you must first transfer them to the Siebel Database Server, and you must have already installed the Siebel Database Server components. For information on installing Siebel Database Server components, see ["Installing the DB Server Components" on page 137](#).

The user-defined functions (UDFs) and stored procedures must be transferred to and installed on the Siebel Database Server to support the Siebel product. Any method that transfers the necessary files to the correct location on the Siebel Database Server is acceptable.

Copying and Installing Stored Procedure Code on DB2

To copy and install the stored procedure code, complete the procedure that follows. Use the steps appropriate to the operating system on which the Siebel Database Server runs.

For information on how to perform basic DB2 tasks, see IBM's *Quick Beginnings* guide.

To copy and install the stored procedure

- 1 Log on to the Siebel Server source installation machine, and navigate to the source installation subdirectory that contains the Siebel Database installation objects.

The directory that contains the files to install is:

DBSRVR_ROOT/db2udb/siebproc/DBSRVR_OS

where:

DBSRVR_ROOT = The Siebel Database Server component subdirectory of your Siebel eBusiness Applications installation directory (*\$SIEBEL_ROOT/dbsrvr*)

DBSRVR_OS = The operating system your database server runs on, for example, AIX

- 2 Copy the file siebproc to the function subdirectory within the DB2 UDB instance directory on the machine where DB2 UDB is installed.

For example, on AIX, this location might be \$INST_HOME/sqllib/function.

Permissions for siebproc should be -rw-r---- (read-write for the owner, read for the group, and neither read nor write for all others). The owner of the file should be the instance owner, and the group should be the group to which the instance owner belongs.

NOTE: If you are deploying with DB2 v8 64-bit, then you need to copy the siebproc64 library file to the sqllib/function directory and rename it from siebproc64 to siebproc.

- 3 Proceed to “Configuring the Siebel Database Server” on page 137.

Configuring the Siebel Database Server

Configuring the Siebel Database Server for installation requires these tasks:

- “Installing the DB Server Components” on page 137
- “Reviewing the Log Files for the DB Server Installation” on page 141
- “Importing the Siebel Repository for the DB Server” on page 143
- “Reviewing the Log Files for Repository Import for the DB Server” on page 146

You will perform configuration tasks using the Siebel Software Configuration Wizard - DB Server Configuration.

Installing the DB Server Components

When you choose Install a new Siebel Database from the Siebel Database Server Options menu of the Siebel Software Configuration Wizard, the utility performs the following tasks:

- Creates Siebel tables and indexes in a specified tablespace.
- Inserts Siebel seed data specific to your database.
- Installs views, packages, and procedures for your database.
- Sets system preferences.

NOTE: Every time you install a new language, you must launch the Siebel Software Configuration Wizard and navigate to Siebel Database Server Options > Install > Add a language to an existing database. For a list of languages supported by Siebel eBusiness Applications in this release, and their corresponding Siebel language codes, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

To install Siebel Database Server components

1 Navigate to `$SIEBEL_HOME/bin` and source environment variables, using one of the following commands, depending on the type of shell you use:

Korn or Bourne shell

```
. ./siebenv.sh
```

TIP: Make sure there is a space between the initial period and `./siebenv.sh`.

C shell

```
source siebenv.csh
```

where:

`$SIEBEL_HOME` = The location of the Siebel Server root directory

2 Verify whether the values for `SIEBEL_ROOT` and `LANGUAGE` are correctly set or are empty by entering:

```
env
```

If the variables are incorrect or missing, reset them using one of the following commands, as appropriate to the shell you use:

Korn or Bourne shell

```
SIEBEL_ROOT=New Value ; export SIEBEL_ROOT
```

```
LANGUAGE=New Value ; export LANGUAGE
```

C shell

```
setenv SIEBEL_ROOT New Value
```

```
setenv LANGUAGE New Value
```

3 Navigate to `$SIEBEL_ROOT/bin` and run the following script:

```
dbsrvr_config.ksh
```

This script launches the Siebel Database Server Configuration Wizard.

The script displays the current settings for the `SIEBEL_ROOT` and `LANGUAGE` variables and prompts you as to whether these settings are correct.

4 Confirm whether or not the settings are correct by entering either `Y` or `N`.

NOTE: If either the `SIEBEL_ROOT` value or the `LANGUAGE` value, which should be the Language Pack installed on the machine, is not set or is incorrect, you must correct them before proceeding.

The Configuration Wizard validates the existence of the `$SIEBEL_ROOT` directory.

5 Specify a different path to your Siebel Server root directory, or press Enter to accept the current setting.

The Configuration Wizard then prompts you for the path to the Siebel Database Server root directory.

6 Specify the path to your Siebel Database Server root directory, or press Enter to accept the current setting.

7 Select the appropriate RDBMS for your installation by entering the respective number from the list the list of supported database platforms displayed:

Select the RDBMS Platform:

- 1- IBM DB2 UDB for Windows and UNIX
- 2- IBM DB2 UDB for Z/OS and OS/390
- 3- Oracle Database Enterprise Edition

8 (Oracle only) Select the appropriate Oracle version for your environment from the Database Version menu:

- 1- Oracle 8i
- 2- Oracle 9i

9 Enter 1 to select the Install Database option from the Siebel Database Operation menu:

Select the Siebel Database Operation

- 1- Install Database
- 2- Upgrade Database
- 3- Import/Export Repository
- 4- Migrate Repository
- 5- Run Database Utilities

10 On the next screen, enter Y if you ran grantusr.sql to set up your tableowner and administrator accounts or N to exit the Configuration Wizard to run this script.

NOTE: These accounts must be in place or you will not be able to complete installation of your seed data, tables, and indexes.

If you elected to proceed, the script displays the Installation Options menu:

Select one of the following options:

- 1- Install Siebel Database
- 2- Add a language to an existing Siebel Database
- 3- Install Siebel Data Warehouse Database (only for IBM DB2 UDB Z/OS and OS/390)

11 Enter 1 to install the Siebel Database components for this database.

12 (Oracle and DB2 UDB for Windows and UNIX only) On the Database Encoding screen, enter the number that corresponds to the database encoding value for your database:

- 1- Unicode
- 2- Non-Unicode

CAUTION: Choose the correct option for your database to prevent installation of the wrong data types. The database will not be able to create Unicode data types on a non-Unicode page setting, so check this setting carefully before choosing the option.

The script displays the list of currently installed languages.

13 Enter the number corresponding to the language in which you want to run your database. This is referred to as the primary (base) language for your database.

14 On the ODBC Data Source screen, specify the ODBC data source name; for example, siebsrvr_siebel1. If you have selected DB2 UDB for z/OS and OS/390, also indicate the Source Database DB2 SubSystem Name. Then click Next.

You can find the ODBC data source name under the [ODBC Data Sources] section of the .odbc.ini file located in the \$SIEBEL_ROOT/sys/ directory.

The Database Username screen appears.

15 Enter the user name and password for the Siebel administrator for your database; for example, SADMIN and SADMIN (Oracle) or SADMIN and db2 (DB2).

The Database Tableowner screen appears.

16 Enter the database tableowner name and password; for example, ora*** and ora*** or siebel and db2.

The Database Server OS screen appears.

17 (DB2 only) On the Database Server OS screen, select the platform on which your database server runs, and click Next.

- 1- Windows
- 2- Solaris
- 3- AIX
- 4- HP-UX5- Linux

18 (Oracle only) On the Database Index screen, enter the name of your index tablespace; for example, INDEX01.

19 (Oracle only) Enter the name of your tablespace; for example, DATA01.

After you have completed your database specifications, the Configuration Wizard displays the list of configured values and prompts you as to whether you want to launch the Siebel Upgrade Wizard (srvrupgwiz).

The Oracle Parallel Index screen appears.

20 (Oracle only) In the Oracle Parallel Index screen, specify the appropriate environment for your installation:

1. I have a single CPU environment
2. I have a multiple CPU environment

NOTE: The single-CPU option above assumes that you are *not* running with parallel indexing on. The multiple-CPU option assumes that you *are* running with parallel indexing on. If you have a multiple-CPU environment but are *not* running with parallel indexing on, choose option 1.

21 (DB2 only) Enter the name of your 4-KB tablespace.

22 (DB2 only) Enter the name of the 16-KB tablespace.

23 (DB2 only) Enter the name of the 32-KB tablespace.

The Common Parameters screen appears.

24 Press Enter to accept the default or modify the default and then press Enter.

25 Click Next to accept the default directory for the Siebel Log Process directory or enter a different directory and then click Next.

26 Enter Y to confirm your specifications and launch the Upgrade Wizard or N to reject the values and exit the Configuration Wizard.

- If you need to change the values you previously entered, rerun the Configuration Wizard by running the `dbsrvr_config.ksh` script. Rerunning the wizard allows you to reconfigure with different values.
- If a program or system error occurs and you need to rerun the Siebel Upgrade Wizard, you can do so, starting at the point at which the wizard failed. **For details, see *Upgrade Guide*.**

If the upgrade was successful, the Siebel Upgrade Wizard displays a success message when installation is complete.

Reviewing the Log Files for the DB Server Installation

The Siebel Database Server component installation creates several log files within the `$SIEBEL_ROOT/log` subdirectory. You must review the files in this subdirectory for any errors.

For example, log files created may be named `srvrupgwiz1.log` (the most recently created), `srvrupgwiz1_01.log`, `srvrupgwiz1_02.log`, and so.

NOTE: For information about reviewing log files using the `logparse` utility, see the *Upgrade Guide*.

Some other files generated for selected supported RDBMS are listed below.

DB2 UDB. For DB2 UDB, the following log files are also generated when you create seed data, tables, and indexes:

```
ddl_ctl.log
dataimp_prim.log
dataimp_prim_lang.log
db2ddl.log
siebproc.log
seeddb2.log
seedver.log
seedssa.log
```

```
ddlview.log
ddlview_sia.log (for SIA)
grantstat.log
updatestats.log
loadstats.log
set_utc_on.log
```

Oracle. For Oracle, the following log files are also generated when you create seed data, tables, and indexes:

```
ddl_ctl.log
dataimp_prim.log
dataimp_prim_lang.log
ddlseq.log
ddlora.log
ddlview.log
ddlview_sia.log (for SIA)
seedssa.log
seedver.log
pkgseq.log
pkgldel.log
seedora.log
pkgvis.log
trgreset.log
ifstrg.log
ifindxstrg.log
set_utc_on.log
month_fn.log
```

Acceptable Errors for the DB Server Installation

The log files may include errors that are expected and benign. Compare any error messages found in the log files to the sample error messages in the errors.txt file, which is located in the installation subdirectory for your database platform, for example, oracle. If a log file is not listed in the errors.txt file, then there are no acceptable error messages for that log file. No further action is required if the log files contain errors listed in the errors.txt file.

NOTE: Only one of each type of error occurring in a particular log file appears in the errors.txt file.

If you find errors not listed in the errors.txt file, correct the condition that caused the errors, and rerun the Upgrade Wizard. The wizard will restart from the point where it left off.

Do not review only the error numbers, because these may have changed following installation of a new driver version. Instead, compare the actual error descriptions to find out which are acceptable errors for this platform.

CAUTION: Although other errors are rarely encountered, this review is critical. Certain errors, such as a failure to create indexes, may result in performance problems or anomalous behavior in Siebel eBusiness Applications.

Troubleshooting the DB Server Installation

Typically, problems during database installation result from insufficient storage space having been allocated, or from the installer having improper user privileges.

Providing a Rollback Segment on Oracle

To avoid certain types of errors after importing the repository, make sure that your database administrator provides only one large rollback segment online in your Oracle database.

Importing the Repository to a Target Database Host on Oracle

Some organizations download tar files onto one machine and, for convenience, install seed data and import the repository from this source machine to another target server where the database resides. If your organization does this, and your platform is Solaris, you must set the following UNIX environment variables for Oracle on the source machine or your repository import will fail:

NLS_LANGUAGE_NLS_TERRITORY.NLS_CHARACTERSET

where:

NLS_LANGUAGE = The language in which your Oracle database runs; for example, CANADIAN FRENCH

NLS_TERRITORY = The territory or region that applies to your language; for example, CANADA

NLS_CHARACTERSET = The character set (also called a code page) that applies to your platform and locale; for example, WE8MSWIN1252 (Western European on Sun Solaris)

To obtain the correct values for these variables, do one of the following:

- Query the v\$nlsparameters table.
- Ask your Oracle administrator.

CAUTION: The source node from which you install and execute must house a Siebel Server.

Importing the Siebel Repository for the DB Server

As a final step, you must import the Siebel Repository. This populates all the repository tables in the Siebel Database Server with the new Siebel eBusiness Applications application objects.

Regardless of how many Siebel eBusiness Applications you are using (for example, Siebel Call Center, Siebel Sales, Siebel Service, and Siebel Marketing), you will load the repository tables only once.

NOTE: When you import data into the Siebel Repository tables, a commit is performed once for each table into which repository data is imported. Alternatively, the commit frequency can be set to a specified number of rows by including the command-line option */h num_rows_per_commit* when the repimexp utility is invoked.

To import the Siebel Repository

1 Navigate to `$SIEBEL_HOME/bin` and source environment variables, using one of the following commands, depending on the type of shell you use:

Korn or Bourne shell

```
. ./siebenv.sh
```

TIP: Make sure there is a space between the initial period and `./siebenv.sh`.

C shell

```
source siebenv.csh
```

where:

`$SIEBEL_HOME` = The location of the Siebel Server root directory

2 Verify whether the `SIEBEL_ROOT` and `LANGUAGE` variables are correctly set or are empty by entering:

```
env
```

If the variables are incorrect or missing, reset them using one of the following commands, as appropriate to the shell you use:

Bourne or Korn shell

```
SIEBEL_ROOT=New Value; export SIEBEL_ROOT
```

```
LANGUAGE=New Value; export LANGUAGE
```

C shell

```
setenv SIEBEL_ROOT New Value
```

```
setenv LANGUAGE New Value
```

3 Navigate to `$SIEBEL_ROOT/bin` and run the following script:

```
dbsrvr_config.ksh
```

This script launches the Siebel Database Server Configuration Wizard.

NOTE: You must have read, write, and execute permission to run this script successfully.

The script begins by displaying the current settings for the `SIEBEL_ROOT` and `LANGUAGE` variables and prompts you as to whether these settings are correct.

4 Confirm whether or not the settings are correct by entering either `Y` or `N`.

NOTE: If either the `SIEBEL_ROOT` or `LANGUAGE` value is not set or is incorrect, you must correct them before proceeding.

5 Specify the path of your Siebel Server root directory, or accept the default by pressing Enter.

6 Specify the path of your Siebel Database Server root directory, or accept the default by pressing Enter.

The script displays the RDBMS Platform screen.

Select the RDBMS Platform:

- 1- IBM DB2 UDB for UNIX and Windows
- 2- IBM DB2 UDB for Z/OS and OS/390
- 3- Oracle Database Enterprise Edition

- 7 Enter the appropriate number for the RDBMS for your installation and press ENTER.
- 8 **(Oracle only)** On the Database Version screen, enter 1 or 2 based on the Oracle version you are using.
- 9 On the Siebel Database Operation screen, type 3 and press Enter to select Import/Export Repository.

Select the Siebel Database Operation

- 1- Install Database
- 2- Upgrade Database
- 3- Import/Export Repository
- 4- Migrate Repository
- 5- Run Database Utilities

- 10 On the Repository Operations screen, type 1 and press Enter to select Import Repository.

Select one of the following options:

- 1- Import Repository
- 2- Add language to an existing Repository
- 3- Export Repository

- 11 On the Import Repository screen, specify the type of Repository you want to import.

Specify your import repository option:

- 1- Import Siebel Repository
- 2- Import Custom Repository

The script displays the list of available Language Packs.

- 12 Enter the number that corresponds to the Language Pack you want to install.

NOTE: In a Unicode-enabled database environment, you can install any of the available Siebel Language Packs. In a non-Unicode database environment, you must consider the correlation of the Language Packs you want to install and the characters supported by your database code page. For example, in a Western European code page database, you can only install Western European Language Packs, such as English, French, Spanish, or German Language Packs. In a Japanese code page database, you can only install Japanese or English Language Packs.

For a list of supported code pages and encoding strategies, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

13 Enter the ODBC data source name; for example, `siebsrvr_ent_srvr1`.

NOTE: The data source is created automatically by the Siebel Server installation, using the format `SiebSrvr_enterprise_server_name`. You should not change any of the default ODBC settings or parameters; otherwise, you will encounter problems using the ODBC. For example, setting the `optimizeLongPerformance` parameter to `enable` corrupts all the scripts in the repository during the import or export processes.

14 Enter the user name password for the Siebel administrator for your database; for example, `SADMIN` and `ORASADMIN`.

15 Enter the Oracle database tableowner name and password; for example, `siebel` and `orasadmin`.

16 Enter the name of your repository or accept the default; for example, `Siebel Repository`.

17 Enter the name of your repository file name or accept the default; for example, `mstrep.dat`.

After you have completed your import Repository specifications, the Configuration Wizard displays the list of configured values and prompts you as to whether you want to launch the Siebel Upgrade Wizard (`srvrupgwiz`).

18 Enter 1 to confirm your specifications and launch the Upgrade Wizard, or 2 to reject the values and exit the Configuration Wizard.

If you need to change the values you previously entered, rerun the Configuration Wizard by running the `dbsrvr_config.ksh` script. Rerunning the wizard allows you to reconfigure with different values.

If a program or system error occurs and you need to rerun the Siebel Upgrade Wizard, you can do so, starting at the point at which the wizard failed. For details, see *Upgrade Guide*.

If the upgrade was successful, the Siebel Upgrade Wizard displays a success message when installation is complete.

Reviewing the Log Files for Repository Import for the DB Server

The repository import process creates several log files within the `$SIEBEL_ROOT/log` subdirectory. You must review the files in this subdirectory for any errors.

For more information, see ["Reviewing the Log Files for the DB Server Installation" on page 141](#).

Acceptable Errors for Repository Import for the DB Server

The log files may include errors that are expected and benign. Compare any error messages found in the log files to the sample error messages in the `errors.txt` file, which is located in the database server platform subdirectory, for example, `oracle`. If a log file is not listed in the `errors.txt` file, then there are no acceptable error messages for that log file. No further action is required if the log files contain errors listed in the `errors.txt` file.

NOTE: Only one of each type of error occurring in a particular log file appears in the `errors.txt` file.

If you find errors not listed in the errors.txt file, correct the condition that caused the errors, and rerun the Upgrade Wizard.

Do not review only the error numbers, because these may have changed following installation of a new driver version. Instead, compare the actual error descriptions to find out which are acceptable errors for this platform.

CAUTION: Although other errors are rarely encountered, this review is critical. Certain errors, such as a failure to create indexes, may result in performance problems or anomalous behavior in Siebel eBusiness Applications.

Troubleshooting Siebel Repository Import for the DB Server

Typical problems that may occur at this stage consist of the following:

- Importing a repository with the same name as an existing repository.
- Database runs out of tablespace pages and cannot allocate new data pages which can be resolved by increasing the tablespace sizes.
- **(DB2 only)** Errors regarding the settings for DB2 configuration parameters, such as APP_CTL_HEAP_SZ. These must be reset, in most cases, to higher values, because Siebel Systems' guidelines suggest only minimum values.

The preceding errors should appear in the log files produced by the repository import process.

Postinstallation Tasks for the Siebel Database Server Installation

Perform the following tasks after you complete your installation of the Siebel Database Server:

- “Verifying System Preferences for the DB Server” on page 147
- “Installing Multilingual Seed Data for the DB Server” on page 149
- “Importing a New Language to the Repository” on page 150
- “Populating the Siebel File System for the DB Server” on page 151

Verifying System Preferences for the DB Server

After you complete the installation and configuration of your Siebel Database Server, you must verify system preferences for the Siebel application in Siebel Tools. For installation instructions for Siebel Tools, see [Chapter 10, “Installing Siebel Tools.”](#)

To verify system preferences

1 Launch Siebel Tools and navigate to Screens > System Administration > System Preferences.

NOTE: The first time you bring up Siebel Tools, the system prompts you to enter a license key number, if you have not done so already. You can find the license key that has been assigned to your site in your license key letter provided with the DVD case or in a MS Word document along with other documents, if you have used FTP to download the software. For detailed information about license keys, see the *Applications Administration Guide*.

2 Look for System Preference Name = Enterprise DB Server Code Page and verify that the value has been set correctly, based on the value that you selected during installation of the database server components (see “[Installing the DB Server Components](#)” on page 137). For a list of the appropriate values, see [Table 18 on page 148](#).

NOTE: The Code Page value must be in lowercase, for example, utf-8 or utf-16.

Table 18. Acceptable Values for Enterprise DB Server Code Page

Value	Language	Database
utf-8 ¹ (Unicode)	All	Oracle 9i
utf-16 ² (Unicode)	All	DB2
cp932 (or equivalent)	Japanese	Oracle 9i, Oracle 8i, DB2
cp1252 (or equivalent)	Western European	All

1. The Oracle database character set may have a different value, although the value entered must be utf-8.

2. Also known as UCS-2, although the value entered must be utf-16.

3 If your database is Unicode-enabled, verify that column UNICD_DATATYPS_FLG in the table S_APP_VER has the Unicode flag set correctly, as illustrated below:

- Codepage (non-Unicode) = N

Oracle

- Unicode Oracle = 8

DB2

- Unicode DB2 Server = Y

NOTE: The data type flag must be uppercase.

Installing Multilingual Seed Data for the DB Server

If your organization deploys internationally and, therefore, requires data to be in multiple languages, you must install multilingual seed data (for example, lists of views, responsibilities, or system preferences). To do so, you add new Language Packs to your database after you have installed the primary (base) language for your database server. This addition populates the List of Values (LOV) with seed data in the new language.

Only after you successfully install seed data in your primary (base) language, can you add seed data in other languages to your database. Adding this seed data also adds new LOV data in the new language.

CAUTION: You cannot add secondary languages to the Siebel Database for a Siebel Enterprise Server unless you have already installed them on the associated Siebel Server.

To install multilingual seed data

- 1 Insert the appropriate DVD for the Siebel applications into the DVD drive, and mount this DVD:
 - *Siebel eBusiness Applications, Base Applications for UNIX_OS*
 - *Siebel Industry Applications, Base Applications for UNIX_OS*

where:

UNIX_OS = Your UNIX operating system, such as AIX, HP-UX, or Solaris

NOTE: The volume label for the DVD is *seaUNIX_OSunibase* (for Siebel eBusiness Applications) or *siaUNIX_OSunibase* (for Siebel Industry Applications), where *UNIX_OS* is aix, hpx, or sol.

- 2 Follow the instructions under ["Installing the Siebel Database Server" on page 128](#) until you get to [Step 5 on page 129](#), but select 2 to select Add a new language to an existing instance.
- 3 Follow the rest of the prompts, inserting the required Language Pack DVD for your Siebel product.
- 4 When installation is complete, launch the Database Server Configuration Wizard and repeat [Step 1 on page 138](#) to [Step 11 on page 139](#) under ["Installing the DB Server Components" on page 137](#).
- 5 On the Select Installation Operation screen, select Add a language to an existing Siebel Database, and then click Next.

- 6 Answer the remaining prompts as you did when you installed your primary (base) language seed data.

NOTE: In a Unicode-enabled database environment, you can install any of the available Siebel Language Packs. In a non-Unicode database environment, you must consider the correlation of the Language Packs you want to install and the characters supported by your database code page. For example, in a Western European code page database, you can only install Western European Language Packs, such as English, French, Spanish, or German Language Packs. In a Japanese code page database, you can only install Japanese or English Language Packs.

For a list of supported code pages and encoding strategies, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

NOTE: To rerun the Upgrade Wizard at the point a program failed or a system error occurred, following the installation of multilingual seed data, see the *Upgrade Guide*.

- 7 Enable the multilingual list of values (MLOV) capability within Siebel eBusiness Applications. For information, see *Configuring Siebel eBusiness Applications*.

Importing a New Language to the Repository

After you successfully import your Siebel Repository in its primary (base) language, you may add additional languages to it.

By adding a new language to your repository, you populate rows of localized User Interface strings for repository objects, which allows Siebel eBusiness Applications to better display the UI in the new language.

Regardless of how many Siebel eBusiness Applications you are using (such as Siebel Sales, Siebel Service, and Siebel Marketing), you perform this step only once for each language you want to install.

CAUTION: You cannot add secondary languages to the Siebel Database for a Siebel Enterprise Server unless you have already installed them on the associated Siebel Server.

To import a new language to your repository

- 1 Follow the procedure for “[Importing the Siebel Repository for the DB Server](#)” on page 143 up to [Step 6 on page 144](#), but choose option 2, Add Language to an Existing Repository.
- 2 Answer the remaining prompts as you did when you imported your primary (base) language repository.

NOTE: To rerun the Upgrade Wizard at the point a program failed or a system error occurred, following importing the repository or following importing new languages to the repository, see the *Upgrade Guide*.

Populating the Siebel File System for the DB Server

Specific files needed to run the Siebel File System, such as correspondence templates and Siebel Marketing files, are provided with the Siebel Database Server software. A subdirectory called *files* is created when you install the Siebel Database Server.

The Siebel administrator must populate the /att File System directory with these file attachments after installing the Siebel Database Server, and before running the Siebel Web Client.

To populate the Siebel File System directory

- 1 Copy the appropriate files from the /files subdirectory of the Siebel Database Server software to the /att subdirectory of the Siebel File System.
- 2 Copy the KB.kb file (for Siebel Smart Answer) from the /files subdirectory of the Siebel Database Server software to the /cms directory within the Siebel File System.
- 3 Verify that the files are in the correct location.

8

Installing the Siebel Web Server Extension

The chapter is written for system administrators or Webmasters who will install and configure the Siebel Web Server Extension (SWSE) on their Web servers. It includes the following topics:

- “[Process of Installing and Configuring the SWSE](#)” on page 153
- “[Siebel Web Server Extension Installation Requirements](#)” on page 154
- “[Installing the Web Server](#)” on page 156
- “[Installing the Siebel Web Server Extension](#)” on page 157
- “[Configuring the Web Server](#)” on page 164
- “[Postinstallation Tasks for Siebel Web Server Extension](#)” on page 165
- “[Troubleshooting Siebel Web Server Extension Installation](#)” on page 177

Siebel Web Server Extension (SWSE) enables communication between Siebel eBusiness Applications Web Clients and Siebel Servers.

Siebel eBusiness Applications are a family of Web-based applications that users access through a standard Web browser. These applications use several server components to service the Web clients:

- **Web server.** Client Web browsers connect to Web servers to display Siebel Web Client applications.
- **Siebel Web Server Extension (SWSE).** A plug-in extension that runs within the Web server and that communicates with the Siebel Web Engine on the Siebel Server.
- **Siebel Web Engine.** Part of the Application Object Manager component on the Siebel Server, such as the Call Center Object Manager. Provides access to Siebel eBusiness Applications data and logic.

For information on supported hardware, operating system platforms, Web browsers, and Web servers, refer to *System Requirements and Supported Platforms* on Siebel SupportWeb.

Process of Installing and Configuring the SWSE

Installing and configuring Siebel Web Server Extension (SWSE) consists of multiple tasks, which should be performed by the system administrator in the following order:

- 1 Review requirements for installing the SWSE. See “[Siebel Web Server Extension Installation Requirements](#)” on page 154.
- 2 Install your desired load-balancing solution. See *Deployment Planning Guide*.
- 3 Install the Web server. See “[Installing the Web Server](#)” on page 156.
- 4 Uninstall your existing SWSE. See Chapter 16, “[Uninstalling Siebel eBusiness Applications](#).”

- 5 Install the SWSE. See “[Installing the Siebel Web Server Extension](#)” on page 157.
- 6 Configure the Web server to work with the SWSE. See “[Configuring the Web Server](#)” on page 164.
- 7 Complete any appropriate postinstallation tasks. See “[Postinstallation Tasks for Siebel Web Server Extension](#)” on page 165.

Siebel Web Server Extension Installation Requirements

Before installing the Siebel Web Server Extension, you should have already installed the following components:

- A supported Web server and any installation requirements referenced in *System Requirements and Supported Platforms* on Siebel SupportWeb for the current release.
- Siebel Gateway Name Server. While this component does not technically have to be installed and running to install the SWSE, it is advisable to have it and the Siebel Enterprise Server already installed. The Gateway Name Server’s installation is a prerequisite to Siebel Enterprise Server installation.
- Siebel Enterprise Server and one Siebel Server, with the Application Object Managers enabled through Server Manager for the Siebel eBusiness Applications you purchased. For information, see the *Siebel System Administration Guide*.
- If you will be using Siebel load balancing, you must generate the load-balancing configuration file (lbconfig.txt) before installing the Siebel Web Server Extension. The SWSE configuration wizard updates the load-balancing virtual host definition and routing URLs in this file. For more information about this file see the *Deployment Planning Guide*.

NOTE: Wait to install additional Siebel Servers until after you have completed installation of the Siebel Web Server Extension and the Mobile Web Client software. Installing this software allows you to test that your connection is working from the Web server to the initial Siebel Server.

Before beginning the installation process, decide how you will distribute the server components.

- **Single-node.** Installation of Siebel Enterprise Server components, Siebel eBusiness Applications server components, and your Web server on a single machine or node.
- **Distributed.** Distribution of the preceding components across multiple Web servers connecting to multiple Application Object Managers whose load can be dynamically balanced across multiple Siebel Servers within an Enterprise Server.

Recommended Siebel Web Server Topology

Each deployment choice involves trade-off. However, in enterprise-size deployments, it is strongly recommended that you use a distributed node deployment for the following reasons:

- **Less resource contention.** Distributing the Web server and the Siebel Server (with Application Object Manager) on different machines eliminates contention for CPU and other server resources. However, to take advantage of the performance improvement, you must have a high-speed network connection between the two machines.

- **Higher fault tolerance.** Operating multiple instances of components on multiple machines reduces downtime and the impact of failure on any one machine.
- **Greater flexibility with firewalls.** Putting the Web components of the Siebel eBusiness Applications on a different machine from the Siebel Server with Application Object Managers lets you deploy your Web server in the DMZ while keeping the Enterprise Server behind a secure firewall.
- **High availability.** A multinode configuration is required for deployments that support large numbers of concurrent users or where high availability is an operating requirement.

Verifying the Siebel Gateway Name Server and Enterprise Server

You must have installed and configured the Siebel Gateway Name Server and an Enterprise Server containing at least one Siebel Server before installing the Siebel Web Server Extension. Complete the steps in [Chapter 6, "Installing the Siebel Server,"](#) to install and configure the Enterprise Server entities, following the configuration chosen in the previous step.

If you are installing Application Object Managers and Web components of Siebel eBusiness Applications on the same machine, use separate installation directories to avoid file permission problems at installation time.

Verifying Web Server Requirements

Make sure that the server that will support the Web Server Extension meets all the hardware and software platform requirements documented in *System Requirements and Supported Platforms* on Siebel SupportWeb.

The HTTP process that hosts SWSE can communicate with multiple application servers. Siebel Systems does not recommend or support the installation of multiple SWSEs on a single Web Server in a production environment. If you want to install multiple SWSEs on a Web Server for development or testing purposes, see Technical Note 456 on Siebel SupportWeb.

You should be aware of the port number for the Web server, because you will need to modify the httpd.conf file to reflect the correct port number. For more information, see ["Editing the httpd.conf File on IHS and HP-Apache2" on page 156.](#)

Web Server Language Pack Requirements

You can deploy multiple Language Packs on one Web server and one Siebel Web Server Extension instance.

The Siebel Server and the Web server do not need to be operated in the same language. However, your Siebel Server, your Web server, and all other server components must use the same character set. For more information, see *Global Deployment Guide*.

Domain Name Requirement

For Solaris or Sun ONE Web Server installations, add the domain name to either /etc/hosts or resolve.conf.

Installing the Web Server

Before installing the SWSE, you need to install, configure, and start the supported Web server software on the designated machine. For the best performance and scalability, put the Web server on a dedicated machine.

Root Directory Write Permission

Make sure that the user running the Web server has read, write, and execute permission to the `$SWEAPP_ROOT` directory and its subdirectories (where `$SWEAPP_ROOT` is the directory in which the Siebel Web Extension is installed).

Editing the `httpd.conf` File on IHS and HP-Apache2

The IHS and HP-Apache2 servers may ship with the default character encoding setting `AddDefaultCharset ISO-8859-1` in the `httpd.conf` configuration file. For nonresident user interface languages, this setting makes some static content, such as launch pop-ups, About boxes, and help pages display incorrectly. Complete the procedure that follows to reset this for non-Western languages.

To modify the `httpd.conf` file

- 1 If using IHS, navigate to the `httpd.conf` file, usually located under `/usr/IBMIHS/conf`. For HP-Apache2, the directory is `/opt/hpws/apache`.
- 2 Open `httpd.conf` with a text editor, such as `vi`.
- 3 Locate the line `AddDefaultCharset ISO-8859-1` and comment it out by placing a number sign (#) character at the beginning of the line.
- 4 Save the file.
- 5 Restart the server.

You also need to make following modifications in the `httpd.conf` file if different port is specified for SWSE.

To modify the `httpd.conf` file for a different port number

- Set the `listen` and the `ServerName` as follows:

listen:port number

ServerName:port number

where:

Listen = IP Address of Web Server machine

SeverName = Machine name

For example:

72.20.167.154:16131

sdch70a012.siebel.com:16131

Finding the Web Server Listening Port Number on Sun ONE Web Server

During Siebel Web Server Extension installation, you are prompted to provide the listening port number for your Web server. You can find this number using the following procedure.

To find the Web server listening port number on Sun ONE Web Server

- 1 Open the serve.xml file located under the config subdirectory of your Web server instance.
- 2 Locate the line *port=port_number*:

where:

port_number = A number for your listening port

Installing the Siebel Web Server Extension

The installation program sets up the Siebel directory structures, copies required files and components to the target disk, and configures the host environment.

Multiple-version instances of the SWSE on a single Web server are not supported in a production environment.

On IHS and HP-Apache2 servers you also must modify the following two lines in the httpd.conf file:

Listen:port number

SeverName:port number

where:

Listen = IP Address of web Server machine

SeverName = Machine name

For example:

172.20.167.154:16131

sdch70a012.siebel.com:16131

To prevent installation problems related to permissions, the user who installs the SWSE should be the same user or have the same permissions as the user who installed the Web server instance.

To avoid DVD swapping, copy all installation files, including the required language files, to a common installation directory within your system or use the Network Image Creator. For more information, see ["Selecting Your Media for Installation" on page 27](#). If you elect not to install directly from DVD, you will not see some of the prompts regarding swapping the DVD in the following procedure.

NOTE: The following procedure is for installing the base product. For patch installation instructions, refer to the *Maintenance Release Guide* provided with the patch.

To install the Siebel Web Server Extension under UNIX

- 1 (Solaris only)** Instantiate an instance of the Web server and record the port number at which it is listening.
- 2** Uninstall your existing SWSE.
- 3** If you are installing from DVD, insert the appropriate DVD for the Siebel applications into the DVD drive, and mount this DVD:
 - *Siebel eBusiness Applications, Base Applications for UNIX_OS*
 - *Siebel Industry Applications, Base Applications for UNIX_OS*

where:

UNIX_OS = Your UNIX operating system, such as AIX, HP-UX, or Solaris

NOTE: The volume label for the DVD is *seaUNIX_OSunibase* (for Siebel eBusiness Applications) or *siaUNIX_OSunibase* (for Siebel Industry Applications), where *UNIX_OS* is aix, hpx, or sol.

- 4** Open a new shell and unset any Siebel environment variables.
- 5** Verify the directories and permissions to those directories into which you will install the product. You must have read, write, and execute permission.
- 6** Navigate to the root directory of the DVD or to the appropriate network directory, if you are installing from a network image.
- 7** Navigate to *UNIX_OS/Server/Siebel_Web_Server_Extension*, where *UNIX_OS* is your UNIX operating system, such as AIX, Solaris, or HPUX (for HP-UX), and open a new shell.

NOTE: To install the SWSE, you must install using a user account that can modify the Web server files appropriate for your installation: Sun ONE Web Server, IBM HTTP Server, or HP-Apache 2 Web server files.

- 8** To start the SWSE installation process, enter the following command, appending any desired flag described in ["Additional Flags for Installation Commands" on page 77](#).

`./setupUNIX_os`

where

UNIX_OS = Your operating system (sol, aix, hpx)

The Installer Welcome screen appears.

9 Click Next.

If you have installed other Siebel components on the same machine, the installer displays the message that an existing installation has been found.

10 Depending on whether you are installing your SWSE files for the first time or adding a new language to an existing instance, take the appropriate action, and then click Next:

- To install the server software in a new instance, select None as the default and click Next. Proceed to [Step 11 on page 159](#).
- To install a new language in an existing instance, select the displayed instance and click Next. Proceed to [Step 12 on page 159](#).

See also ["Guidelines for Installing Multiple Language Packs on the Siebel Server" on page 95](#) for important additional information on this topic.

The Installer Path screen appears.

11 Enter the fully qualified path to the installation directory and click Next.

The Installer Language Selection screen appears.

12 Choose the language or languages to be installed and click Next.

All servers are installed with at least one primary (base) language. Additional languages can be installed at a later date, if desired. For more information, see *Global Deployment Guide*.

When installing languages at a later date, you must also reinstall any patches that have been run on the directory.

NOTE: In a Unicode-enabled database environment, you can install any of the available Siebel Language Packs. In a non-Unicode database environment, you must consider the correlation of the Language Packs you want to install and the characters supported by your database code page. For example, in a Western European code page database, you can only install Western European Language Packs, such as English, French, Spanish, or German Language Packs. In a Japanese code page database, you can only install Japanese or English Language Packs.

For a list of supported code pages and encoding strategies, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

The Installation Verification screen appears.

13 Click Next.

The Installation Progress screen appears, and the installer creates uninstaller folder.

- If you are installing more than one language, the Primary Language screen appears. Proceed to [Step 14 on page 159](#).
- If you are installing only one language, the Web Server Root Directory screen appears. Proceed to [Step 15 on page 160](#).

14 Select the primary language for this installation and click Next.

The Web Server Root Directory screen appears.

15 Select the root directory for the SWSE on your Web server and click Next.

The installer proceeds to install the specified files. After the files have been copied to the installation location, this message appears:

Setup did not find the *lang* language pack on the current media. Please insert the DVD containing the *lang* language pack and select the *setupUNIX_OS* file from the *lang* folder.

where:

lang = The code for the language you are installing, such as *enu* for U.S. English.

UNIX_OS = Your UNIX operating system, such as *aix*, *hp*, or *sol*.

NOTE: For Siebel Industry Applications, the Windows and UNIX Language Packs are on different DVDs.

16 Remove the current DVD from the drive and insert the appropriate Language Pack DVD.

A dialog box titled Navigate to the executable on the *lang* Language Pack DVD appears and displays a file called *siebel.ini*. However, you do not need to do anything with this file.

Clear the filter dialog box, if needed, to be sure that you can see the appropriate files.

17 Open *setupUNIX_OS* under *UNIX_OS/Server/Siebel_Web_Extension/lang* directory, where *UNIX_OS* is for your UNIX operating system and *lang* is the code for the Language Pack you are installing, such as *enu*.

A message appears, stating that language files are being installed.

18 When installation of all the language files is completed, the installer prompts you again for the base DVD.

Please re-insert the base DVD and browse to the *setupUNIX_OS* file to enable setup to continue.

19 Reinsert the base DVD, navigate to *UNIX_OS/Server/Siebel_Web_Extension/setupUNIX_OS*, and click OK.

The Load Balancing Configuration screen appears.

20 Select the desired load-balancing method for your environment and click Next.

- If you select Single Siebel Server in the Enterprise, proceed to [Step 21 on page 161](#).
- If you select Use a Third Party Load Balancer, proceed to [Step 22 on page 161](#).
- If you select Use Siebel Load Balancing, proceed to [Step 23 on page 161](#).

21 Enter Hostname for the Siebel Server and the port number (default 2321) for the SCBroker component. Click Next and proceed to [Step 24 on page 161](#).

This port is used for all communications between the Web server and the Siebel Server. Make sure the port you specify for the SCBroker (Siebel Connection Broker) component is not occupied by any other applications, other Siebel components (such as Siebel Gateway Name Server), or other Siebel Server instances. If you have installed multiple Siebel Servers on this machine, make sure you enter a unique SCBroker port for each Siebel Server instance.

If you need to change the SCBroker port number later, use Siebel Server Manager to specify a value for the Static Port Number parameter (alias PortNumber). For more information about SCBroker, see *Siebel System Administration Guide* and *Deployment Planning Guide*.

22 Enter virtual IP address or hostname and virtual port number for a third-party load balancer, if you use one. Click Next and proceed to [Step 24 on page 161](#). For information on writing routing rules for third-party HTTP load balancers, see the *Deployment Planning Guide*.

23 Enter the full path to the virtual host file (lbconfig.txt). Click Next and proceed to [Step 24 on page 161](#).

This file must already exist. For more information, see ["Siebel Web Server Extension Installation Requirements" on page 154](#).

24 Enter the name of your Enterprise Server and click Next.

The Compression Type screen appears.

25 Select the type of compression you want to use for communications between the Web Server and the Siebel Servers, and click Next:

None

ZLIB

The Encryption screen appears.

26 Select the encryption type the Siebel Web Clients should use to communicate with the Application Object Managers and click Next:

NONE. No networking encryption.

RSA. Required protocol if you will be using the RSA Security Systems 128-bit strong encryption feature for data transport.

NOTE: The Application Object Managers to which the Siebel eBusiness Applications connect must be configured to use the same protocol. For more information, see [Chapter 6, "Installing the Siebel Server."](#)

The Web Server HTTP Port screen appears.

27 Accept the default HTTP port (80), or enter a new port number, and click Next.

The Installer Configuration Web Server HTTPS (Secure HTTP) Port screen appears.

28 Accept the default Web Server HTTPS port (443), or enter a new port number, and click Next.

The Web Update Protection Key screen appears.

29 Enter the Web Update Protection Key that your administrator will use for Web maintenance.

For information on what this key is used for, see ["About the Web Update Protection Key" on page 163](#).

The Anonymous Login Employee Name screen appears.

30 Enter the anonymous employee login ID and click Next.

NOTE: This value should be a login ID that any employee may use to access the Login view. The login ID should be a valid client login with privileges to navigate to Login views.

The Anonymous Login Employee Password screen appears.

This parameter is for employees who may browse applications without logging in.

NOTE: If you do not want to enable this feature for some employees, you can bypass this screen without entering anything by just clicking Next.

31 If you use this parameter, enter the anonymous login password, confirm it, and click Next.

The Anonymous Login Contact Name screen appears.

32 Enter the anonymous login contact name and click Next.

The Anonymous Contact Password screen appears.

33 Enter the anonymous login password, reconfirm it, and click Next.

The Deploy Secure Sockets Layer screen appears.

34 Indicate whether you want to deploy secure socket in your enterprise or not, by selecting or clearing the Yes box on this screen.

■ If Yes, proceed to [Step 35 on page 162](#).

■ If No, proceed to [Step 39 on page 163](#).

35 On the Certificate File Name screen, enter the following and click Next:

Certificate File Name. The certificate file name.

CA Certificate File Name. The certificate authority file identifying the trusted authority who issued the certificate.

The Private Key File Name screen appears.

36 Enter the following and click Next:

Private Key File Name. Name of the private key file.

Private Key File Password. Password for the private key file name.

Private Key File Password (confirm). Password you entered in the preceding example.

The Peer Authentication screen appears.

37 Select whether or not you want Peer Authentication.

The Restart screen appears.

38 Indicate whether or not you want to restart the Web server now to complete the changes and click Next.

NOTE: If you did not choose to restart your Web server earlier during configuration, your changes will not take effect until you do so.

The Installer Verification screen appears.

39 Verify the settings:

- To apply the settings, click Next.
- If you want to change any, use the Back button to go back and update any parameters. You can use the Next button to return to this screen and confirm your new values.

The Configuration Wizard displays the message that the SWSE has been successfully installed.

40 Click Finish.

About the Web Update Protection Key

The Web Update Protection Key is the password your Siebel administrator uses to refresh the application image files on your Web server your developers have updated and placed on the Siebel Server after customizing the Siebel application with Siebel Tools.

The Web server contacts the Siebel Server, refreshing these images each time the administrator restarts the Web server. However, administrators can achieve the same result, refreshing the images by just entering this password in a command line, particularly when deploying multiple Web servers. For more information on this topic, see *Security Guide for Siebel eBusiness Applications*.

NOTE: Although the Web Update Protection Key is set during SWSE configuration, you may change it later on, if desired, by editing it in the eapps.cfg file, located in the bin subdirectory of your SWSE installation.

To avoid the Web server cycling every time the SWSE directory images are refreshed, complete the following procedure.

To refresh the SWSE directory structure without cycling the Web server

1 Log in to the application.

2 Type the following URL into the Address field of the browser:

`http://host:port/application/start.swe?SWECmd=UpdateWebImages&SWEPassword=passwd`

where:

host = The name of the Web server machine

port = Web Server listen port (Not required if using the default port, 80)

application = Any Siebel application, such as callcenter_enu, sales_enu, and so on

passwd = Password defined in eapps.cfg by WebUpdatePassword

For example:

`http://siebel1:81/callcenter/start.swe?SWECmd=UpdateWebImages&SWEPassword=siebel`

Configuring the Web Server

To configure the Web server for use with the Siebel Web Server Extension, you must edit the Web server httpd.conf file.

The httpd.conf file is the main Web server configuration file. It contains the configuration directives that give the server its instructions. When using IHS, this file is located under \$IHS_ROOT/conf. If you are using HP-Apache2, the default directory is /opt/hpws/apache.

You should use the following guidelines for setting parameters in the httpd.conf file when using IHS or HP-Apache2 with Siebel applications.

■ Required.

- Make sure your section <worker.c> looks like the following:

```
<IfModule worker.c>
  ThreadLimit N
  StartServers 1
  ServerLimit 1
  MaxClients N
  MinSpareThreads 1
  MaxSpareThreads N
  ThreadsPerChild N
  MaxRequestsPerChild 0
</IfModule>
```

where:

N = Two times the average number of concurrent users

- The User and Group values should correspond to an existing user who has appropriate permissions. Most importantly, the user should have appropriate permissions for various SWSE directories.

■ Recommended.

- Set UseCanonicalName to OFF. You are required to set UseCanonicalName to OFF if you load-balance Web servers.

- Set KeepAliveTimeout to 15 seconds.
- Set MaxKeepAliveRequests=0 for maximum performance.

■ **Optional.**

- You can comment out the line that loads the CGI module, if you are not using the CGI functionality of IHS or HP-Apache2. Commenting out the line makes tracking IHS or HP-Apache2 processes simpler because there is always one child process.

IHS.

```
LoadModule cgid_module modules/mod_cgid.so
```

HP-Apache2.

```
LoadModule cgi_module modules/mod_cgi.so
```

Detailed information about the directives in httpd.conf is available on <http://www.apache.org>.

Configuring HP-Apache2 for Optimal Performance

Siebel eBusiness Applications will run slowly on HP-Apache2 Web servers unless you make the following changes to the httpd.conf configuration file.

- 1 Edit the /etc/privgroup file. If it does not exist, create it. Add the following entry to the file:

```
apache_group_name RTPRIO
```

where:

apache_group_name = The group name containing the username that owns the Apache server

- 2 Save the file and exit.

- 3 In the shell, execute the following command:

```
setprivgrp -f /etc/privgroup
```

- 4 Add the following to the file \$APACHE_ROOT/bin/startapa, at the beginning of the file:

```
rtprio 127 -$$
```

Save the file and exit.

Postinstallation Tasks for Siebel Web Server Extension

Perform the following postinstallation tasks as required by your deployment:

- “Reviewing Installation Directories for Siebel Web Server Extension” on page 166
- “Creating a New Virtual Directory” on page 168
- “Creating a New Virtual Directory on Multiple Colocated Web Servers” on page 169

- “Setting SWSE Directory Permissions” on page 170
- “Granting User Permissions on the Web Server” on page 170
- “Configuring Sun ONE Web Server to Accept Siebel Web Server Extension” on page 172
- “Enabling HTTP Compression for Siebel Web Applications” on page 173
- “Editing the Web Server Extension Configuration File (eapps.cfg)” on page 174
- “Configuring the Default HTTP and HTTPS Port for Siebel Web Server” on page 175
- “Reviewing the Log Files for Siebel Web Server Extension” on page 176

Reviewing Installation Directories for Siebel Web Server Extension

Review the physical and virtual directories created during installation of the Web Server Extension on the Web server host to familiarize yourself with the locations of files, such as the configuration file (eapps.cfg).

Physical Directories

The following list shows some of physical directories and files created when you install the SWSE on the Web server. In the list, *language* represents languages you have installed, such as ENU for U.S. English.

```
SWEApp/
    _uninst/
    admin/
    bin/
        language/
        eapps.cfg
        sweiis.dll
    install_script/
    locale/
        language/
    log/
    public/
        language/
            demo/
            files/
            images/
    base.txt
    language.txt
    log.txt
    upgrade.log
```

_uninst. Contains files required for uninstallation of the product.

admin. Contains the file swseapps.scm, which is used during installation. This file launches the dialog boxes used during configuration of the Siebel eBusiness Applications.

bin. Contains the SWSE configuration file (eapps.cfg) and the libraries needed for the SWSE functionality.

locale. Contains resource files with information about any run-time errors.

log. Reports communication errors between the SWSE and the Application Object Managers in the Siebel Servers.

public. Each language-specific subdirectory contains the default HTML file (default.htm) used to redirect the browser to the SWSE and subdirectories of the Siebel Server.

Verifying Virtual Directories on the Web Server

Virtual directories are installed on the Web server for each installed Siebel eBusiness Web application. For example, there is an eservice directory for Siebel eService.

To verify the virtual directories on IHS and HP-Apache2

- Open the Web server configuration file httpd.conf.

When using IHS, this file is located under \$IHS_ROOT/conf. If you are using HP-Apache2, the default directory is /opt/hpws/apache.

The following example partially illustrates a virtual directory structure visible for Siebel eBusiness Applications on IHS or HP-UX.

```
Alias /ecustomer_enu /vol1/siebel/eappweb/public/enu
Alias /erm_enu /vol1/siebel/eappweb/public/enu
Alias /emarketing_enu /vol1/siebel/eappweb/public/enu
Alias /callcenter_enu /vol1/siebel/eappweb/public/enu
Alias /marketing_enu /vol1/siebel/eappweb/public/enu
```

To verify the virtual directories on Sun ONE Web Server

- Open the Web server configuration file obj.conf, located under \$iplanetserver/webserverinstance/config.

The following example partially illustrates the virtual directory structure for Siebel eBusiness Applications on the Sun ONE Web Server.

```
NameTrans fn="pfx2dir" from="/partnerfinder_enu" dir="/export/home/siebel/public/enu"
NameTrans fn="pfx2dir" from="/ecustomer_enu" dir="/export/home/siebel/public/enu"
NameTrans fn="pfx2dir" from="/emarketing_enu" dir="/export/home/siebel/public/enu"
NameTrans fn="pfx2dir" from="/etraining_enu" dir="/export/home/siebel/public/enu"
NameTrans fn="pfx2dir" from="/echannel_enu" dir="/export/home/siebel/public/enu"
NameTrans fn="pfx2dir" from="/esales_enu" dir="/export/home/siebel/public/enu"
NameTrans fn="pfx2dir" from="/sales_enu" dir="/export/home/siebel/public/enu"...
```

Creating a New Virtual Directory

Virtual directories are created automatically when you install the SWSE. However, you may in some cases want to create your own virtual directory, for example, to be able to test features, such as Web Single Sign-On (Web SSO), so that you can point to an already existing Application Object Manager.

You would add the new virtual directory to either obj.conf (Sun ONE) or httpd.conf (IHS and HP-Apache2), as appropriate, using the procedures provided in this section.

After adding a new virtual directory, you must add the name of the new virtual directory to the appropriate connect string in the eapps.cfg file under \$SWEAPP_ROOT/bin.

To add a new virtual directory for Sun ONE Web Server

- Open the obj.conf file to view the existing virtual directories and add a line as shown in the following example:

```
NameTrans fn="pfx2dir" from="/myvirdir_lang" dir="/export/home/siebel/public/ lang"
```

where:

myvirdir_lang = The name of the language-specific virtual directory

lang = The Siebel code for the language

To add a new virtual directory for IHS

- Open the httpd.conf file to view the existing virtual directories and add a line as shown in the following example:

```
Alias /myvirdir_lang /export/home/swe/public/ lang
```

To add a new virtual directory for HP-Apache2

- Open the httpd.conf file to view the existing virtual directories and add lines like those shown in the following example:

```
<virtualHost> *
  ServerName www.domain.tld
  DocumentRoot /www/domain
</virtualHost>
```

where:

www.domain.tld = The new top level domain

/www/domain = The directory path to the virtual domain's root

Creating a New Virtual Directory on Multiple Colocated Web Servers

You have the option of overriding the default Siebel software installation behavior by creating a virtual directory on more than one instance of the Web server on the same machine. For example, you may have multiple Web sites, each with its own URL, that you run on one Web server instance. However, by default, the SWSE installer installs only to the default Web site.

The best way to resolve this problem is by editing the siebel.ini file (installed in the bin directory of the SWSE instance) so that reinstallation of the SWSE does not revert to the same virtual directory.

To edit the siebel.ini file not to create the virtual directory

- 1 Configure the siebel.ini file as shown in the following example:

[RunAfter]

```
ConfigEAppWeb = yes
```

```
CreateVD = no
```

- 2 Follow the instructions under ["Creating a New Virtual Directory" on page 168](#) to create a new virtual directory.

Setting SWSE Directory Permissions

The Web server administrator and all Siebel users and groups should have read and execute permission on all Siebel Web Server Extension (SWSE) virtual directories. If these permissions are not granted, login pages will not be rendered properly.

The SWSE should have read and write permissions to the `$SWEAPP_ROOT/public/language` directory on the Web server machine (where SWSE is installed), so that static public files can be cached on the Web server to enhance application performance.

Granting User Permissions on the Web Server

After installing the SWSE on a Web server running UNIX, take the following steps.

To modify permissions on all platforms

- Verify that the Web server administrator has read and execute permission on all SWSE directories and files.
- Verify that the subdirectory `$SWEAPP_ROOT/public`, which contain the files for the Web image publishing and file caching features, has read and write permission to the SWSE process owner.

To modify permissions on Sun ONE Web Server

- 1 Verify that you have installed the required version of Sun ONE Web Server, as documented in *System Requirements and Supported Platforms* on Siebel SupportWeb.
- 2 After the correct version of the Sun ONE Web Server is installed, use the Sun ONE Web Server administration console to create a Web server instance. You can find the administration console at:

`SOWS_install/https-admserv`

where:

`SOWS_install` = The root directory of the Sun ONE Web Server

- 3 In that directory, run `./start` to start the Admin Web Server instance if it is not running.

4 Open an instance of Internet Explorer browser and enter the following URL:

`http://machineName:portNumber/https-admserv`

where:

machineName = The name of the local machine on which the Web server resides

portNumber = The port number of the HTTP Admin Web server

The Sun ONE Web Server administration console is displayed in the browser window.

5 In the Web server administration console, choose Add Server. Enter the following values required to define the new instance of the Web server:

- **Server Name.** This value can be any name, but is usually the host computer's name, as in *machine_name.domainname.com*.
- **Server Port.** The port number on which you want to run this Web server.

CAUTION: If you use port 1 to 1024, you must have root privileges to start the Web server. If you do not have or need root privileges, use a port number greater than 1024. Verify that your port is available using the following command:

`netstat -a | grep port_number`

- **Server Identifier.** This can be any name, but is usually identified as *machine_name*.
- **Server User.** Usually either *root* or the system user based on which port you choose and which user you want to control the Web Server instance.
- **MTA Host.** Accept the default.

6 Verify that the account the Sun ONE httpd daemon uses has the following privileges:

- a Write permissions for the *\$SWEAPP_ROOT/log* directory. Typically, to do so, you must change the permissions for the appropriate directory.
- b Read and write permissions to all files and subdirectories in the *\$SWEAPP_ROOT/public* and *\$SWEAPP_ROOT/public/enu* directory.

To modify permissions on IBM HTTP Server (IHS) and HP-Apache2

1 Make sure that the login running the Web server has the following permissions for the scripts installed with the SWSE:

- Read, write, and execute privilege for starting and stopping the Web server.
- Write permission for the log file path.
- Read-write permissions to files in *\$SWEAPP_ROOT/public*.

CAUTION: If you use port 1 to 1024, you must have root privileges to start the Web server. If you do not have or need root privileges, use a port number greater than 1024. Verify that your port is available using the following command:

`netstat -a | grep port_number`

- 2** Install the SWSE. Run `install_eappweb` under a user account that can modify IBM HTTP or HP-Apache 2 Web server configuration files.

NOTE: If you installed your Web server using root privileges, you must have root privileges to install the SWSE.
- 3** Verify that the account the IBM HTTP or HP-Apache 2 `httpd` daemon uses has the following privileges:
 - a** Write permissions for the `$SWEAPP_ROOT/log` directory. Typically, to do so, you must change the permissions for the appropriate directory.
 - b** Recursive read and write permissions to all files in the `$SWEAPP_ROOT/public` and `$SWEAPP_ROOT/public/enu` directory.

Configuring Sun ONE Web Server to Accept Siebel Web Server Extension

If your Web server runs under the Solaris operating system, it is crucial that you configure the Sun ONE Web Server to accept the changes that the SWSE installer makes to the Sun ONE server configuration files after you install SWSE. Otherwise, changes that you may make in the future to the Sun ONE Web Server configuration will overwrite the changes made by the Siebel installation script.

To make sure that Sun ONE Web Server accepts changes made by SWSE

- 1** Navigate to the Sun ONE Web Server Administration page. (For instructions, see the Sun ONE documentation.)
- 2** Click the button that shows the server instance on which the SWSE was installed.
The Server Preferences page for the instance appears.
- 3** On the upper-right side of the Server Preferences page, click **Apply**.

Another page with a warning message appears:

WARNING: The configuration files have been edited by hand. Use this button to load the latest configuration files.

- 4** Click **Load Configuration Files**.

This displays the message:

Success! The most recent config files have been loaded.

This message indicates that the Sun ONE Web Server has accepted the changes made to it by the installer.

Sun ONE Web Server References to the eapps.cfg File

The Siebel installer adds a reference to the Sun ONE server configuration file magnus.conf, located within the Sun ONE configuration directory during installation. The magnus.conf file is used to specify the global settings of a Web server, such as Server Information, Object file config, DNS lookup, ACL and so on.

A typical line the installer would add to magnus.conf might resemble the following example:

```
Init fn="swe-init"config-file="/$WEAPP_ROOT/bin/eapps.cfg" siebel-home="/eappweb"
```

To locate magnus.conf

- Navigate to the following path:

Sun_ONE_Web_Server_Root/https-your_server_instance_name/config

Enabling HTTP Compression for Siebel Web Applications

The use of HTTP compression between the browser and the Web server can improve the performance of Siebel eBusiness Applications over a wide-area network (WAN). Typically, you should consider enabling HTTP compression if a significant number of users access applications over a WAN for which network bandwidth may be a constraint.

The benefit of compression is even greater for users who access applications using standard interactivity, rather than high interactivity, because the latter is already optimized for network use.

However, if your users access applications mostly over a local-area network (LAN), turning on HTTP compression does not improve performance. Instead, it might create performance overhead related to the extra processing needed on both the client and the server sides to compress and decompress data.

HTTP compression is available for all supported Web server platforms without any additional installation. HTTP compression functionality is built into the Siebel Web Server Extension.

CAUTION: You should not use compression if you have an application between the Web server and browser, such as a proxy server or firewall, that does not support HTTP 1.1.

Before using HTTP compression, you must make it active by setting the DoCompression parameter in the eapps.cfg file.

- **FALSE.** If you do not want to compress any traffic.
- **TRUE.** If you want to compress certain traffic. If this option is selected, the application will still disable compression in the following scenarios:
 - Traffic with HTTP 1.0 headers. This is because HTTP 1.0 does not support compression.
 - Traffic from a proxy server. This is because it may not be possible for the Siebel administrator to know whether an end user is behind a proxy server that only supports HTTP 1.0 traffic.

- **CompressProxyTraffic.** Use this option if you want to compress all traffic, whether or not it goes through a proxy server. You should only use this option if your application administrator is 100% certain that any proxy server or other appliance between the Web server and browser supports HTTP 1.1.

You can enable or disable HTTP compression as default functionality for all applications or selectively for individual applications. By default, HTTP compression is enabled for all applications.

To enable HTTP compression

- 1 Open the eapps.cfg file, located in the \$SWEAPP_ROOT/bin directory, in a text editor.
- 2 Perform one or both of the following:
 - To enable HTTP compression as default functionality, set the DoCompression parameter to TRUE in the [defaults] section. If the DoCompression parameter is not present, add it.
 - To enable HTTP compression for an individual application, set the DoCompression parameter to TRUE in the section for that application. For example, in [/callcenter], set DoCompression = TRUE. If the DoCompression parameter is not present, add it.

NOTE: Setting a parameter for an individual application overrides the default setting that may appear in the [defaults] section. If a parameter is set as a default, then its value applies to all applications for which it is not overridden at the individual application level.

- 3 Save and close the eapps.cfg file. Changes to the eapps.cfg file are not active until you restart the Web server.

To disable HTTP compression as a default or for an individual application, set DoCompression to FALSE in the appropriate section of the eapps.cfg file.

Editing the Web Server Extension Configuration File (eapps.cfg)

The SWSE installer installs a single configuration file, eapps.cfg, for all the Siebel eBusiness Applications located in \$SWEAPP_ROOT/bin.

The eapps.cfg file contains configuration information that you entered during the configuration of the Siebel Web Server Extension, including identity and connectivity information for the Application Object Managers, and login and security settings.

You may, if desired, add selected optional parameters manually to affect the selected Siebel Web Client applications as a whole. You may also override the added parameters to determine the performance of one or more applications.

For detailed information about the structure and parameters of the eapps.cfg file, see *Siebel System Administration Guide*.

To edit the eapps.cfg file

- 1 Open \$SWEAPP_ROOT/bin/eapps.cfg using the editor of your choice.

- 2** Make desired changes. Save and close the file.
- 3** Stop and restart the following processes in the order shown:
 - Stop Web server.
 - Stop Siebel Server, only if you have changed any Siebel Server parameter.
 - Stop Siebel Gateway Name Server, only if you have changed any Siebel Server parameter.
 - Start Siebel Gateway Name Server, only if you have changed any Siebel Server parameter.
 - Start Siebel Server, only if you have changed any Siebel Server parameter.
 - Web server.

For information about configuring security and authentication parameters in the eapps.cfg file for your deployment, see *Security Guide for Siebel eBusiness Applications*.

Configuring the Default HTTP and HTTPS Port for Siebel Web Server

The default HTTP and HTTPS port for Web server are port 80 and 443, respectively. When you deploy SWSE onto third-party Web server, you might want to configure these to use a different port numbers. The following procedure provides the steps to configure these ports.

To configure the default HTTP and HTTPS

- 1** Open the eapps.cfg file.
- 2** Locate the [defaults] section.
- 3** Change the port number for HTTPPort and HTTPSPort to a desired port number.

```
HTTPPort = 81  
HTTPSPort = 444
```

- 4** Configure the Web Server.

HTTP port for both HP-UX Apache and IBM AIX Apache Web server

- a** Using any text editor, open the \$SWEAPP_ROOT/conf/httpd.conf file.
- b** Locate the Listen section and change the HTTP port number to the number you set in [Step 3 on page 175](#).

```
Listen HostIP:81
```

where:

HostIP = The IP Address of the Web Server

- c** Change the ServerName value to the same value as the one for Listen.

ServerName *HostIP*:81

HTTPS port for HP-UX Apache

- a** Using any text editor, open the `$SWEAPP_ROOT/conf/ssl.conf` file.
- b** Change the HTTPS port numbers in the following section to the port number you set in [Step 3 on page 175](#).

```
Listen 444
<VirtualHost_default_:444>
SSLEngine on
```

HTTPS port for IBM AIX Apache Web server

- a** Using any text editor, open the `$SWEAPP_ROOT/conf/httpd.conf` file.
- b** Add the following section before the Virtual Directories section to enable SSL.

```
LoadModule ibm_ssl_module modules/mod_ibm_ssl.so
Listen HostIP:444
```

where:

HostIP = The IP Address of the Web Server

- c** Add the following section at the end of the `httpd.conf` file, before the Virtual Directories section.

```
<VirtualHost HostIP:444>
SSLEnable
DocumentRoot $home/$build/web/htdocs/en_US
ErrorLog logs/ssl_error_log
CustomLog logs/ssl_access_log common

</VirtualHost>
Keyfile $home/$build/web/ssl/key.kdb
```

Sun ONE Web Server

- a** Using the Sun ONE Web Server Admin console, go to the Preferences screen.
- b** Click on the Edit Listen Sockets tab and change the port number to the new value you set in [Step 3 on page 175](#).

Reviewing the Log Files for Siebel Web Server Extension

Siebel Web Server Extension (SWSE) generates one or more log files as a result of connection attempts with the Siebel Server. These log files reside in `$SWEAPP_ROOT/log`.

Depending on the logging level you choose, these files record errors, warnings, and general information. Events, such as Web server failures or invalid configuration of the SWSE, are captured in these logs. Analyzing the log files can provide clues for troubleshooting SWSE problems.

For more information about reviewing log files and monitoring Web servers and SWSE, see *System Monitoring and Diagnostics Guide for Siebel eBusiness Applications*.

Troubleshooting Siebel Web Server Extension Installation

This section provides suggestions for troubleshooting problems you may encounter when installing the Siebel Web Server Extension.

Problem: After installation, when launching the Siebel Web Client, a message appears, stating:

Page Cannot be displayed

Cause: Virtual directories were not installed or configured properly.

Solution: Use the following procedure to resolve the problem.

- 1** Refresh the connection between your browser and the Web site.
- 2** Make sure that the Local Path for the virtual directories is correct. This path should be the following:
`$SWEAPP_ROOT/public/7language`
- 3** Make sure that the AnonUser specified in the eapps.cfg file is also specified in the database with the correct responsibilities. Otherwise, you cannot access the home page.
- 4** Make sure that the connect string for the Siebel application is correct. It should be defined similar to the following (where load balancing is not deployed):

```
ConnectionString = siebel.TCPIP.none.none://siebelserver_name:2321/enterprise_name/  
ProductNameObjMgr_7language
```

Problem: Your Siebel application hangs or times out.

Cause: Appropriate parameters are not available within the [default] section of the eapps.cfg file for the Siebel eBusiness Application.

Solution: Make sure that the defaults section of the eapps.cfg file contains valid username, HTTPPort, and HTTPSPort values.

Problem: Inability to access the Web client. The browser status bar may display errors, such as SWESubmitOnEnter is undefined, and the login page may appear to hang.

Solution: Make sure that the user running the Web server has read and write permission to the \$SWEAPP_ROOT directory.

Problem: After installation, when launching the Siebel Web Client, the login page does not display properly. For example, images may be missing.

Cause: The user who installed the SWSE plug-in does not have proper permissions to the \$SWEAPP_ROOT/public/lang directory.

Solution: Grant read, write, and execute permissions to this user using the following steps:

- 1** Stop the Web server.
- 2** Change the permissions on the *lang* directory appropriately by using the chmod command (chmod 777 7ang).
- 3** Start the Web server.

This chapter provides information about how to install the Siebel Mobile and Dedicated Web Clients, and about how to start Siebel applications. It includes the following topics:

- “About Installing the Siebel Client” on page 179
- “Process of Installing the Siebel Client” on page 180
- “Preinstallation Tasks for the Siebel Client” on page 180
- “Installing the Siebel Mobile and Dedicated Web Client” on page 182
- “Installing the Siebel Sample Database” on page 188
- “Importing Non-ENU Repository and Seed Data into the Siebel Sample Database” on page 191
- “Postinstallation Tasks for the Siebel Client” on page 192
- “Logging in to Your Siebel Application” on page 195
- “Siebel Client Shortcuts and Start-Up Options” on page 197
- “Using Siebel QuickStart with the Siebel Mobile Web Client” on page 201

For the uninstallation procedure, see “Uninstalling Mobile and Dedicated Web Clients” on page 264.

About Installing the Siebel Client

Siebel Systems supports Mobile and Dedicated Web Client installations on the operating systems and hardware described in *System Requirements and Supported Platforms* on Siebel SupportWeb. These clients are installed and run on supported Microsoft Windows platforms only.

NOTE: This book assumes that installations are performed by administrators, not end users.

The installation described in this chapter is based on default installation parameters set by Siebel Systems.

If you want to prepare custom software installation packages for distribution to end users, you install the Siebel client as a model installation. After completing client installation and configuration, you run the Siebel Packager utility. A model client installation serves as the basis for a package. For details, see *Going Live with Siebel eBusiness Applications*.

The behavior of the client installer can be modified by updating parameter settings in the setup.ini and siebel.ini files. For more information about the function of the siebel.ini file and how to modify it, see comments contained within the siebel.ini file itself, and see installation topics on Siebel SupportWeb.

NOTE: You can install or run multiple instances of the Siebel client on the same system. ActiveX controls used in high-interactivity applications are versioned differently for each Siebel product release, including maintenance releases. Except for maintenance releases, which are applied to an existing base installation, you must install each different version in a separate location.

To support Mobile Web Client users after installation, you also verify connection to the Siebel Remote Server. For more information, see ["Postinstallation Tasks for Siebel Server" on page 106](#). See also *Siebel Remote and Replication Manager Administration Guide*.

For information about uninstalling Siebel client software, see ["Uninstalling Mobile and Dedicated Web Clients" on page 264](#).

Process of Installing the Siebel Client

The Siebel client installation and setup consists of the following tasks which should be performed by the Siebel administrator:

You can choose to install the Mobile Web Client or the Dedicated Web Client. When you install the Siebel client or the Sample Database, you also install language extension packs.

- 1 Review the preinstallation tasks. See ["Preinstallation Tasks for the Siebel Client" on page 180](#).
- 2 Install the Siebel client. See ["Installing the Siebel Mobile and Dedicated Web Client" on page 182](#).
- 3 (Optional) Install the Siebel Sample Database. See ["Installing the Siebel Sample Database" on page 188](#).
- 4 Verify the installation. See ["Postinstallation Tasks for the Siebel Client" on page 192](#).
- 5 As necessary, modify values for configuration parameters for the Mobile or Dedicated Web Client. For more information, see *Siebel System Administration Guide*.
- 6 Log in to the Siebel application. See ["Logging in to Your Siebel Application" on page 195](#).

NOTE: If installing from DVD, make sure you have the base DVD and all required language DVDs before you start. Optionally, you can install from a network image of the installation source files. You create this network image by copying the content of the required DVDs or by using the network image creator. Make sure the network image includes the Language Packs you need. See ["Creating a Network Image" on page 30](#).

Preinstallation Tasks for the Siebel Client

Review the issues and tasks in this section before running the Siebel client installer.

Administrative Rights for Installation

Administrative rights are required for installation or uninstallation of the Siebel Mobile or Dedicated Web Client.

For information on setting administration rights, consult the operating system manuals for the version of Microsoft Windows on which you are installing the Siebel client software.

For information about uninstalling Siebel client software, see ["Uninstalling Mobile and Dedicated Web Clients" on page 264](#).

Directory Naming Conventions

By default, the Siebel client installer assumes an installation directory of C:\Program Files\Siebel\7.7\Web Client. You can specify to install in a different location, but the default location is generally recommended.

Use installation directory names that describe both the version number and the component being installed. The directory name can use any characters appropriate for Windows-compatible long filenames.

In this book, the directory into which you install the Siebel client is often referred to as *SIEBEL_CLIENT_ROOT*. If you install into a directory other than the default, make appropriate substitutions through the remainder of this chapter.

CAUTION: Do not install other Siebel components, such as Siebel Tools, into the same directory where you have installed the Siebel client, such as C:\Program Files\Siebel\7.7\Web Client. Install each component into a separate directory, or into a subdirectory of the top-level directory, such as a subdirectory of C:\Program Files\Siebel\7.7. However, if you install the Sample Database, you *must* do so in the same directory as the Siebel client. If you install multiple Siebel components on the same machine (that will access different data sources), determine your directory-naming convention before you begin installing. For more information on installing Siebel Tools, see Chapter 10, "Installing Siebel Tools."

Requirements and Recommendations for the Siebel Client

Before beginning Siebel client installation, review the requirements and recommendations for hardware, system software, and third-party software described in *System Requirements and Supported Platforms* on Siebel SupportWeb.

Database Connectivity Software for the Dedicated Web Client

Siebel Dedicated Web Client computers connecting directly to database servers must have the correct vendor-specific database connectivity software installed. See *System Requirements and Supported Platforms* on Siebel SupportWeb.

NOTE: The correct version of database connectivity software must be installed before installing the Siebel client (assuming that the relevant siebel.ini file settings have not been modified).

For additional information, see "Postinstallation Tasks for the Siebel Client" on page 192.

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

- For IBM DB2 Universal Database for Windows and UNIX, you install and configure the DB2 client software to connect to the Siebel Database. The connect string and tableowner information should be recorded on the Deployment Planning Worksheet in Appendix A, "Deployment Planning Worksheet." Use the ODBC driver version specified in *System Requirements and Supported Platforms* on Siebel SupportWeb.

- For Oracle Database, you install and configure the Oracle client software to connect to the Siebel Database. The connect string and tableowner information should be recorded on the Deployment Planning Worksheet in [Appendix A, "Deployment Planning Worksheet."](#) Use the driver version specified in *System Requirements and Supported Platforms* on Siebel SupportWeb.

NOTE: If you are upgrading from Oracle 7.x client to a later version of the Oracle client, you must uninstall and reinstall the Siebel Dedicated Web Client after upgrading the Oracle client.

If you are running an Oracle client, be sure to set the NLS_SORT parameter to BINARY or choose a setting for NLS_LANG that includes binary. These settings are required for adequate performance from the Dedicated Web Client.

For more information, see the *Upgrade Guide* and see ["Process of Configuring Oracle for Siebel Applications"](#) on page 36.

- For IBM DB2 Universal Database for z/OS and OS/390, you use DB2 Connect to connect from the Dedicated Web Client to the Siebel Database. For details, see *Implementing Siebel eBusiness Applications on DB2 UDB for z/OS and OS/390*.

Other Third-Party Software

Your Siebel application may require some third-party software products to be installed on the local client, for full functionality. For more information about third-party software, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

For information about requirements for the Web browser environment for running Siebel Web Clients, see also *Siebel System Administration Guide*.

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

- The IBM LDAP client must be installed for Dedicated Web Clients connecting to an LDAP directory server using the LDAP security adapter. For more information, see *Security Guide for Siebel eBusiness Applications*.

NOTE: Remember to install on the client machines all software required to view any standard attachment types your deployment may use within the Siebel implementation.

Clearing Browser Cache and Closing Browser Sessions

Before you install the Siebel client software, it is recommended that you clear the Microsoft Internet Explorer browser cache and close any browser sessions on the client machine.

For information about requirements for the Web browser environment for running Siebel Web Clients, see also *Siebel System Administration Guide*.

Installing the Siebel Mobile and Dedicated Web Client

This section describes how to install the Siebel Mobile and Dedicated Web Client. The software installed on the user's machine for Siebel Mobile Web Client and Dedicated Web Client is identical. Therefore, a single installer provides the software necessary to run either type of client.

For general information about these Siebel client types, see the *Deployment Planning Guide*.

Before you begin installation, review “[Preinstallation Tasks for the Siebel Client](#)” on page 180.

NOTE: Each Siebel client is designed to support only a single Siebel Enterprise. To support multiple Enterprises on a single machine for testing purposes, be sure to install clients in separate directories. For more information, see “[Directory Naming Conventions](#)” on page 181.

Siebel Client Installer Flow

The standard Siebel Mobile and Dedicated Web Client installer performs the following:

- Checks the client computer to verify whether required components have already been installed.
- Creates all required ODBC data sources.
- Installs the Siebel client software and specified language extension packs.
- Creates Siebel application and utility shortcuts.
- Allows the installation log file to be viewed.

Procedure for Installing the Siebel Client

Complete the following steps to install the Siebel Mobile or Dedicated Web Client and specified language extension packs.

You can also create a network image of the installation source files by using the Siebel network image creation utility or by directly copying the files from the DVD. For more information, see “[Creating a Network Image](#)” on page 30.

NOTE: The following procedure is for installing the base product. For patch installation instructions, refer to the *Maintenance Release Guide* provided with the patch.

To install the Siebel Mobile or Dedicated Web Client software

- 1 If you are installing from DVD, insert the appropriate DVD for the Siebel applications into the DVD drive of the client machine:
 - *Siebel eBusiness Applications, Base Applications for Windows*
 - *Siebel Industry Applications, Base Applications for Windows*

NOTE: The volume label for the DVD is seawinunibase (for Siebel eBusiness Applications) or siawinunibase (for Siebel Industry Applications).
- 2 In Windows Explorer, navigate to the root directory of the DVD or to the appropriate network directory, if you are installing from a network image.

CAUTION: You must run this and other installation programs from the DVD or from a network drive mapped to a drive letter. If you attempt to install from an unmapped network drive, the installer may be unable to locate files it needs to proceed and may fail.
- 3 Navigate to Windows\Client\Siebel_Web_Client, and double-click install.exe to start the Siebel client installer.

4 In the Choose Setup Language screen, choose the language in which to conduct the installation, then click OK.

The default installation language is the one that corresponds to the current regional settings on the installation machine.

5 If you have an existing client installation, you can choose to add language extension packs to this installation.

- If you are installing a new instance of the Siebel client, click Next, then go to [Step 6 on page 184](#).
- If you are adding languages to an existing Siebel client installation:
 - Select the check box next to the line identifying the existing installation to which you are adding languages, then click Next.
 - Select the check box next to each language you are installing, then click Next.
 - Proceed to [Step 10 on page 185](#).

6 In the Welcome screen, click Next.

7 In the Setup Type screen, verify that the Siebel client installation directory listed is correct. The default directory is C:\Program Files\Siebel\7.7\Web Client. Perform one of the following:

- Click Next to accept the default directory.
- Edit the directory text, such as to append the build number to the Siebel directory level, or to specify another drive such as D:, then click Next.
- Click Browse, select a different destination directory, then click Next.

For details on pathname requirements, see ["Directory Naming Conventions" on page 181](#).

8 While still in the Setup Type screen, select the type of installation to perform:

- **Typical.** Installs all base Siebel client components, plus the following optional components: Help Files, Third-Party Help Files, and Packager Utility. This option is recommended for most users. Proceed to [Step 10 on page 185](#).
- **Compact.** Installs all base Siebel client components. Proceed to [Step 10 on page 185](#).
- **Custom.** Installs all base Siebel client components and lets you specify whether to install any or all optional components. Some of these options are preselected by default. Proceed to [Step 9 on page 184](#).

NOTE: Siebel administrators should install Server Manager and the Siebel Packager utility.

9 For a custom installation, select from the Select Components screen the optional components you want to install. This screen appears only if you chose Custom installation in [Step 8 on page 184](#).

10 In the Choose Languages screen, select the languages (that is, Language Packs) to install. The language in which you are performing the installation, specified in [Step 4 on page 184](#), is preselected as a default. You must specify at least one language to install.

If you are installing Language Packs for an existing Siebel client installation, go to [Step 21 on page 187](#).

Verify that your destination machine has sufficient disk space for the installation, then click Next.

NOTE: The installer displays space requirements for only one drive. The drive that contains the TEMP directory requires at least 10 MB free prior to installation. Also, pay attention to your hard drive file system configuration. Using a FAT configuration with a 64-KB allocation unit is not recommended, because this may leave insufficient space for installation of all necessary components and cause the installation to fail. Configure file systems using NTSF instead.

11 In the Select Client Type screen, specify if you are installing the Mobile Web Client or the Dedicated Web Client, then click Next.

NOTE: Some of the remaining installation steps in this procedure apply only if you are installing the Mobile Web Client, or only if you are installing the Dedicated Web Client.

For Mobile Web Client installations, go to [Step 13 on page 185](#).

12 *Dedicated Web Client installations only:* In the Server Database screen, select the type of server database on which you are implementing your Siebel application. Choose one of the following, then click Next:

- IBM DB2 UDB for Windows and UNIX
- Microsoft SQL Server
- Oracle Database Server 9*i* (CBO)
- Oracle Database Server 8*i* (RBO)
- IBM DB2 UDB for z/OS and OS/390

NOTE: Based on your choice, the Siebel client installer validates that the correct database connectivity software has been installed. If not, you must exit the Siebel client installer, install the required software, then restart the client installer.

13 In the File System Server Information screen, enter your Siebel File System server directory path, then click Next.

NOTE: The Siebel File System directory path can be a UNC share name (for example, \\SRV1\\siebfile) or a mapped drive (for example, K:\\siebelFS).

14 In the Remote Server Information screen, enter your Siebel Remote Server connectivity information, then click Next. (This step applies to the Siebel Mobile Web Client only; for the Dedicated Web Client, click Next to accept the default.)

For Mobile Web Client installations, go to [Step 17 on page 186](#).

15 *Dedicated Web Client installations only:* In the Database Identification screen, enter the following information. Specify information for the database you specified in the Server Database screen in [Step 12 on page 185](#):

- For IBM DB2 Universal Database for Windows and UNIX, specify the Database Alias and Table Owner, then click Next.
- For Microsoft SQL Server, specify the Server Name and Database Name, then click Next.
- For Oracle Database, specify the Database Alias and Table Owner, then click Next.
- For IBM DB2 Universal Database for z/OS and OS/390, specify the Database Alias (as defined in DB2 Connect) and Table Owner or Schema Qualifier, then click Next.

16 *Dedicated Web Client installations only:* In the Enterprise Server Information screen, specify the address of the Siebel Gateway Name Server and the name of the Enterprise Server to which this client will connect for administration.

The Gateway Name Server Address is the network name or the IP address of the machine on which the Siebel Gateway Name Server is installed. To enter a specific port number, append the Gateway Name Server Address string with a colon and the desired port number.

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

17 *Mobile Web Client installations only:* In the Enterprise Server Information screen, specify the address of the Siebel Gateway Name Server and the name of the Enterprise Server, then click Next.

NOTE: The Siebel Gateway Name Server address is typically the machine name or VIP where the Name Server is running.

18 In the Server Request Broker Information screen, specify the name of the Siebel Server on which the Server Request Broker component is operating. This component is used for dynamic assignment and other interactive operations. Then click Next. (This step applies to the Siebel Dedicated Web Client only; for the Mobile Web Client, click Next to accept the default.)

19 In the Search Server Information screen:

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

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

20 In the Select Program Folder screen, enter the name of the program folder that will contain your Siebel shortcuts, then click Next.

The default name is Siebel Web Client 7.7. You can use spaces and use the backslash (\) in folder names to create a folder hierarchy.

Clicking Next in this step initiates file transfer. The setup program copies files to the local hard disk. A status bar in the Setup Status dialog box indicates the progress of the installation. You can cancel installation while files are being copied to the local disk.

After files have been installed for the base installation, the installer may prompt you to insert the DVD from which files for Language Pack installation will be transferred. (This prompt may not appear if you are installing from a network image location.)

21 When prompted, insert the *Language Extension Pack* DVD for each language you specified in [Step 10 on page 185](#), such as *English Language Extension Pack* for U.S. English. Then, using Windows Explorer, navigate from the DVD root directory to the folder Windows\Client\Siebel_Web_Client\language, where *language* represents the language you are prompted to install, such as ENU for U.S. English.

NOTE: For Siebel Industry Applications, the Windows and UNIX Language Packs are on different DVDs.

If you receive this prompt, but are not installing from DVD, navigate to the network location where the language files are located.

22 Double-click install.exe to start the Siebel client language extension pack installer.

The setup program copies files to the local hard disk for each specified language, in addition to those that were installed for the base installation.

A status bar in the Setup Status dialog box indicates the progress of the installation. You can cancel installation while files are being copied to the local disk.

If you specified additional Language Packs to be installed, return to [Step 21 on page 187](#).

If you have installed all specified Language Packs, proceed to the next step. Alternatively, if you have installed Language Packs for an existing client installation, the installer exits. Skip the rest of this procedure.

23 Review the information presented in the Event Log screen, then click Next.

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

NOTE: Write down the name of the installation directory as shown in this screen, for future reference.

24 Review the information presented in the Registry Log screen, then click Next.

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

25 Click Finish in the InstallShield Wizard Complete screen.

The Siebel client installation is now finished. Siebel application shortcuts are created in the program folder specified in [Step 20 on page 187](#). For more information, see ["Siebel Mobile and Dedicated Web Client Shortcuts" on page 197](#).

26 Review the installation log to verify that all components installed successfully.

If you are installing the Siebel Sample Database, see ["Installing the Siebel Sample Database" on page 188](#).

To verify successful installation, see ["Postinstallation Tasks for the Siebel Client" on page 192](#).

Installing the Siebel Sample Database

The Sample Database contains example data of various kinds to help you understand how the Siebel eBusiness Applications work. You can install the Sample Database for the Siebel Mobile or Dedicated Web Client. Alternatively, you can also install the Sample Database for Siebel Tools. The Sample Database, like the local database used with the Siebel Mobile Web Client, is based on SQL Anywhere.

For platform requirements for installing and using the Siebel Sample Database, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

NOTE: Installation of the Siebel Sample Database is optional and applies to the Siebel Mobile and Dedicated Web Clients only, not to the Siebel Web Client. Before you can install the Sample Database, you must install the client, as described in ["Installing the Siebel Mobile and Dedicated Web Client" on page 182](#).

After you have installed the Sample Database, you can run Siebel Demo applications, such as those described in ["Siebel Client Shortcuts and Start-Up Options" on page 197](#). You can also customize shortcuts, as described in the same section.

See also the subsection on directory names in ["Preinstallation Tasks for the Siebel Client" on page 180](#).

If you install a non-ENU Language Pack, see also ["Importing Non-ENU Repository and Seed Data into the Siebel Sample Database" on page 191](#).

NOTE: The following procedure is for installing the base product. For patch installation instructions, refer to the *Maintenance Release Guide* provided with the patch.

To install the Siebel Sample Database

1 If you are installing from DVD, insert the appropriate DVD for the Siebel applications into the DVD drive of the client machine:

- *Siebel eBusiness Applications, Base Applications for Windows*
- *Siebel Industry Applications, Base Applications for Windows*

NOTE: The volume label for the DVD is seawinunibase (for Siebel eBusiness Applications) or siawinunibase (for Siebel Industry Applications).

2 In Windows Explorer, navigate to the root directory of the DVD or to the appropriate network directory, if you are installing from a network image.

CAUTION: You must run this and other installation programs from the DVD or from a network drive mapped to a drive letter. If you attempt to install from an unmapped network drive, the installer may be unable to locate files it needs to proceed and may fail.

3 Navigate to Windows\Database\Siebel_Sample_Database, and double-click install.exe to start the Sample Database installer.

4 In the Choose Setup Language screen, choose the language in which to conduct the installation, then click OK.

The default installation language is the one that corresponds to the current regional settings on the installation machine.

5 If you have an existing Sample Database installation, you can choose to add language extension packs to this installation.

- If you are installing a new instance of the Siebel Sample Database (into a Siebel client installation that does not already have the Sample Database), click Next, then go to [Step 6 on page 189](#).
- If you are adding languages to an existing Siebel Sample Database installation:
 - Select the check box next to the line identifying the existing Sample Database installation to which you are adding languages, then click Next.
 - Select the check box next to each language you are installing, then click Next.
 - Proceed to [Step 10 on page 190](#).

6 In the Welcome screen, click Next.

7 In the Setup Type screen, verify that the Sample Database installation directory listed is correct. The default directory is C:\Program Files\Siebel\7.7\Web Client.

CAUTION: You must install the Sample Database in the same location where you installed the Siebel Mobile or Dedicated Web Client.

- Click Next to accept the default directory.
- Click Browse to select a different destination directory (if you installed the Siebel client in a non-default location), then click Next.

For details on pathname requirements, see ["Directory Naming Conventions" on page 181](#).

8 While still in the Setup Type screen, select the type of installation to perform:

- **Typical.** Installs the Sample Database plus optional components. This option is recommended for most users. Proceed to [Step 10 on page 190](#).
- **Compact.** Installs the Sample Database plus optional components. Proceed to [Step 10 on page 190](#).

- **Custom.** Installs the Sample Database and lets you specify whether to install the following optional components: Sample Files and Sample Search Index. These options are selected by default. Proceed to [Step 9 on page 190](#).

NOTE: For the standard installer for the Siebel Sample Database, the Setup Type options currently install the same components. In a customized installation, these options may install different elements.

- 9 For a custom installation, select from the Select Components screen the optional components you want to install. This screen appears only if you chose Custom installation in [Step 8 on page 189](#).
- 10 In the Choose Languages screen, select the languages (that is, Language Packs) to install.

If you are installing Language Packs for an existing Siebel client installation, go to [Step 12 on page 190](#).

Verify that your destination machine has sufficient disk space for the installation, then click Next.

NOTE: After you install the Sample Database, you may need to import repository data and seed data for a specified non-ENU language, depending on your requirements. For details, see ["Importing Non-ENU Repository and Seed Data into the Siebel Sample Database" on page 191](#).

- 11 In the Select Program Folder screen, enter the name of the program folder that will contain your Siebel shortcuts, then click Next.

The default name is Siebel Web Client 7.7. You can use spaces and use the backslash (\) in folder names to create a folder hierarchy.

Clicking Next in this step initiates file transfer. The setup program copies files to the local hard disk. A status bar in the Setup Status dialog box indicates the progress of the installation. You can cancel installation while files are being copied to the local disk.

After files have been installed for the base Sample Database installation, the installer may prompt you to insert the DVD from which files for Language Pack installation will be transferred. (This prompt may not appear if you are installing from a network image location.)

- 12 When prompted, insert the *Language Extension Pack* DVD for each language you specified in [Step 10 on page 190](#), such as *English Language Extension Pack* for U.S. English. Then, using Windows Explorer, navigate from the DVD root directory to the folder Windows\Database\Siebel_Sample_Database\language, where *language* represents the language you are prompted to install, such as ENU for U.S. English.

NOTE: For Siebel Industry Applications, the Windows and UNIX Language Packs are on different DVDs.

If you receive this prompt, but are not installing from the DVD, navigate to the network location where the language files are located.

13 Double-click install.exe to start the Sample Database language extension pack installer.

The setup program copies files to the local hard disk for each specified language, in addition to those that were installed for the base Sample Database installation.

A status bar in the Setup Status dialog box indicates the progress of the installation. You can cancel installation while files are being copied to the local disk.

If you specified additional Language Packs to be installed, return to [Step 12 on page 190](#).

If you have installed all specified Language Packs, proceed to the next step. Alternatively, if you have installed Language Packs for an existing Sample Database installation, the installer exits. Skip the rest of this procedure.

14 Review the information presented in the Event Log screen, then click Next.

This log provides details of the steps the installer has performed during your Sample Database installation.

15 Click Finish in the Setup Complete screen.

The Siebel Sample Database installation is now finished. Siebel Demo application shortcuts (for example, Siebel Call Center Demo - ENU) are created in the program folder specified in [Step 11 on page 190](#). For more information, see ["Siebel Mobile and Dedicated Web Client Shortcuts" on page 197](#).

To verify successful installation, see ["Postinstallation Tasks for the Siebel Client" on page 192](#).

Importing Non-ENU Repository and Seed Data into the Siebel Sample Database

By default, the SRF file installed with each language extension pack you install for the Siebel client contains the appropriate localization strings to display correct field labels for this language. In addition, demo user data is installed for each Language Pack you install for the Siebel Sample Database.

However, the Sample Database contains only ENU repository data and seed data, even after you have installed a non-ENU language for the Siebel client and for the Sample Database.

If you want to work with non-ENU repository data or seed data in the Sample Database, you must import the necessary localization strings into the Siebel Repository tables. After you have done this, you can view the non-ENU repository data by connecting to the Sample Database using the Siebel Tools Client, and you can view the non-ENU seed data in a Siebel application context.

To import non-ENU localization strings, you run the samp.bat batch file. This batch file first *deletes* the ENU repository data and seed data, and then inserts the repository data and seed data for the language you specify.

The file samp.bat is installed in *SIEBEL_CLIENT_ROOT\sample\UTF8*, where *SIEBEL_CLIENT_ROOT* is the directory where you installed the Siebel client and the Sample Database.

The syntax for using the samp.bat batch file is as follows:

```
samp SIEBEL_CLIENT_ROOT ODBC_DATA_SOURCE LANGUAGE
```

where:

SIEBEL_CLIENT_ROOT = The directory where you installed the Siebel client and the Sample Database.

ODBC_DATA_SOURCE = The ODBC data source you are using for the Sample Database. See also “[Verifying ODBC Data Sources for the Siebel Mobile and Dedicated Web Client](#)” on page 194.

LANGUAGE = The three-letter code for the language for which you are installing repository data and seed data.

For example, run samp.bat in a command window using a command like the following:

```
samp "C:\Program Files\siebel\7.7\web client" "SEAW Samp Db default instance" DEU
```

NOTE: Before you import repository data and seed data into the Sample Database, make sure the SQL Anywhere database engine is running. It is running if you have started a Siebel Demo application after initially installing the Sample Database with U.S. English.

The SQL Anywhere database engine starts when the Siebel Mobile or Dedicated Web Client initially connects to the Sample Database during a Windows session. If the configuration parameter AutoStopDB is FALSE (default), the database engine continues to run after the user logs out of the Siebel application. If this parameter is TRUE, the database engine exits when the user logs out. The AutoStopDB parameter is defined in the [Sample] section of the application configuration file, such as uagent.cfg for Siebel Call Center. For more information about Siebel application configuration parameters, see *Siebel System Administration Guide*.

Postinstallation Tasks for the Siebel Client

Review the following issues and perform the related tasks after running the Siebel client installer, to verify a successful Siebel client installation:

- “[Configuring the Siebel Client When Siebel VB or Siebel eScript Is Not Licensed](#)” on page 192
- “[Verifying the Siebel Client Directory Structure](#)” on page 193
- “[Verifying ODBC Data Sources for the Siebel Mobile and Dedicated Web Client](#)” on page 194

Then you can start the Siebel application, as described in “[Logging in to Your Siebel Application](#)” on page 195.

Configuring the Siebel Client When Siebel VB or Siebel eScript Is Not Licensed

The default configuration files for the Siebel client have Siebel VB or Siebel eScript enabled. This is done by setting the parameter EnableScripting to TRUE. If this parameter is TRUE, but you do not have either Siebel VB or Siebel eScript licensed, the client does not start. An error message is returned, indicating that you must turn off Siebel VB or Siebel eScript before running the client.

To configure Siebel client when Siebel VB or Siebel eScript are not licensed

- Set EnableScripting to FALSE in the configuration file used by your Siebel client configuration. This configuration file resides in the directory *SIEBEL_CLIENT_ROOT\bin\LANGUAGE*.

Verifying the Siebel Client Directory Structure

The Siebel client installer creates directories on each Siebel client. Use Windows Explorer to verify the directory structure on your computer. Following are an example of the directory structure of a typical Siebel client installation and descriptions of individual directories.

- ***SIEBEL_CLIENT_ROOT***. The directory for the Siebel client installation, such as C:\Program Files\Siebel\7.7\Web Client (the default). This installation directory contains the directories identified in the following section. You can change the name during the installation process. For more information, see ["Directory Naming Conventions" on page 181](#).
- **actuate**. Contains all the Actuate-related files, for Siebel Reports.
- **bin**. Contains all binary files (*.exe, *.dll, *.ssf, *.pre), configuration files (*.cfg), user preference files, and language-specific files.
- **charts**. Contains files for generating charts.
- **fonts**. Contains font files.
- **isstempl**. Contains templates for the Customer Order Management CDA application and engine files for newly created projects.
- **jar**. Contains JAR files (these are not used with Microsoft Internet Explorer).
- **lex**. Contains dictionary files used by the spelling checker.
- **local**. Where the local database is stored.
- **locale**. Stores language-specific files.
- **log**. Stores the log files from client operations, such as synchronization.
- **msgtempl**. Stores message files used by the client.
- **objects**. Contains compiled Siebel repository (SRF) files and language-specific files.

NOTE: Monitoring of any SRF file by virus scanning software may significantly degrade Siebel Mobile Web Client or Dedicated Web Client performance. If you have virus scanning software installed on your computers, you should configure it to skip SRF files. Because these files are binary data files, the risk of virus infection is low, and so excluding these files from scanning should be acceptable. Alternatively, you may choose to scan SRF files, but less frequently than other files.

- **packager**. Stores files used by the Siebel Packager utility.
- **public**. Contains HTML, ActiveX, Java, and JavaScript files, and image files used by the client.
- **reports**. Contains all report files.
- **sample**. Where the Sample Database is installed.
- **sqltemp**. Contains SQL scripts. These files should not be modified.

- **temp.** Contains working report files.
- **upgrade.** Will contain Siebel Anywhere upgrade files retrieved by the user.
- **webtempl.** Contains Siebel application Web templates.

Verifying ODBC Data Sources for the Siebel Mobile and Dedicated Web Client

The Siebel client installer creates the ODBC data sources shown in [Table 19 on page 194](#). By default, these are created as user data sources, which are visible only to the user account under which the Siebel client is installed.

If two or more users need to log in using the same Windows client machine, install the client using the `SystemDSN` parameter instead of the `UserDSN` parameter in the `siebel.ini` file.

For each data source name, an optional DSN suffix may be defined to allow multiple DSN instances to be referenced from the `siebel.ini` file. This is required if you will install multiple instances of the Siebel software on the same machine, each of which will access a different data source. In the data sources shown in [Table 19 on page 194](#), the DSN suffix is represented as *optional_DSN_suffix*. In the `siebel.ini` file, the suffix is specified using the parameter `DsnSufix`. Usually this parameter is set to *default instance*. If you require additional instances of this DSN to be defined in the `siebel.ini` file, set this parameter to an appropriate string value for each additional DSN instance.

For more information about creating custom installer packages, see *Going Live with Siebel eBusiness Applications*.

NOTE: Make sure to use the ODBC drivers described in *System Requirements and Supported Platforms* on Siebel SupportWeb.

Table 19. Siebel Client ODBC Data Sources

Data Source	When It Is Used
SEAW DB2UDB <i>optional_DSN_suffix</i>	For IBM DB2 installations only, connects to the DB2 database.
SEAW Local Db <i>optional_DSN_suffix</i>	Connects to the local database (SQL Anywhere).
SEAW Samp Db <i>optional_DSN_suffix</i>	Connects to the Siebel Sample Database (SQL Anywhere).

Table 19. Siebel Client ODBC Data Sources

Data Source	When It Is Used
SEAW Oracle <i>optional_DSN_suffix</i>	<p>For Oracle installations only, connects to the Oracle database. This data source is used only by the Siebel administrator when creating Siebel Anywhere upgrade kits.</p> <p>If you are using Oracle 9<i>i</i>, for the Dedicated Web Client, this data source must include the following settings, which are specified in the applicable registry entry:</p> <p>ColumnsAsChar = 1 ColumnSizeAsCharacter = 1</p>
SEAW Search <i>optional_DSN_suffix</i>	ODBC data source used by Hummingbird SearchServer; created only if Hummingbird is installed. This data source is always created as a SystemDSN.
SEAW Text <i>optional_DSN_suffix</i>	Used for reporting and data merge into the local SQL Anywhere database.

Logging in to Your Siebel Application

This section provides basic instructions for logging into your Siebel application through these Siebel client types:

- Siebel Dedicated Web Client
- Siebel Mobile Web Client
- Siebel Web Client

Before logging in, review requirements described in this book or related documents. Also note the following issues:

- User rights to read and write in Siebel client installation directories are required for running the Siebel Mobile or Dedicated Web Client.

For information on setting user rights, consult the operating system manuals for the version of Microsoft Windows on which the application is installed.

- After the Siebel Database has been installed, users will be unable to use the Siebel application until the license key for a base Siebel application has been entered into the Siebel Database.

You enter license keys initially by using the Siebel Dedicated Web Client or Siebel Tools Client. Additional licenses or licenses for optional modules can be entered subsequently using the Siebel Web Client, Siebel Dedicated Web Client, or Siebel Tools Client.

NOTE: You can find the license key that has been assigned to your site in the license key letter provided with the DVD case, or, if you used FTP to download the software, in a Word document. For detailed information about license keys, see *Applications Administration Guide*.

- The user name and password used to log in to Siebel applications must be those of an employee with a valid position and division defined in the Siebel Database. Therefore, the first time you log in to the server database, do so as an administrator. Use SADMIN as the user name and password, or use different credentials, as defined by your administrator. Then you can set up other users as employees with defined positions and responsibilities.

For more information on setting up employees, see *Security Guide for Siebel eBusiness Applications*.

- The Web browser must be correctly configured to run the Siebel application. High-interactivity and standard-interactivity applications have different requirements. High-interactivity applications can use the client health check feature to verify that requirements have been met.

For more information on configuring the browser for high interactivity and standard interactivity, see *Siebel System Administration Guide*. See also *System Requirements and Supported Platforms* on Siebel SupportWeb.

To log in to your Siebel application using the Siebel Dedicated Web Client

- 1 Double-click one of the Siebel shortcuts in the program folder, such as Siebel Call Center.
- 2 Log in using a valid user ID and password.
- 3 Specify the Server database and click OK.

NOTE: The first time you log in to the Server database, you are prompted to enter your site's license key number.

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

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

NOTE: If you need to access license keys at a later time, such as to enter additional license keys, you can do so from the License Keys view. To access this view from the application menu, choose Navigate > Site Map > Administration - Application > License Keys.

To log in to your Siebel application using the Siebel Mobile Web Client

- 1 Double-click one of the Siebel shortcuts in the program folder, such as Siebel Call Center.
- 2 Log in using a valid user ID and password.
- 3 Specify the Local database and click OK.

NOTE: When logging into a local database for the first time, users are automatically prompted to connect to the Siebel Server and download the local database. Users should attempt this only after a local database has been extracted for them.

For more information on Siebel Remote and extracting local databases, see *Siebel Remote and Replication Manager Administration Guide*.

To log in to your Siebel application using the Siebel Web Client

- 1 Open your Web browser.
- 2 Go to the URL for your Siebel application.
- 3 Log in using a valid user ID and password.

The Siebel application you are connecting to is already configured to work with a specific database. You do not need to specify a database to connect to.

Siebel Client Shortcuts and Start-Up Options

This section provides information about the shortcuts installed in the Siebel program folder when you install the Siebel client, and about command-line options used in these shortcuts.

It also provides information about creating custom shortcuts to access Siebel applications using Demo users other than those specified in the predefined shortcuts installed with the Siebel Sample Database.

Siebel Mobile and Dedicated Web Client Shortcuts

The Siebel client and Sample Database installers create shortcuts in the Siebel program folder for the modules you have installed. For Siebel applications, separate shortcuts are installed for each installed language. Which shortcuts are installed depends on your installation choices and is also subject to the settings in the siebel.ini file. Most shortcuts are installed in the program group; some are installed in the start-up group.

For information about customizing the shortcuts, see ["Siebel Mobile and Dedicated Web Client Start-Up Options" on page 199](#).

Siebel application shortcuts installed by the client installer are listed here. When you run a shortcut to start a Siebel application, you can connect to the database server (for LAN-connected users), to an initialized local database, or to the Sample Database (if it has been installed). The Demo application shortcuts connect to the Sample Database using predefined demonstration users.

Each application shortcut loads the Siebel configuration file for that application—for example, Siebel Call Center uses the file uagent.cfg.

Siebel Application Shortcuts

The following are the Siebel application shortcuts installed in the Siebel client program group:

- **Siebel Call Center.** Starts Siebel Call Center.
- **Siebel Call Center Demo.** Starts Siebel Call Center, using the Sample Database.
- **Siebel Employee Relationship Management Administration.** Starts Siebel Employee Relationship Management Administration.

- **Siebel Employee Relationship Management.** Starts Siebel Employee Relationship Management.
- **Siebel Employee Relationship Management Demo.** Starts Siebel Employee Relationship Management, using the Sample Database.
- **Siebel Marketing.** Starts Siebel Marketing.
- **Siebel Marketing Demo.** Starts Siebel Marketing, using the Sample Database.
- **Siebel Partner Manager.** Starts Siebel Partner Manager.
- **Siebel Partner Manager Demo.** Starts Siebel Partner Manager, using the Sample Database.
- **Siebel Partner Portal.** Starts Siebel Partner Portal.
- **Siebel Sales.** Starts Siebel Sales.
- **Siebel Sales Demo.** Starts Siebel Sales, using the Sample Database.
- **Siebel Service.** Starts Siebel Service.
- **Siebel Service Demo.** Starts Siebel Service, using the Sample Database.

Utility and Synchronization Program Shortcuts

The following are additional shortcuts installed in the Siebel client program group. These shortcuts run utilities such as Siebel Packager or synchronization programs.

- **Siebel Packager.** Starts the Siebel Packager utility. For more information about Siebel Packager, see *Going Live with Siebel eBusiness Applications*.
- **Siebel Remote.** Starts the Siebel Remote stand-alone synchronization program (siebsync.exe). For more information about Siebel Remote, see *Siebel Remote and Replication Manager Administration Guide*.
- **Siebel TrickleSync.** Starts the Siebel TrickleSync program (autosync.exe). This shortcut is created in both the program group and the start-up group. For more information about Siebel TrickleSync, see *Siebel Remote and Replication Manager Administration Guide*.
- **Siebel Sales Handheld Sync.** Starts the Siebel Sales Handheld Sync synchronization program (syncmanager.exe).
- **Siebel Service Handheld Sync.** Starts the Siebel Service Handheld Sync synchronization program (syncmanager.exe).
- **Siebel QuickStart.** Starts the Siebel QuickStart agent, for Siebel Mobile Web Client users. For more information, see ["Using Siebel QuickStart with the Siebel Mobile Web Client" on page 201](#).

NOTE: The Siebel QuickStart shortcut is not installed by default. To install it, specify QuickStart = YES in the [Icons] section of the siebel.ini file. The shortcut is created according to the settings in the [QuickStart] section of the file. The shortcut is installed in the start-up group when Folder = startup. The shortcut must be located in the start-up group to function correctly.

Siebel Mobile and Dedicated Web Client Start-Up Options

The application shortcuts described in ["Siebel Mobile and Dedicated Web Client Shortcuts" on page 197](#) run an executable program called siebel.exe, followed by various start-up options. For example, the shortcut for Siebel Call Center - ENU may be defined as shown in the following example (depending on your installation location). For this example, the only option used is /c, to specify the configuration file.

```
"C:\Program Files\siebel\7.7\web client\BIN\siebel.exe" /c CFG_FILE_PATH\uagent.cfg
```

The Demo application shortcuts also specify the Sample Database, user and password information, and CTI simulation. For example, the shortcut for Siebel Call Center Demo - ENU may be defined as shown in the following:

```
"C:\Program Files\siebel\7.7\web client\BIN\siebel.exe" /c CFG_FILE_PATH\uagent.cfg
/d sample /u CCHENG /p CCHENG /ctsim
```

In the preceding examples, *CFG_FILE_PATH* represents the full path to the configuration file, using the MS-DOS "8.3" file-naming convention. This file is located in BIN\LANGUAGE in the *SIEBEL_CLIENT_ROOT* directory, such as BIN\ENU for U.S. English.

For example, the actual target definition for the Siebel Call Center - ENU shortcut may resemble the following example:

```
"C:\Program Files\siebel\7.7\web client\BIN\siebel.exe" /c
"C:\PROGRA~1\SIEBEL~1\7.7\WEBCLI~1\bin\ENU\uagent.cfg"
```

The siebel.exe program may also be run from an MS-DOS window. In this case, the start-up options may be entered directly on the command line. For information about creating custom shortcuts, see ["Creating Custom Siebel Application Shortcuts" on page 200](#).

The available start-up options are described in [Table 20 on page 199](#).

Table 20. Siebel Mobile and Dedicated Web Client Start-Up Options

Start-Up Option	Description
<i>/c config_file</i>	Required. Specifies the path and filename for the configuration file to use, such as siebel.cfg for Siebel Sales or uagent.cfg for Siebel Call Center.
<i>/d data_source</i>	Specifies the data source to connect to, as defined in the configuration file. The Demo shortcuts specify "/d sample" to access the Sample Database. <ul style="list-style-type: none"> ■ If you do not use /u and /p to specify a valid Siebel user, and do not use /d to specify a valid data source, then you can specify the data source from the login screen. ■ If you use /u and /p but do not use /d, then the local database is assumed.

Table 20. Siebel Mobile and Dedicated Web Client Start-Up Options

Start-Up Option	Description
<code>/l language</code>	<p>Specifies the three-letter code for the language to use for this client session, such as ENU for U.S. English. The applicable Language Pack must have been installed for the client.</p> <p>If you do not use <code>/l</code> to specify a valid language, the language is obtained from the configuration file.</p>
<code>/u username</code>	<p>Specifies the user name. The Demo shortcuts specify predefined demo users using <code>/u</code> and <code>/p</code> options.</p> <p>If you do not use <code>/u</code> and <code>/p</code> to specify a valid Siebel user, you must log in from a login screen.</p> <p>CAUTION: Security issues must be considered in using <code>/u</code> and <code>/p</code> options (in particular <code>/p</code>) to access a live production system. These values are not encrypted.</p> <p>See also Appendix C, "Demo Users in the Siebel Sample Database."</p>
<code>/p password</code>	Specifies the password for the user specified using <code>/u</code> .
<code>/ctisim</code>	Runs the Communications Simulator. This option should generally be used only with predefined Demo shortcuts that specify it, such as Siebel Call Center Demo. For more information, see <i>Siebel Communications Server Administration Guide</i> .
<code>/b browser_exe</code>	<p>Specifies the path and filename for the browser executable program to use for the Siebel client session.</p> <p>The <code>/b</code> option is needed only if a browser that is not supported for the Siebel application is currently the default browser. For example, if you are running a high-interactivity application, such as Siebel Call Center, you must use a supported version of Microsoft Internet Explorer. If this browser is not the default browser, use <code>/b</code> to specify the browser explicitly.</p> <p>For more information about supported browsers for Siebel eBusiness Applications, see <i>System Requirements and Supported Platforms</i> on Siebel SupportWeb.</p>
<code>/s spool_file</code>	Specifies spooling SQL to a specified output file. This option may be useful for troubleshooting purposes. For more information, see <i>Performance Tuning Guide</i> .

Creating Custom Siebel Application Shortcuts

If you need to customize the Siebel eBusiness Applications shortcuts described in ["Siebel Mobile and Dedicated Web Client Shortcuts" on page 197](#), you can do so by modifying shortcut properties, and changing the value for the Target field. Generally, rather than modifying existing shortcuts or creating them from scratch, it may be best to copy existing ones and rename and modify the copies.

You must observe the following requirements for creating or modifying shortcuts:

- Do not modify the location displayed in the shortcut property labeled *Start in*. Doing so may cause problems when the Upgrade Wizard is run.
- If you are deploying clients operating against an Oracle database, do not include parentheses in the labels of the Siebel shortcuts if you modify them. Including parentheses prevents the application from connecting to the Oracle database.
- When defining the Target value for a shortcut, follow the guidelines for using the options described in ["Siebel Mobile and Dedicated Web Client Start-Up Options" on page 199](#).

The Siebel Sample Database, which is accessed by using one of the Demo shortcuts described in ["Siebel Mobile and Dedicated Web Client Shortcuts" on page 197](#), contains many predefined demo users. For example, CCHENG is the demo user for the Siebel Call Center Demo shortcut. Many other demo users are available in the Sample Database that are not represented in the existing Demo shortcuts. Each demo user is intended to illustrate a particular Siebel application as it would appear for a user with certain predefined responsibilities.

NOTE: For lists of demo users available in the Siebel Sample Database, per Siebel application, see [Appendix C, "Demo Users in the Siebel Sample Database."](#)

To view all available responsibilities

- From the application-level menu, choose Navigate > Site Map > Administration - Application > Responsibilities.

See also the access control section of the *Security Guide for Siebel eBusiness Applications*.

Using Siebel QuickStart with the Siebel Mobile Web Client

Siebel QuickStart is an agent that is preloaded on a mobile user's machine at start-up and reduces the time required to launch the Siebel Mobile Web Client. Siebel QuickStart is enabled and loaded for the first time from the Siebel application login screen.

NOTE: Siebel QuickStart can be used with the Siebel Mobile Web Client, when connecting to the local database or Sample Database. It does not apply to the Siebel Dedicated Web Client or Siebel Web Client.

Siebel QuickStart applies to subsequent instances of the same type of Siebel application session—running the same application as the same user and with the same start-up options. The speed increase provided by QuickStart does not take effect on the initial Siebel login. Subsequent logins of the same type of Siebel application session benefit from QuickStart, until the user disables QuickStart.

Siebel QuickStart stores the encrypted Siebel user name and password in a cookie. For more information about using cookies with Siebel applications, see *Security Guide for Siebel eBusiness Applications*.

NOTE: Users should disable Siebel QuickStart for existing application sessions before enabling it for another application session.

Enabling and Disabling Siebel QuickStart

Instructions are provided in the following procedures for enabling and disabling Siebel QuickStart.

NOTE: This section assumes that the Siebel QuickStart shortcut is located in the start-up group. The Siebel QuickStart shortcut is not created by default. For information about how to create it, see “Siebel Mobile and Dedicated Web Client Shortcuts” on page 197.

To enable Siebel QuickStart

- 1 Start a Siebel application with the Mobile Web Client. For example, double-click the shortcut for Siebel Call Center for your applicable language.
- 2 In the Siebel login screen, check the Enable Siebel QuickStart check box.

The QuickStart agent is loaded into memory for the rest of the Microsoft Windows session, and is loaded again when the user logs into Windows subsequently, unless the user disables it.

To disable Siebel QuickStart from the login screen

- 1 Start a Siebel application with the Mobile Web Client. For example, double-click the shortcut for Siebel Call Center for your applicable language.
- 2 In the Siebel login screen, clear the Enable Siebel QuickStart check box, if it is checked.

The QuickStart agent is not loaded for this Siebel application session, and does not load subsequently unless it is explicitly specified.

To disable Siebel QuickStart from the system tray

- Right-click the Siebel icon in the system tray and select Disable On Startup.
If the Siebel application is not running, the QuickStart agent exits. The agent does not load subsequently unless it is explicitly specified.
If the Siebel application is running, the QuickStart agent stays loaded until you log out of the Siebel application session. The agent does not load subsequently unless it is explicitly specified.

Options for the Siebel Icon in the System Tray

When the Siebel application is running or the QuickStart agent is loaded, an icon appears in the system tray. Right-clicking this icon displays several choices:

- **Exit.** Exits the QuickStart agent for the current Windows session. This option is available only when the QuickStart agent is loaded and the Siebel application is *not* running. If QuickStart is enabled, the agent loads again the next time the user starts the Siebel application the same way, or starts Windows.
- **Disable On Startup.** Disables Siebel QuickStart the next time the user starts the Siebel application or starts Windows. Also exits the QuickStart agent, in the manner described in the previous section. This option is available only when the QuickStart agent is loaded, whether or not the Siebel application is running.

- **About.** Displays information about Siebel applications. This option is available when the Siebel application or the QuickStart agent are running, or both.
- **Help.** Displays *Siebel Online Help*. This option is available when the Siebel application or the QuickStart agent are running, or both.

Using View Precaching with Siebel QuickStart

When the QuickStart agent is loaded, views specified using the parameters in the [Preload] section of the configuration file, such as siebel.cfg, are preloaded (precached) during start-up of the Siebel application. In subsequent application sessions, navigating to a precached view is faster.

In the [Preload] section, specify the names of the views to be precached as the values for configuration parameters named View1, View2, and so on.

For more information about specifying configuration file parameters, see *Siebel System Administration Guide*.

Specifying QuickStart Availability with Siebel Packager

By default, the siebel.exe program has Siebel QuickStart available. However, administrators may choose to package client installations with QuickStart unavailable—so the Enable Siebel QuickStart check box does not appear on the Siebel login screen and thus cannot be enabled by end users.

When preparing model Siebel client installations to include in packages you create using the Siebel Packager utility, you can disable Siebel QuickStart. To do this, rename or remove the siebel.exe program and then change the name of siebel1.exe to siebel.exe.

For more information on using the Packager utility, see *Going Live with Siebel eBusiness Applications*.

QuickStart and AutoStopDB Configuration Parameter

When you are using Siebel QuickStart, you may also decide to set the configuration parameter AutoStopDB to FALSE for the local database. Both of these features have a similar performance benefit when the Siebel application is started and exited multiple times within the same Windows session.

The AutoStopDB parameter is specified in the [Local] section of the application configuration file, such as uagent.cfg for Siebel Call Center. For more information, see *Siebel System Administration Guide*.

10 Installing Siebel Tools

This chapter explains how to install Siebel Tools in a Windows environment. It includes the following topics:

- “Process of Installing Siebel Tools” on page 205
- “Siebel Tools Requirements” on page 205
- “Installing the Siebel Tools Client” on page 206
- “Postinstallation Tasks for Siebel Tools” on page 209

For the uninstallation procedure, see “Uninstalling Siebel Tools” on page 265.

Process of Installing Siebel Tools

The Siebel Tools installation consists of multiple tasks that you should perform in the following sequence:

- 1 Verify installation requirements. See “Siebel Tools Requirements” on page 205.
- 2 Install Siebel Tools. See “Installing the Siebel Tools Client” on page 206.
- 3 Perform postinstallation tasks. See “Postinstallation Tasks for Siebel Tools” on page 209.
 - a Connect to the database server and enter the license key. See “Verifying Successful Installation of Siebel Tools” on page 210.
 - b Verify the installation directory structure. See “Verifying the Siebel Tools Directory Structure” on page 210.
 - c Verify read/write access to the Siebel Tools directories. See “Verify Read/Write Access to Siebel Tools Directories” on page 212.
 - d Verify ODBC data sources. See “Verify Siebel Tools ODBC Data Sources” on page 212.

Siebel Tools Requirements

Before you install Siebel Tools, make sure that:

- Your client platform meets the requirements defined in *System Requirements and Supported Platforms* on Siebel SupportWeb for the version of the software you are using.
- You have all the third-party software required for your implementation installed, including the database connectivity software for your chosen RDBMS.

- You have installed the Siebel Database Server included with Siebel eBusiness Applications. This database stores the Siebel Tools project repositories. For more information about installing and configuring the Siebel Database Server, see [Chapter 7, "Installing the Siebel Database Server."](#)

A local database can also be initialized for each developer user, as applicable. For more information, see *Configuring Siebel eBusiness Applications* and *Using Siebel Tools*.

NOTE: The Siebel Tools Client can also access demonstration data in the Siebel Sample Database, which you can install with the Siebel Mobile Web Client. For more information, see ["Installing the Siebel Sample Database" on page 188](#) and related sections.

- To create system data sources, you must modify the `SystemDSN` parameter in the `siebel.ini` file before running the Siebel Tools installation. For information about how to modify the `SystemDSN` parameter in the `siebel.ini` file, see *Siebel System Administration Guide*.

NOTE: The sort order for the Siebel Database Server should be set to binary; otherwise, you cannot compile or merge repositories.

Administrative Rights for Installation

Administrative rights are required for installation or uninstallation of the Siebel Tools Client.

For information on setting administration rights, consult the operating system manuals for the version of Microsoft Windows on which you are installing the Siebel client software.

For information about uninstalling Siebel Tools Client software, see ["Uninstalling Siebel Tools" on page 265](#).

Installing the Siebel Tools Client

You install Siebel Tools from the *Siebel eBusiness Applications, Base Applications for Windows* (for Siebel eBusiness Applications) or *Siebel Industry Applications, Base Applications for Windows* (for Siebel Industry Applications) DVD.

You can also create a network image of the installation source files by using the Siebel network image creation utility or by directly copying the files from the DVD. For more information, see ["Creating a Network Image" on page 30](#).

NOTE: The following procedure is for installing the base product. For patch installation instructions, refer to the *Maintenance Release Guide* provided with the patch.

To install Siebel Tools

- 1 If you are installing from DVD, insert the appropriate DVD for the Siebel applications into the DVD drive of the developer machine:
 - *Siebel eBusiness Applications, Base Applications for Windows*
 - *Siebel Industry Applications, Base Applications for Windows*

NOTE: The volume label for the DVD is `seawinunibase` (for Siebel eBusiness Applications) or `siawinunibase` (for Siebel Industry Applications).

- 2 In Windows Explorer, navigate to the root directory of the DVD or to the appropriate network directory, if you are installing from a network image.

CAUTION: You must run this and other installation programs from the DVD or a network drive mapped to a drive letter. If you attempt to install from an unmapped network drive, the installer may be unable to locate files it needs to proceed and may fail.

- 3 Navigate to Windows\Client\Siebel_Tools, and double-click install.exe to start the Siebel Tools Client installer.

The Choose Setup Language screen appears.

- 4 Select the language in which you would like to run the wizard.

The default installation language is the one that corresponds to the current language of the operating system.

The Welcome to Siebel eBusiness Application Tools Setup screen appears.

- 5 Click Next to start the installation process.

- 6 On the Setup Type screen perform the following:

- a Choose the type of installation to execute from the following options:
 - **Typical.** Installs all Siebel Tools components. This option is recommended for most users. This option does not install the report source code which is required for creating custom reports.
 - **Compact.** Installs all modules except the help files and report source code.
 - **Custom.** Lets you customize your installation by choosing among different components. Each component is listed with the amount of disk space it requires. Click Disk Space to see how much disk space is available on the hard drive and network drives that are accessible from this client computer. This option is recommended for experienced administrators only. If you want to create custom reports you must perform a custom setup and check the report source code component.

NOTE: A warning appears if there is insufficient disk space to install Siebel Tools on the destination host machine. In this case, you must free some disk space before continuing with the installation.

- b Select a destination directory and click Next.

By default, setup installs in the directory C:\Program Files\Siebel\7.7\Tools. If desired, you may choose a different drive for installation by clicking Browse. If you specify a directory other than C:\Program Files\Siebel\7.7\Tools, make the appropriate substitutions as you read this chapter.

CAUTION: Do not install Siebel Tools in the same directory as the Siebel client. Doing so will cause memory conflicts and program crashes.

The Choose Languages screen appears.

7 Select the language you want to install and click Next.

NOTE: Siebel Tools must be installed with the English Language Pack. If you need to customize non-English reports, you can install other Language Packs as well. The files specific to the languages chosen in this step are copied to your workstation.

The Server Database screen appears.

8 Select the database client and click Next.

NOTE: The installation program checks that the prerequisite database software is installed on the machine. If it is not, the installation wizard will not proceed.

The File System Server Information screen appears.

9 Type the Siebel File System directory path. Use either the UNC name of the Siebel File System directory or a drive letter mapped to it.

The Remote Server Information screen appears.

10 Type the Siebel Remote Server host name (network name or the machine name) to which this client will connect, or specify different ones.

Record the information you provided in [Step 9 on page 208](#) and [Step 10 on page 208](#) in your copy of the Deployment Planning Worksheet, [Appendix A, "Deployment Planning Worksheet."](#)

The Database Information screen appears.

11 Specify the database identification.

NOTE: Make sure the database is configured to handle binary sort order. For more information, see ["Selecting a Language for DB2 UDB" on page 48.](#)

DB2:

- **Database Alias.** Type the database alias for your Siebel Server Database in the Deployment Planning Worksheet.
- **Tableowner.** Type the name of the database account that owns the Siebel tables in the Deployment Planning Worksheet.

Microsoft SQL Server:

- **Database Server Hostname.** Type the server name for your Siebel Database Server in the Deployment Planning Worksheet.
- **Database Instance Name.** Type the name of the database owner account in the Deployment Planning Worksheet.

NOTE: Microsoft SQL Server is case-sensitive; all information must be entered exactly as it exists on the SQL Server database.

Oracle:

- **Database Alias.** Type the connect string for your Siebel Database Server as recorded in your copy of the Deployment Planning Worksheet.
- **Table Owner.** Type the name of the database account that owns the Siebel tables as recorded in the copy of the Deployment Planning Worksheet.

12 Select the program folder where you want the Siebel Tools icons to be installed. The default is Siebel Tools 7.xx. If you do not want to accept the default, you have the following options:

- Select a folder from the list.
- Type in a new program folder name.

The Event Log dialog box appears after the installer starts copying files. It describes the steps the installer completes during your Siebel Tools installation.

The installer proceeds to install the specified files. After the files have been copied to the installation location, this message appears:

Setup did not find the *7ang* language pack on the current media. Please insert the DVD containing the *7ang* language pack and select the setup.exe file from the *7ang* folder.

where:

lang = The code for the language you are installing, such as *enu* for U.S. English.

NOTE: For Siebel Industry Applications, the Windows and UNIX Language Packs are on different DVDs.

13 Remove the current DVD from the drive and insert the appropriate Language Pack DVD and click OK.

A dialog box titled Select install.exe from the *lang* directory appears and displays the content of the current *lang* directory. However, you do not need to do anything with this directory.

14 Double-click setup.exe under Windows\Client\Siebel_Tools\lang, where *lang* is the code for the Language Pack you are installing, such as *enu* for U.S. English.

A message appears, stating that language files are being installed.

When all language files have been installed, a new message box appears, stating:

Please re-insert the base DVD and browse to the setup.exe to enable setup to continue.

15 Remove the current DVD from the drive and insert the base DVD and click OK.

The installer completes the installation and displays the Event Log screen.

16 Review the information on this screen and in the file SSDsetup.log, created in the Siebel Tools installation directory. If necessary, take appropriate action to address the errors and rerun the installation; otherwise, click Next to complete the installation.

Postinstallation Tasks for Siebel Tools

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

- “Verifying Successful Installation of Siebel Tools” on page 210
- “Verifying the Siebel Tools Directory Structure” on page 210
- “Verify Siebel Tools ODBC Data Sources” on page 212

Verifying Successful Installation of Siebel Tools

Verify that installation was successful by connecting to the Siebel Database Server and entering your license key for Siebel Tools.

To verify that the installation completed successfully

- 1 Start Siebel Tools and log on to the Siebel Database Server. The first time you log on, the system prompts you to enter a license key number, if you have not done so already. If this is the case proceed to [Step 2 on page 210](#).
- 2 Type your license key number in the dialog box that appears, and click OK. You can find the license key assigned to your site in your license key letter, provided in the DVD case or within an MS Word document if you have used FTP to download the software. For detailed information about license keys, see *Applications Administration Guide*.

Verifying the Siebel Tools Directory Structure

The Siebel Tools installation program creates the following directories.

TOOLS. The Siebel Tools root directory.

NOTE: The root directory name may differ, based on installation choices made.

actuate	Actuate-related files for generating and running reports.
afc	Actuate Foundation Class files.
bin	Actuate binary files.
cache	Actuate cache files.
bin	All binary files (.exe, .dll, .cfg, .dsn, .enu, .bat), configuration files, and user preference files.
language	Language-specific dll files.
dll	Siebel Tools program library files.
bin	Siebel Tools binary files.
exe	Siebel Tools executable files.
classes	Java code files.
examples	
examples\src	
examples\src\com	
examples\src\com\siebel	
examples\src\com\extra	
examples\src\com\integration	
examples\src\com\integration\mq	Examples of Java code files.
examples\src\com\integration\servlet	Examples of Java code files.

help	Siebel Tools help files.	
	<i>language</i>	Help files for the language you installed.
local	The local, extracted database.	
	files	Local file attachments.
	inbox	Not used for Siebel Tools.
	outbox	Not used for Siebel Tools.
locale	Language-specific files.	
log	Log files from Siebel Tools operations.	
msgtempl	Message files.	
objects	Location of the siebel.srf file, the compiled definition file used by Siebel Tools. This is also the default location for SRF files created using the Siebel Tools object compiler.	
<p>NOTE: Monitoring of any SRF file by virus scanning software may significantly degrade Siebel Tools Client performance. If you have virus scanning software installed on your computers, you should configure it to skip SRF files. Because these files are binary data files, the risk of virus infection is low, and so excluding these files from scanning should be acceptable. Alternatively, you may choose to scan SRF files, but less frequently than other files.</p>		
public	HTML and graphics files for uploading and cascading style sheet files.	
reports	Location of all report files.	
	<i>language</i>	Version for the language you installed.
reppatch	Location of the XML files used by the maintenance update wizard. All log files generated by the maintenance wizard are also created under reppatch\log.	
	We use the same folder for configuration of the postupgrade wizard rules and log file generation.	
rptsrc	Location of Actuate source files for all reports.	
	<i>language</i>	Version for the language you installed.
	<i>language\lib</i>	Report object library (.rol) files.
	<i>language\standard</i>	Report object design (.rod) files.
sample	Location where the Sample Database (sse_samp.dbf) is installed.	
	files	Where the sample file attachments are installed.
	inbox	Not used for Siebel Tools.
	outbox	Not used for Siebel Tools.
scripts	Location of Java scripts.	
sqltemp	SQL statement fragments used by certain Siebel Tools operations.	
temp	Temporary working area.	
upgrade	Not used for Siebel Tools.	
webtempl	Location of Siebel Web Template (.swt) files.	

Verify Read/Write Access to Siebel Tools Directories

After installing Siebel Tools, verify that the Siebel Tools user has sufficient permissions to read and write data to the Tools directory.

To verify permission settings

- 1 Select the Siebel Tools root directory and right-click on it.
- 2 Choose Properties and go to the Security tab.
- 3 Review and make sure users have read/write access to Siebel Tools directories.

Verify Siebel Tools ODBC Data Sources

The Siebel Tools Installer creates the ODBC data sources described in [Table 21](#). By default, these are created as system data sources, which are visible to all user accounts on the machine where Siebel Tools is installed.

CAUTION: Because the total length of the data source name must be no more than 32 characters, make sure you select a short name for your local database. If you select a long name for your local database (for example, SSD LOCAL DB M:/SIEBEL/10910/TOOLS), the data source created by the Siebel Tools Installer will not appear under the System DNS tab and you will experience failure of Siebel Tools operations such as checkout.

Table 21. Siebel Tools ODBC Data Sources

Data Source	Use
SSD Local Db default instance	Connects to the local SQL Anywhere database.
SSD	Connects to the DB2 database.
SSD default instance	Connects to the Microsoft SQL Server or Oracle database.

For Oracle 8*i* or 9*i*, verify that the following registry keys are set as shown. These values are required in order for the ODBC driver to behave correctly.

```
PacketSize = 0
EnableScrollableCursors = 0
```

If you have upgraded your database from Oracle 8*i* to Oracle 9*i*, verify that the following registry keys are set as shown. These values are required in order for the ODBC driver to behave correctly.

```
ColumnsAsChar = 1
ColumnSizeAsCharacter = 1
```

11 Installing the Siebel CORBA Object Manager

This chapter describes the steps involved in installing the Siebel CORBA Object Manager. It includes the following topics:

- ["Process of Installing the Siebel CORBA Object Manager" on page 213](#)
- ["About Siebel CORBA Object Manager" on page 214](#)
- ["Verifying Siebel CORBA Object Manager Requirements" on page 214](#)
- ["Configuring Database Connectivity for Siebel CORBA Object Manager" on page 215](#)
- ["Verifying Network Connectivity for Siebel CORBA Object Manager" on page 215](#)
- ["Installing Object Request Broker Software" on page 216](#)
- ["Installing the Siebel CORBA Object Manager" on page 216](#)
- ["Copying the Repository File to the CORBA Language Directory" on page 219](#)
- ["Review the Installation for Siebel CORBA Object Manager" on page 219](#)

NOTE: The Siebel CORBA Object Manager has been deferred from the initial Siebel 7.7 release, but will be available in a 7.7 fix pack. For the latest update, see Alert 929 on Siebel SupportWeb.

Process of Installing the Siebel CORBA Object Manager

Installing the Siebel CORBA Object Manager consists of multiple tasks that you should perform in the following sequence:

- 1 Review the requirements for installing Siebel CORBA Object Manager. See ["About Siebel CORBA Object Manager" on page 214](#) and ["Verifying Siebel CORBA Object Manager Requirements" on page 214](#).
- 2 Review database connectivity information and configure connectivity to the Siebel Database. See ["Configuring Database Connectivity for Siebel CORBA Object Manager" on page 215](#).
- 3 Verify your connection to the network. See ["Verifying Network Connectivity for Siebel CORBA Object Manager" on page 215](#).
- 4 Install Object Request Broker software. See ["Installing Object Request Broker Software" on page 216](#).
- 5 Install Siebel CORBA Object Manager software. See ["Installing the Siebel CORBA Object Manager" on page 216](#).
- 6 Copy the Siebel repository files to the language directories. See ["Copying the Repository File to the CORBA Language Directory" on page 219](#).

- 7 Review the installation directories. See ["Review the Installation for Siebel CORBA Object Manager" on page 219](#).

About Siebel CORBA Object Manager

The Siebel CORBA Object Manager is an alternative object manager; it allows you to access the Siebel Business Objects through a supported, industry-standard CORBA object request broker (ORB). The standard Application Object Manager is installed when you install your Siebel Servers.

Because the Siebel CORBA Object Manager is not installed as part of the standard Siebel Server installation, if you plan to use the CORBA interfaces, you must install the Siebel CORBA Object Manager on each server on which you plan to operate it.

The Siebel CORBA Object Manager does not require the creation of a Siebel Enterprise Server, or installation of a Siebel Gateway Name Server or Siebel Server. Rather, the Siebel CORBA Object Manager operates outside the Siebel Server infrastructure. Task instantiation and management, load balancing, and other capabilities that are usually provided by the Siebel Enterprise Server infrastructure are instead provided by the CORBA environment.

Connectivity between client applications and Siebel CORBA Object Manager is provided by third-party CORBA software. For information on the specific CORBA products and versions supported by Siebel eBusiness Applications, see *System Requirements and Supported Platforms* on Siebel SupportWeb. The Siebel CORBA Object Manager installation provides support for all supported third-party CORBA products.

Verifying Siebel CORBA Object Manager Requirements

- Be sure that all servers on which the Siebel CORBA Object Manager will be installed meet the hardware and software requirements described in *System Requirements and Supported Platforms* on Siebel SupportWeb.
- The CORBA Object Manager may be installed on a server that also supports the Siebel Enterprise Server components, although for best performance you must install the CORBA Object Manager onto a dedicated server.
- The CORBA Object Manager installation program uses `/siebel` as the default installation directory. Whether you are installing CORBA Object Manager into a pre-existing installation directory or performing a fresh installation, make sure that you do not install CORBA into the same directory as the Siebel Server. To install the CORBA Object Manager in a separate directory, make sure that the environment variable `$SIEBEL_ROOT` either is not set or is set to the new directory.

NOTE: Use a directory naming convention that identifies the component and version being installed.

- If you will be installing the VisiBroker third-party CORBA software, you must make sure that an appropriate Java run-time environment has been installed. For more information on VisiBroker Java run-time environment requirements, see the VisiBroker documentation.

Configuring Database Connectivity for Siebel CORBA Object Manager

You must configure your database connectivity software to allow the Siebel CORBA Object Manager to connect to the Siebel Enterprise database:

- **Oracle.** Verify that the Oracle Net8 or Net9 database connectivity software, as appropriate to your database, is installed on each server, according to the Oracle documentation. See *System Requirements and Supported Platforms* on Siebel SupportWeb for database connectivity software requirements.

Prior to installing the Siebel Server and Siebel Enterprise Server, you must use the Oracle Net8, (or Net9, as appropriate to your database), Easy Configuration utility to define a database alias with the proper connection information for your Siebel Database Server, if you have not done so already. Record the connect string in [Appendix A, "Deployment Planning Worksheet."](#) You will specify this connect string when installing the Siebel Server.

- **DB2 UDB for Windows and UNIX.** Define a database alias with the proper connection information for your database. This alias will be the connect string used when installing the Siebel Server.

Use either the DB2 Client Configuration Assistant or the Command Line Processor to define your database alias. For more information, see *DB2 Universal Database Quick Beginnings* manual or *IBM DB2 Universal Database Command Reference*.

DB2 UDB for z/OS and OS/390. For information on configuring database connectivity software for DB2 UDB for z/OS and OS/390, see *Implementing Siebel eBusiness Applications on DB2 UDB for z/OS and OS/390*.

Verifying Network Connectivity for Siebel CORBA Object Manager

You must verify network connectivity between the Siebel Server and the Siebel Database Server.

To verify network connectivity

- 1 Use the test utility for your network type to verify that the Siebel Servers can access the database servers. For TCP/IP networks, you should use the ping utility.
- 2 Verify connectivity to the Database Server:
 - **Oracle.** Use the tnsping utility and Net8 or Net9 database alias from a Command Prompt window to make sure that you can connect to the database, using the network connect string that you defined in the previous step.
 - **DB2 UDB.** Open a new shell and make sure that you can connect to your database.

a Type the following command:

```
DB2 connect to database_alias user user_ID using password
```

where:

database_alias = A valid database alias on DB2

user_ID = A valid user name on DB2

password = The appropriate password for that user name

If your connection is valid, you should see a message that looks like the following:

```
The connection test is successful
```

```
Database Server      = DB2/AIX|Solaris x.x.x
SQL authorization ID = SADMIN
Database alias       = NAME
```

If your connection is not valid, verify your configuration.

b To close the connection, type db2 terminate.

For information on verifying network connectivity for DB2 UDB for z/OS and OS/390, see *Implementing Siebel eBusiness Applications on DB2 UDB for z/OS and OS/390*.

Installing Object Request Broker Software

You must have a working Orbix or VisiBroker environment prior to installing the Siebel CORBA Object Manager. If necessary, you must install either the Orbix or VisiBroker third-party CORBA software. For more information, see the following:

- If you are installing Orbix third-party CORBA software, see “Getting Started” on the HTML page that appears after installing the Orbix software.
- If you are installing VisiBroker third-party CORBA software, see VisiBroker’s hard-copy documentation.

After installation, verify the third-party CORBA software is installed and functioning correctly.

Installing the Siebel CORBA Object Manager

Complete the following steps to install the Siebel CORBA Object Manager on each UNIX server.

NOTE: The following procedure is for installing the base product. For patch installation instructions, refer to the *Maintenance Release Guide* provided with the patch.

To install the Siebel CORBA Object Manager

1 Install the appropriate DVD for the Siebel applications into the DVD drive:

- *Siebel eBusiness Applications, Base Applications for UNIX_OS*
- *Siebel Industry Applications, Base Applications for UNIX_OS*

where:

UNIX_OS = Your UNIX operating system, such as AIX, HP-UX, or Solaris

NOTE: The volume label for the DVD is *seaUNIX_OSunibase* (for Siebel eBusiness Applications) or *siaUNIX_OSunibase* (for Siebel Industry Applications).

2 Navigate to the *Siebel_CORBA_Object_Manager* directory on the DVD:

3 Start the Siebel CORBA Object Manager installation process by entering the following command. Append any desired flag described in ["Additional Flags for Installation Commands" on page 77](#):

```
./setupUNIX_os
```

The Installer Welcome screen appears.

4 Click Next.

If you have installed other Siebel components on the same machine, the installer displays the message that an existing installation has been found.

5 Depending on whether you are installing your Siebel CORBA Object Manager files for the first time or adding a new language to an existing instance, take the appropriate action, then click Next:

- To install the server software in a new instance, select None as the default and click Next. Proceed to [Step 6 on page 217](#).
- To install a new language in an existing instance, select the displayed instance and click Next. Proceed to [Step 10 on page 218](#).

See also ["Guidelines for Installing Multiple Language Packs on the Siebel Server" on page 95](#) for important additional information on this topic.

The Installer Path screen appears.

6 Enter the fully qualified path to the installation directory and click Next.

7 The Installer Setup Type screen appears.

8 Choose the type of Siebel CORBA Object Manager installation to execute from the following options; then click Next to continue:

- **Typical.** Installs all Siebel CORBA Object Manager components except those displayed. Proceed to [Step 10 on page 218](#).
- **Compact.** Installs only those components necessary to run the Siebel CORBA Object Manager, but no additional components, help, or CORBA sample codes. Proceed to [Step 10 on page 218](#).

- **Custom.** Lets you customize your installation by choosing the specific components you want to install. Proceed to [Step 9 on page 218](#).

If you selected Custom, the Custom Installation Setup screen appears.

9 Select the components that you want to install. Decide whether or not you want to install the Sample Clients and IDL (Interface Definition Language which defines the interfaces it provides through the Siebel CORBA Object Manager) and click Next.

The language selection screen appears.

10 Choose the language or languages you intend to install for Siebel CORBA Object Manager on the server; then click Next.

All servers are installed with at least one language, the primary (base) language. Additional languages can be installed at a later date, if desired. When installing languages at a later date, you must also reinstall any patches that have been run on the directory. For more information, see *Global Deployment Guide*.

NOTE: In a Unicode-enabled database environment, you can install any of the available Siebel Language Packs. In a non-Unicode database environment, you must consider the correlation of the Language Packs you want to install and the characters supported by your database code page. For example, in a Western European code page database, you can only install Western European Language Packs such as English, French, Spanish, or German Language Packs. And in a Japanese code page database, you can only install Japanese or English Language Packs.

For a list of supported code pages and encoding strategies, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

The Installation Verification screen appears.

11 Verify the settings and click Next. Which screen appears next depends on whether you are installing one or multiple languages.

- If you are installing more than one language, the Primary Language screen appears. Proceed to [Step 12 on page 218](#).
- If you are installing only one language, the Database Selection screen appears. Proceed to [Step 13 on page 218](#).

12 Choose the primary (base) language and click Next.

NOTE: This is the primary (base) language for your Enterprise. It is the language in which you want your Siebel Server to run and which you normally want to read messages.

The Database Selection screen appears.

13 Choose the appropriate database and click Next.

The Database Alias or Connection String screen appears.

14 Enter the database alias or connection string, as described as follows, and click Next.

DB2 UDB. Enter the database alias for your Siebel Database, for example, db2345.

Oracle. Enter the valid Oracle connection string for your database.

The Database Table Owner screen appears.

15 Enter the database tableowner for the Siebel tables and click Next.

The Installer Verification screen appears.

16 Verify the settings:

- To apply the settings, click Next.
- To make any changes, use the Back button to go back and update any parameters. You can use the Next button to return to this screen and confirm your new values; then click Next.

The Settings Progress screen appears as the Configuration Wizard configures the software.

The Configuration Wizard displays the message that the Siebel CORBA Object Manager has been successfully installed.

17 Click Finish.

Copying the Repository File to the CORBA Language Directory

Before starting the Siebel CORBA Object Manager, copy the latest version of your customized Siebel repository file (the SRF file) to the *objects/language* subdirectory of each Siebel CORBA Object Manager installation.

Review the Installation for Siebel CORBA Object Manager

Review the directory structure created by Siebel CORBA Object Manager installation. The directory structure is located under the directory specified during the installation.

The directory structure should match the one shown as follows:

```
SIEBEL_ROOT
  bin/
    language/
  lib/
    language/
  locale/
  log/
  msgtemp/
  objects/
  sampleclient/
  temp/
  upgrade/
  ORBsetup.log
  ORBsetup.reg
```

bin. Contains executable programs.

language. Contains locale-specific configuration files.

lib. Contains shared libraries.

language. Contains language-specific shared libraries.

locale. Language-specific message files.

log. Log and trace files.

objects. Contains language-specific directories with language-specific repository file (SRF).

sampleclient. Contains C++ source code for building a sample client.

temp. Contains temporary files used during execution.

upgrade. Files and scripts related to version upgrades by installer.

ORBsetup.log. ORB setup log.

ORBsetup.reg. ORB registry entries.

12 Installing Siebel eAI Connector Software

This chapter describes the steps involved in installing Siebel eAI Connector support files. It includes the following topics:

- ["Process of Installing eAI Connector Software" on page 221](#)
- ["Preinstallation Considerations for eAI Connectors" on page 221](#)
- ["Installing the Siebel eAI Connector Support Files" on page 222](#)

Process of Installing eAI Connector Software

Installing the eAI Connector consists of multiple tasks that you should perform in the following sequence:

- 1 Review preinstallation considerations. See ["Preinstallation Considerations for eAI Connectors" on page 221](#).
- 2 Install eAI Connector software. See ["Installing the Siebel eAI Connector Support Files" on page 222](#).
- 3 Configure eAI Connector software.

For instructions on how to configure Siebel eAI Connector software, refer to Siebel documentation on the appropriate connector:

- [Siebel Connector for Oracle Applications](#)
- [Siebel Connector for Siebel eBusiness Applications](#)

Preinstallation Considerations for eAI Connectors

Additional configuration is required if you plan to use Siebel Connector for Oracle Applications against multiple instances of its back-office application. Please contact Siebel Technical Support for configuration instructions.

NOTE: Siebel Connector for Oracle Applications and Siebel Connector for PeopleSoft support all Siebel 7 operating systems.

For list of supported platforms, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

Installing the Siebel eAI Connector Support Files

Complete the following steps to install the Siebel eAI Connector support files on each UNIX server, using the information you recorded in your copy of [Appendix A, "Deployment Planning Worksheet."](#)

If you are installing using a network image, you notice that some steps you perform differ from those documented in this procedure; for example, you will not need to swap DVDs, as described in [Step 13 on page 224](#) to [Step 16 on page 224](#). For more information about creating a network image, see "Creating a Network Image" on page 30.

NOTE: The following procedure is for installing the base product. For patch installation instructions, refer to the *Maintenance Release Guide* provided with the patch.

To install the Siebel eAI Connector support files

- 1 If you are installing from DVD, insert the appropriate DVD for the Siebel applications into the DVD drive, and mount this DVD:
 - *Siebel eBusiness Applications, Base Applications for UNIX_OS*
 - *Siebel Industry Applications, Base Applications for UNIX_OS*

where:

UNIX_OS = Your UNIX operating system, such as AIX, HP-UX, or Solaris

NOTE: The volume label for the DVD is *seaUNIX_OSunibase* (for Siebel eBusiness Applications) or *siaUNIX_OSunibase* (for Siebel Industry Applications), where *UNIX_OS* is aix, hpx, or sol.

As a convenience, you may also want to mount the *seaall/anglep* (for Siebel eBusiness Applications) or *siaall/anglep* (for Siebel Industry Applications) DVD, where *lang* is the code for the language you are installing, on a different DVD drive for the same machine.

- 2 Navigate to the root directory of the DVD or to the appropriate network directory.
- 3 Navigate to *UNIX_OS/Server/Siebel_Enterprise_Server*.
- 4 Open a new shell, and unset any Siebel-related environment variables, such as *\$SIEBEL_ROOT*.
- 5 Enter the following command, appending any additional flags that you may want to use, as described in ["Additional Flags for Installation Commands" on page 77](#).

```
./setupUNIX_OS
```

The Installer Welcome screen appears.

- 6 Click Next.

If you have installed other Siebel components on the same machine, the installer displays the message that an existing installation has been found.

7 Depending on whether you are installing your eAI files for the first time or adding a new language to an existing instance, take the appropriate action, then click Next:

- To install the server software in a new instance, select None as the default and click Next. Proceed to [Step 8 on page 223](#).
- To install a new language in an existing instance, select the displayed instance and click Next. Proceed to [Step 10 on page 223](#).

See also “[Guidelines for Installing Multiple Language Packs on the Siebel Server](#)” on page 95 for important additional information on this topic.

The Installer Path screen appears.

8 Enter the fully qualified path to the \$SIEBEL_ROOT directory and click Next.

The Component Selection screen appears.

9 Select the EAI Connectors.

The Setup Type screen appears.

10 Choose the type of installation to execute from the following options; then click Next to continue:

- **Typical.** To install all components.
- **Compact.** To install only those components necessary, but no additional components or help.
- **Custom.** To customize your installation by choosing the specific components you want to install.

The Directory Location screen appears.

11 Review the information and click Next to continue or Back to change the directory location.

If you have not installed Siebel Gateway Name Server or Siebel Server, the Language Selection screen appears.

12 Select the languages for this server and click Next.

All servers are installed with at least one language, the primary (base) language. Additional languages can be installed at a later date, if desired. When installing languages at a later date, you must also reinstall any patches that have been run on the directory. For more information, see *Global Deployment Guide*.

NOTE: In a Unicode-enabled database environment, you can install any of the available Siebel Language Packs. In a non-Unicode database environment, you must consider the correlation of the Language Packs you want to install and the characters supported by your database code page. For example, in a Western European code page database, you can only install Western European Language Packs, such as English, French, Spanish, or German Language Packs. And in a Japanese code page database, you can only install Japanese or English Language Packs.

For a list of supported code pages and encoding strategies, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

The Installation Verification screen appears.

13 To copy the files for the selected product into the installation location, click Next.

The Installer Progress screen appears.

The installer proceeds to install the specified files. After the files have been copied to the installation location, this message appears:

Setup did not find the *lang* language pack on the current media. Please insert the DVD containing the *lang* language pack and select the *setupUNIX_OS* file from the *lang* folder.

where:

lang = The code for the language you are installing, such as *enu* for U.S. English.

UNIX_OS = Your UNIX operating system, such as *aix*, *hp*, or *sol*.

NOTE: You will not receive this prompt if you are installing from a network image.

14 Insert the appropriate language DVD and navigate to the location of the selected language (Siebel_Enterprise_Server/*lang*/).

where:

lang = The Siebel code for language you are installing

NOTE: Clear the filter dialog box, if needed, to be sure you can see the appropriate files.

15 Select *setupUNIX_OS* and click OK.

The Installer Language Pack Progress screen appears.

When installation of all the language files has been completed, the installer prompts you to reinsert the base DVD:

Please re-insert the base DVD and browse to the *setupUNIX_OS* file to enable setup to continue.

16 Reinsert the base DVD and navigate to *Siebel_Enterprise_Server/setupUNIX_OS* and click OK.

17 Click Finish.

For Siebel eAI product configuration tasks, refer to the appropriate Siebel eAI Connector documentation on the *Siebel Bookshelf*.

13 Installing the ChartWorks Server

This chapter describes installation and postinstallation tasks for the ChartWorks Server for use with Siebel eBusiness Applications. The ChartWorks Server provides the functionality for the basic appearance of charts used in a variety of Siebel eBusiness Applications. It includes the following topics:

- “[Process of Installing the ChartWorks Server](#)” on page 225
- “[Installing the ChartWorks Server](#)” on page 225
- “[Configuring the ChartWorks Server](#)” on page 227
- “[Changing the ChartWorks Server Specified for a Web Client](#)” on page 227

Process of Installing the ChartWorks Server

Installing the ChartWorks Server consists of multiple tasks that you should perform in the following sequence:

- 1 Review preinstallation requirements. For general requirements, see [Chapter 2, “Preparing for Installation.”](#) See also the *ChartWorks Server Installation Guide* by Visual Mining, Inc., on the *Siebel eBusiness Third-Party Bookshelf*.
- 2 Install ChartWorks Server. See “[Installing the ChartWorks Server](#)” on page 225.
- 3 Configure ChartWorks Server. See “[Configuring the ChartWorks Server](#)” on page 227.
- 4 (Optional) Change the ChartWorks Server specified for a Web client. See “[Changing the ChartWorks Server Specified for a Web Client](#)” on page 227.

Installing the ChartWorks Server

The information in this section supplements the installation instructions provided by Visual Mining, Inc., which are provided in the *Siebel eBusiness Third-Party Bookshelf*. It is not intended to replace them.

You can install ChartWorks Server on any server in your local area network, as long as that server is able to ping a Siebel Server. Typically, it is installed on the Siebel Server. Install at least one ChartWorks Server per Enterprise, and, preferably, one ChartWorks Server per Siebel Server. No additional license key is required for ChartWorks Server.

ChartWorks software is installed with the Siebel Mobile Web Client and Dedicated Web Client. The associated Windows service starts automatically when a chart is accessed within the client.

To install ChartWorks Server

- 1 Review preinstallation requirements. See the *ChartWorks Server Installation Guide* by Visual Mining, Inc., on the *Siebel eBusiness Third-Party Bookshelf*.
- 2 If you are installing from DVD, insert the appropriate DVD for the Siebel applications into the DVD drive, and mount this DVD:

- *Siebel eBusiness Applications, Base Applications for UNIX_OS*
- *Siebel Industry Applications, Base Applications for UNIX_OS*

where:

UNIX_OS = Your UNIX operating system, such as AIX, HP-UX, or Solaris

NOTE: The volume label for the DVD is *seaUNIX_OSunibase* (for Siebel eBusiness Applications) or *siaUNIX_OSunibase* (for Siebel Industry Applications), where *UNIX_OS* is aix, hpx, or sol.

- 3 Log on to the server with root permissions.
- 4 Open a new shell and navigate to the root directory of the DVD or to the appropriate network directory.
- 5 Navigate to *UNIX_OS/Server_Ancillary/chartworks_server/language/unix*.

where:

UNIX_OS = Your UNIX operating system, such as AIX, Solaris, or HPUX (for HP-UX)

language = The three-letter code for the language of your Siebel eBusiness Applications product; for example, enu for U.S. English.

- 6 Create a directory for installing ChartWorks Server, and copy into that directory the tar file appropriate to the UNIX operating system. The file will be one of the following:

```
chartworksserver3.7.siebel.aix.tar
chartworksserver3.7.siebel.hpx.tar
chartworksserver3.7.siebel.sol.tar
```

- 7 Un-tar the file by entering:

```
tar -xvf tar file_name
```

NOTE: On AIX, using GNU TAR is preferable to using AIX TAR, because the latter truncates long class names.

- 8 Enter *./server.sh*.
- 9 After all files have been copied by the installer, manually copy the file *DynamicChartResource.class*, which is located with the Visual Mining ChartWorks Server installer, to the following directory:
VISUALMINING_INSTALL_ROOT/ChartWorksServer3.7/root/classes/netcharts/util

- 10 For the rest of the installation, follow the instructions in *ChartWorks Server Installation Guide* by Visual Mining, Inc., available on the *Siebel eBusiness Third-Party Bookshelf*.

NOTE: The Solaris installation instructions are valid for AIX and HP-UX platforms.

Configuring the ChartWorks Server

The Siebel Server configuration prompts you to set certain parameters related to communications with the ChartWorks Server. For instructions on installing Siebel Server, see [Chapter 6, "Installing the Siebel Server."](#)

Following installation of ChartWorks Server software, you must configure the ChartWorks Server, regardless of your UNIX platform.

To configure ChartWorks Server

- 1 Navigate to your installation directory for ChartWorks Server; for example:
`$CHARTWORKS_SERVER_HOME/root/Charts`
- 2 Create a new subdirectory called Siebel.chart.
- 3 Within the new Siebel.chart subdirectory, create a new file, using vi, and type the following three characters in uppercase but without a carriage return:
`CDL`
- 4 Save the file as Siebel.cdx.
- 5 Make sure the DefaultChartFont parameter in your configuration file and the Application Default Chart Font parameter in your component definition of your Application Object Manager are set to a font that is available on your machine; for example, Verdana-10-Normal or hp_roman8 (for CSY language on HP-UX). A default font is used by ChartWorks if no font is defined for the chart or if the font defined for the chart is not available on the UNIX machine.
- 6 If you are using the Sun ONE Web Server, verify that JavaScript is enabled on the Web server. ChartWorks will not run if JavaScript is disabled, and you will get the following error message:
`An error occurred while sending a request to the chart server`
- 7 If you are running Siebel Server on HP-UX, complete the following additional step:
 - Copy file NFUtil.class, which is located in the same directory as the Visual Mining ChartWorks Server installer, to the following directory:
`VISUALMINING_INSTALL_ROOT/server/root/classes/netcharts/util/`

NOTE: Specifying nohup (nohup ./ChartworksServerControl start) to start the ChartWorks server prevents the ChartWorks Server process from being killed when the account owner logs off.

Changing the ChartWorks Server Specified for a Web Client

The installation script prompts for the ChartWorks server location and provides the default value of the localhost. You can change the ChartWorks Server specified for an Enterprise by using the Server Administration UI after you install client applications.

To specify the ChartWorks Server for a Web client

- 1** In the Server Administration GUI, navigate to the Enterprise Configuration screen.
- 2** Click the Enterprise Profile Configuration view tab.
- 3** Select the named subsystem, Server Data Source (ServerDataSrc).
- 4** Query in the applet for the parameter DSChartServer.
- 5** Enter the location of your ChartWorks Server, for example, localhost.
- 6** Query in the applet for the parameter DSChartImageFormat.
- 7** Set the value of this parameter to png, jpeg, or gif.

To specify the ChartWorks Server for a Dedicated Web Client

- 1** Open the .cfg file specific to the application for which you want to specify the ChartWorks Server.
- 2** Change the value of the chartServer parameter under applicable data source sections, such as [ServerDataSrc], to localhost:8001.
- 3** Change the value of ChartImageFormat parameter to png.

14 Installing the Siebel Reports Server

This chapter describes the tasks to install and configure the Siebel Reports Server and related components. It includes the following topics:

- “Process of Installing Siebel Reports Server” on page 229
- “About the Siebel Reports Server” on page 230
- “Preinstallation Tasks for the Siebel Reports Server” on page 231
- “Installing the Siebel Reports Server” on page 232
- “Confirming a Successful Installation of the Actuate iServer Components” on page 238
- “Actuate iServer Postinstallation Task” on page 239
- “Postinstallation Tasks for the Siebel Reports Server” on page 239
- “Testing the Siebel Reports Server from the Siebel Web Client” on page 246
- “How to Implement Clustering with the Siebel Reports Server” on page 247
- “Installing Additional Modules” on page 247

The same instance of the Siebel Reports Server allows the generation of reports in multiple languages.

The Actuate iServer does not run reports based on the regional settings of the host machine. Instead, it refers to the `localemap.xml` file (located in the `etc` folder of the Actuate iServer installation directory). For more information on configuring the iServer locales, see the *Administering Actuate iServer System* manual in the `Actuate` folder of the *Siebel eBusiness Third-Party Bookshelf* CD-ROM.

Except where noted, the installation instructions in this chapter supersede the information in Actuate documentation.

Process of Installing Siebel Reports Server

Using the Siebel Reports Server Installer, the Siebel Reports Server and its associated components are installed in the following order:

Server

- Actuate iServer and Management Console for Siebel
- Actuate Active Portal JSP and Reports View Adapter for Siebel

The following Actuate client products can be used to create and modify reports. These products can be found for installation in the `Windows\Client_Ancillary\actuate\language` directory, where `language` is the code for the Language Pack you installed (for example, `enu` for U.S. English).

Client

- (Optional) Actuate e.Report Designer Professional
- (Optional) Actuate e.Report Designer

About the Installation of the Siebel Reports Server

The following installation steps apply whether all components of the Siebel Reports Server are installed on the same machine or on multiple machines.

To install the Siebel Reports Server, perform the following tasks:

- 1 Before installing the Reports Server, set up a UNIX account for the Reports Administrator. See ["Preinstallation Tasks for the Siebel Reports Server" on page 231](#).
- 2 Review preinstallation requirements. See ["Preinstallation Tasks for the Siebel Reports Server" on page 231](#).
- 3 Install the Siebel Reports Server. See ["Installing the Siebel Reports Server" on page 232](#).

Installing the Siebel Reports Server includes the following components:

- Actuate iServer and Management Console for Siebel
- Active Portal JSP and the Reports View Adapter for Siebel

The two components can be installed together or separately.

- 4 Confirm the installation was successful. See ["Confirming a Successful Installation of the Actuate iServer Components" on page 238](#).
- 5 Perform postinstallation tasks. See ["Postinstallation Tasks for the Siebel Reports Server" on page 239](#).
- 6 Install additional designing products for creating Siebel reports if needed. See ["Installing Additional Modules" on page 247](#).

About the Siebel Reports Server

In a UNIX environment, the Siebel Reports Server requires the following components:

- **Actuate iServer and Management Console for Siebel.** The Actuate iServer for Siebel generates and manages report documents for the Siebel application. The iServer contains the Encyclopedia volume, a shared repository that stores report items along with related data, such as access privileges and request queues.

The Management Console manages one or more iServers and Encyclopedia volumes. The Management Console is installed with the Actuate iServer.

- **Actuate Active Portal JSP and Reports View Adapter for Siebel.** The Actuate Active Portal JSP provides access to the Siebel Reports Server from the Web using JavaScript and JavaTM Server Page (JSP) tags. Active Portal JSP is used to run, schedule, and view reports in the Siebel application.

The Reports View Adapter is an application used for viewing the Reports Server views in the Siebel application. The Reports View Adapter is installed with the Actuate Active Portal JSP.

For more information about iServer, Management Console, and Active Portal JSP products, see the Actuate folder of the *Siebel eBusiness Third-Party Bookshelf*.

The Actuate components are customized to work with the Siebel application. Siebel files are installed when each Actuate component is installed.

For designing reports for use in Siebel applications, you may install the following components on a Windows client:

- **(Optional) Actuate e.Report Designer Professional.** Used by professional developers of structured content to design, build, and distribute report object designs and components throughout the enterprise. Actuate e.Report Designer Professional is used along with Siebel Tools to create and customize Siebel Actuate reports.

Actuate e.Report Designer Professional must be installed on a developer machine that has Siebel Tools installed on it.

- **(Optional) Actuate e.Report Designer.** Lets you design and build reports using its graphical user interface. This application complements e.Report Designer Professional and is used by business users to modify and distribute a variety of reports. No programming is required, therefore Actuate e.Report Designer is not used to create Siebel Actuate reports. This application supports both modifying complex reports and using components from libraries.

Actuate e.Report Designer must be installed on a developer machine that has Siebel Tools installed on it.

For more information on installing Siebel Tools, see [Chapter 10, "Installing Siebel Tools."](#)

For more information about these Actuate products, see the Actuate folder of the *Siebel eBusiness Third-Party Bookshelf*.

Preinstallation Tasks for the Siebel Reports Server

For important preinstallation considerations, refer to the information on configuring an iServer System user account in the *Installing Actuate iServer System* manual. The manual is located in the Actuate folder of the *Siebel eBusiness Third-Party Bookshelf*. Read this section carefully and discuss it with your system administrator so that an account for the Siebel Reports Server can be allocated.

Note the following information when installing the Actuate iServer System:

- Make sure that System Administrator privileges are assigned to the administrator installing the Actuate iServer. Web administrator privileges are needed for installing and administering the Management Console and the Actuate Active Portal.
- The default application server used with the Actuate iServer System is the Actuate HTTP service. The Actuate HTTP service is included in the installations for the Actuate Management Console and the Actuate Active Portal JSP. Siebel Systems supports the use of other application servers for Actuate Management Console and Active Portal for JSP. For more information, see *System Requirements and Supported Platforms* on Siebel SupportWeb.
- Siebel Reports Server does not support the use of the Lightweight Directory Access Protocol (LDAP) for user authentication. For Siebel reports to function correctly, you will always synchronize users between the Siebel application and the Actuate iServer System.
- For the Siebel eBusiness Application, installing the Siebel Reports Server in a clustered environment is supported using the Actuate Management Console. For preliminary information on clustering, see "[How to Implement Clustering with the Siebel Reports Server](#)" on page 247.
- Installing Actuate Active Portal JSP and Reports View Adapter for Siebel requires Internet connection at the time of installation, and specifically requires the ability to access the Web site <http://java.sun.com>. For more information about this requirement, see Alert 1051 on Siebel SupportWeb.
- Siebel Reports Server uses the following default TCP/IP port numbers:
 - Actuate iServer – 8000
 - Actuate iServer Process Management Daemon – 8100
 - Active Portal HTTP Service – 8700
 - Management Console HTTP Service – 8900

You can specify non-default port numbers during installation. Before you install, validate that all the ports you will use are available.

Installing the Siebel Reports Server

NOTE: After unzipping the installation files, set permissions for each file before beginning the installation.

Use the following instructions to install the Siebel Reports Server.

NOTE: The following procedure is for installing the base product. For patch installation instructions, refer to the *Maintenance Release Guide* provided with the patch.

To install the Siebel Reports Server

1 If you are installing from DVD, insert the appropriate DVD for the Siebel applications you are installing into the DVD drive, and mount this DVD:

- *Siebel eBusiness Applications, Base Applications for UNIX_OS*
- *Siebel Industry Applications, Base Applications for UNIX_OS*

where:

UNIX_OS = Your UNIX operating system, such as AIX, HP-UX, or Solaris

NOTE: The volume label for the DVD is *seaUNIX_OSunibase* (for Siebel eBusiness Applications) or *siaUNIX_OSunibase* (for Siebel Industry Applications), where *UNIX_OS* is aix, hpx, or sol.

2 Navigate to the following directory:

Server_Ancillary/actuate

3 Double-click *setupUNIX_OS*.

where:

UNIX_OS = The type of UNIX you are installing

4 The Welcome to the InstallShield Wizard for Siebel Reports Server screen appears. Click Next.

5 To install the server software in a new instance, select None as the default and click Next. Proceed to [Step 6 on page 233](#).

To install a new language in an existing instance, select the displayed instance and click Next. Proceed to [Step 11 on page 234](#).

6 Use the Browse button to select a different drive or directory or select the displayed default directory for file installation and then click Next.

This directory name must not contain spaces, although underscores are allowed.

7 Click Next.

The installer prompts you to select one of the following products to install:

- Actuate iServer and Management Console for Siebel
- Actuate Active Portal JSP and Reports View Adapter for Siebel

NOTE: Installing Actuate Active Portal JSP and Reports View Adapter for Siebel requires Internet connection at the time of installation. For more information, see ["Preinstallation Tasks for the Siebel Reports Server" on page 231](#).

8 Choose one of the following options:

- Install the products for which your organization has a license key by selecting both check boxes.

NOTE: Before proceeding, review the preinstallation requirements for each module you plan to install. See ["Preinstallation Tasks for the Siebel Reports Server" on page 231](#) and other applicable sections.

- Select one or both of the products for installation and configuration.

CAUTION: When installing another instance of the Actuate Management Console, you must have 300 MB of extra disk space on your system drive (usually your C: drive) to accommodate the Actuate iServer. The Actuate iServer and Management Console are installed and uninstalled together.

9 Click Next.

NOTE: If you install all licensed components at once, the Siebel Reports Server Installer prompts you for the installation parameters of each component individually and in the sequence required.

The installer prompts you to select the type of installation setup you prefer.

10 Choose the type of Siebel Reports Server installation to execute from the following options and click Next.

- **Typical.** Installs the components used for the Siebel Reports Server.
- **Compact.** This setup option is the same as Typical.
- **Custom.** This setup option is the same as Typical.

11 Select the languages you wish to install for the Siebel Reports Server.

Servers are installed, at a minimum, with a base language and, optionally, with one or more additional languages.

NOTE: Unless your database is Unicode enabled, Siebel Systems does not support installation of any language other than U.S. English on top of a base Japanese, Simplified Chinese, Traditional Chinese, or Korean Language Pack.

12 Click Next.

The installer program performs a validation check to make sure that the installation prerequisites are met.

If they are not, a prompt appears, stating which installation requirement is not met.

13 Read and accept the terms of the Actuate Software License Agreement and click Next.

NOTE: If you choose not to accept the terms, you will not be able to continue with the installation.

The Locale Information screen for the Actuate iServer Configuration appears.

14 Specify the default locale information and the time zone that will be used for this installation of the Reports Server and click Next.

Individual users can also change the locale and language from within the Siebel application. For more information on changing the locale and language for reports, see the *Siebel Reports Administration Guide*.

15 Select Yes to have the Process Management Daemon start the iServer automatically.

By selecting Yes, you will not have to manually start the iServer after starting the Process Management Daemon.

Click Next.

16 On the Configure Actuate System Administration Password screen, enter a password that will be used to configure the Actuate iServer.

This is the Actuate iServer System user password mentioned in the ["Preinstallation Tasks for the Siebel Reports Server" on page 231](#).

Click Next.

17 You can accept the defaults shown for the host name (which might be an IP address instead of a host name) and the port number (8100) of the machine where the Process Management Daemon runs. Click Next.

You may choose to designate a different port number for the Actuate Process Management Daemon. For more information, see the *Installing Actuate iServer System* manual in the Actuate folder of the *Siebel eBusiness Third-Party Bookshelf*.

18 You can accept the defaults shown for the host name (which might be an IP address instead of a host name) and the port number (8000) of the machine where the iServer runs. Click Next.

You may choose to designate a different port number for the iServer. For more information, see the *Installing Actuate iServer System* manual in the Actuate folder of the *Siebel eBusiness Third-Party Bookshelf*.

19 Type the Encyclopedia volume name and click Next.

The defaulted Encyclopedia volume name is the host name of the machine that runs the Actuate iServer. You may choose to designate a different volume name for the Encyclopedia volume.

20 On the Configure Actuate System Administration Password screen, type a user-specified password for the Actuate system administrator.

System Administration is accessed through the Actuate Management Console.

The system administration password entered here is the one used when you log into System Administration from the Management Console. The default user name is Administrator.

21 On the Management Console HTTP Service Information screen, specify the HTTP port number that the Actuate Management Console will use.

This is the port you will connect your browser to when accessing the HTTP service for the Actuate Management Console. The port number default is 8900.

You may choose to designate a different port number for the Management Console HTTP Service. For more information on port numbers, see the *Installing Actuate iServer System* manual in the Actuate folder of the *Siebel eBusiness Third-Party Bookshelf*.

22 If you are installing Actuate Active Portal JSP and Reports View Adapter for Siebel along with Actuate iServer and Management Console for Siebel, go to [Step 23 on page 236](#).

If you are installing Actuate Active Portal JSP and Reports View Adapter for Siebel only, choose the set up type to execute from the following options and click Next.

Typical. Installs the components used for the Siebel Reports Server.

Compact. This setup option is the same as Typical.

Custom. This setup option is the same as Typical.

- If you are installing Actuate Active Portal JSP and Reports View Adapter for Siebel only, select the languages you wish to install and click Next.

23 Read and accept the terms of the Actuate Software License Agreement and click Next.

NOTE: If you choose not to accept the terms, you will not be able to continue with the installation.

24 On the Actuate HTTP Service Destination screen, use the Browse button to select a different drive or directory or select the displayed default directory for the Actuate HTTP Service software installation and click Next.

This directory name must not contain spaces, although underscores are allowed.

25 If you are installing Actuate Active Portal JSP and Reports View Adapter for Siebel along with Actuate iServer and Management Console for Siebel, go to [Step 26 on page 236](#).

If you are installing Actuate Active Portal JSP and Reports View Adapter for Siebel only, specify the default locale information and the time zone that will be used for this installation and click Next.

Individual users can also change the locale and language from within the Siebel application. For more information about changing the locale and language for reports, see the *Siebel Reports Administration Guide*.

26 On the Actuate HTTP Service Information screen, specify the HTTP port number that the Actuate HTTP Service will use.

This is the port number you will connect your browser to when accessing the HTTP service for the Actuate Active Portal. The port number default is 8700.

You may choose to designate a different port number for this Actuate Portal HTTP Service. For more information on port numbers, see the *Installing Actuate iServer System* manual in the Actuate folder of the *Siebel eBusiness Third-Party Bookshelf*.

27 Specify the account information that will be used to run the Actuate HTTP service for Actuate Active Portal JSP and Reports View Adapter for Siebel.

28 If you are installing Actuate Active Portal JSP and Reports View Adapter for Siebel along with Actuate iServer and Management Console for Siebel, go to [Step 31 on page 237](#).

If you are installing Actuate Active Portal JSP and Reports View Adapter for Siebel only, enter the Encyclopedia volume name of the Actuate iServer and click Next.

29 If you are installing Actuate Active Portal JSP and Reports View Adapter for Siebel only, enter the host name (which might be an IP address instead of a host name) and the port number of the Actuate iServer and click Next.

This is the port number you entered in [Step 18 on page 235](#).

This information will be used by Actuate Active Portal JSP and Reports View Adapter for Siebel to contact the Actuate iServer.

30 If you are installing Actuate Active Portal JSP and Reports View Adapter for Siebel only, enter the host name and port number that Siebel Reports View Adapter will use to contact the Process Management Daemon and click Next.

This is the port number you entered in [Step 17 on page 235](#).

31 The installer displays the location into which it will install the Siebel Reports Server and any other features you have elected to install. It also displays the file size.

If this is acceptable, click Next. Otherwise, click Back to adjust your installation parameters or location.

The installer proceeds to install the specified files. After the files have been copied to the installation location, this message appears:

Setup did not find the *7ang* language pack on the current media. Please insert the DVD containing the *7ang* language pack and select the *setupUNIX_OS* file from the *7ang* folder.

where:

7ang = The code for the language you are installing, such as *enu* for U.S. English.

UNIX_OS = Your UNIX operating system, such as *aix*, *hp*, or *sol*.

32 Remove the current DVD from the drive and insert the appropriate Language Pack DVD into the DVD drive of the same server.

33 Navigate to the *Server_Ancillary/actuate/language* directory (where *language* stands for the Language Pack you want to deploy, such as *enu* for U.S. English) and double-click *setupUNIX_OS*.

34 After the Language Pack installation is complete, an information screen appears, stating:

Please re-insert the base DVD and browse to the *setupUNIX_OS* file to enable setup to continue.

where:

UNIX_OS = Your UNIX operating system, such as *aix*, *hp*, or *sol*.

35 Click OK.

36 Reinsert the base DVD, navigate to the *Server_Ancillary/actuate* directory, and double-click *setupUNIX_OS* to continue with the Siebel Reports Server installation.

where:

UNIX_OS = The type of UNIX you are installing

The Installer screen appears.

37 Click Finish.

Starting and Stopping the Actuate Management Console HTTP Service

When the Actuate iServer installation installs Management Console, batch and script files are created to start and stop the Management Console.

To start and stop the Actuate Management Console Service

- Start Management Console using the *StartMC.sh* or *StartMC.bat* scripts.
- Stop Management Console using the *StopMC.sh* or *StopMC.bat* scripts.

These scripts are located in \$AC_SERVER_HOME/ManagementConsole/bin.

Confirming a Successful Installation of the Actuate iServer Components

You should confirm that the Siebel Reports Server and its components were successfully installed before continuing with the postinstallation tasks for the Siebel Reports Server.

To confirm a successful installation of the Actuate iServer and Management Console for Siebel

- 1** Make sure that the Process Management Daemon is started.
- 2** Open a Web browser and access the Management Console's log in page by typing the URL:

`http://host:port/acadmin/login.jsp`

where:

host = The name of the machine where the Actuate Management Console is installed.

port = the port number that the Actuate HTTP Service listens on. The default port number is 8900.

The Management Console log in page appears.

- 3** Using the default user name Administrator with the corresponding password click Log In.
- The Management Console Files and Folders page appears.
- 4** Confirm that the Actuate Report Executable (ROX) files are correctly imported into the Reports Server encyclopedia.

- a** Select the Files & Folders tab.
- b** Click the Siebel Reports folder in the Name column.

For the reports shown, the Type column should reflect Actuate Report Executable as the file type.

- c** While still in the Siebel Reports folder, click the Language folder in the Name column.

For the reports shown, the Type column should also reflect Actuate Report Executable as the file type.

The files in this folder correspond to the languages you have installed on the Reports Server. Each language will have a separate folder each containing ROX files.

To confirm a successful installation of the Actuate Active Portal JSP

- 1** Confirm that the Actuate HTTP Service 7 used by Active Portal JSP is running.
- 2** Open a Web browser and access Active Portal's login page by typing the URL:

`http://host:port/acweb/login.jsp`

Where:

host = the name of the machine where the Actuate Active Portal is installed.

port = the port number that the Actuate HTTP Service listens on. The default port number is 8700.

The Active Portal login page appears.

NOTE: Because the Single Sign-On feature is implemented during the Reports Server installation, you will not be able to directly access the Active Portal beyond the home page.

Setting Actuate iServer Parameters

The Reports Server administrator should set the Actuate iServer parameter Factory services properties - Number of Requests Before Recycling Processes to 100 to avoid memory leaks.

For instructions on how to modify this Actuate iServer parameter, see the *Administering Actuate iServer System* manual in the Actuate folder of the *Siebel eBusiness Third-Party Bookshelf*.

NOTE: To set parameters for Actuate iServer, open the Actuate Management Console, log in to System Administration, select a Server, and select the Advanced tab.

Actuate iServer Postinstallation Task

After installing the Actuate iServer, you must install TrueType fonts in order to view reports in PDF format. For instructions on installing TrueType fonts, see the *Working with Multiple Locales* manual in the Actuate folder of the *Siebel eBusiness Third-Party Bookshelf*.

The following are the TrueType fonts required by Siebel reports:

- ARIAL.TTF
- ARIALBD.TTF
- ARIALBI.TTF
- ARIALUNI.TTF

NOTE: To view reports in PDF format in Actuate 6 and higher, please make sure that you are using the Adobe Acrobat Reader 5.

Postinstallation Tasks for the Siebel Reports Server

After installing the Siebel Reports Server, you must perform the following tasks:

- “[Changing the Operating System Parameter for HP-UX](#)” on page 240
- “[Setting the JAVA_OPTS Parameter](#)” on page 240

- “Defining the External Host and Symbolic URLs” on page 241
- “Enabling the Siebel Reports Server with the Siebel Dedicated Web Client” on page 242
- “Enabling the Siebel Reports Server with the Siebel Web Client” on page 243
- “Synchronizing Siebel Users to the Reports Server” on page 245
- “Synchronizing Locale-Sensitive Parameters” on page 246

Changing the Operating System Parameter for HP-UX

After the Siebel Reports Server is installed, change the operating system parameter in the Reports Server configuration file to reflect HP-UX.

To change the operating system parameter in rptsrvr.cfg

- 1 Navigate to the Actuate iServer directory; for example, /export/home/actuate7/AcServer.
- 2 Open rptsrvr.cfg in a text editor.
- 3 Change the value of the parameter os to hpx:

```
os = hpx
```

- 4 Save the changes and close the file.

Restart the Actuate iServer for the changes to take effect.

Setting the JAVA_OPTS Parameter

On AIX and HP-UX, the JAVA_OPTS option is required to be set for Single Sign-On from the Siebel application to the Reports Server to successfully work.

On all UNIX platforms, the JAVA_OPTS parameter is also used to increase the heap size if you run into *Out of Memory* errors while trying to access any of the Actuate JSP pages.

To set the JAVA_OPTS parameter for AIX and HP-UX

- 1 Navigate to the Actuate HTTP Service installation (for example, /export/home/actuate7/activeportal/actuate_http_service/bin) and locate the file setclasspath.sh.
- 2 Search for JAVA_OPTS and enter:
`-Djava.library.path=/export/home/actuate7/activeportal/actuate_http_service/bin`

To set the JAVA_OPTS parameter for Out of Memory errors for all UNIX platforms

- 1 Navigate to the Actuate HTTP Service installation (for example, /export/home/actuate7/activeportal/actuate_http_service/bin) and locate the file setclasspath.sh.

2 Search for JAVA_OPTS and enter:

```
JAVA_OPTS="-Xms Minm -Xmx Maxm"
```

where:

Min and Max = Integer values (in MBs) that specify the minimum and maximum heap size for the Actuate HTTP Service process

CAUTION: If you specify more than one JAVA_OPTS option, make sure that all the options are set at one place or that they are compounded, using `JAVA_OPTS="$JAVA_OPTS current_options"`. Otherwise, only the latest setting will be in effect, which can cause problems.

The following are examples for setting the JAVA_OPTS parameter for *Out of Memory* errors:

- Use this approach if JAVA_OPTS is set in only one file.

```
JAVA_OPTS="-Djava.library.path=/export/home/actuate7/activeporta1/
actuate_http_service/bin -Xms256m -Xmx512m"
```

- Use this approach if JAVA_OPTS is set in multiple files (such as catalina.sh and setclasspath.sh). You will use compounding in each file where JAVA_OPTS is set.

```
JAVA_OPTS="$JAVA_OPTS -Xms256m -Xmx512m"
```

Defining the External Host and Symbolic URLs

Establishing an external host and symbolic URLs allow for the display of external data (from an external Web site) in the Siebel application. This procedure informs the Siebel application where to find the Active Portal.

For Siebel reports, configuring Host Administration and Symbolic URLs will:

- Allow the display of the content for My Reports, My Jobs, and Personal Profile views under Reports Server Screens.

The external application used is the Siebel Reports View Adapter.

- Allow for the Running and Scheduling of Reports using Active Portal.
- Provide the Single Sign-On technology that eliminates the need to log in manually to the Reports Server.

For more information, also see the *Siebel Portal Framework Guide* on the *Siebel Bookshelf*.

To define the External Host and Symbolic URLs

- 1** Open the Siebel application.
- 2** From the application-level menu, choose Navigate > Site Map > Administration - Integration > WI Symbolic URL List.
- 3** From visibility filter, select Host Administration.
- 4** Locate the Virtual Name *rshost* using Query.

- 5 In the Name field, enter the name of the Actuate Active Portal machine and the Actuate Active Portal port number (for example, server1:8700).
NOTE: Do not change the value in the Virtual Name field.
- 6 Save the record.

Enabling the Siebel Reports Server with the Siebel Dedicated Web Client

This section describes how to modify configuration files, such as `siebel.cfg`, on the Dedicated Web Client to enable the Siebel Reports Server.

To configure the Siebel Application Object Manager files

- 1 Navigate to the `BIN\language` subdirectory of your Siebel eBusiness Applications installation directory.

where:

language = The Siebel code for the Language Pack you installed; for example, ENU for U.S. English.

- 2 Locate and open the appropriate configuration (CFG) file.
- 3 Using your default text editor, edit the following parameters in the [ActuateReports] sections.

`[ActuateReports]`

`EnableReportServer = TRUE`

`ReportServerHost` = Valid formats for this parameter are:

- If using an IP Address to refer to the Reports Server Host, then you need to include the Encyclopedia volume name for this parameter.
`IP Address:Port Number/Encyclopedia volume name (example: 1.160.10.240:8000/volume1)`
- If the Reports Server Host name is different from the Encyclopedia volume name, then the Encyclopedia volume name must be included for this parameter.
`ReportsServerHost:Port Number/Encyclopedia volume name (example: server1:8000/volume1)`
- If the Reports Server Host name and the Encyclopedia volume name are the same, then the Encyclopedia volume name does not need to be included for this parameter.

ReportServerHost:Port Number (example: server1:8000)

NOTE: By default, if the Encyclopedia volume name is not specified, it is assumed to be the same as the ReportServerHost.

ProtocolName = Name of protocol to use for viewing reports (example: HTTP)

RoxDir = /Siebel Reports/

ConnectionString = Connect string for an Application Object Manager (where load balancing is not deployed) is:

`siebel.TCPIP.none.none://SiebelServerHost:SCBPort/EnterpriseServerName/
XXXObjMgr_Language`

where:

- `siebel.TCPIP` = Networking protocol
- `none.none` = The encryption type and compression type
- `SiebelServerHost` = Name of the machine on which the Siebel Server is installed
- `SCBPort` = Listening port number for the SCBroker component (default is 2321)
- `EnterpriseServerName` = Name of your Siebel Enterprise Server
- `XXXObjMgr_Language` = Type of Object Manager and Language Pack for the Siebel eBusiness application you are installing, for example:
 - `SCCOBJMgr_enu` for U.S. English Siebel Call Center Object Manager
 - `SSEObjMgr_enu` for U.S. English Siebel Sales Object Manager

NOTE: Setting the `Actuate Report Cast Domain` and `Actuate Server Report Cast Host` parameters is no longer required.

Enabling the Siebel Reports Server with the Siebel Web Client

This section describes how to set up the various parameters for enabling the Siebel Reports Server for the Siebel Web Client.

See the *Siebel System Administration Guide* for more information on how to modify Application Object Manager parameters.

To set the Reports Server parameters for the Application Object Manager

- 1 From the application-level menu, choose `Navigate > Site Map > Administration – Server Configuration > Servers`.

The screen that appears displays three different list applets. The top applet lists the Siebel Servers for the enterprise. The middle applet has three tabs—Components, Parameters and Events. The bottom applet has two tabs—Events and Parameters.

2 In the top list applet, select the Siebel Server that you want to configure.

3 In the middle applet, click the Components tab.

This list applet contains the components for the Siebel Server selected in the top applet.

Choose the relevant Application Object Manager.

4 In the bottom applet, click the Parameters tab.

This list applet contains the parameters for the Component selected in the middle applet.

5 Change the following parameters:

Actuate Server Connect String = Connect string for an unbalanced Siebel Server is:

```
siebel.TCPIP.none.none://SiebelServerHost:SCBPort/EnterpriseServerName/  
XXXObjMgr_Language
```

where:

- `siebel.TCPIP` = Networking protocol
- `none.none` = The encryption type and compression type
- `SiebelServerHost` = Name of the host on which the Siebel Server is installed
- `SCBPort` = Listening port number for the SCBroker component (default is 2321)
- `EnterpriseServerName` = Name of your Siebel Enterprise Server
- `XXXObjMgr_Language` = Type of Object Manager and Language Pack for the Siebel eBusiness application you are installing, for example:
 - `SCCOBJMGR_enu` for U.S. English Siebel Call Center Object Manager
 - `SSEOBJMGR_enu` for U.S. English Siebel Sales Object Manager

Actuate Server Enable Flag = True

Actuate Server Network Protocol Name = Name of protocol to use for viewing reports
(example: HTTP)

Actuate Server Report Server Host = Valid formats for this parameter are:

- If using an IP Address to refer to the Actuate Server Report Server Host, then include the Encyclopedia volume name for this parameter.
IP Address:Port Number/Encyclopedia volume name (example: 1.160.10.240:8000/volume1)
- If the Actuate Server Report Server Host name is different from the Encyclopedia volume name, then the Encyclopedia volume name must be included for this parameter.
Actuate Server Report Server Host:Port Number/Encyclopedia volume name (example: server1:8000/volume1)
- If the Actuate Server Report Server Host name and the Encyclopedia volume name are the same, then the Encyclopedia volume name is not included for this parameter.

Actuate Server Report Server Host:Port Number (example: server1:8000)

NOTE: By default, if the Encyclopedia volume name is not specified, it is assumed to be the same as the ReportServerHost.

Actuate Server Rox Directory = /siebel Reports/

NOTE: Setting the Actuate Report Cast Domain and Actuate Server Report Cast Host parameters is no longer required.

- 6 Save changes and restart the component or the Siebel Server.

Synchronizing Siebel Users to the Reports Server

Synchronization is the process of creating accounts for Siebel users on Actuate iServer and is required for users to run, schedule, and view reports in Reports Server views.

To synchronize Siebel Users to the Reports Server

- 1 Log in to the Siebel eBusiness application as the Siebel Reports Administrator.
- 2 From the application-level menu, select Navigate > Site Map > Reports Server > User Administration.

NOTE: The recommendation is to synchronize users in smaller buckets, particularly when a large number of users is synchronized.

- 3 With the first user highlighted, click Synchronize One.
The Siebel Users window appears.
- 4 Type the Reports Administrator user name and password.
A confirmation message, stating that the user was successfully added to the Reports Server, appears in the Siebel Users window.

- 5 For the remaining users, click Synchronize All.

NOTE: You will not see the Siebel Users login window again as long as you remain in the same view.

After the users have been synchronized, a confirmation window appears, displaying the total number of new user accounts added to the Reports Server. This confirmation message may also include the number of users already found to exist on the Reports Server.

- 6 If users are being synchronized in smaller buckets repeat [Step 5 on page 245](#).

Before synchronizing Siebel users, the Reports Administrator must create an account on the Actuate iServer, using an account name that has Siebel administrator privileges, such as SADMIN, and assign the administrative role to that account by using Actuate Management Console.

The administrator should review the *Administering Actuate iServer System* manual before setting up an account for the administrator using Actuate Management Console.

NOTE: If the database is refreshed, the Siebel Reports administrator should perform the user synchronization again to make sure that the Reports Server passwords for these users, which are stored in the Siebel Database, match what is stored in the Actuate iServer.

Synchronizing Locale-Sensitive Parameters

For the Reports Server to format reports based on user-specified locale, the locale definitions in localemap.xml file should match the equivalent parameters in the Siebel Application Object Manager.

For more information about setting parameters for Application Object Managers, see *Siebel System Administration Guide*.

Verify that the locale-specific parameters in the localemap.xml file match the corresponding parameters in the Application Object Manager. See the *Siebel Reports Administration Guide* for a list of these parameters.

Testing the Siebel Reports Server from the Siebel Web Client

Complete the instructions that follow to test the Siebel Reports Server from the Siebel Web Client.

To test the Siebel Reports Server from the Siebel Dedicated Web Client

- 1** Start any Siebel eBusiness application from the Mobile Web Client (for example, Siebel Sales) and connect to the server.
The application's home page appears.
- 2** From the application-level menu, choose Navigate > Site Map > Accounts > Accounts > My Accounts.
- 3** Choose Accounts List from the link bar.
- 4** Click Reports and, from the drop-down list, select Schedule.
The Schedule a Report dialog box appears.
- 5** From the drop-down list, select Account List and click Schedule.
- 6** Indicate that you want to schedule the report to run once a few minutes later, specify the date, and time.
Click Submit.
The Action status window appears, stating that the job ACLIST was successfully submitted.
- 7** From the application-level menu, choose Navigate > Site Map > Reports Server > My Jobs.

8 Click the Scheduled tab.

The scheduled request appears in the view, indicating the scheduled date, time, and other information.

To test Siebel Reports Server from the Siebel Web Client

- 1** Start any Siebel eBusiness Application (for example, Siebel Sales).
The application's home page appears.
- 2** From the application-level menu, choose Navigate > Site Map > Accounts > Accounts > My Accounts.
- 3** Choose Accounts List from the link bar.
- 4** Click Reports and, from the drop-down list, select Account List.
- 5** The program starts generating the report and displays the output in your browser window.

If the report does not appear, check the order and location in which the Siebel Reports Server components are installed, as described earlier in this chapter.

How to Implement Clustering with the Siebel Reports Server

For the Siebel eBusiness Application, installing the Siebel Reports Server in a clustered environment is supported using Actuate Management Console.

To implement clustering with the Siebel Reports Server

- 1** Install the Actuate iServer and Management Console for Siebel component on each node being clustered following the instructions in ["Installing the Siebel Reports Server" on page 232](#).
- 2** Stop the Actuate Management Console HTTP Service on each node following the instructions in ["Starting and Stopping the Actuate Management Console HTTP Service" on page 237](#).
- 3** Continue implementing clustering on the Reports Server using the information in the *Administering Actuate iServer System* manual in the Actuate folder of the *Siebel eBusiness Third-Party Bookshelf*.

Installing Additional Modules

You can install additional modules for the Siebel Reports Server. These modules add additional features for creating reports. See the following topics to install these modules:

- ["Installing Actuate e.Report Designer Professional" on page 248](#)
- ["Installing Actuate e.Report Designer" on page 249](#)

Installing Actuate e.Report Designer Professional

Actuate e.Report Designer Professional offers developers of structured content for the Windows platform the added capability of designing, building, and distributing report object designs and components throughout the enterprise.

Installation of Actuate e.Report Designer Professional is not required to run the Siebel Reports Server.

If you install Actuate e.Report Designer Professional, you must install it on a developer machine that has Siebel Tools installed on it.

NOTE: The following procedure is for installing the base product. For patch installation instructions, refer to the *Maintenance Release Guide* provided with the patch.

To install Actuate e.Report Designer Professional

1 Insert the appropriate DVD for the Siebel applications you are installing into the DVD drive:

- *Siebel eBusiness Applications, Base Applications for Windows*
- *Siebel Industry Applications, Base Applications for Windows*

2 Navigate to the following directory:

Client_Ancillary\actuate\language\erdpro

where:

language = The Siebel code for the Language Pack you installed; for example, enu for U.S. English.

3 Double-click Setup.exe.

The Actuate installation wizard will guide you through the installation process.

Compiling Reports with Actuate 7

The Actuate 7 e.Report Designer Professional (erdpro) compiler includes changes made to improve performance. The compiler is now more stringent and catches errors that might have been ignored in earlier versions. To provide backward compatibility for reports developed with Actuate 5.x or 6.x, which fail when compiled with Actuate 7, use the following compilation instructions.

To compile reports with Actuate 7

1 Edit the following registry variable on the system where erdpro is installed:

HKEY_CURRENT_USER\Software\Actuate\Actuate e.Report Designer Professional 7.0\Settings\IndirectDataRowMemberAccess

2 Set value to 1 (default value is zero).

3 If IndirectDataRowMemberAccess is not present in your registry, create a DWORD value with the name IndirectDataRowMemberAccess and Hexadecimal value of 1.

4 Close all open erdpro instances and open a new erdpro session.

5 Compile your report.

NOTE: This solution may also apply to new reports created with Actuate 7 erdpro that fail compilation due to Indirect DataRow Member Access.

Installing Actuate e.Report Designer

Actuate e.Report Designer lets developers for the Windows platform design and create reports, using its graphical user interface.

Installation of Actuate e.Report Designer is not required to run the Siebel Reports Server.

If you install Actuate e.Report Designer, you must install it on a developer machine that has Siebel Tools installed on it.

NOTE: The following procedure is for installing the base product. For patch installation instructions, refer to the *Maintenance Release Guide* provided with the patch.

To install Actuate e.Report Designer

1 Insert the appropriate DVD for the Siebel applications you are installing into the DVD drive:

- *Siebel eBusiness Applications, Base Applications for Windows*
- *Siebel Industry Applications, Base Applications for Windows*

2 Navigate to the following directory:

Client_Ancillary\actuate\language\erd

where:

language = The Siebel code for the Language Pack you installed; for example, enu for U.S. English.

3 Double-click Setup.exe.

The Actuate installation wizard will guide you through the installation process.

15 Verifying Your System Using the Environment Verification Tool

This chapter provides information about verifying your system using the Environment Verification Tool (EVT). It includes the following topics:

- "About the Environment Verification Tool (EVT)" on page 251
- "About the EVT Configuration File" on page 252
- "Available EVT Output Formats" on page 254
- "Optional EVT Command Line Flags" on page 256
- "Running EVT in Query Mode" on page 257
- "Launching the EVT Utility" on page 258

About the Environment Verification Tool (EVT)

The Environment Verification Tool (EVT) is a cross-platform tool to help system administrators to verify the configuration of the Siebel eBusiness Applications environment. System administrators can use the EVT utility to identify errors and potential problems in the Siebel Enterprise after installation in a development or test environment, or following rollout or upgrades.

NOTE: It is recommended to use EVT to verify your Siebel applications environment.

The EVT utility is included with the Siebel Server software. EVT uses various operating systems utilities and Siebel command-line utilities to query information about Siebel components' installation and configuration settings.

EVT verifies that the machines running Siebel software are configured correctly and according to *System Requirements and Supported Platforms* on Siebel SupportWeb.

What Products Can EVT Check?

You can run the EVT against Siebel products as well as some third-party products as listed as follows:

Siebel products:

- Siebel Gateway Name Server
- Siebel Server
- Siebel Web Server Extension
- CORBA Object Manager

Third-party products:

- Web server (IIS/IHS/IWS)
- Database

EVT Check Groups

The EVT engine is driven by a configuration file (evt.ini). This file is specific for each version and cannot be used to run the utility against an earlier or a later version of the software. This file identifies the default checks that need to be run, and also provides the dependency logic, such as operating system-specific checks or database-specific checks, between different checks. It can be customized to check for other issues as well.

If you want to create customized checks, create a copy of the original .ini file for this purpose, so that you do not accidentally affect EVT functionality.

You can use EVT to validate configuration settings in the following check groups:

- Environment checks (ENV)
- Siebel Server checks (SVR)
- Database client checks (DBC)
- Web server checks (WEB)
- Database Server checks (DBS)
- Internal checks (INT)
- Network settings checks (NET)
- Operating settings checks (OS)
- Other checks (OTH)

About the EVT Configuration File

EVT uses a configuration file (evt.ini) to determine what checks it needs to perform and for each check what settings it should be checking for. Each Siebel release has a corresponding configuration file specific for that release. This file resides under the bin subdirectory of the `$SIEBSRVR_ROOT` directory. This file consists of two main sections:

- **Overridenameserverinfo.** These sections are used to provide static information that overrides the Enterprise-level information queried from the Siebel Gateway Name Server attributes. These checks execute only if the `ProcessSection` parameter in the check is set to `TRUE`. All `NAMESERVERINFO` checks get information from this section if `ProcessSection` is set to `TRUE` (default is `FALSE`) rather than from querying the Gateway Name Server.

- **CheckX.** These sections contain check definitions for different Checkgroups. Refer to the evt.ini file for a detailed description of parameters used for each check section. A check definition can have the parameters shown in [Table 22 on page 253](#). Not shown in the table are check-dependent parameters, such as PARAMNAME and PARAMVALUE.

Table 22. EVT Check Definition Format

Parameter	Description
CHECKID	Unique identifier for each check definition.
CHECKGROUP	The area of the application environment that is verified by this check.
CHECKNAME	Name of the check to run.
SERVERTYPE	The server type on which the check can be run—either Siebel Server, Siebel Gateway Name Server, Siebel CORBA Object Manager, Web server with SWSE, or Siebel Database Server. SERVERTYPE can have multiple delimited values separated by commas, for example, SERVERTYPE=DBSERVER,SIEBSRVR,SWSE.
OSTYPE	<p>The operating system applicable to this check. OSTYPE can have multiple delimited values separated by commas, for example, OSTYPE=AIX,SOL,W32.</p> <p>For a list of supported operating systems for the current release, review the <i>System Requirements and Supported Platforms</i> on Siebel SupportWeb.</p>
DEPENDENCY	This feature is used to implement conditional logic in the .ini file, for example, checking for the right Oracle client version if Oracle is the RDBMS in use. DEPENDENCY can have multiple delimited values separated by commas, for example, DEPENDENCY=Check1,Check231.
PRIMARY	Determines whether this check must be printed as part of the output. Checks implemented only to fulfill a dependency are not printed in the output if they prevent the next check from succeeding.

Table 22. EVT Check Definition Format

Parameter	Description
RESULTMODE	<p>The value of RESULTMODE specifies how the check will be evaluated. Use one of the following values:</p> <ul style="list-style-type: none"> ■ Evaluate performs a text comparison and returns TRUE if the values are the same (for example, Required Value = YES). ■ Inverted is the opposite of Evaluate. If Evaluate returns TRUE, inverted would return FALSE. ■ VersionCheck evaluates dotted version strings (for example, the value should be 7.5.3.2 or greater). ■ InvertedVersionCheck returns FALSE where VersionCheck would return TRUE.
ERRORLEVEL	<p>This parameter uses two values—WARN and FAIL—to determine whether the failure of a particular check constitutes a critical failure or just a warning. Critical failures are misconfigurations that would result in the failure of Siebel software in one form or another, whereas warnings apply to misconfigurations that may result in reduced performance, but not necessarily a software failure.</p>

All the parameters in the .ini file should be set to the alias and not the actual value; for example, PARAMNAME=Lang and PARAMVALUE=ENU.

You can use # (pound sign) in the evt.ini file to comment out specific lines.

You can also add new checks to the .ini file based on your business requirements using the parameters described in [Table 22 on page 253](#). If you decide to do so, make a copy of the file and make your modifications in the new file, then use the -f option, as described in [Table 23 on page 256](#), to point EVT to use the new configuration file.

Available EVT Output Formats

EVT supports several output formats: TEXT, TEXTFILE, HTML, and HTMLFILE.

- **TEXT.** Prints all output directly to the console, terminal, or DOS window. This is the only mode of operation when EVT is executed in query mode by giving the -q option. For an explanation of flags that can be used with EVT, see [Table 23 on page 256](#).
- **TEXTFILE.** Prints all output to a log file. The filename format is evt.hostname.timestamp.log. The log is created in the current directory. To create the log in a specified directory, use the -l *log_dir* option, where *log_dir* is the path to the desired directory.
- **HTML.** Prints HTML output to the console, terminal, or DOS window. This format is mainly for redirecting the output to another program or utility that can consume the output or redirect it to a file.

- **HTMLFILE.** HTMLFILE output format creates an HTML file in the current directory. The file name takes the form `evt.hostname.timestamp.htm`.

where:

hostname = Machine name from where you are running the EVT.

username = Username of the person running the EVT.

timestamp = Number of epoch seconds (starting from January 1, 1970). It exists solely to maintain the uniqueness of filenames.

You should delete previously generated output files on a regular basis.

Optional EVT Command Line Flags

You can run the EVT utility with various options as described in [Table 23](#).

Table 23. Flags Used with EVT

Flag	Description
h	Prints a help message with a list of all the flags you can use with the EVT utility.
g	Name of the Siebel Gateway Name Server. If not provided, EVT picks up the name of the Siebel Gateway Name Server from the Siebel Server configuration file; for example, enu/siebel.cfg.
s	Name of the Siebel Server. If not provided, EVT determines the name of the server from the directory tree.
e	Name of the Enterprise Server. If not provided, EVT determines the name of the Enterprise Server from the Siebel Server configuration file; for example, enu/siebel.cfg.
u	Username to use to log in to Server Manager. The default username is <code>sadmin</code> .
p	Password to log in to Server Manager. The default password is <code>sadmin</code> . NOTE: If any of the <code>svrmgr</code> parameters are provided incorrectly, EVT will not be able to check Siebel Server parameters. To print the details of root cause, use the <code>-d SHOWERRORS</code> flag.
o	Format of the output. EVT can generate outputs in several formats: TEXT (default), TEXTFILE, HTML, and HTMLFILE.
d	Run the script in debug mode. Supported debug levels are shown in order of verbosity, starting with the least verbose level (See examples of this flag as follows.): DEFAULT. (Default) Prints only check for pass/fail/not executed. EXPLAIN. Prints description of what has been checked and why. If a check could not be run, no explanation is given. If a check executed and found an error, it would report the corrective actions to be taken. SHOWERRORS. Prints the same information as EXPLAIN, but, in addition, prints any errors encountered that prevented a check from executing. For example, if the check included verification of a particular file having been executed, but the file does not exist, SHOWERRORS provides the error that prevented execution. SHOWCOMMENTS. Prints the same output as SHOWERRORS, but, in addition, prints more detailed information about how the check was implemented. This is essentially debug information, for example: Got value <code>A</code> from file <code>X</code> , etc. EVTLOG. Prints the same output as SHOWCOMMENTS, but, in addition, prints the execution log for EVT. This output is primarily useful to EVT developers.
1	Output directory to which report are written.

Table 23. Flags Used with EVT

Flag	Description
t	Type of server to check (Siebel Server [SIEBSRVR], Siebel Gateway Name Server [GTWYNS], Siebel Database Server [DBSERVER], Siebel Web Server Extension [SWSE], Siebel CORBAOM [CORBAOM]). For example, if -t SWSE is defined, then EVT runs only Web server-related checks and those checks that can be run on any type of server, such as JRE.
f	Location of central evt.ini file. The default is the current directory.
q	Run EVT in query mode. See “ Running EVT in Query Mode ” on page 257.
w	Location of Web server installation (required for SWSE related checks on UNIX).

NOTE: If you do not provide -e, -g, -s, -u, and -p options, EVT tries to query information from the configuration files under the ENU directory.

Example 1

Launching evt, using a custom .ini and generating HTML output.

```
evt -f evt_cust.ini -o HTML > output.html
```

Example 2

Launching evt, using a custom .ini and generating HTML output with details on what commands were run, what files were opened, and so on.

```
evt -f evt_cust.ini -o HTML -d SHOWCOMMENTS > output_debug.html
```

Running EVT in Query Mode

EVT can also be run in query mode. This mode is intended to interface with other utilities that need to query the installation for information.

To run in query mode, you must use the -q flag. The -q flag must be accompanied by a properly formatted query string.

NOTE: In query mode, EVT ignores all other options except the -h.

The query string consists of *name=value* pairs delimited by the plus sign (+).

The output of EVT in this mode is either pass[] or fail[], with the current value of the parameter in brackets.

Example:

```
% evt.pl -q "Checkname=VAR+ParamName=SIEBEL_ASSERT_MODE+ParamValue=0"
fail[]- SIEBEL_ASSERT_MODE is not set to 0 and its current value is [NULL].
```

Example:

```
evt.pl -q "Checkname=UNDEFVAR+ParamName=SIEBEL_ASSERT_MODE"
```

pass[]- Because we know that SIEBEL_ASSERT_MODE is not defined, we run an UNDEFVAR to check whether the variable is defined. As expected, this check passes and the current value is still [NULL].

Launching the EVT Utility

The EVT executable program (evt) is installed under the bin subdirectory of `$SIEBSRVR_ROOT`. You can run this executable with different options selected, based on what part of your environment you want to check.

For details on how to use EVT on previous releases, see Technical Note 467 on Siebel SupportWeb.

Review the following topics to determine how to edit the evt.ini file and to use command-line options:

- ["About the EVT Configuration File" on page 252](#)
- ["Optional EVT Command Line Flags" on page 256](#)
- ["Available EVT Output Formats" on page 254](#)
- ["Launching the EVT Utility" on page 258](#)

To launch EVT

- 1 Verify that permissions for the evt executable program are set to 755.
- 2 The evt.ini file contains all the approved checks. If you need to add any checks or modify any of the existing checks, make a copy of the file and make your modification in the new file. Then use the -f option, as described in [Table 23 on page 256](#), to point EVT to use the new configuration file. For details on content of the evt.ini file see ["About the EVT Configuration File" on page 252](#).
- 3 Navigate to `$SIEBEL_ROOT` and source the Siebel environment variables, using one of the following commands, depending on the type of shell you use:

Korn or Bourne shell

```
. ./siebenv.sh
```

TIP: Make sure there is a space between the initial period and ./siebenv.sh.

C shell

```
source siebenv.csh
```

- 4 Make `$SIEBSRVR_ROOT/bin` the current directory.
- 5 Enter an EVT command. Include any desired flags, as described in ["Optional EVT Command Line Flags" on page 256](#).

```
./evt
```

Example

Launching EVT using custom .ini and generating HTML output:

```
./evt -f evt_cust.ini -o HTML > output.html
```

Launching EVT with -f, -o, and -d options to use custom .ini, generate HTML output with details on what command were run, what files were opened, and so on:

```
./evt -f evt_cust.ini -o HTML -d SHOWCOMMENTS > output_debug.html
```


16 Uninstalling Siebel eBusiness Applications

This chapter provides instructions for uninstalling Siebel eBusiness Applications. It includes the following topics:

- “Uninstalling Earlier Versions of Siebel Applications” on page 261
- “Uninstalling Siebel 7.7” on page 262
- “Uninstalling Siebel Servers or the Siebel Enterprise, Using `srvcredit`” on page 263
- “Uninstalling Mobile and Dedicated Web Clients” on page 264
- “Uninstalling the Siebel Reports Server” on page 264
- “Uninstalling Siebel Tools” on page 265
- “Uninstalling Resonate Central Dispatch” on page 265
- “Uninstalling Non-Enterprise Servers or the SWSE” on page 265
- “Uninstalling Siebel Language Packs from the Servers” on page 267
- “Troubleshooting the Uninstallation Process” on page 267
- “Migrating to a New Version of Siebel eBusiness Applications” on page 267

The uninstallation process is based on the Siebel products installed in a specific directory. You can run the uninstaller script (`$_SIEBEL_ROOT_\uninst\ses\uninstall.ksh`) to uninstall a specific product installed under the uninstaller’s parent directory. Uninstallation procedures for clustered nodes constitute the only exception to this. For information about this type of uninstallation, see *Deployment Planning Guide*.

CAUTION: To successfully uninstall, you must use the uninstaller created during the installation process. Do not delete Siebel product directories to uninstall products.

Uninstalling Earlier Versions of Siebel Applications

To uninstall an earlier version of Siebel eBusiness Applications, you must use the certified uninstallation method for that version. For 6.x.x, 7.0.x or 7.5.x uninstallation information, see the *Siebel Server Installation Guide* (previous version of this guide) appropriate for the installed version.

Uninstalling Siebel 7.7

To uninstall version 7.7, you must either be the same user or in the same group as the user who performed the installation.

CAUTION: When uninstalling servers, always uninstall the Siebel Gateway Name Server last, after all Siebel Servers in the Siebel Enterprise have been removed, and only stop the Siebel Server; the Uninstallation Wizard automatically stops the Siebel Gateway Name Server. If you do stop the Siebel Gateway Name Server prior to uninstall, you will receive the following error message: Errors were encountered while changing the configuration in the following steps: RmNSDef, RmNSEntDef.

To uninstall a Siebel Server

- 1 Stop the Siebel Server process.
- 2 Open a new shell.
- 3 Navigate to `$SIEBEL_ROOT/_uninst` and enter the following command:

`uninstall.ksh ses optional_arguments`

where:

optional_arguments = Any valid arguments that can be passed to the uninstaller, such as `-is:javaconsole -console` to run in console mode.

NOTE: If you want to uninstall an incomplete or unsuccessful installation and you do not see the `_uninst` file in the `$SIEBEL_ROOT` directory, contact Technical Support for assistance.

The Uninstaller screen appears, listing the products installed in this directory.

- 4 From the Uninstaller screen, choose the products to uninstall and click Next.

NOTE: If you have Siebel Gateway Name Server, Siebel Server, and Siebel DB Server all installed into `$SIEBEL_ROOT` and want to uninstall all of them, you can select all of them on this screen.

The Uninstaller Verification screen appears.

- 5 Verify the products to be uninstalled and click Next.

The Uninstaller Progress screen appears, showing the progress of file removal.

- 6 When the Uninstaller displays the Uninstaller Success screen, click Finish.

To uninstall a Siebel Gateway Name Server

- 1 Stop the Siebel Gateway Name Server process.
- 2 Open a new shell.

3 Navigate to `$_SIEBEL_ROOT/_uninst` and enter the following command:

```
uninstall.ksh ses optional_arguments
```

where:

optional_arguments = Any valid arguments that can be passed to the uninstaller, such as `-is:javaconsole -console` to run in console mode.

NOTE: If you want to uninstall an incomplete or unsuccessful installation and you do not see the `_uninst` file in the `$_SIEBEL_ROOT` directory, contact Technical Support for assistance.

The Uninstaller screen appears, listing the products installed in this directory.

4 From the Uninstaller screen, choose Siebel Gateway Name Server and click Next.

NOTE: Make sure you have uninstalled all the Siebel Servers served by this Siebel Gateway Name Server before continuing.

The Uninstaller Verification screen appears.

5 Verify the products to be uninstalled and click Next.

The Uninstaller Progress screen appears, showing the progress of file removal.

6 When the Uninstaller displays the Uninstaller Success screen, click Finish.

Uninstalling Siebel Servers or the Siebel Enterprise, Using *srvredit*

You can use *srvredit*, a command-line utility, to remove a Siebel Server or to remove a Siebel Enterprise, as illustrated in the following procedures.

To uninstall Siebel Server

■ Enter:

```
srvredit -g SiebelGateway -e SiebelEnterprise -s SiebelServer -x \$Server
```

To uninstall the Siebel Enterprise

■ Enter:

```
srvredit -g SiebelGateway -e SiebelEnterprise -x \$Enterprise
```

NOTE: You cannot use *srvredit* to remove files.

Uninstalling Mobile and Dedicated Web Clients

To uninstall the Siebel Mobile or Dedicated Web Client, run the Siebel Systems Uninstallation Manager from the Windows Add or Remove Programs.

NOTE: You can install Siebel Mobile or Dedicated Web Clients only on the Windows platform.

Any file that is updated by a user after installation is not deleted. After uninstallation, files remaining in the client installation directory can be safely deleted at the discretion of the administrator.

Uninstalling the Siebel Reports Server

Review the following procedure when uninstalling the Siebel Reports Server software.

To uninstall the Siebel Reports Server

- 1** Stop the Actuate Process Management Daemon 7 process.
- 2** Open a new shell.
- 3** Navigate to `$SIEBEL_ROOT/_uninst` and enter the following command:

`uninstall.ksh thirdparty optional_arguments`

where:

optional_arguments = Any valid arguments that can be passed to the uninstaller, such as `-is:javaconsole -console` to run in console mode.

You can append additional arguments to your command. For more information, see ["Additional Flags for Installation Commands" on page 77](#).

NOTE: If you want to uninstall an incomplete or unsuccessful installation and you do not see the `_uninst` file in the `$SIEBEL_ROOT` directory, contact Technical Support for assistance.

The Uninstaller screen appears, listing the products installed in this directory.

- 4** From the Uninstaller screen, choose the products that you want to uninstall and click Next.

NOTE: You can choose to uninstall all Reports Server products at the same time, or you can choose to uninstall products individually.

The Uninstaller Verification screen appears.

- 5** Verify the products to be uninstalled and click Next.

The Uninstaller Progress screen appears, showing the progress of file removal.

- 6** When the Uninstaller displays the Uninstaller Success screen, click Finish.

Uninstalling Siebel Tools

To uninstall Siebel Tools, run the Siebel Systems Uninstallation Manager from the Windows Add or Remove Programs.

NOTE: You can install Siebel Tools only on the Microsoft Windows platform.

Any file that is updated by a user after installation is not deleted. After uninstallation, files remaining in the directory can be safely deleted, at the discretion of the administrator.

Uninstalling Resonate Central Dispatch

Resonate Central Dispatch, a third-party load-balancing product previously required in all 7.x Siebel Enterprise-level deployments, is unsupported as of Siebel 7.7.

For information on how to run a highly available system using Siebel 7.7, see the *Deployment Planning Guide*.

To uninstall Resonate Central Dispatch from a server

- 1** Stop Web Servers and Siebel Server Processes on the server.
- 2** Clean up any orphaned scheduling rule as necessary. For details, see the *Resonate Central Dispatch User Guide*.
- 3** Verify that CDAgent processes are running on all nodes so Resonate site would operate properly.
- 4** Log in to the Dispatch Manager.
- 5** Stop the Resonate site.
- 6** Remove the server from the Resonate site and save the changes. For details, see the *Resonate Central Dispatch Resonate Commander Installation Guide* for the operating system you are using.
- 7** Check the logs to make sure the Resonate RXP Driver (Kernel module in UNIX) are removed properly. If not, remove the RXP components manually. Not removing the RXP module properly may affect future networking operations.
- 8** Uninstall Resonate software from the server using the Resonate uninstall tools. For details, see the *Resonate Central Dispatch Resonate Commander Installation Guide* for the operating system you are using.

Uninstalling Non-Enterprise Servers or the SWSE

The process for uninstalling the Siebel Database Server, Siebel CORBA Object Manager, Siebel Web Server Extension (SWSE), and eAI Connector files is virtually identical to the uninstallation of the Siebel Server, except the parameter you provide will be different.

To uninstall these products

- Enter:

`uninstall.ksh product_name optional_arguments`

where:

- *product_name* = The code for the product you want to uninstall. corbaom (for the CORBA Object Manager), eappweb (for the SWSE), encryption (the Strong Encryption Pack), ses (for the Siebel Enterprise Server components such as Siebel Gateway Name Server, Siebel Server, Siebel Database Server, EAI, and PIMSI), and thirdparty (for Siebel Report Server).

For example:

`uninstall.ksh eappweb`

`uninstall.ksh ses -is:javaconsole -console`

`uninstall.ksh ses -args SS_SETUP_INI=test.ini`

For additional uninstallation information regarding the SWSE, see “[Restoring a Web Server After Uninstalling the SWSE](#)” on page 266.

Restoring a Web Server After Uninstalling the SWSE

After uninstalling your SWSE, you can restore your Web server using the following procedure.

To restore your Web Server

- 1 Copy all the backup configuration files, created during installation, referenced in the following example to their original location under the Web server directory.

`config_file_name_backup_timestamp.bak`

For example:

`obj_conf_020714204932.bak`

Solaris

- `start`
- `config/mime.types`
- `config/obj.conf`
- `config/magnus.conf`

AIX and HP-UX

- `conf/httpd.conf`
- `conf/mime.types`

2 (HP-UX Only) Reset any existing LANG variable to the actual directory that the symbolic link represents. If the environmental variable LANG is set to a directory name that is a symbolic link, the Java uninstaller for Siebel Server will fail.

NOTE: The LANG variable cannot be set to univ.utf8. This causes the uninstaller to fail.

Uninstalling Siebel Language Packs from the Servers

You cannot uninstall Language Packs selectively from your servers. If you must uninstall a particular Language Pack, you must uninstall the Siebel Server on which it is installed and reinstall it with the correct Language Pack or Packs.

Troubleshooting the Uninstallation Process

Uninstallation is usually straightforward when the previous installation instructions have been followed correctly. This section describes how to recover from a failed uninstallation.

Recovering from a Failed Uninstallation

If you encounter any issue with the uninstallation process, you can run the uninstallation again. This uses the backup made by the uninstaller under the backup directory (ses_BAK) to reconstruct your original installation. You can then address the cause of the failure and run the uninstallation for a third time to complete the uninstallation process.

NOTE: The recovery mechanism only can be used if the uninstallation process fails. It cannot be used to undo a successful uninstallation.

Migrating to a New Version of Siebel eBusiness Applications

When migrating to a new version of Siebel eBusiness Applications, refer to the instructions in the *Upgrade Guide*. If you are migrating to a new database platform, consult Siebel Services.

A

Deployment Planning Worksheet

Each time you install a new Siebel Enterprise Server, you must make copies of this worksheet for each member of the deployment team. This worksheet includes the following sections:

- "Team Lead Summary Data" on page 269
- "Enterprise Server Names and Installation Directories Data" on page 269
- "Siebel Accounts, Host Names, and Static IPs Data" on page 270
- "Cluster Deployment Data" on page 271
- "Ports and RDBMS Details Data" on page 272

Team Lead Summary Data

Section 1: Deployment Team Members

Deployment Team Lead	
Siebel Administrator	
System Administrator	
Database Administrator	

Section 2: Deployment Overview

Component Name	Version	Codepage /Unicode	Owner	Number of Users	Server OS
Database Server (RDBMS:)					
Siebel Servers					
Web Server					

Enterprise Server Names and Installation Directories Data

Make a copy for *each* Enterprise you install.

Section 3: Server Names

Component Name	Network Host Name	Installation Directory
Enterprise Server / Siebel Root		
Siebel Server		
Siebel Database Server		
File System		
Siebel Gateway Name Server		
Siebel CORBA Object Manager (if applicable)		
Web Server		

Siebel Accounts, Host Names, and Static IPs Data

Make a copy for each Enterprise you install.

Section 4: Siebel Account Information

	Login/User ID	Password
Siebel Service Owner		
Anonymous Employee User ID		
Contact User ID		
Security User ID (LDAP)		

Section 5: Host Name and Static IP Addresses

Server Name	Static IP/Host Name	Subnet Mask
Siebel Gateway Name Server		
Enterprise Server (load balancer VIP, if third-party load balancer is used)		
Siebel Server		

Cluster Deployment Data

Make a copy for *each* partition of your shared disk (H:\, I:\, J:\, and so on). (Choice of resource groups clustered is optional.)

Section 6: Cluster Resource Groups

Resource Group	Network Name	IP Address/Machine Name
Siebel Gateway		
Siebel File System		
Siebel Database Server		

Section 7: Cluster Configuration

Server Type	Network Hostname	Cluster IP Address	Resource Group IP Address	Subnet
Gateway Node 1				
Gateway Node 2				
Siebel File System Node 1				
Siebel File System Node 2				

Cluster Group	Heartbeat IP Address	Heartbeat Subnet

Ports and RDBMS Details Data

Section 8: Ports and ODBC Data Source Name

Make a copy for each Enterprise you install.

NOTE: If your database is IBM DB2 UDB for z/OS and OS/390, a Deployment Planning Worksheet dedicated to the Siebel Database Server installation is provided in *Implementing Siebel eBusiness Applications on DB2 UDB for z/OS and OS/390*.

Synchronization Manager for Remote Users	
Request Manager (optional)	
Siebel Connection Broker	
ODBC Data Source Name	
Other Ports	

Section 9: Database Information

Items (if applicable)	Value
RDBMS OS Platform, Version and Patch	
RDBMS Platform, Version, and Patch	
DB Server	
Host Instance Name	
Database Name	
Port #	
TableOwner and Password	
Tablespace Name, Usage (Data or Index), and Page Size	
Tablespace Name, Usage (Data or Index), and Page Size	
Tablespace Name, Usage (Data or Index), and Page Size	

B

Enabling Server Components

This appendix provides a comprehensive list of all server components or business services that require enabling by users in Siebel eBusiness Applications, version 7.x.

You can enable individual server components on one Siebel Server and other components on a separate Siebel Server or servers; for example, if you want to operate some components as part of a cluster, but not others.

NOTE: You may need to set parameters such as MaxTasks and MinMTServers for the enabled components to configure them for your business requirements. For more details, see *Performance Tuning Guide* and *Siebel System Administration Guide*. See also Technical Note 388 on Siebel SupportWeb.

Enabling Server Component Groups

The component groups described in [Table 24](#) reside on the Siebel Server and must be enabled for their particular products to function. Enabling can be undertaken at the time you initially configure the Siebel Server, or at any time thereafter, using Server Manager.

NOTE: The System Management Component Group is enabled by default and cannot be disabled.

Table 24. Server Components That Must Be Enabled

Component Group	Component Group Members
Assignment Management	Batch Assignment
	Assignment Manager
Communications Management	Communications Session Manager
	Communications Configuration Manager
	Communications Inbound Receiver
	Communications Inbound Processor
	Communications Outbound Manager
	Email Manager
	Page Manager
	Smart Answer Manager
Content Center	Content Project Publish
	Content Project Start

Table 24. Server Components That Must Be Enabled

Component Group	Component Group Members
Credit Assign	Incentive Compensation Credit Assignment
	Incentive Compensation Credit Assignment Database
	Incentive Compensation Rule Manager Service
	Incentive Compensation Credit Rules to AM Rules Update Manager
Data Quality	Data Quality Manager
Dun and Bradstreet	D&B Update Mgr (D&B)
	D&B Update Mgr (Siebel)
	D&B Update Mgr (Multi-task)
Siebel Employee Relationship Management (ERM)	ERM Compensation planning Service
	eTraining Object Manager
Enterprise Application Integration (EAI)	MQSeries Server Receiver
	MQSeries AMI Receiver
	Business Integration Manager
	Business Integration Batch Manager
	Enterprise Integration Mgr
	EAI Object Manager
	MSMQ Receiver
	JMS Receiver
	SMQ Receiver
Field Service	Appointment Booking Engine
	Field Service Cycle Counting Engine
	Field Service Mobile Inventory Transaction Engine
	Service Order Part Locator Engine
	Preventive Maintenance Engine
	Field Service Replenishment Engine
	Optimization Engine
	Field Service Object Manager
	Service Order Fulfillment Engine
Forecast Service Management	Forecast Service Manager

Table 24. Server Components That Must Be Enabled

Component Group	Component Group Members
Handheld Synchronization	Siebel Service Handheld 7.5
	Handheld Sales CE
Incentive Compensation	Incentive Compensation Mgr
	ICM Order Import
	ICM CalcWkbk Import
	ICM Calc Engine
	ICM Quota Import
	ICM Container Calculation
	ICM Container Recalculation
Marketing Server	List Import Service Manager
Marketing Object Manager	Marketing Object Manager
	eMarketing Object Manager
	eEvents Object Manager
Oracle Connector	Oracle Receiver
SAP Connector	SAP Send Transaction
	SAP Process Transaction
	SAP BAPI tRFC Receiver
	SAP IDOC Receiver for MQ Series
	SAP IDOC AMI Receiver for MQ Series
Siebel Core Reference Application Components (CRA)	Siebel Core Reference Application Object Manager
Sales Hierarchy Service (SalesHierSvc)	Sales Hierarchy Service Manager
Siebel Anywhere	Upgrade Kit Builder
Siebel eChannel	Partner Manager Object Manager
	eChannel Object Manager
Siebel eDocuments ¹	Document Server
Siebel Call Center	Call Center Object Manager
	eService Object Manager
Siebel Dynamic Commerce	Dynamic Commerce
	Dynamic Auto Close
	Dynamic Commerce Alerts

Table 24. Server Components That Must Be Enabled

Component Group	Component Group Members
Siebel ISS	eSales Object Manager
	eCustomer Object Manager
	Siebel Product Configuration Object Manager
Siebel Remote	Database Extract
	Parallel Database Extract
	Generate New Database
	Replication Agent
	Synchronization Manager
	Transaction Merger
	Transaction Processor
	Transaction Router
Siebel Sales	Sales Object Manager
	Siebel Mobile Connector Object Manager
Sales Hierarchy Service Component	Sales Hierarchy Service Manager
Siebel to Siebel Connector	HA Upgrade MQSeries Server Receiver
	Siebel to Siebel MQSeries Receiver
	Siebel to Siebel MSMQ Receiver
Siebel Wireless	Siebel eChannel Wireless
	Siebel Self Service Wireless
	Siebel Sales Wireless
	Siebel Service Wireless
System Management (Enabled by default and, therefore, not visible on the Enable Components screen of the Siebel Software Configuration Wizard.)	Server Manager
	Siebel Server
	Siebel Server Scheduler
	Server Request Broker
	Server Request Processor
	File System Manager
	Client Administration
	Administration Notification Component
	Connection Broker
	Server Table Cleanup

Table 24. Server Components That Must Be Enabled

Component Group	Component Group Members
Workflow Management	Workflow Action Agent
	Workflow Monitor Agent
	Workflow Process Manager
	Workflow Process Batch Manager
	Generate Triggers
	Workflow Recovery Manager
PIM Server Integration Management	PIMSI Engine

1. The Siebel eDocuments component must be installed on a dedicated Document Server host machine. For more information, see *Applications Administration Guide*.



Demo Users in the Siebel Sample Database

This appendix lists the demo users defined in the Siebel Sample Database for several Siebel applications. It includes the following topics:

- “Demo Users for Siebel eBusiness Applications” on page 279
- “Demo Users for Siebel Industry Applications” on page 288

NOTE: For more information about using a demo user to log in to a Siebel demo application, see “Siebel Client Shortcuts and Start-Up Options” on page 197.

Demo Users for Siebel eBusiness Applications

This section identifies demo users applicable to the Siebel Sample Database you install for Siebel eBusiness Applications.

Demo Users for Siebel Call Center

Table 25 lists the demo users for Siebel Call Center.

Table 25. Demo Users for Siebel Call Center

Username / Password	Name / Title	Application	Primary Responsibility	Role
CCHENG	Casey Cheng / Universal Agent	Siebel Call Center	Universal Agent	Cheng handles service requests of all types: emails, inbound calls, and Web collaboration session requests. In addition, he executes outbound call campaigns.
TARNOLD	Ted Arnold / Telesales Representative	Siebel Call Center	Telesales Representative	Arnold primarily executes inbound and outbound telemarketing and telesales calls.

Table 25. Demo Users for Siebel Call Center

Username / Password	Name / Title	Application	Primary Responsibility	Role
VTAYLOR	Vic Taylor / VP Call Center	Siebel Call Center	Call Center Manager	Taylor's responsibilities for the day-to-day operations of a Call Center make him a regular user of Siebel Call Center Administration functions. He uses the Siebel Analytics function to evaluate performance and ROI and to make strategic decisions based on the analyses.
EMODI	Emily Modi / Engagement Manager	Siebel Call Center	Consulting Manager	Modi is responsible for managing a consulting practice business, including opportunity management, client relationships, contracts and agreements, and financial reporting and management.
GABBO	Glen Abbole / Information Technologist	Siebel Professional Services	Consultant	Abbole is responsible for day-to-day project management, including staffing requests.
GCLARK	Gary Clark / Consultant	Siebel Professional Services	Consulting Manager	Clark is responsible for managing a consulting practice business.

Demo Users for Siebel Customer Order Management

[Table 26](#) lists the demo users for Siebel Customer Order Management.

Table 26. Demo Users for Siebel Customer Order Management

Username / Password	Name / Title	Application	Primary Responsibility	Role
JADAMS	Jamie Adams / VP of Information Technology	Siebel Customer Order Management	Web Corporate User	Adams uses Siebel Advisor to get guidance and advice online, Siebel eCatalog to navigate through product offerings, Siebel Configurator and Pricer to configure and price orders, and Siebel eSales to check out online sales information.
MCARLSON	Mike Carlson / VP of Sales	Siebel Customer Order Management	Web Purchasing Manager	Carlson works at Marriott International, a customer of Siebel Systems. He uses the Siebel online self-service products to answer questions, find solutions to his problems, and gather information about Siebel products Marriott has bought or is considering buying.

Demo Users for Siebel ERM

Table 27 lists the demo users for Siebel ERM.

Table 27. Demo Users for Siebel ERM

Username / Password	Name / Title	Application	Primary Responsibility	Role
APARKER	Ashley Parker / Product Line Manager	Siebel ERM Administrator	ERM User, Siebel Administrator	Parker is an employee who sets objectives, takes training classes, files SRs. Parker also is an administrator who can perform all administrative functions.
JRUBIN	Jason Rubin / Director, Product Marketing	Siebel ERM	ERM Manager, ERM Analytics Manager	Rubin is the person used most frequently in ERM Demos. Rubin is a mid-level manager in the organization who has approval capabilities, a number of layers of employees below him in the organization, view of certain analytics dashboards, and ability to act like an individual contributor.
MSALTEN	Mark Salten / Vice President, Information Technology and CIO	Siebel ERM	ERM Manager, ERM Analytics HelpDesk	Salten is a CIO who can view key metrics related to internal HelpDesk performance.
NMENDEZ	Narina Mendez / Senior Vice President, Human Resources	Siebel ERM	ERM Manager, ERM Analytics HR	Mendez is an HR executive who can view key analytics that display workforce performance metrics.

Table 27. Demo Users for Siebel ERM

Username / Password	Name / Title	Application	Primary Responsibility	Role
EHOLDEN	Ed Holden / Senior Vice President, Product Marketing	Siebel ERM	ERM Manager, ERM Analytics VP	Holden is a vice president who approves comp plans, views overall organization analytics, and is Jason Rubin's Manager.
TSMITH	Tom Smith / Chairman and CEO	Siebel ERM	ERM Manager, Executive Analytics User	Smith is an executive who views key analytics and sets the corporate strategy.

Demo Users for Siebel Field Service

[Table 28](#) lists the demo users for Siebel Field Service.

Table 28. Demo Users for Siebel Field Service

Username / Password	Name / Title	Application	Primary Responsibility	Role
DCOLLINS	Dana Collins / Dispatcher	Siebel Service	Dispatcher	Collins is responsible for addressing customer issues when personnel must be sent onsite.
FROBERTS	Fred Roberts / Field Service Engineer	Siebel Service	Senior Field Engineer	Roberts is a field service engineer working for Siebel Systems Service Team. He is responsible for carrying out field repairs and replacing defective parts.
SMURPHY	Seth Murphy / Service Manager	Siebel Service	Service Administrator	Murphy manages all service operations.

Demo Users for Siebel Marketing

Table 29 lists the demo users for Siebel Marketing.

Table 29. Demo Users for Siebel Marketing

Username / Password	Name / Title	Application	Primary Responsibility	Role
LAPPLE	Linda Apple / Marketing Analyst	Siebel Marketing	Marketing Analytics User	Apple uses Siebel Marketing to analyze data for marketing campaigns.
MMARINO	Mary Marino / eMarketing Manager	Siebel eMarketing	Marketing Analytics User	Marino uses Siebel eMarketing to conduct email and Web campaigns.
BANDERS	Brian Andersen / Business Analyst	Siebel Marketing	Business Analyst	Andersen uses Siebel Marketing to analyze data for marketing campaigns.
PMILLER	Pat Miller / Vice President, Marketing	Siebel Marketing	Marketing Executive	Miller uses Siebel Marketing to monitor and analyze marketing campaigns and their effectiveness.
MMAY	Marion May / Marketing Manager	Siebel Marketing & Siebel Events Manager	Marketing Manager	May creates and executes different types of marketing campaigns and events.
RUTAH	Robin Utah / Customer	Siebel Events (customer-facing)	Web Registered User	Utah is a customer who registers for an event using a Siebel Events Web site.

Demo Users for Siebel PRM

[Table 30](#) lists the demo users for Siebel PRM.

Table 30. Demo Users for Siebel PRM

Username / Password	Name / Title	Application	Primary Responsibility	Role
CELLIS	Cory Ellis / VP of Channels	Partner Manager	Channel Operations Manager	
CMAX	Chris Max / Channel Marketing Manager	Partner Manager	Channel Marketing Manager Analytics User	Max uses Siebel Partner Manager to manage relationships with consulting partners.
CMORRIS	Colby Morris / Partner Manager	Partner Manager	Channel Account Manager	Morris uses Siebel Partner Manager to manage the relationships with the reseller partners he is responsible for. He drives marketing, sales and service through the partner organization, and assesses the overall performance of the partner organization.
COBRIEN	Clay Obrien / Channel Operations Manager	Partner Manager	Channel Operations Manager	
TANGEL	Ted Angel / Senior Channel Executive	Partner Portal	Channel Executive	
CDOUGLAS	Charles Douglass / President	Partner Manager	Partner Operations Manager	
OMANN	Owen Mann / Partner Operations Agents	Partner Portal	Partner Operations Analytics User	

Table 30. Demo Users for Siebel PRM

Username / Password	Name / Title	Application	Primary Responsibility	Role
RMARLOW	Robin Marlow / Partner Sales Manager	Partner Portal	Partner Executive	Marlow uses Siebel Partner Portal to work with Siebel Systems and to improve the effectiveness of all interactions with her customers, whether for marketing, sales or service purposes.
SMARTINS	Sam Martins / Partner Service Rep	Partner Portal	Partner Service Rep Analytics User	
SMOSS	Sam Moss / Partner Sales Manager	Partner Portal	Partner Executive	
SREED	Shawne Reed / Partner Marketing Agent	Partner Portal	Partner Marketing Agent	
SMEIZEN	Sandy Meizen / Partner Service Manager	Partner Manager	Partner Sales Representative - Wireless	
SROBERTS	Stacey Roberts / Partner Sales Rep	Partner Portal	Partner Sales Representative - Wireless	

Demo Users for Siebel Sales

[Table 31](#) lists the demo users for Siebel Sales.

Table 31. Demo Users for Siebel Sales

Username / Password	Name / Title	Application	Primary Responsibility	Role
MSTERN	Madison Stern / Regional Manager	Siebel Sales	Sales Manager	Stern uses Siebel Sales to manage all personal and team Sales and Forecasting information.
NSACHS	Nancy Sachs / VP Sales, North America	Siebel Sales	Multi-Organizational Manager	Sachs uses Siebel Sales to manage personal, team, and organizational Sales and forecasting information. She also performs analysis on revenue pipelines and forecast.
TSMYTHE	Terry Smythe / District Manager	Siebel Sales	Field Sales Representative	Smythe uses Siebel Sales to manage all personal Sales and Forecast information.

Demo Users for Siebel Industry Applications

This section identifies demo users applicable to the Siebel Sample Database you install for Siebel Industry Applications.

Demo Users for Siebel Automotive

[Table 32](#) lists the demo users for Siebel Automotive.

Table 32. Demo Users for Siebel Automotive

Username / Password	Name / Title	Application	Primary Responsibility	Role
BATKINS	Bill Atkins	Siebel eCustomer	Web Registered User	Atkins is the customer who is the recipient of all sales, service and marketing activities.
AALEXIS	Andrea Alexis	Siebel Automotive	Auto Customer Service Representative	Alexis is an OEM employee who uses Siebel Automotive to manage all customer relationships, including Captive Finance related activities.
HABEL	Henry Abel	Siebel Automotive	Auto Field Manager	Abel is an OEM employee who uses Siebel Automotive to manage all dealer relationships including Captive Finance related business.
CAUSTIN	Chris Austin	Siebel Marketing	Auto Marketing Manager	Austin is an OEM Employee who uses Siebel Marketing and Siebel Analytics to manage all marketing activities.
GMORRIS	Gus Morris	Siebel Dealer	Auto Dealer General Manager	Morris is Dealer General Manager who uses Siebel Dealer to manage marketing campaigns, OEM relationships, administer users at the dealership and manage all Sales Managers at Dealership.

Table 32. Demo Users for Siebel Automotive

Username / Password	Name / Title	Application	Primary Responsibility	Role
SAGNES	Sophia Agnes	Siebel Dealer	Auto Dealer Sales Assistant	Agnes is the Receptionist at Dealership who role is to greet guests and direct them to the right sales or service person.
SAMOORE	Samantha Moore	Siebel Dealer	Auto Dealer Sales Manager	Moore is the Sales Manager at Dealership who uses Siebel Dealer to manage her team of Sales Consultants at Dealership.
SCHAN	Scott Chan	Siebel Dealer	Auto Dealer Sales Consultant	Chan is the Sales Consultant at Dealership who uses Siebel Dealer to manage Sales of Vehicles.

Demo Users for Siebel Communications, Media & Energy: Energy

Table 33 lists the demo users for Siebel Communications, Media & Energy: Energy.

Table 33. Demo Users for Siebel Communications, Media & Energy: Energy

Username / Password	Name / Title	Application	Primary Responsibility	Role
TWELLS	Tony Wells / NE CSR	Siebel Energy	ENY Customer Service Rep	

Demo Users for Siebel Communications, Media & Energy: Media

Table 34 lists the demo users for Siebel Communications, Media & Energy: Media.

Table 34. Demo Users for Siebel Communications, Media & Energy: Media

Username / Password	Name / Title	Application	Primary Responsibility	Role
CMARSH	Chris Marsh / Customer	Customer CME	Web Registered User	Marsh uses Siebel eCustomer for Media to subscribe for service.
BEDINGER	B Edinger / Field Sales Director	Siebel Power Communications	COM Sales Manager	Edinger is Sales Manager at Millennium World Communications.
TMILLER	Toni Miller / Customer Service Representative	Siebel Power Communications	COM Customer Service Rep	Miller uses Siebel Media to access customer information.

Demo Users for Siebel Communications, Media & Energy: Wireless

Table 35 lists the demo users for Siebel Communications, Media & Energy: Wireless.

Table 35. Demo Users for Siebel Communications, Media & Energy: Wireless

Username / Password	Name / Title	Application	Primary Responsibility	Role
CWATSON	Cory Watson / Customer Service Representative	Siebel Power Communications	COM Customer Service Rep	Watson uses Siebel Communications Wireless to access customer information.
PWEATHER	Pat Weathers / Customer	Customer CME	Web Registered User	Weathers uses Siebel eCustomer for Media to subscribe for service.

Demo Users for Siebel Communications, Media & Energy: Wireline

[Table 36](#) lists the demo users for Siebel Communications, Media & Energy: Wireline.

Table 36. Demo Users for Siebel Communications, Media & Energy: Wireline

Username / Password	Name / Title	Application	Primary Responsibility	Role
KALLISON	Kate Allison / Customer	Customer CME	Web Registered User	Allison uses Siebel eCustomer for Wireline to subscribe for service.
SROBERTS	Shirley Roberts / Customer	Customer CME	Web Corporate User	Roberts uses Siebel eCustomer for Wireline to manage her business activities.
MNASH	Mike Nash / Field Sales Representative	Siebel Power Communications	COM Field Sales Rep	Nash uses Siebel Communications to manage his opportunities and validate quotes and orders.
SCOLLINS	Sue Collins / Customer Service Representative	Siebel Power Communications	COM Customer Service Rep	Collins uses Siebel Communications to access customer information.

Demo Users for Siebel Consumer Sector: Apparel and Footwear

[Table 37](#) lists the demo users for Siebel Consumer Section: Apparel and Footwear.

Table 37. Demo Users for Siebel Consumer Sector: Apparel and Footwear

Username / Password	Name / Title	Application	Primary Responsibility	Role
BYOUNG	Brian Young / AF Buyer (Partner Portal)	Siebel PRM Partner Portal for AF	AF Buyer (Partner Portal)	Young is a buyer for Apparel and Footwear accounts.
MAUSTIN	Mike Austin / AF Marketing Administrator	Siebel Apparel and Footwear Sales	AF Marketing Administrator	Austin is a Marketing Admin for Apparel and Footwear accounts.

Table 37. Demo Users for Siebel Consumer Sector: Apparel and Footwear

Username / Password	Name / Title	Application	Primary Responsibility	Role
SMOSS	Sandy Moss / AF Sales Manager	Siebel Apparel and Footwear Sales	AF Sales Manager	Moss is a Sales Manager for Apparel and Footwear accounts.
TARNOLD	Ted Arnold / AF Key Account Manager	Siebel Apparel and Footwear Sales	AF Key Account Manager	Arnold is a Key Account Manager for Apparel and Footwear accounts.

Demo Users for Siebel Consumer Sector: Consumer Goods

[Table 38](#) lists the demo users for Siebel Consumer Sector: Consumer Goods.

Table 38. Demo Users for Siebel Consumer Sector: Consumer Goods

Username / Password	Name / Title	Application	Primary Responsibility	Role
CCARNEY	Chris Carney / Call Center Agent	Siebel Consumer Goods Call Center	CG Universal Agent	Carney is a customer service call center agent; also handles Web inquiries.
MMEYERS	Marty Meyers / Assistant Brand Manager	Siebel Consumer Goods Marketing	CG XX Marketing Manager	Meyers sets up marketing programs and manages programs.
LSTREET	Lisa Street / Store Manager	Siebel Consumer Goods and Customer	CG XX Store Manager - eChannel	Street manages displays and product inventory.
TMARTIN	Tim Martin / Trade Marketing	Siebel Consumer Goods Sales and Siebel Consumer Goods Marketing	CG XX Trade Marketing Manager	Martin is a trade marketing manager.
JSTANLEY	Jeff Stanley / VP of Marketing	Siebel Consumer Goods Marketing	CG VP of Marketing	Stanley reviews approvals and sets up budgets.
BPARKER	Billy Parker / Deduction Agent	Siebel Consumer Goods Sales	CG Deductions Agent	Parker is responsible for resolving all deductions.

Table 38. Demo Users for Siebel Consumer Sector: Consumer Goods

Username / Password	Name / Title	Application	Primary Responsibility	Role
CSTAMPS	Colby Stamps / Customer Financial Service Manager	Siebel Consumer Goods Sales	CG CFS Manager	Stamps is a Finance Manager with financial reps as direct reports.
KDRESEL	Kelly Dresel / Retail Sales Representative	Siebel Consumer Goods Sales	CG Retail Sales Representative	Dresel is a retail sales rep responsible for servicing retail stores.
RMARCKS	Ricky Marks / CG Retail Sales Manager	Siebel Consumer Goods Sales	CG Retail Sales Manager	Marks is a retail sales manager with retail sales reps as direct reports.
VPRATT	Vick Pratt / Senior VP	Siebel Consumer Goods Sales	CG SR VP	Pratt is a Vice President over Sales, Marketing, Finance, and Operations.
CTRIPP	Courtney Tripp / Key Account Manager	Siebel Consumer Goods Sales and Handheld	CG Key Account Manager	Tripp develops account plans and promotions to drive incremental volume at select accounts.
DLIVERY	Del Livery / Delivery Representative	Siebel Consumer Goods Sales and Handheld	CG Deliver Representative - CE	Livery is a retail sales rep who uses handheld devices when in field.
MROBINS	Max Robins / Merchandising Representative	Siebel Consumer Goods Sales and Handheld	CG Retail Merchandising Representative - CE	Robins is a retail merchandising rep at retail accounts who uses handheld devices.

Demo Users for Siebel Financial Services: Healthcare

Table 39 lists the demo users for Siebel Financial Services: Healthcare.

Table 39. Demo Users for Siebel Financial Services: Healthcare

Username / Password	Name / Title	Application	Primary Responsibility	Role
LANDREWS	Louise Andrews / Call Center Agent	Healthcare Call Center	HC Agent - Call Center	Andrews works for health plan; handles member and provider service calls.
TWATSON	Tom Watson / Group Sales Rep	Healthcare Sales	HC Sales Rep - Group	Watson works for health plan; collaborates with agents and brokers on group sales.
WWU	Wendy Wu / Health Insurance Broker	Agent Portal	HC Broker	Wu works for a partner organization (insurance agency or brokerage).
JJUDD	Jerry Judd / Accountant	Customer Portal and Enrollment Portal	Web Corporate User	Judd is a health plan member.
SREED	Sheila Reed / Benefits Administrator	Group Portal	HC Administrator - Employer Group	Reed works for an employer group or TPA (Third-party administrator).
BGRANT	Bob Grant / Visit Coordinator	Provider Portal	HC Doctor Assistant - Provider Portal	Grant works at a physicians office or clinic.
FMILLER	Fred Miller / Vice President, Marketing	Marketing	FIN Analyst - Marketing	Miller uses Siebel Marketing and Siebel Analytics to evaluate important business drivers and to determine what marketing campaigns need to be created and executed.

Demo Users for Siebel Financial Services: Institutional Finance

Table 40 lists the demo users for Siebel Financial Services: Institutional Finance.

Table 40. Demo Users for Siebel Financial Services: Institutional Finance

Username / Password	Name / Title	Application	Primary Responsibility	Role
BKEMPER	Bonnie Kemper / Director - Commercial Banking	Siebel Finance Call Center	IF Manager - Commercial Banking	Kemper uses Siebel Finance Sales to manage all personal and team contact, opportunity, loan request, and Forecast information for commercial banking.
CBAXTER	Charlie Baxter / Relationship Manager	Siebel Finance Call Center	IF Banker - Commercial Banking	Baxter uses Siebel Finance Sales to manage all personal contact, opportunity, loan requests, and forecast information for commercial banking.
EASPEN	Eve Aspen / Events Administrator	Siebel Finance Call Center	IF Events Administrator - Institutional Sales	Aspen uses Siebel Events Manager for Finance to plan and manage institutional marketing events.
FPRICE	Francis Price / Financial Advisor - Private Client Services	Siebel Finance Call Center	IF Broker - Wealth Management	Price uses Siebel Finance to manage all relationship functions related to financial planning and wealth management across retail brokerage and wealth management.
IBARNES	Ian Barnes / Vice President	Siebel Finance Call Center	IF Banker - Investment Banking	Barnes uses Siebel Finance Sales to manage all personal deals, forecasts, client, and event information for investment banking, while respecting all Chinese Wall security requirements.

Table 40. Demo Users for Siebel Financial Services: Institutional Finance

Username / Password	Name / Title	Application	Primary Responsibility	Role
ISTONE	Irene Stone / Vice President Equity Sales	Siebel Finance Call Center	IF Sales Manager - Institutional Sales	Stone uses Siebel Finance Sales to manage client relationships, sales, and call list information for institutional sales.
MDONAHUE	Michael Donahue / Senior Managing Director	Siebel Finance Call Center	IF Manager - Investment Banking	Donahue uses Siebel Finance Sales to manage investment banking client relationships, while adhering to Chinese Wall security requirements. He also performs sophisticated analysis on revenue pipelines and forecasting.
RADAMS	Robert Adams / Research Analyst	Siebel Finance Call Center	IF Sales Rep - Institutional Sales	Adams uses Siebel Finance Sales to manage client relationships and to maintain and distribute research.

Demo Users for Siebel Financial Services: Insurance

Table 41 lists the demo users for Siebel Financial Services: Insurance.

Table 41. Demo Users for Siebel Financial Services: Insurance

Username / Password	Name / Title	Application	Primary Responsibility	Role
CANTHONY	Chris Anthony / Claims Adjuster	Siebel Financial Services	IN Claims Adjuster	Anthony is a Claims Adjuster.
CCONWAY	Chris Conway / Insurance Call Center Agent	Siebel Financial Services	IN Agent - Call Center	Conway is a Call Center/ Service Representative.
VALONTO	Victor Alonto / Sales Representative	Siebel Financial Services	IN Channel Manager	Alonto manages relationships with agents and brokers.

Table 41. Demo Users for Siebel Financial Services: Insurance

Username / Password	Name / Title	Application	Primary Responsibility	Role
BWONG	Bill Wong / Customer	Siebel Financial eCustomer	Web Corporate User	Wong is a customer (Customer Portal).
CALLEN	Cindy Allen / Insurance Agent	Siebel Insurance Agent Portal	IN Agent - Agent Portal User	Allen is an Insurance Agent (Agent Portal).

Demo Users for Siebel Financial Services: Retail Finance

Table 42 lists the demo users for Siebel Financial Services: Retail Finance.

Table 42. Demo Users for Siebel Financial Services: Retail Finance

Username / Password	Name / Title	Application	Primary Responsibility	Role
CABLE	Carol Able / Contact Center Agent	Siebel Finance Call Center	RF Universal Agent - Contact Center	Able handles inbound consumer service requests and is responsible for cross-selling and outbound telesales.
CMICHAEL	Christine Michaels / Manager	Siebel Finance Call Center	RF Vice President - Contact Center	Michaels manages an inbound and outbound call center.
EQUITY	Erika Quity / Mortgage Specialist	Siebel Finance Call Center	RF Agent - Credit Center Service	Quity uses Siebel Finance Call Center to handle consumer loan requests, such as mortgage, home equity, and credit card requests in a call center.
SBUTLER	Stacey Butler / Senior Call Center Agent	Siebel Finance Call Center	RF Agent - Small Business Call Center	Butler uses Siebel Finance Call Center in a blended small business call center, handling both sales and service.

Demo Users for Siebel High Technology/Industrial Manufacturing

Table 43 lists the demo users for Siebel High Technology/Industrial Manufacturing.

Table 43. Demo Users for Siebel High Technology/Industrial Manufacturing

Username / Password	Name / Title	Application	Primary Responsibility	Role
AGRAHAM	Amy Graham / COOP Program Administrator	HTIM	COOP Program Administrator	Channel Operations Manager
AMARTIN	Andy Martin / Design Registration and SPA Administrator	HTIM	Design Reg Administrator	Design Reg Administrator, SPA Administrator
ALIM	Arlene Lim / COOP Manager	HTIM	COOP Manager	Channel Partner Manager
IADAMS	Irene Adams / Design Registration and SPA Approver	HTIM	Design Reg Manager	Design Reg Manager, SPA Manager
RCHANG	Rob Chang / COOP Specialist	HTIM	COOP Specialist	Channel Marketing Manager
BRANCH	Bill Ranch / Distributor Sales Rep Branch	HTIM PRM	Design Reg Manager	Partner Sales Rep, SPA Manager
JGORDON	Jon Gordon / COOP Partner User	HTIM PRM	COOP Partner User	Partner Marketing Manager
RMASON	Rick Mason / Distributor Sales Rep	HTIM PRM	Design Reg Individual	Partner Sales Rep, SPA Individual

Demo Users for Siebel Hospitality

Table 44 lists the demo users for Siebel Hospitality.

Table 44. Demo Users for Siebel Hospitality

Username / Password	Name / Title	Application	Primary Responsibility	Role
EHART	Emilia Hart / Revenue Manager	Siebel Hospitality	TH - Revenue Manager	Hart is the person who is responsible for maximizing the asset utilization and profit potential of the hotel.
HOSADMIN	Siebel Administrator - TH / Sys Admin - TH	Siebel Hospitality	TH Hospitality Administrator User	The Hospitality administrator is the person responsible for the administration of the Hospitality application.
MHAWK	Mike Hawk / Operations Manager	Siebel Hospitality	TH- Operations Manager	Hawk is responsible for taking care of the day-to-day operations of executing group events.
MSANDERS	Mike Sanders / National Sales Manager	Siebel Hospitality	TH- National Sales Manager	Sanders is the person who sells group events across properties and can view group execution activities across properties.
PHARG	Phil Harg / Sales Manager	Siebel Hospitality	TH - Sales Manager	Harg is the person who sells events to a client for a particular property.
PHALL	Pablo Hall / Sales Manager	Siebel Hospitality	TH - Sales Manager HLR	Hall is the person who sells events to a client for a particular property.
PHAYS	Patricia Hays / Events Director	Siebel Hospitality	TH- Events Director	Hays is the person finally responsible for execution of all the events in the hotel.
SROSS	Sandy Ross / Events Manager	Siebel Hospitality	TH- Events Manager	Ross is the key point of resource during the event execution phase of group events.

Demo Users for Siebel Life Sciences: Clinical

[Table 45](#) lists the demo users for Siebel Life Sciences: Clinical.

Table 45. Demo Users for Siebel Life Sciences: Clinical

Username / Password	Name / Title	Application	Primary Responsibility	Role
CROSEN	Chris Rosen / Clinical Director	Siebel Clinical	Clinical Director	Rosen uses Siebel Clinical Manager and Clinical Project and Resource Management to manage and track clinical trials across all programs within the clinical organization.
CSANDERS	Cathy Sanders / Clinical Manager	Siebel Clinical	Clinical Manager	Sanders uses Siebel Clinical Manager and Clinical Project and Resource Management module to manage her assigned clinical trial projects.
CSTONE	Cindy Stone / Clinical Research Associate	Siebel Clinical	Clinical Research Associate	Stone uses Siebel Clinical Manager, Protocol Builder, and Trip Report modules to manage her sites and record trip reports.
CWALKER	Connie Walker / Clinical Research Associate	Siebel Clinical	Clinical Research Associate	Walker uses Siebel Clinical Manager, Protocol Builder, and Trip Report modules to manage her sites and record trip reports.
CYOUNG	Craig Young / Clinical Research Associate	Siebel Clinical	CL Clinical Research Associate - Light	Young uses Siebel Clinical to manage clinical trial documents.

Table 45. Demo Users for Siebel Life Sciences: Clinical

Username / Password	Name / Title	Application	Primary Responsibility	Role
ASIMON	Anna Simon / Site Administrator	Siebel Clinical Site Portal	Delegated Customer Administrator Site	Simon administers and maintains the site portal for clinical investigators and site coordinators.
JALBRIGHT	Jill Albright / Site Coordinator	Siebel Clinical Site Portal	Registered Customer Site	Albright uses the site portal to screen, re-screen, and enroll subjects for clinical trials.

Demo Users for Siebel Life Sciences: Medical

[Table 46](#) lists the demo users for Siebel Life Sciences: Medical.

Table 46. Demo Users for Siebel Life Sciences: Medical

Username / Password	Name / Title	Application	Primary Responsibility	Role
MDADMIN	Siebel Administrator - MD / Sys Admin - MD	Siebel Medical	LS Administrator	The administrator for Siebel Medical (Medical Products Organization).
CALEX	Carlos Alex / Engineer - Corrective Action	Siebel Medical	MD Corrective Actions	Alex is responsible for managing corrective and preventive actions.
PALLEN	Paul Allen / Engineer - Product Analysis	Siebel Medical	MD Product Analysis	Allen is responsible for analyzing the root cause of product problem.
QMANNY	Quincy Manny / Quality Manager	Siebel Medical	MD Quality Manager	Manny is a quality and safety manager for investigating adverse events and regulatory reports.
RLONDON	Rob London / Regulatory Liaison	Siebel Medical	MD Quality Manager	London is responsible for managing complaint and adverse events investigation.
SMARQUEZ	Susan Marquez / Marketing Manager	Siebel Medical	PH Marketing Manager	Marquez is responsible for managing marketing campaigns.

Table 46. Demo Users for Siebel Life Sciences: Medical

Username / Password	Name / Title	Application	Primary Responsibility	Role
SMASTERS	Sean Masters / Customer Service Rep	Siebel Medical	MD Customer Service Rep	Masters is a customer service representative responsible for answering customer calls and requests.
SMICHAEL	Seth Michael / Field Engineer	Siebel Medical	MD Field Engineer	Michael is a field service engineer responsible for managing servicing equipment at customer location.
SMILES	Sunny Miles / Senior VP	Siebel Medical	MD Executive Analytics	Miles is the executive officer responsible for overseeing the organization's performance.
SMILIKEN	Steve Miliken / Customer Service Manager	Siebel Medical	Service Analytics Administrator	Miliken is a service manager responsible for both customer service and field service.
SMITCHEL	Sandy Mitchel / Contracts Manager	Siebel Medical	MD Contracts Manager	Mitchel is responsible for creating, administrating and managing contracts.
SMURPHY	Samuel Murphy / Sales Rep	Siebel Medical	MD Sales Rep	Murphy is a sales representative in the Medical Products Organization.
SMORGAN	Sue Morgan / Sales Manager	Siebel Medical	MD Sales Manager	Morgan is a sales manager in the Medical Products Organization.

Demo Users for Siebel Life Sciences: Pharma

Table 47 lists the demo users for Siebel Life Sciences: Pharma.

Table 47. Demo Users for Siebel Life Sciences: Pharma

Username / Password	Name / Title	Application	Primary Responsibility	Role
BCARTERS	Barbara Carters / Primary Sales Representative	Siebel Pharma Sales	PH Pharma Pulsar Rep	Carters is a representative calling on primary care physicians for Pulsar division.
CKNIGHT	Carol Knight / Primary Sales Representative	Siebel Pharma Sales	PH Pharma Pulsar Rep	Knight is a representative calling on primary care physicians for Pulsar division.
CPARK	Christina Park / National Account Director	Siebel Pharma Sales	PH Pharma District Manager - US Sales	Park manages national accounts, contacts and tracks formulary status and contracts.
GSTEVENS	Greg Stevens / Primary Sales Representative	Siebel Pharma Sales	PH Pharma Pulsar Rep	Stevens is a representative calling on primary care physicians for Pulsar division.
ILEVIN	Isaac Levin / Primary Sales Representative	Siebel Pharma Sales	PH Pharma Pulsar Rep	Levin is a representative calling on primary care physicians for Pulsar division.
JKIM	Jonathan Kim / Specialty Sales Representative	Siebel Pharma Sales	PH Pharma Specialty Sales Rep - US Sales	Kim is a sales rep for specialty sales force.
KCARLTON	Kevin Carlton / Primary Sales Representative	Siebel Pharma Sales	PH Pharma Pulsar Rep	Carlton is a representative calling on primary care physicians for Pulsar division.
LHILL	Lynford Hill / Primary Sales Representative	Siebel Pharma Sales	PH Pharma Pulsar Rep	Hill is a representative calling on primary care physicians for Pulsar division.
PDAVIDSO	Patrick Davidson / Primary Sales Representative	Siebel Pharma Sales	PH Pharma Pulsar Rep	Davidson is a representative calling on primary care physicians for Pulsar division.

Table 47. Demo Users for Siebel Life Sciences: Pharma

Username / Password	Name / Title	Application	Primary Responsibility	Role
SCARROL	Scott Carrol / National Account Manager	Siebel Pharma Sales	PH Pharma Account Manager - US Managed Care	Carrol manages regional accounts, contacts and tracks formulary status and contracts.
SMILLER	Sarah Miller / District Manager	Siebel Pharma Sales	PH Pharma District Manager - US Sales	Miller is a District Manager managing a team of field representatives.
SPORTER	Susan Porter / Primary Sales Representative	Siebel Pharma Sales	PH Pharma Sales Rep - US Sales	Porter is a representative calling on primary care physicians. She manages contacts, accounts, samples, events, meetings, and calendar.
AGENSCHE	Anne Genscher / Pharmaceutical CSR	Siebel Pharma Sales	PH Pharma CSR	Genscher is based in Germany and manages customer service requests.
CECKERT	Christine Eckert / Pharmaceutical Account Representative	Siebel Pharma Sales	PH Pharma Sales Rep - EMEA Sales	Eckert is an account sales rep based in Germany.
MSONNTAG	Matthias Sonntag / Pharmaceutical Sales Representative	Siebel Pharma Sales	PH Pharma Sales Rep - EMEA Sales	Sonntag is a sales rep based in Germany.
PFISCHER	Peter Fischer / Pharmaceutical Sales Representative	Siebel Pharma Sales	PH Pharma Sales Rep - EMEA Sales	Fischer is a sales rep based in Germany.
CMARTIN	Claude Martin / Pharmaceutical Sales Representative	Siebel Pharma Sales	PH Pharma Sales Rep - EMEA Sales	Martin is a sales rep based in France.
EDUPONT	Eric Dupont / Pharmaceutical District Manager	Siebel Pharma Sales	PH Pharma District Manager - EMEA Sales	Dupont is a District Manager based in France and has a team of representatives.

Table 47. Demo Users for Siebel Life Sciences: Pharma

Username / Password	Name / Title	Application	Primary Responsibility	Role
IREAU	Isabelle Reau / Pharmaceutical Sales Representative	Siebel Pharma Sales	PH Pharma Sales Rep - EMEA Sales	Reau is a sales rep based in France.
VBONTAN	Vincent Bontan / Pharmaceutical Account Representative	Siebel Pharma Sales	PH Pharma Sales Rep - EMEA Sales	Bontan is an account sales rep based in France.
YCOUDERC	Yann Couderc / Pharmaceutical CSR	Siebel Pharma Sales	PH Pharma CSR	Couderc is based in France and manages customer service requests.
VSCHNELL	Volker Schneller / Pharmaceutical District Manager	Siebel Pharma Sales	PH Pharma District Manager - EMEA Sales	Schneller is a District Manager based in Germany and has a team of representatives.
AROSSI	Anna Rossi / Pharmaceutical Sales Representative	Siebel Pharma Sales	PH Pharma Sales Rep - EMEA Sales	Rossi is a sales rep based in Italy.
CVERDI	Claudia Verdi / Pharmaceutical Account Representative	Siebel Pharma Sales	PH Pharma Sales Rep - EMEA Sales	Verdi is an account sales rep based in Italy.
FMANOLI	Filippo Manoli / Pharmaceutical District Manager	Siebel Pharma Sales	PH Pharma District Manager - EMEA Sales	Manoli is a District Manager based in Italy and has a team of representatives.
MBIANCO	Maria Bianco / Pharmaceutical CSR	Siebel Pharma Sales	PH Pharma CSR	Bianco is based in Italy and manages customer service requests.
MBRAMBIL	Mario Brambilla / Pharmaceutical Sales Representative	Siebel Pharma Sales	PH Pharma Sales Rep - EMEA Sales	Brambilla is a sales rep based in Italy.

Table 47. Demo Users for Siebel Life Sciences: Pharma

Username / Password	Name / Title	Application	Primary Responsibility	Role
ACIUDAD	Ana Ciudad / Pharmaceutical District Manager	Siebel Pharma Sales	PH Pharma District Manager - EMEA Sales	Ciudad is a District Manager based in Spain and has a team of representatives.
EROMERO	Eva Romero / Pharmaceutical CSR	Siebel Pharma Sales	PH Pharma CSR	Romero is based in Spain and manages customer service requests.
IMARTIN	Isabel Martin / Pharmaceutical Sales Representative	Siebel Pharma Sales	PH Pharma Sales Rep - EMEA Sales	Martin is a sales rep based in Spain.
MPEREZ	Marcos Perez / Pharmaceutical Sales Representative	Siebel Pharma Sales	PH Pharma Sales Rep - EMEA Sales	Perez is a sales rep based in Spain.
VLOPEZ	Vincente Lopez / Pharmaceutical Account Representative	Siebel Pharma Sales	PH Pharma Sales Rep - EMEA Sales	Lopez is an account sales rep based in Spain.
CRWHITE	Craig White / Pharmaceutical CSR	Siebel Pharma Sales	Pharma Customer Service Representative - UK	White is based in the UK and manages customer service requests.
JFOSTER	James Foster / Pharmaceutical Sales Representative	Siebel Pharma Sales	PH Pharma Sales Rep - EMEA Sales	Foster is a sales rep based in the UK.
KSMALL	Kevin Small / Pharmaceutical Account Representative	Siebel Pharma Sales	PH Pharma Sales Rep - EMEA Sales	Small is an account sales rep based in the UK.

Table 47. Demo Users for Siebel Life Sciences: Pharma

Username / Password	Name / Title	Application	Primary Responsibility	Role
RDAWSON	Richard Dawson / Pharmaceutical District Manager	Siebel Pharma Sales	PH Pharma District Manager - EMEA Sales	Dawson is a District Manager based in the UK and has a team of representatives.
VSINCLAI	Victoria Sinclair / Pharmaceutical Sales Representative	Siebel Pharma Sales	PH Pharma Sales Rep - EMEA Sales	Sinclair is a sales rep based in the UK.

Demo Users for Siebel Loyalty

[Table 48](#) lists the demo users for Siebel Loyalty.

Table 48. Demo Users for Siebel Loyalty

Username / Password	Name / Title	Application	Primary Responsibility	Role
ASANCHEZ	Anna Sanchez / Loyalty Program Member	Siebel Loyalty Customer Portal	Web Registered User	Sanchez, a member of the loyalty program, uses the loyalty customer portal.
JSTEVENS	John Stevens / Loyalty Program Member	Siebel Loyalty Customer Portal	Web Registered User	Stevens, a member of the loyalty program, uses the loyalty customer portal.
PKUMAR	Prabhu Kumar / Loyalty Program Member	Siebel Loyalty Customer Portal	Web Registered User	Kumar, a member of the loyalty program, uses the loyalty customer portal.
LYADMIN	Siebel Administrator - LY / Sys Admin - LY	Siebel Loyalty Manager	Loyalty Administrator (LA)	Overall administrative responsibility for Loyalty.
MSROBINS	Mary S. Robins / Members Services Rep (MSR)	Siebel Loyalty Manager	Member Services Representative (MSR)	Robins is a front-line loyalty rep who deals with loyalty program members and other customers.

Table 48. Demo Users for Siebel Loyalty

Username / Password	Name / Title	Application	Primary Responsibility	Role
MMULHONE	Mark Mulhone / Loyalty Marketing Manager (LMM)	Siebel Loyalty Manager	Loyalty Marketing Manager (LMM)	Mulhone manages loyalty promotions.
PMARS	Paul Mars / Partner Manager	Siebel Loyalty Manager	Loyalty Partner Manager (LPM)	Mars manages the loyalty program's partners.
PPARTNER	Paul Partner / Partner Representative	Siebel Loyalty Partner Portal	Loyalty Partner Representative (LPR)	Partner is an employee who uses the Loyalty Partner Portal.

Demo Users for Siebel Public Sector

[Table 49](#) lists the demo users for Siebel Public Sector.

Table 49. Demo Users for Siebel Public Sector

Username / Password	Name / Title	Application	Primary Responsibility	Role
DSMITH	Dana Smith / Citizen (eService user)	Siebel Public Sector eService	Web Corporate User	Smith is a citizen who seeks service from a variety of government agencies, including applying for social services benefits and paying taxes.
GOVADMIN	Siebel Administrator - GOV / Sys Admin - GOV	Siebel Public Sector	Siebel Administrator	System administrator for Siebel Public Sector applications.
TJACKSON	Terry Jackson / Doctor (Partner Portal user)	Siebel Public Sector PRM Portal	Channel Partner Manager	Jackson is an employee at a non-profit organization that works in conjunction with a government agency to assist in performing the government mission—whether collecting taxes or helping to deliver benefits to citizens.

Table 49. Demo Users for Siebel Public Sector

Username / Password	Name / Title	Application	Primary Responsibility	Role
CWEST	Charles West / Case Worker	Siebel Public Sector	PS Benefits Case Management	West is a case worker with a federal government social services agency, responsible for managing the cases of many citizens throughout the case lifecycle.
JBUTLER	Jennifer Butler / Benefits Case Supervisor	Siebel Public Sector	PS Benefits Case Management	Butler is a case supervisor at a federal government social services agency, responsible for managing a number of case workers.
RCOLLINS	Rich Collins / Tax Case Worker	Siebel Public Sector	PS Benefits Case Management	Collins is a case worker at a state government tax agency, responsible for managing many citizens' tax cases through their lifecycle, including collection, audits, and appeals.
LTHOMAS	Leigh Thomas / 311 Call Center Operator	Siebel Public Sector	PS Incident Management	Thomas works as a customer service agent in a local government 311 call center. Leigh is responsible for responding to citizen inquiries on a broad range of topics.
DFRANKLIN	Dana Franklin / Investigative Agent	Siebel Public Sector	PS Investigative Case Management	Franklin is an agent with a federal law enforcement agency, responsible for investigating criminal activity and threats to the public interest.

Table 49. Demo Users for Siebel Public Sector

Username / Password	Name / Title	Application	Primary Responsibility	Role
JROWAN	Jean Rowan / Immigration Services Officer	Siebel Public Sector	PS Investigative Case Management	Rowan works as an immigration services officer for a federal immigration agency. Jean is responsible for processing incoming applications for visas and citizenship & making determinations as to whether to grant these benefits.
MWILLIAM	Mike Williams / Investigative Agent	Siebel Public Sector	PS Investigative Case Management	Williams is an agent with a federal law enforcement agency, responsible for investigating criminal activity and threats to the public interest.
PMORRIS	Pat Morris / Intelligence Analyst	Siebel Public Sector	PS Investigative Case Management	Morris is an analyst with a federal intelligence agency, responsible for monitoring and assessing threats to national safety and producing a range of intelligence products.
CWOODS	Chris Woods / Public Health Professional	Siebel Public Sector	PS Threat & Response Management	Woods is an epidemiologist with a federal public health agency, responsible for tracking and responding to outbreaks of deadly diseases.

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