SIEBEL 7
eBusiness

SIEBEL WEB CLIENT ADMINISTRATION GUIDE

VERSION 7.5.3

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Contents

Chapter 3. Deploying Siebel Web Clients

Introduction

This guide explains the installation, deployment, and administration of Siebel application clients.

Siebel Mobile Web Client and Siebel Dedicated Web Client installation are covered, as is browser deployment for Siebel Web Client, Mobile Web Client and Dedicated Web Client.

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

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

Product Modules and Options

This Siebel Bookshelf contains descriptions of modules that are optional and for which you may not have purchased a license. Siebel's Sample Database also includes data related to these optional modules. As a result, your software implementation may differ from descriptions in this Bookshelf. To find out more about the modules your organization has purchased, see your corporate purchasing agent or your Siebel sales representative.

How This Guide Is Organized

This guide provides information necessary to install and configure Siebel clients, organized according to the types of Siebel clients you may deploy.

- The overview applies to all major Siebel clients.
- Installation instructions apply to those who install the Mobile and Dedicated Web Clients.
- Deployment instructions apply to those who deploy Web browsers and Siebel Web Client, Mobile Web Client, or Dedicated Web Client.
- Mobile Web Client configuration and usage information applies to those who perform administration tasks to support mobile users and Siebel Remote.
- Configuration parameter information applies to those who will modify configuration files for Mobile and Dedicated Web Clients.
- Siebel Packager information applies to those who create installer packages for Mobile and Dedicated Web Clients.

Additional Resources

For additional information on topics related to those covered in this book, see the following books:

- *Siebel Server Installation Guide* for the operating system you are using, for information about server installation procedures.
- *Siebel Server Administration Guide*, for information about managing Application Object Managers and the Siebel Web Client, and about managing configuration parameters for Siebel Server.
- *Upgrade Guide* for the operating system and database you are using, for information about upgrading Siebel eBusiness Applications.
- *Siebel Tools Reference*, for information about installing the Siebel Tools Client and about configuring the Siebel application.
- *Siebel Remote and Replication Manager Administration Guide*, for information about supporting Siebel Remote and the Mobile Web Client.
- *Security Guide for Siebel eBusiness Applications*, for information about security issues for Siebel eBusiness Applications.
- *System Requirements and Supported Platforms*, for information about platform and third-party software issues affecting your Siebel client deployment.

Revision History

Siebel Web Client Administration Guide

Version 7.5.3

Table 1. Changes Made in Version 7.5.3

Topic	Revision
"User Rights for Running Siebel Client" on page 28	Added subsection.
"Siebel Mobile and Dedicated Web Client Startup Options" on page 50	Added caution about modifying default shortcuts.
"Uninstalling the Mobile and Dedicated Web Clients" on page 51	Added subsection about automated uninstallation.
Chapter 3, "Deploying Siebel Web Clients"	Added new chapter about deploying Siebel Web clients in Web browser environment. *New for version 7.5.3:* The ActiveX control based on the CAB file SiebelOptionPack.cab is new. It replaces the controls based on the CAB files Axhook.cab and setopt.cab, which were applicable to previous version 7.5.*x* releases.
"User Synchronization Options for Mobile Web Client" on page 83	Updated descriptions and illustration of the Siebel Remote synchronization dialog box.
Chapter 5, "Using Siebel Packager Utility"	Moved former Appendix B to become Chapter 5.
"Customizing Siebel.ini Files" on page 105	*Revised for version 7.5.3:* Updated description of the `RootDirectory` parameter, for the siebel.ini file. Added description of the `addLanguages` parameter, for the siebel.ini file.

Table 1. Changes Made in Version 7.5.3

Topic	Revision
"Configuration Parameters Index" on page 117	*New for version 7.5.3:* Added *Siebel Bookshelf* references for the following parameters, which are new in version 7.5.3: ■ `AccessibleEnhanced` ■ `ApplicationStyle` ■ `CommConfigCache` ■ `ViewPreloadSize` ■ `WebTemplatesVersion`
"Configuration Parameters Index" on page 117	Added *Siebel Bookshelf* references for the following configuration parameters, which were previously not listed in this book: ■ `EditFieldCaption` ■ `EditFieldType` ■ `EnableCDA` ■ `ListRowStyle` ■ `MarkupLanguage` ■ `NumberOfBookmarks` ■ `NumberOfListRows` ■ `RequiredIndicator` ■ `ShowWriteRecord` ■ `SystemSWFName` ■ `TreeNode`*X* ■ `UserSWFName` ■ `UserSWSName`
"Siebel Application Parameters for Client" on page 128	Updated description of the `EncryptPassword` parameter.

January 2003 Bookshelf

Table 2. Changes Made in 7.5, Rev. A for January 2003 Bookshelf

Topic	Revision
"Configuring the Siebel Application" on page 23	New section.
"Application Names and Siebel Clients" on page 24	New section.
"User Preferences and Siebel Clients" on page 25	New section.
"Other Third-Party Software" on page 31	Removed non-required third-party software.
"Installing the Siebel Mobile and Dedicated Web Client" on page 32	Consolidated and updated installation procedures for Mobile and Dedicated Web Clients.
"Siebel Client ODBC Data Sources" on page 45	Updated list of ODBC data sources.
"Siebel Client Shortcuts" on page 46	Updated lists of shortcuts (icons).
"Logging into Your Siebel Application" on page 48	Updated to cover all major client types. Moved section from later chapter.
"Siebel Mobile and Dedicated Web Client Startup Options" on page 50	New section.
"Siebel Mobile Web Client and Siebel QuickStart" on page 91	Updated section. Moved section from earlier chapter.
"Editing Configuration Files" on page 116	Moved section from earlier chapter.
"Configuration Parameters Index" on page 117	Merged from previously separate appendix and updated.
"Siebel Application Parameters for Client" on page 128	Updated list of parameters for `[Siebel]` section.
"Data Source Parameters" on page 134	Updated list of parameters for data source sections.

Table 2. Changes Made in 7.5, Rev. A for January 2003 Bookshelf

Topic	Revision
"Product Configurator Parameters" (and following subsections)	Removed sections on module-specific parameters. Added references in configuration parameters index.
"Sample Selection from Configuration File" on page 144	Moved section from earlier chapter.

Additional Changes

- This document now refers to the Siebel client installation directory, such as C:\sea752\client, as *SIEBEL_CLIENT_ROOT*.

About Siebel Clients 1

This chapter provides general information about the following Siebel application client types:

- Siebel Web Client
- Siebel Mobile Web Client
- Siebel Dedicated Web Client

A Siebel client is a computer that operates Siebel eBusiness Applications, accessing data and services by way of one or more servers. The Siebel clients allow users to access information managed by Siebel applications. All Siebel deployments include one or more of the Siebel client types. You can deploy a mixture of clients.

Figure 1 shows the major Siebel client types, in a deployment that includes multiple Siebel Servers. Following the illustration are descriptions of these clients.

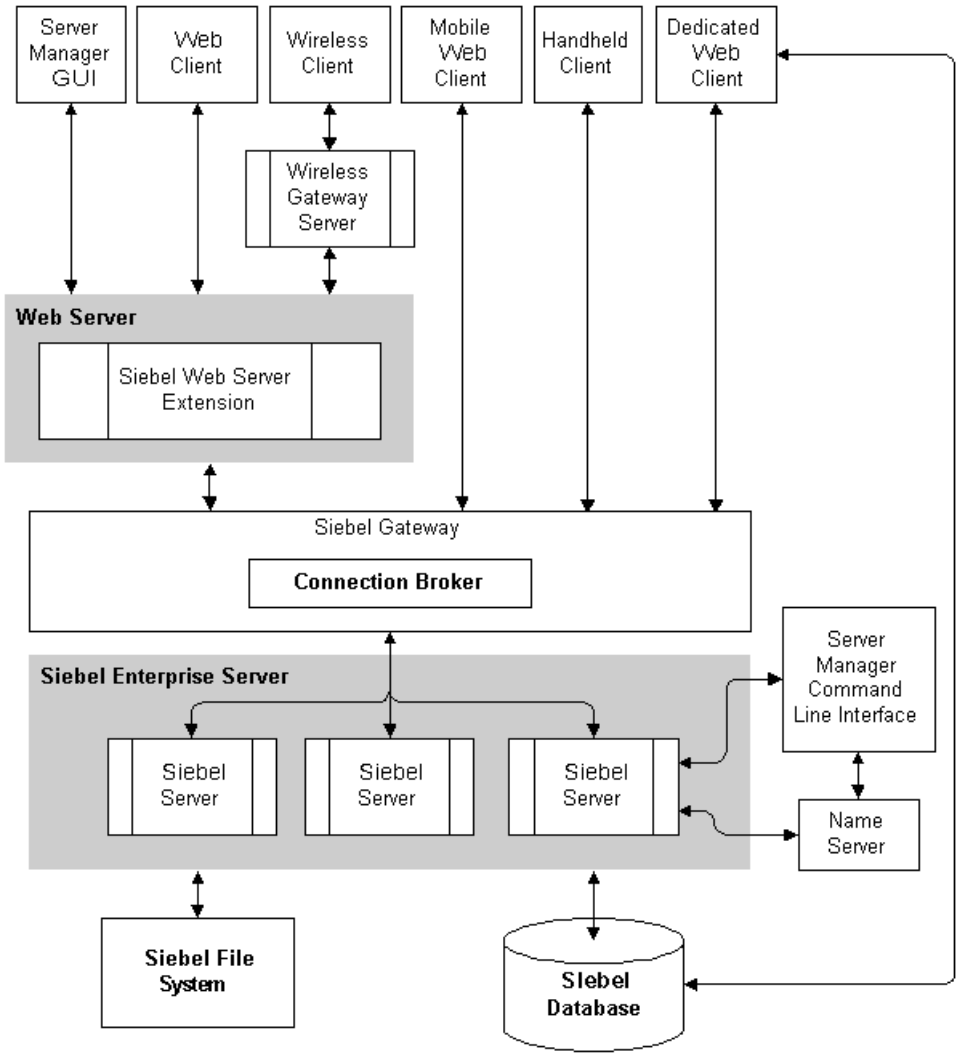

Figure 1. Architecture of a Siebel Client Deployment

Siebel Client Types

The following types of Siebel eBusiness Applications clients are discussed in this book:

- **Siebel Web Client.** Siebel Web Client runs in a standard browser on the end user's client computer, and does not require any additional persistent software installed on the client. The browser connects through a Web server to the Siebel Server, which executes business logic and accesses data from the Siebel Database. Only the user interface layer of the Siebel eBusiness Applications architecture resides on the user computer.

  For more information, see "Siebel Web Client" on page 18.

- **Siebel Mobile Web Client.** Siebel Mobile Web Client is designed for local data access, without the need to be connected to a server. Each mobile machine includes a local database, which the mobile user periodically synchronizes with the Siebel (enterprise) database. The Mobile Web Client runs in a standard browser on the end user's client computer, such as a laptop, but does not connect to a Web server. All layers of the Siebel eBusiness Applications architecture reside on the user computer.

  For more information, see "Siebel Mobile and Dedicated Web Clients" on page 20.

- **Siebel Dedicated Web Client.** Siebel Dedicated Web Client connects directly to a database server for all data access, and does not store any Siebel data locally. The Dedicated Web Client runs in a standard browser on the end user's client computer, but does not connect to a Web server. All layers of the Siebel eBusiness Applications architecture, except for the database, reside on the user computer.

  For more information, see "Siebel Mobile and Dedicated Web Clients" on page 20.

NOTE: Clients for Siebel Handheld and Siebel Wireless products are not discussed in this book. For more information, see applicable documents on *Siebel Bookshelf*.

The Siebel Web Client, Mobile Web Client, and Dedicated Web Client run in a third-party Web browser.

For information about Web browser deployment for Siebel applications, see Chapter 3, "Deploying Siebel Web Clients." For supported browser versions, refer to *System Requirements and Supported Platforms*.

Comparing Siebel Clients

Table 3 compares the features of Siebel application clients. For more information, see "Siebel Web Client" on page 18 and "Siebel Mobile and Dedicated Web Clients" on page 20.

Table 3. Deciding Which Siebel Client Meets Your Needs

Client Feature	Siebel Web Client	Siebel Mobile Web Client	Siebel Dedicated Web Client
Installation required; upgrade capabilities		X	X
Self-contained: does not need a Web server		X	X
Works on disconnected Windows client computer; able to synchronize		X	
Network connectivity: direct connection to database	X		X
Zero-footprint; no local installation	X		
UNIX platforms	X		

Siebel Web Client

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

- No Siebel software installation is required on the client computer.
- No Siebel upgrades are required on the client computer.

- Central management and support reduces IT and deployment costs and supports a heterogeneous assortment of desktop computers.

Siebel Web Client and Application Object Manager

With the Siebel Web Client, the Application Object Manager on the Siebel Server hosts the Business Objects layer and Data Objects layer of the Siebel architecture. The Siebel Web Client hosts the User Interface layer of the Siebel architecture.

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

- Deployment of Siebel Web Client
- Real-time integration with external applications through the Siebel Object Interfaces
- Simplified administration

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

Siebel applications use session cookies to track the session state. For details, see "Using Cookies with Siebel Applications" on page 74.

The Siebel repository file (SRF) is installed as part of each Siebel Server installation, in the *SIEBSRVR_ROOT*\objects*LANGUAGE* directory. Any changes to the repository file must be applied to all Siebel Server installations that are to serve the modified application to the Siebel Web Client. When reconnecting to the Application Object Manager, Web Client users automatically retrieve the new Siebel application configuration.

NOTE: You can deploy a copy of the same SRF file on Microsoft Windows or UNIX systems.

Siebel Mobile and Dedicated Web Clients

The Siebel Mobile and Dedicated Web Clients contain user interface and business logic, and require installation of Siebel software on each users's computer. Both of these Siebel clients are Microsoft Windows clients, delivered through a Web browser.

The software installed on the user's machine for the Siebel Mobile Web Client and Dedicated Web Client is identical. However, the installer presents a subset of prompts if you are installing the Mobile Web Client.

Once the Mobile Web Client has been installed, you can modify the configuration file to allow the client to connect to the enterprise database (functioning as a Dedicated Web Client) or to the local database (functioning as a Mobile Web Client). As installed, the Dedicated Web Client can connect to either database (functioning as either a Dedicated Web Client or a Mobile Web Client).

These Siebel clients include a lightweight HTTP listener that listens on a dynamic port for HTTP requests from the local machine. Any requests from other machines on the network are ignored. Therefore, minimal security risk exists when the application is used on the network.

- **Siebel Mobile Web Client.** This client is designed for local data access and does not need to be connected to a server. Siebel Mobile Web Client meets the needs of field professionals who do not have continuous access to a network. Siebel Mobile Web Client uses a local database on each mobile machine.

  Periodically, the client must access the Siebel Remote Server (on a Siebel Server) using a local area network (LAN), wide area network (WAN), virtual private network (VPN), or modem to synchronize data changes with the Siebel Database on the database server and with the Siebel File System.

  NOTE: Siebel QuickStart is an agent that is preloaded on a mobile user's machine at startup and reduces the time required to launch the Siebel Mobile Web Client. For more information, see "Siebel Mobile Web Client and Siebel QuickStart" on page 91.

- **Siebel Dedicated Web Client.** This client provides direct connectivity to a database server. It requires software to be installed on the client machine, but does not require a local database, Web server, or Application Object Manager on a Siebel Server.

  Some operations are performed only by Siebel Server components. Functionality associated with many Siebel modules requires Siebel Server. For example, batch operations such as those performed by Siebel Assignment Manager require a Siebel Server. For more information, consult the documentation for the Siebel modules you plan to use, and see *Siebel Server Administration Guide*.

NOTE: The Siebel Dedicated Web Client can connect to the Siebel File System in different ways. For more information, see the description of the `FileSystem` configuration parameter in "Data Source Parameters" on page 134.

Siebel Mobile Web Client and Siebel Remote

The Siebel Mobile Web Client is designed to operate without a real-time connection to any server.

The Mobile Web Client downloads a portion of the Siebel Database and the Siebel File System to the user's computer, so that the user can access the data locally without being connected directly to the Siebel Database, Siebel Server, or Siebel File System. The Mobile Web Client then periodically accesses the Siebel Server using a LAN, WAN, VPN, or modem to synchronize data changes between the local database and the enterprise database.

For information about setting up Siebel Remote, see *Siebel Remote and Replication Manager Administration Guide*.

Local Database and File System

The Siebel Mobile Web Client uses a local database to store data for user access. The local database, based on SQL Anywhere, contains Siebel applications tables that store user data.

Transactions created by the mobile user are stored in DX files. Siebel Remote forwards these transactions to the Siebel Remote Server when the client synchronizes. These log files (which accumulate in the *SIEBEL_CLIENT_ROOT*\log directory) can be deleted if necessary to conserve space. The most recent log files should be kept for troubleshooting and diagnostic purposes.

The Siebel Mobile Web Client also uses a local Siebel File System to store files from the Siebel File System for the Enterprise. These files are available when the user is disconnected from the Siebel Server. Users can request specific files to download to their local Siebel File System. The Siebel administrator can also specify files to be published or broadcast to all mobile users. Files added locally by the mobile user will be uploaded to the Siebel File System at the next synchronization session.

See also the description of the `FileSystem` configuration parameter described in "Data Source Parameters" on page 134.

Siebel Remote Client Software

The Siebel Remote client software runs on the Siebel Mobile Web Client and manages the synchronization process between the Mobile Web Client and the Siebel Remote Server. Mobile users can start the Siebel Remote client in two ways:

- Background synchronization

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

- Stand-alone synchronization

  When the Siebel client is *not* running, mobile users can launch the Siebel Remote client in stand-alone synchronization mode, by using the Siebel Remote shortcut or a third-party scheduling program. During stand-alone synchronization, the Siebel Remote client synchronizes the local database separately from the Siebel client.

  The Siebel client *cannot* be running during stand-alone synchronization.

The Siebel Remote client uses the TCP/IP protocol to communicate with the Siebel Remote Server using a LAN, WAN, VPN, or modem.

Synchronization Process Overview

The synchronization process invoked by the Siebel Remote client includes the following stages:

1. Connects to the Siebel Remote Server, which starts a Synchronization Manager session for the Mobile Web Client.

   NOTE: The Synchronization Manager notifies the mobile user if the Siebel administrator has performed a database extract for the Mobile Web Client or if the local database does not exist.

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

Configuring the Siebel Application

The user interface of the Siebel application, as delivered through the Web browser and the Siebel client, is made up of many interrelated elements. You configure many of these elements or their behavior by using Siebel Tools to modify Siebel object definitions, editing cascading style sheet (CSS) or Web template files, creating or modifying scripts, or modifying configuration files.

For example, most of the fonts used to display data and user interface elements in the Siebel application are specified by editing cascading style sheet files such as jctrls.css or main.css.

On the other hand, the font used in displaying charts is specified using the `DefaultChartFont` parameter. This parameter is defined in the configuration files, such as siebel.cfg, on the Siebel Mobile and Dedicated Web Client. It is defined on the Siebel Server as a parameter on the Application Object Manager.

For more information about configuration file parameters, see Appendix A, "Configuration Parameters." For more information about Siebel Server parameters, see *Siebel Server Administration Guide*.

Global deployment and support of multiple languages and Unicode environments present some special issues, in particular concerning fonts used in the Siebel client. For more information, see *Global Deployment Guide*.

For more information about various topics in configuring Siebel applications, see:

- *Siebel Tools Reference*
- *Siebel Tools Online Help*
- *Configuration Guidelines*

Application Names and Siebel Clients

For each of the Siebel eBusiness Applications, closely related but distinct configuration parameters help identify the application internally and to end users, through the user interface.

- `ApplicationName` specifies an internal name used by the system.
- `ApplicationTitle` specifies a name that is to appear in the browser title bar.
- `ApplicationSplashText` specifies the name that appears in the splash screen when the application is started.

These parameters are already defined appropriately for each Siebel application in the corresponding configuration file. For example, for Siebel Call Center, which uses the file uagent.cfg, `ApplicationName` is set to Siebel Universal Agent, and both `ApplicationTitle` and `ApplicationSplashText` are set to Siebel Call Center.

As with many of the parameters described in Appendix A, "Configuration Parameters," these configuration parameters are used only for the Siebel Mobile or Dedicated Web Client. The application is determined by the configuration file that is associated with the shortcut you run.

For information about equivalent parameters on the Siebel Server, applicable to the Siebel Web Client, see *Siebel Server Administration Guide*.

User Preferences and Siebel Clients

Preferences that Siebel users specify, such as those in the User Preferences screen, accessed from the View menu, are saved to the client or server machine, depending on which type of client is being used:

- For users on Siebel Mobile or Dedicated Web Client, user preferences are saved by default on the local client machine.

  By default, user preference data is saved in the *SIEBEL_CLIENT_ROOT*\bin directory. A different location for this data, including a network location, can be specified by specifying a value for the optional configuration parameter `SharedModeUsersDir`. For more information, see "Siebel Application Parameters for Client" on page 128.

- For users on Siebel Web Client, user preferences are saved on the Siebel Server.

  By default, user preference data is saved in the UserPref subdirectory under the directory containing the Siebel File System. A different location for this data can be specified on the Siebel Server or Application Object Manager level by modifying the value of the configuration parameter `SharedModeUsersDir`.

User preference filenames are in the form *user_ID*&*Siebel_appname*.spf—for example, SADMIN&Siebel Universal Agent.spf for the user SADMIN running Siebel Call Center.

Locale Settings for Siebel Clients

Siebel clients adopt locale settings as follows:

- The Siebel Web Client adopts the locale settings from the Application Object Manager.
- The Siebel Mobile and Dedicated Clients adopt the locale settings defined in the client operating system's regional settings.

For more information, see *Global Deployment Guide*.

Installing Mobile and Dedicated Web Clients 2

Siebel Systems supports Mobile and Dedicated Web Client installations on the hardware and operating systems described in *System Requirements and Supported Platforms*. This installation is based on default installation parameters set by Siebel Systems.

You can use the Siebel Packager utility to prepare custom installation packages for distribution to end users. A model client installation is prepared as the basis for a package. For details, see Chapter 5, "Using Siebel Packager Utility."

The Siebel administrator should perform the following general client installation and setup procedures:

1. Review the preinstallation tasks. See "Before Installing" on page 28.
2. Create a model installation by running the Siebel client installer (for Mobile and Dedicated Web Client). See "Installing the Siebel Mobile and Dedicated Web Client" on page 32.
3. If you want to install the Siebel Sample Database, run the Sample Database installer. See "Installing the Sample Database" on page 39.
4. Verify the installation by performing the postinstallation tasks. See "After Installing" on page 42.
5. Log into the Siebel application. See "Logging into Your Siebel Application" on page 48.
6. Configure the Siebel Mobile Web Client and verify connection to Siebel Remote Server. See "Configuring and Using Mobile Web Client" on page 79.
7. As necessary, modify values for configuration parameters for the Mobile or Dedicated Web Client. See Appendix A, "Configuration Parameters."

8 If you want to prepare custom software installation packages for distribution to end users based on the model installation, run the Siebel Packager utility. See Chapter 5, "Using Siebel Packager Utility."

This chapter also describes startup options for the Siebel Mobile and Dedicated Client, and provides information about uninstalling Siebel client software.

Before Installing

Review the following issues and perform the related tasks 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 the application is installed.

User Rights for Running Siebel Client

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.

Directory Names

By default, the Siebel client installer assumes an installation directory of C:\sea7*xx*\client. 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 the Siebel Tools Client, into the same directory where you have installed the Siebel client, such as C:\sea7*xx*\client. Install each component into a separate directory, or into a subdirectory of the top-level directory, such as a subdirectory of C:\sea7*xx*. You can, however, install the Sample Database in the same directory as the Siebel client. If you install multiple Siebel components on the same machine, determine your directory-naming convention before you begin installing. For more information on installing the Siebel Tools Client, see *Siebel Tools Reference*.

It is recommended that you use installation directory names that describe both the version number and the component being installed.

CAUTION: The directory name must not include special characters (such as apostrophes, accents, and ampersands), slashes, or spaces (instead, use underscores), and must be unique within the Siebel Enterprise Server. The letters may be lower- or uppercase. The total path must not exceed 18 characters. These characters must be ASCII characters, not extended characters.

Requirements and Recommendations for 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*.

Database Connectivity Software

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*.

NOTE: The correct version of connectivity software must be installed before installing the Siebel client.

When you have installed your 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 the *Siebel Server Installation Guide* for the operating system you are using. Use the ODBC driver version specified in *System Requirements and Supported Platforms*.
- For Microsoft SQL Server, you download and install the Microsoft Data Access Components (MDAC) specified in *System Requirements and Supported Platforms*. The Siebel client uses these drivers, but creates its own ODBC data source during installation. This data source should be recorded on the Deployment Planning Worksheet in the *Siebel Server Installation Guide* for the operating system you are using.

- 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 the *Siebel Server Installation Guide* for the operating system you are using. Use the driver version specified in *System Requirements and Supported Platforms*.

  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 the *Siebel Server Installation Guide* for the operating system you are using.

- For IBM DB2 Universal Database for OS/390 and z/OS, 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 OS/390 and z/OS*.

Other Third-Party Software

Your Siebel application requires some third-party software products to be installed on the local client, for full functionality. For more information about where to obtain this software, see *System Requirements and Supported Platforms*.

Install the following third-party software for full Siebel functionality for the Siebel Mobile and Dedicated Web Client:

- The Siebel client software requires that MFC Runtime components are installed as a prerequisite to installation of the Siebel client. If this software component is missing, the client installer exits with a log message stating the installation requirement of MFC components.

- Microsoft Data Access Components (MDAC) components must be installed for all Mobile and Dedicated Web Clients, as described in "Database Connectivity Software" on page 30.

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.

Installing the Siebel Mobile and Dedicated Web Client

This section describes how to install the Siebel Mobile and Dedicated Web Client.

NOTE: This book assumes that installations are performed by administrators, not end users.

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 more information, see "Siebel Mobile and Dedicated Web Clients" on page 20.

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.
- Checks the client computer to verify installation of the proper version of Microsoft Data Access Components (MDAC) components.
- Creates all required ODBC data sources.
- Installs Siebel client software and allows the installation log file to be viewed.

Before you begin installation, see *System Requirements and Supported Platforms*.

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 Names" on page 29.

To install the Siebel Mobile or Dedicated Web Client software

1. Using Windows Explorer, navigate to the root directory of the *Siebel eBusiness Applications Web Client Programs* CD-ROM, then navigate to the seaw folder. Use the version of this CD-ROM that includes the languages you need.

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

2. Double-click install.exe to start the Siebel client installer.
3. From 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.

4. If you have an existing client installation, you can choose to add language packs to this installation.
   - If you are installing a new instance of the Siebel client, click Next, then go to Step 5.
   - If you are adding languages:
     - Click in the check box next to the line identifying the installation, then click Next.

- Click in the check box next to each language you are installing, then click Next.

The setup program copies language pack files to the local host machine's hard disk, and then exits. Skip the rest of this procedure.

5. In the Welcome screen, click Next.

6. In the Setup Type screen, select the type of installation to perform. All options install a common set of components. The Custom option lets you specify which optional components to install. Typical and Compact options install subsets of the optional components.

   - **Typical.** Installs all base Siebel client components, plus the following optional components: First Logic Configuration Files, Packager Utility, Siebel Charts, Siebel Debug Symbols. This option is recommended for most users.
   - **Compact.** Installs all base Siebel client components, plus the following optional component: Siebel Charts. Select this option for an installation with minimum storage requirements.
   - **Custom.** Installs all base Siebel client components and lets you specify whether to install the following optional components: Server Manager, First Logic Configuration Files, Packager Utility, Siebel Charts, ODBC Driver for External Oracle Database, and Siebel Debug Symbols. Some of these options are preselected by default.

   NOTE: Siebel administrators should use the Custom setup option and make sure to install the Server Manager and the Packager utility.

7. While still in the Setup Type screen, verify that the Siebel client installation directory listed is correct. The default directory is C:\sea7*xx*\client.

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

   For details on pathname requirements, see "Directory Names" on page 29.

   If you are performing a:

   - Typical or Compact installation, go to Step 9 on page 35.

- Custom installation, go to Step 8.

8 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 6 above.

9 In the Choose Languages screen, select the languages to install. The language in which you are performing the installation, specified in Step 3 on page 33, is preselected as a default.

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, since this may leave insufficient space for installation of all necessary components and cause the installation to fail.

10 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 Mobile Web Client, or only if you are installing Dedicated Web Client.

For Mobile Web Client installations, go to Step 12 on page 36.

11 *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 Universal Database 7.2 (for Windows and UNIX)
- Microsoft SQL Server 2000

- Oracle Database

Based on your choice, the Siebel client installer validates that the correct database connectivity software has been installed.

NOTE: For IBM DB2 Universal Database for OS/390 and z/OS, see *Implementing Siebel eBusiness Applications on DB2 UDB for OS/390 and z/OS*.

---

12 In the first Server Locations screen, enter your Siebel File System server connectivity information, then click Next.

NOTE: Siebel File System connectivity information can be the UNC share name of the Siebel File System directory (for example, \\SRV1\siebfile), or a drive letter mapped to the Siebel File System directory (for example, K:\).

---

13 In the second Server Locations screen, enter your Siebel Remote Server connectivity information, then click Next.

For Mobile Web Client installations, go to Step 15 on page 37.

14 *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 11 on page 35:

- 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.

NOTE: For IBM DB2 Universal Database for OS/390 and z/OS, see *Implementing Siebel eBusiness Applications on DB2 UDB for OS/390 and z/OS*.

Go to Step 16 on page 37.

15 *Mobile Web Client installations only:* In the Enterprise Server Information screen, specify the address of the Siebel Gateway (Gateway Server) and the name of the Enterprise Server, then click Next.

NOTE: The Siebel Gateway address is typically the machine name or VIP where the Siebel Gateway is running.

Go to Step 17.

16 *Dedicated Web Client installations only:* In the Enterprise Server Information screen, specify the Gateway Server Address (for Siebel Gateway) and Enterprise Server to which this client will connect for administration.

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

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

To enter a specific port number, append the Gateway Server 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 In the Server Request 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.

NOTE: If you are using Resonate Central Dispatch to load balance server requests, leave this field blank. If you are *not* using Resonate Central Dispatch to load balance server requests, you must specify the Siebel Server name for server requests.

18 In the Search Configuration screen:

- If you will use Siebel Search, 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, consult *Siebel Search Administration Guide*.

19 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 Client 7.*x*.*x*. You can use spaces and the backslash (\) in folder names to create a folder hierarchy.

CAUTION: 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.

The setup program copies files to the local host machine's hard disk. A status bar in the Setup Status dialog box indicates the progress of the installation. A separate set of files is installed for each language specified in Step 9 on page 35, in addition to those installed for the base installation.

20 Review the Event Log screen, then click Next.

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

21 Review the Registry Log screen, then click Next.

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

22 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 19 on page 38. For more information, see "Siebel Client Shortcuts" on page 46.

23 Review the installation log to verify that all components installed successfully.

To verify successful installation, see "After Installing" on page 42.

Installing the Sample Database

This section describes how to install 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. Or, 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.

NOTE: Installation of the Siebel Sample Database is optional and applies only to Siebel Mobile and Dedicated Web Clients, not to the Siebel Web Client. You must install the client before you can install the Sample Database.

The installer for all language versions of the Sample Database exists on the *Siebel Sample Database* CD-ROM.

To install the Siebel Sample Database

1 Use Windows Explorer to navigate to the root directory of the *Siebel Sample Database* CD-ROM, then navigate to the sample folder.

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

2 Double-click install.exe to start the installer.

3 From the Choose Setup Language screen, choose the language in which to conduct the installation, then click OK.

4 From the Welcome screen, click Next.

5 In the Setup Type screen, select the type of Siebel installation to perform:

- **Typical.** Installs the Sample Database plus optional components. This option is recommended for most users.
- **Compact.** Installs the Sample Database plus optional components.
- **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.

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.

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

CAUTION: Be sure that the directory path in the Setup Type screen is the same as that of the Mobile or Dedicated Web Client installation. The path must include the root level of the client. The default directory is C:\sea7*xx*\client.

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

For details on pathname requirements, see "Directory Names" on page 29.

If you are performing a:

- Typical or Compact installation, go to Step 8 on page 41.
- Custom installation, go to Step 7.

7 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 5 on page 40.

8 In the Choose Languages screen, select the languages to install. The language in which you are performing the installation, specified in Step 3 on page 40, is preselected as a default.

Verify that your destination machine has sufficient disk space for the installation, then click Next.

NOTE: Before installing a non-ENU language, be sure the SQL Anywhere database engine is running. The SQL Anywhere database engine is started when the Siebel Mobile or Dedicated Web Client is connected to the Sample Database. If the configuration parameter `AutoStopDB` is FALSE (default), then the database engine continues to run after the user logs out of the Siebel applications. If this parameter is TRUE, then the engine exits when the user logs out.

---

9 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 Client 7.*x*.*x*. You can use spaces and the backslash (\) in folder names to create a folder hierarchy.

The setup program copies files to the local host machine's hard disk. A status bar in the Setup Status dialog box indicates the progress of the installation. A separate set of files is installed for each language specified in Step 8, in addition to those installed for the base installation.

10 Review the Event Log screen, then click Next.

This log provides details of the steps the installer has performed during your Sample Database installation.

11 Click Finish in the Setup Complete screen.

The installation is now finished. Siebel Demo application shortcuts (for example, Siebel Call Center Demo - ENU) are created in the program folder specified in Step 9 on page 41. For more information, see "Siebel Client Shortcuts" on page 46.

To verify successful installation of the Sample Database, see "After Installing" on page 42.

NOTE: By default, the SRF file contains the appropriate localization strings to display correct field labels for the languages you have chosen when installing the Sample Database. However, if you later make a change to the Siebel Repository, you must import non-ENU localization strings for non-ENU field labels before compiling the new SRF file. To import non-ENU localization strings, run Programs > Siebel Client 7.*x*.*x* > Import *LANGUAGE* (such as Import FRA for French). A batch process is initiated to import the localization strings.

After Installing

Review the following issues and perform the related tasks after running the Siebel client installer, to verify a successful Siebel client installation:

- "Configuring Client When Siebel VB or Siebel eScript Not Licensed" on page 42
- "Verifying the Siebel Client Directory Structure" on page 43
- "Siebel Client ODBC Data Sources" on page 45
- "Siebel Client Shortcuts" on page 46

Configuring Client When Siebel VB or Siebel eScript 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.

```
sea752
   client
      actuate
      bin
      charts
      fonts
      isstempl
      lex
      local
      locale
      log
      msgtempl
      objects
      packager
      public
      reports
      sample (if Sample Database was installed)
      sqltempl
      temp
      upgrade
      webtempl
```

- ***SIEBEL_CLIENT_ROOT.*** The directory for the Siebel client installation, such as C:\sea752\client. This installation directory contains the directories identified below. You can change the name during the installation process. For more information, see "Directory Names" on page 29.
- **actuate.** Contains all the Actuate-related files, for Siebel Reports.
- **bin.** Contains all binary files (*.exe, *.dll, *.cfg, *.ssf, *.pre), configuration files, user preference files, and language-specific files.

- **charts.** Contains files for generating charts.
- **fonts.** Contains font files.
- **isstempl.** Contains templates for the SIS (Siebel Interactive Selling) CDA application.
- **local.** Where the local database is stored.
- **locale.** Stores language-specific files.
- **log.** Stores the log files from client operations, such as synchronization.
- **msgtempl.** Stores message files used by the client.
- **objects.** Contains compiled Siebel repository (SRF) files and language-specific files.
- **packager.** Stores files used by the Siebel Packager utility.
- **public.** Contains HTML files, JavaScript files, and images used by the Web Client.
- **reports.** Contains all report files.
- **sample.** Where the Sample Database is installed.
- **sqltemp.** Contains SQL scripts. These files should not be modified.
- **temp.** Contains working report files.
- **upgrade.** Will contain Siebel Anywhere upgrade files retrieved by the user.
- **webtempl.** Contains Siebel Web templates.

Siebel Client ODBC Data Sources

The Siebel client installer creates the ODBC data sources shown in Table 4. By default, these are created as user data sources, which are visible only to the user account under which the Siebel client is installed. The drive letter and directory at the end of each data source name varies, depending on where you have chosen to install the Siebel client.

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

If two or more users need to login using the same Windows client machine, it is necessary to install the client using the `SystemDSN` parameter instead of the `UserDSN` parameter in the siebel.ini file. For more information about the siebel.ini file and custom installer packages, see Chapter 5, "Using Siebel Packager Utility."

Table 4. Siebel Client ODBC Data Sources

Data Source	When It Is Used
SEAW DB2UDB *SIEBEL_CLIENT_ROOT*	For IBM DB2 installations only, connects to the DB2 database.
SEAW Local Db *SIEBEL_CLIENT_ROOT*	Connects to the local SQL Anywhere database.
SEAW MSQL *SIEBEL_CLIENT_ROOT*	For Microsoft SQL Server installations only, connects to the Microsoft SQL Server database.
SEAW Oracle *SIEBEL_CLIENT_ROOT*	For Oracle installations only, connects to the Oracle database. This data source is used only by the Siebel administrator when creating Siebel Anywhere upgrade kits.
SEAW Search *SIEBEL_CLIENT_ROOT*	ODBC data source used by Hummingbird SearchServer; created only if Hummingbird is installed. This data source is always created as a SystemDSN.
SEAW Text *SIEBEL_CLIENT_ROOT*	Used for reporting and data merge into the local SQL Anywhere database.

NOTE: Make sure to use the ODBC drivers described in *System Requirements and Supported Platforms*.

Siebel Client Shortcuts

The Siebel client and Sample Database installers create shortcuts in the Siebel program folder for the modules you have installed. Separate shortcuts are installed for each installed language.

For information about customizing the shortcuts, see "Siebel Mobile and Dedicated Web Client Startup Options" on page 50.

Some of the Siebel application shortcuts installed by the client installer are listed below. 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).

Demo application shortcuts connect to the Sample Database automatically. Other shortcuts run utilities such as Siebel Packager or synchronization programs.

- **Packager.** Use this shortcut to start the Siebel Packager utility.
- **Siebel Call Center.** Use this shortcut to start Siebel Call Center.
- **Siebel Marketing.** Use this shortcut to start Siebel Marketing.
- **Siebel Remote.** Use this shortcut to start the Siebel Remote stand-alone synchronization program (siebsync.exe). For more information, see "User Synchronization Options for Mobile Web Client" on page 83.
- **Siebel Sales.** Use this shortcut to start Siebel Sales.
- **Siebel Service.** Use this shortcut to start Siebel Service.
- **Import *LANGUAGE*.** The Import *LANGUAGE* shortcut is created for each non-English version of the Sample Database you install. For a French installation, for example, the shortcut name is Import FRA. Use this shortcut to import a version of the Sample Database for your installed language. See "Installing the Sample Database" on page 39.
- **Siebel Call Center Demo.** Use this shortcut to start Siebel Call Center, using the Sample Database.
- **Siebel Marketing Demo.** Use this shortcut to start Siebel Marketing, using the Sample Database.
- **Siebel Sales Demo.** Use this shortcut to start Siebel Sales, using the Sample Database.
- **Siebel Service Demo.** Use this shortcut to start Siebel Service, using the Sample Database.

Logging into 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:

- 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 do this using the Siebel Dedicated Web Client or Siebel Tools. Additional licenses or licenses for optional modules can be entered subsequently using the Siebel Web Client, as well as the Siebel Dedicated Web Client or Siebel Tools.

  For detailed information, see *Applications Administration Guide*.

- The user name and password used to log into 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 into the server database, do so as an administrator. Use SADMIN as the user name and password. 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*.

To log into 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.

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

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, navigate to the Site Map, then choose Application Administration > License Keys.

To log into 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 into 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 Mobile and Dedicated Web Client Startup Options

If you need to customize the Siebel eBusiness Application shortcuts described in "Siebel Client Shortcuts" on page 46, you can do so by modifying shortcut properties, and changing the value for the Target field.

CAUTION: Do not modify the location displayed in the shortcut property labeled "Start in." Doing so may cause problems when the Upgrade Wizard is run.

The Siebel Mobile and Dedicated Web Clients run an executable program called siebel.exe, followed by various startup options. For example, the shortcut for Siebel Call Center - ENU is defined as shown below. For this example, the only option used is /c, to specify the configuration file.

```
SIEBEL_CLIENT_ROOT\BIN\siebel.exe /c SIEBEL_CLIENT_ROOT\bin\ENU\uagent.cfg
```

The siebel.exe program may also be run from an MS-DOS window. In this case, the startup options may be entered directly on the command line.

The available startup options are described in Table 5.

Table 5. Siebel Mobile and Dedicated Web Client Startup Options

Startup Option	Description
`/c config_file`	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.
`/d data_source`	Required. Specifies the data source to connect to, as defined in the configuration file.
`/l language`	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.
`/u username`	Specifies the user name. The Demo shortcuts specify predefined demo users using /u and /p options. *Note:* Security issues must be considered in using these options for access to a live production system.

Table 5. Siebel Mobile and Dedicated Web Client Startup Options

Startup Option	Description
`/p password`	Specifies the password for this user. *Note:* You must consider the additional security risks involved in using the /p startup option. Risks apply whether the option is used on the command line directly or whether it is defined within a Siebel client shortcut.
`/ctisim`	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 *Siebel Communications Server Administration Guide*.
`/s spool_file`	Specifies spooling SQL to a specified output file. This option may be useful for troubleshooting purposes.

Uninstalling the Mobile and Dedicated Web Clients

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

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.

Automated Uninstallation

You can also perform an automated uninstallation (also known as unattended or silent uninstallation). To do this, run the batch file siebunis.bat, located in the directory *SIEBEL_CLIENT_ROOT*/bin. Running siebunis.bat in turn runs other batch files, which perform the uninstallation tasks. In siebunis.bat, the token %1% represents the Siebel client installation root directory, referred to in this book as *SIEBEL_CLIENT_ROOT*.

To perform automated uninstallation

1 In a command shell, change to the directory *SIEBEL_CLIENT_ROOT*/bin.

2 Enter the following at a command line:

```
siebunis $SiebelRoot
```

Deploying Siebel Web Clients 3

This chapter provides information about how to deploy the Siebel Web clients covered in this book: Siebel Web Client, Mobile Web Client, and Dedicated Web Client.

NOTE: In this chapter, the term "Web client" generally refers to all the Siebel client types mentioned above.

In particular, this chapter describes Web browser settings that affect Siebel application behavior, such as security settings, ActiveX controls, cookies, Java software environment, and so on.

NOTE: Supported browser products and versions are documented in *System Requirements and Supported Platforms*. This book is located on Siebel SupportWeb, under Installation and Release Documentation/Supported Platforms.

About Deployment Modes for Siebel Web Clients

There are two fundamental modes of deployment for a Siebel Web client:

- Standard interactivity
- High interactivity

The user interface characteristics of Siebel eBusiness Applications, and the experience of your end users, depends greatly on the interactivity mode in which you deploy your applications.

NOTE: For information about which Siebel applications use each of these deployment modes, refer to *System Requirements and Supported Platforms*. For information about configuration issues for deployment modes, refer to *Siebel Tools Reference*.

To deploy Siebel clients, software prerequisites and configuration requirements must be considered for each deployment mode.

Each mode provides performance and usability characteristics that may offer advantages for a given environment. In choosing the appropriate deployment mode of the Web client, you must carefully consider the target users of your Siebel applications, and carefully evaluate the requirements applicable to your deployment choices.

You must coordinate all of your deployment activities—those described in this book and those described in related books such as *Siebel Server Installation Guide*. The deployment requirements for client machines must correspond to your target user characteristics.

Table 6 describes the basic differences between the two deployment modes. The sections that follow provide additional information about each mode.

Table 6. Comparison of Standard Interactivity and High Interactivity Modes

Feature	Standard Interactivity	High Interactivity
Support for broader variety of browsers	X	
Uses JavaScript technology	X	X
Uses ActiveX technology		X
Uses Java technology		X

Standard Interactivity

The standard interactivity client provides users of Siebel applications with a user experience similar to that for users of traditional Web applications for customer applications, such as those for consumers. The usability characteristics of this deployment mode will be familiar to users of typical consumer Web sites, such as CNN.com, Amazon.com, and so on.

Most user interactions in standard interactivity deployment mode result in a page refresh. When creating a new record, the user clicks the New button (which refreshes the page as the application displays a new entry form), enters the relevant data, then clicks the Save or Submit button (which again refreshes the page as the application redisplays the original page). Similarly, when a user browses through a list of records, the page refreshes each time a new record is selected.

When users quickly enter, review, and edit large numbers of records, as is the case for employee applications such as Siebel Call Center, the user experience of standard interactivity mode deployment may not meet usability requirements. However, sometimes it may be desirable to deploy employee applications in standard interactivity mode.

High Interactivity

The high interactivity client is designed to provide users of Siebel applications with a user experience similar to that for users of traditional GUI-based client applications, such as for Microsoft Windows.

High interactivity reduces the number of page refreshes, compared to standard interactivity—when interacting with the application, browsing through records, and so on. This is made possible by making data-only updates from the server. The application thus makes optimal use of network bandwidth.

For example, a high interactivity client does not require a page refresh for creating a new record. A user creates a new record by clicking the New button. A new row is created in a list dynamically, without a page refresh. The user enters the relevant data, then clicks outside of the record (“steps off of the record”) to implicitly commit the change—again, without a page refresh.

Some of the features of the high interactivity framework are:

- **Fewer page refreshes.**

- **Support for client-side scripting.**
- **Support for implicit commit.** This feature enables automatic saving when a user steps off of a new or modified record.
- **Other usability features.** Such features include MVG shuttle applets; drag-and-drop column reordering; drag-and-drop file attachments; keyboard shortcuts; smart controls for calendar, calculator and currency; and applet scrollbars.

The high interactivity framework provides performance and usability enhancements by taking advantage of capabilities supported by Microsoft Internet Explorer browsers. These capabilities include Document Object Model (DOM), Java, and ActiveX controls.

Deploying Siebel applications in high interactivity mode requires that customers and their users adhere to strict guidelines regarding the deployed operating system, Web browser version and settings, and Java software environment.

Overview of Deployment Requirements

Certain features and functions in Siebel eBusiness Applications require particular browser settings. Unless stated, all supported browser versions require the settings and configuration outlined in this document. The requirements for your individual deployment may vary, but must meet the minimum requirements in Table 7.

Table 7. Requirements for Standard Interactivity and High Interactivity

Requirement	Standard Interactivity	High Interactivity
Must meet standard interactivity deployment requirements. (Supports standard browser settings.)	X	
Must meet high interactivity general deployment requirements.		X
Must meet high interactivity ActiveX deployment requirements.		X
Must meet high interactivity Java deployment requirements.		X

Standard Interactivity Deployment Requirements

This section describes in detail the standard interactivity deployment requirements summarized in "About Deployment Modes for Siebel Web Clients" on page 53.

Browser Requirements

Siebel eBusiness Applications running in standard interactivity mode are supported on most commonly used Web browser versions. End users must use a supported Web browser and version, as defined in *System Requirements and Supported Platforms*.

The browser must support the following technologies:

- HTML 3.2 syntax.
- JavaScript interpretation.

NOTE: If Siebel Reports Server is to be accessed from the application client, then cookies should be enabled for the browser. For more information, see "Using Cookies with Siebel Applications" on page 74.

Firewall Requirement

When deploying Siebel standard interactivity applications across a firewall, make sure that your firewall supports the HTTP 1.1 protocol.

High Interactivity Deployment—General Requirements

This section describes in detail the high interactivity general deployment requirements summarized in "About Deployment Modes for Siebel Web Clients" on page 53.

You can use the Microsoft Internet Explorer Administrator Kit and other system management tools to support high interactivity mode deployment requirements in supported versions of Internet Explorer. Customers should review the features of applicable deployment tools.

Predefined Security Settings for Web Content Zones

Web content zones in Microsoft Internet Explorer support predefined security setting templates, or groups of settings: Low, Medium-low, Medium, and High.

You can use a zone such as Local intranet or Trusted sites for your Siebel applications and use the default security setting templates. Local intranet defaults to the Medium-low setting, and Trusted sites defaults to the Low setting. Siebel applications support both Low and Medium-low settings; Low is preferred.

- To use the Local intranet zone, the Siebel eBusiness Applications URL must be hosted on the same intranet as the end users' Web browsers.
- To use the Trusted sites zone, the Siebel eBusiness Applications URL must be added as a site to the Trusted sites zone.

  Because Trusted sites are explicitly designated, lower security settings can generally be used than for other zones. For example, you can use the Trusted sites zone to allow end users to use ActiveX controls required for the Siebel application deployment, yet restrict end users from using ActiveX controls that may be associated with other sites.

Using security setting templates is preferred. If you do not use them, then you may need to adjust individual security settings for the applicable Web content zone. Some procedures in this chapter describe specifying (or verifying) custom settings, for customers who cannot use security setting templates. For more information, see "Manual Security Settings for High Interactivity" on page 69.

For more information about specifying Internet Explorer security settings or other settings, refer to Microsoft documentation.

Adjusting Printing Settings

To enable printing Siebel application screens using the browser's Print command, Internet Explorer users must modify their printing settings.

To adjust printing settings

1. In Internet Explorer, choose Tools > Internet Options.
2. Click the Advanced tab.
3. Under Printing, select Print background colors and images.

4 Click OK.

Bypassing Proxy Server for Local Addresses

If your network uses a proxy server, you should adjust your Internet Explorer browser settings to bypass the proxy server for local addresses. This setting provides better performance for all Siebel clients described in this book. For the Siebel Mobile or Dedicated Web Client, this setting is required.

To specify settings to bypass the proxy server for local addresses

1 In Internet Explorer, choose Tools > Internet Options.

2 Click the Connections tab, then click the LAN Settings button.

3 In the Proxy server section, verify whether the option Use a Proxy server for your LAN is enabled.

4 If the option Use a Proxy server for your LAN is enabled, check the box for Bypass proxy server for local addresses.

5 Click OK, then click OK again.

High Interactivity Deployment—ActiveX Requirements

This section describes in detail the ActiveX requirements for high interactivity deployment, noted in "About Deployment Modes for Siebel Web Clients" on page 53.

Siebel eBusiness Applications in high interactivity mode rely on ActiveX technology to deliver features such as interactive controls, keyboard accelerators, email client integration, and so on. For a list of the ActiveX download files (CAB files), see "ActiveX Controls Distributed for High Interactivity" on page 65.

A browser running a high interactivity application should be enabled to work with (download, instantiate and script) ActiveX controls. It is recommended that the URL for Siebel eBusiness Applications be part of a zone for which security settings are defined as described in this section.

In addition, system administrators may need to modify permissions for users or applicable groups. For most deployments, downloading ActiveX controls on demand from a Web server is preferable: code for each control is downloaded to the Downloaded Program Files directory when the control is invoked for the first time by an application feature.

As noted in "ActiveX Controls Distributed for High Interactivity" on page 65, running some of these controls requires permission associated with Power Users.

The following methods are commonly used to meet the above requirements:

- Modifying user groups or permissions in one of two alternative ways:
  - Adding users to the Power Users group
  - Relaxing default permissions granted to the Users group
- Predeploying ActiveX controls for secure user permissions

How to implement each approach is described in the following sections.

Modifying User Groups or Permissions

This section describes two alternative ways of allowing users to download ActiveX controls. Use one of these methods.

Adding Users to the Power Users Group

End users on supported Microsoft Windows platforms require write access to the Downloaded Program Files directory and the Windows registry to allow automatic download and installation.

Typically, the Power Users or Administrators groups on supported Microsoft Windows platforms have the necessary permissions. The Users group, however, does not have these permissions. Consequently, putting your users in the Power Users group or Administrators group—or in a new user group with the appropriate permissions—will allow automatic download.

For more information on adding users to the Power Users group or other groups, review Microsoft operating system documentation.

Relaxing Default Permissions Granted to the Users Group

Another approach is to grant all users the appropriate permissions by relaxing default permissions granted to the Users group. To do this, execute the following command (on one line) on supported Microsoft Windows platforms:

```
secedit /configure /cfg %windir%\security\templates\compatws.inf
/db compat.sdb
```

More information on this issue can be found in the following Microsoft article:

```
http://support.microsoft.com/default.aspx?scid=kb;en-us;Q269259
```

Predeploying ActiveX Controls for Secure Environments

If users on supported Microsoft Windows platforms are operating in secure environments and cannot obtain write access to the Downloaded Program Files directory through means described in the previous section, the ActiveX controls used for Siebel applications must be predeployed on these users' machines.

The procedure that follows predeploys ActiveX controls by loading an HTML file similar to the example shown in "Example HTML File for Predeploying ActiveX Files" on page 63. The ActiveX controls you can deploy are those described in "ActiveX Controls Distributed for High Interactivity" on page 65.

NOTE: This task must be performed with the proper administrative permissions to install software on the client machine—usually Power Users or above.

To predeploy ActiveX controls

1. Navigate to the directory *SIEBSRVR_ROOT*\webmaster*build_number*\applets, where *SIEBSRVR_ROOT* is the Siebel Server installation directory and *build_number* is the applicable build number. This directory contains the CAB files for the ActiveX controls you will deploy.

   NOTE: Optionally, you can create a different directory, and copy the CAB files to that directory. All remaining steps in this procedure refer to the location from which you will be deploying the ActiveX controls.

2 Create a Web share for the directory specified in Step 1, such as the applets directory. Give this Web share read and execute permissions. (You may want to revert to more secure permissions after completing this procedure.)

   The name of the Web share will be referenced in the URLs in the HTML file you edit in subsequent steps.

3 In the Web share directory, execute the following command to expand the CAB files:

   ```
   expand *.cab Web_share_path
   ```

   where *Web_share_path* is the complete path to the directory you specified as a Web share, such as applets. For each CAB file, a corresponding INF file is created in the Web share directory.

4 In the Web share directory, create an HTML file—for example, named predeploy.htm.

5 For each CAB file to be deployed, review its corresponding INF file. Review or edit the HTML file created in Step 4, to specify object tag values similar to those in "Example HTML File for Predeploying ActiveX Files" on page 63.

   - For the `id` attribute, you can use a name as shown in the example, the name of the INF file, or some other descriptive comment.
   - For the `classid` attribute, use the attribute identified in the INF file.
   - For the `codebase` attribute, use the URL location of the CAB file. In the example, *localhost* represents the machine name and *applets* represents the Web share directory. Use the CAB file names and version numbers as represented in the INF files.

   You should have one object tag entry for each ActiveX control you are deploying. Delete any object tags you do not need.

6 Save the HTML file.

7 Remotely log into each client machine, then open the HTML file in Microsoft Internet Explorer. Wait until the message indicates that all the files have been downloaded, then close the browser and log off of the client machine.

8 Repeat Step 7 for each applicable user.

Example HTML File for Predeploying ActiveX Files

The following is an example HTML file for predeploying ActiveX controls as described in the procedure above. Text in italics represents elements that may need to be modified for each object tag.

```
<html>

<head>

<meta http-equiv="Content-Type" content="text/html;
charset=windows-1252">

<title>Predeployment Installer</title>

</head>

<body>

<p>

This page predeploys all Siebel ActiveX controls.  Please allow time
for all ActiveX controls to be downloaded before closing this page.

</p>

</body>

<object
id="SiebelOptionPack"
classid="clsid:9d5f04cf-ef12-4ee5-8b30-8444b08c5500"
codebase="http://localhost/applets/
SiebelOptionPack.cab#version=7,5,3,16123">
</object>

<object
id="siebelextmailclient"
classid="clsid:1EEBFE70-1CE8-11D6-8C81-00D0B7E72554"
codebase="http://localhost/applets/
siebelextmailclient.cab#version=7,0,0,0">
</object>

<object
id="csagent"
classid="clsid:DBFF771D-3F92-4C70-9978-508738536F38"
codebase="http://localhost/applets/csagent.cab#version=1,0,0,0">
</object>
```

```
<object
id="SiebelhtmlEditorLaunch"
classid="clsid:727BEA23-42BE-4B46-9D2C-11521BF55940"
codebase="http://localhost/applets/
SiebelhtmlEditorLaunch.cab#version=1,0,0,0">
</object>

<object
id="siebelhtml"
classid="clsid:E06373B3-02C9-11D5-8BE8-00D0B7C0A3B1"
codebase="http://localhost/applets/
siebelhtml.cab#version=7,5,3,0">
</object>

<object
id="subman"
classid="clsid:06314967-EECF-11D2-9D64-0000949887BE"
codebase="http://localhost/applets/subman.cab#version=7,5,3,0">
</object>

</head>

<body>

<p>

The download is done you may close the window

</body>

</html>
```

ActiveX Controls Distributed for High Interactivity

Table 8 lists the ActiveX controls distributed and used with Siebel Web clients. All of these controls are signed.

NOTE: Depending on your Siebel software release, you may have only a subset of these CAB files.

Table 8. ActiveX Controls Used with Siebel Web Clients

Filename	Size in KB (Uncompressed)	Control Name / Function
csagent.cab	57	Name: Siebel Communications Toolbar support for Sun JRE Supports the communications toolbar (for Siebel CTI or other modules) when using Sun JRE.
siebelhtml.cab	73	Name: Siebel Web Client Automation Server Supports client-side integrations your company may implement. (When this control is deployed, the `EnableWebClientAutomation` configuration parameter must be set to TRUE.) Siebel Systems uses this control to support client-side email integration. See also the description for SiebExtMailClient.cab (Siebel Email Integration Control). *Note:* Running this control requires the user to have the permissions associated with the Power Users group.
siebelhtmlEditorLaunch.cab	36	Name: Siebel Rich Text Editor Supports the Siebel rich text editor (rich text control).
SiebelOptionPack.cab	1457	Name: Siebel HI Base Framework Supports the Siebel high interactivity (HI) base framework.

Table 8. ActiveX Controls Used with Siebel Web Clients

Filename	Size in KB (Uncompressed)	Control Name / Function
SiebExtMailClient.cab	305	Name: Siebel Email Integration Control Supports client-side email integration (for Lotus Notes or Microsoft Outlook). For more information about deploying this type of integration, refer to *Siebel Communications Server Administration Guide*. *Note:* Deploying this control requires that you also deploy siebelhtml.cab (Siebel Web Client Automation Server).
subman.cab	77	Name: Siebel eBriefings offline content Synchronization Supports Siebel eBriefings offline content synchronization. *Note:* Running this control requires the user to have the permissions associated with the Power Users group.

Uninstalling ActiveX Controls

If any ActiveX controls that have been downloaded to a user's machine are no longer needed, you can uninstall them by deleting them from the Downloaded Program Files directory.

If the user has permissions as described in "Modifying User Groups or Permissions" on page 60, applicable controls will be downloaded again as they are needed.

High Interactivity Deployment—Java Requirements

This section describes in detail the Java requirements for high interactivity deployment, noted in "About Deployment Modes for Siebel Web Clients" on page 53.

A supported Java software environment is required to run a high interactivity client. Such an environment is also known as a Java Virtual Machine (JVM) or Java Runtime Environment (JRE). Siebel applications support the following Java environments:

- Microsoft Java Virtual Machine (JVM)
- Sun Java Runtime Environment (JRE)

Supported JVM/JRE versions are outlined in *System Requirements and Supported Platforms*. Choose the appropriate JVM/JRE based on compatibility requirements with existing applications as well as on availability.

For a list of the Java download files, see "Java Applets Distributed for High Interactivity" on page 68.

The message bar, communications toolbar, and Business Process Designer are examples of Siebel product features that require Java functionality, depending on Siebel release and configuration.

Specifying the Java Software Environment

This section describes the two alternative Java software environments supported for Siebel applications.

Specifying Microsoft Java Virtual Machine (JVM)

If Microsoft JVM is installed and no other Java environment is installed, then it is already configured as the default Java environment, and you do not need to do anything else.

However, if you also have Sun JRE installed, you may need to modify security settings to specify Microsoft JVM as the default. For details, see "Manual Security Settings for High Interactivity" on page 69.

To use Sun JRE, you must specify it as the default, as described below.

Specifying Sun Java Runtime Environment (JRE)

To enable Siebel high interactivity applications to use Sun Java Runtime Environment (JRE), you must specify Sun JRE as the default Java environment in the browser. Another JVM or JRE product may also be installed, but Sun JRE should be enabled as the default.

To specify settings for Sun JRE

1. In Internet Explorer, choose Tools > Internet Options.
2. Click the Advanced tab.
3. In Settings, under Java (Sun), check Enable Java *xxxx* (where *xxxx* represents the version number for Sun JRE).
4. Click OK.

Java Applets Distributed for High Interactivity

Table 9 lists the Java applets distributed and used with Siebel Web clients. All of these controls are signed, except where noted.

Table 9. Java Applets Used with Siebel Web Clients

Filename	Size in KB (Uncompressed)	Feature / Function
SiebelFlowChart.cab	150	Design of SmartScripts, organization charts, workflow rules.
SiebelFunnelChart.cab	80	Constructs sales and sales-phases pipeline analysis charts.
SiebelLocale.cab	122	Locale features (date, time, currency). *Note:* This Java applet is unsigned by default.
SiebelMarketingEditor.cab	116	Marketing campaign designer.
SiebelMenu.cab	57	Application-level menus.
SiebelRulesDesigner.cab	67	Personalization business rules designer.

Table 9. Java Applets Used with Siebel Web Clients

Filename	Size in KB (Uncompressed)	Feature / Function
SiebelToolbar.cab	119	Communications toolbar (for Siebel CTI or related modules) and scrolling message bar.
SiebelShared.cab	27	Shared requirement for Java features above.

Manual Security Settings for High Interactivity

If you are *not* using supported security setting templates for applicable Web content zones for your Siebel high interactivity applications, then you must manually specify the Internet Explorer settings described in this section.

See also "High Interactivity Deployment—General Requirements" on page 57 and following sections.

Manual Settings for ActiveX Controls and Plugins

To enable full functionality related to ActiveX controls and plugins for Siebel applications in high interactivity mode, specify the following settings.

For more information, see "High Interactivity Deployment—ActiveX Requirements" on page 59.

To specify ActiveX settings

1. In Internet Explorer, choose Tools > Internet Options.
2. Click the Security tab.
3. Select the Web content zone you want to customize (for example, Local intranet or Trusted sites).
4. Click Custom Level.
5. In Security Settings, under ActiveX Controls and Plug-ins > Download Signed ActiveX Controls, select Enable or Prompt.

6 In Security Settings, under ActiveX Controls and Plug-ins > Run ActiveX Controls and Plug-ins, select Enable.

7 In Security Settings, under ActiveX Controls and Plug-ins > Script ActiveX Controls marked safe for scripting, select Enable.

8 Click OK, then click OK again.

Manual Settings for Scripting

To enable full functionality related to scripting for Siebel applications in high interactivity mode, specify the following settings.

Scripting is used in the high interactivity framework to manage data-only interactions with the server and to interact with the browser DOM, ActiveX controls, Java applets, and so on. The high interactivity framework also supports browser scripting for data validations.

To specify scripting settings

1 In Internet Explorer, choose Tools > Internet Options.

2 Click the Security tab.

3 Select the Web content zone you want to customize (for example, Local intranet or Trusted sites).

4 Click Custom Level.

5 In Security Settings, under Miscellaneous > Active Scripting, select Enable or Prompt.

6 In Security Settings, under Miscellaneous > Scripting of Java Applets, select Enable or Prompt.

7 Click OK, then click OK again.

Manual Settings for Downloads

To enable full functionality related to attachments and file import and export for Siebel applications in high interactivity mode, specify the following settings.

To specify download settings

1. In Internet Explorer, choose Tools > Internet Options.
2. Click the Security tab.
3. Select the Web content zone you want to customize (for example, Local intranet or Trusted sites).
4. Click Custom Level.
5. In Security Settings, under Downloads > File Download, select Enable.
6. Click OK, then click OK again.

Manual Settings for Microsoft Java Virtual Machine

If Microsoft Java Virtual Machine (JVM) is installed and no other Java environment is installed, then it is the default Java environment, unless another module such as Sun JRE is already installed and specified as the default. If you are not using security setting templates, and you have Sun JRE installed, follow the steps below to make sure that Microsoft JVM is the default Java environment.

For more information, see "High Interactivity Deployment—Java Requirements" on page 66.

To specify settings for Microsoft JVM

1. In Internet Explorer, choose Tools > Internet Options.
2. Click the Security tab.
3. Select the Web content zone you want to customize (for example, Local intranet or Trusted sites).
4. Click Custom Level.
5. In Security Settings, under Microsoft VM > Java Permissions, select Medium safety or Low safety.

   This security setting is automatically applied with the Medium-low or Low security template for the applicable Web content zone.

6 If Sun JRE is also installed on the machine: Click the Advanced tab. In Settings, under Java (Sun), verify that Enable Java *xxxx* is not checked (where *xxxx* represents the version number for Sun JRE).

   In other words, if you intend to use Microsoft JVM, make sure that Sun JRE is not enabled.

7 Click OK.

Manual Settings for IFRAME Support

Siebel Web templates are configured to use IFRAME elements. To enable IFRAME support in your browser, follow the steps described below.

For more information about IFRAME support, consult your browser documentation.

To enable support for IFRAME elements

1 In Internet Explorer, choose Tools > Internet Options.

2 Click the Security tab.

3 Select the Web content zone you want to customize (for example, Local intranet or Trusted sites).

4 Click Custom Level.

5 In Security Settings, under Miscellaneous > Launching programs and files in an IFRAME, select Enable or Prompt. (Enable is recommended.)

6 Click OK, then click OK again.

Other Deployment Options for High Interactivity

This section describes several additional browser deployment settings and issues for Siebel high interactivity applications.

See also "Using Cookies with Siebel Applications" on page 74.

NOTE: Settings described in this section are optional in most cases. The applicability of these sections varies according to your overall deployment environment.

Using Secure Sockets Layer (SSL)

If you are using Secure Sockets Layer (SSL) between the Web server and the Web browser with any high interactivity mode application, the following message may appear:

```
This page contains both Secure and Non Secure items. Do you want
to download non secure items?
```

This prompt may be misleading, because, despite the wording of this message, Siebel application requests will be processed on HTTPS, not HTTP. The prompt can optionally be suppressed.

For more information about using Secure Sockets Layer with Siebel applications, refer to *Security Guide for Siebel eBusiness Applications*.

To suppress the prompt for secure and non-secure items

1. In Internet Explorer, choose Tools > Internet Options.
2. Click the Security tab.
3. Select the Web content zone you want to customize (for example, Local intranet or Trusted sites).
4. Click Custom Level.
5. In Security Settings, under Miscellaneous > Display mixed content, select Enable.
6. Click OK, then click OK again.

Deploying Siebel Applications Accessed Through a Firewall

When deploying Siebel high interactivity applications across a firewall, verify that your firewall supports the HTTP 1.1 protocol. If your firewall does *not* support HTTP 1.1 protocol, the browser setting to disable this protocol for proxy connections should be specified.

To disable using HTTP 1.1 through a proxy

1. In Internet Explorer, choose Tools > Internet Options.
2. Click the Advanced tab.
3. Under HTTP 1.1 settings, uncheck Use HTTP 1.1 through proxy connections.
4. Click OK.

Disabling Script Debugging

Script debugging is typically automatically enabled by Microsoft Visual Studio products. To improve performance of the Web browser for use with Siebel applications, you must disable script debugging in the Internet Explorer browser.

To disable script debugging

1. In Internet Explorer, choose Tools > Internet Options.
2. Click the Advanced tab.
3. Under Browsing, check Disable script debugging.
4. Click OK.

Using Cookies with Siebel Applications

Siebel applications running in the Web browser can optionally use cookies for a variety of purposes.

NOTE: Unless otherwise noted, all of the cookies described in this section apply to both high interactivity and standard interactivity applications.

All cookies used by Siebel applications are encrypted using standard encryption algorithms provided by RSA.

For information about enabling cookies in the Microsoft Internet Explorer Web browser, see "Enabling Cookies for Siebel Applications" on page 77.

Siebel applications use the following kinds of cookies:

- **Session cookie.** Manages user sessions. For details, see "Session Cookie" on page 75.
- **Auto-login credential cookie.** Stores user credentials. For details, see "Auto-Login Credential Cookie" on page 77.
- **Siebel QuickStart cookie.** This cookie is created for the Mobile Web Client when Siebel QuickStart is used. This Siebel client supports employee applications in high interactivity mode only. The Siebel QuickStart cookie, named siebel.local.client, is persistent and does not contain Siebel session ID data.

  For more information, see "Siebel Mobile Web Client and Siebel QuickStart" on page 91.
- **Siebel Reports Server cookie.** Contains the user's Siebel login name and an auto-generated password. This cookie is sent by the Siebel Web Server to the browser, and must be enabled in order for the user's Siebel client to connect to the Reports Server (in single sign-on fashion). The Reports Server cookie, named ReportCookie, is non-persistent and does not contain Siebel session ID data.

  For more information about administering Siebel Reports, refer to *Siebel Reports Administration Guide*.

Session Cookie

The session cookie consists of the session ID generated for a user's session. This cookie is used to manage the user position in the session. This cookie applies to the Siebel Web Client only.

The Siebel application can run in either cookie-based mode or cookieless mode. Use cookieless mode if a particular browser does not support cookies.

- **Cookie-based mode.** When a user successfully logs into the application, a unique session ID is generated. The components of the session ID are generated in the Siebel Server and sent to the Session Manager running in the Siebel Web Server Extension. In cookie-based mode, the session ID is passed to the user's browser in the form of a non-persistent cookie.

  Session ID components include the applicable server ID, process ID, and task ID, combined with a timestamp. All values are in hexadecimal form, as shown:

  server_ID.process_ID.task_ID.timestamp

  For example, the session ID may resemble this:

  `sn=!1.132.6024.3ca46b0a`

  The session ID is encrypted in the cookie if the `EncryptSessionId` parameter is set to `TRUE` in the eapps.cfg file. Encrypting the session ID prevents unauthorized attackers from capturing the cookie and determining its format.

  The session cookie is non-persistent and is stored in memory only. It stays in the browser for the duration of the session, and is deleted when the user logs out or is timed out.

  For every application request that the user makes during the session, the cookie is passed to the Web server in an HTTP header as part of the request. Without a valid cookie in the HTTP header, the Web server will not honor that request.

- **Cookieless mode.** By default, Siebel applications use session cookies. However, if the user's browser does not support or allow the use of cookies, the session automatically uses cookieless mode.

  In cookieless mode, the session ID is passed as an argument in the SWE construct of the URL. Any URL request passed to the Web server from the browser must include a valid session ID, or it will be rejected by the Web server.

  The session ID in the URL is encrypted if the `EncryptSessionId` parameter is set to `TRUE` in the eapps.cfg file.

  The Siebel application can be configured to not use cookies for session management—that is, it can be set to operate in cookieless mode at all times. For more information, see *Siebel Server Installation Guide* and *Security Guide for Siebel eBusiness Applications*.

Auto-Login Credential Cookie

The auto-login credential cookie consists of the username and password for a given user, and the URL string used to access the application. The auto-login credential cookie is persistent and is stored on the user's browser in encrypted form (it is always encrypted). This cookie applies to the Siebel Web Client only.

The auto-login credential cookie is not mandatory. It is an optional way to allow users not to have to enter their username and password every time they log in.

Enabling Cookies for Siebel Applications

This section describes how to enable the Microsoft Internet Explorer Web browser to handle cookies used by Siebel applications.

Review instructions for your supported browser version.

To enable cookies using Internet Explorer 5.5

1. Choose Tools > Internet Options.
2. Click the Security tab.
3. In Security settings, under Allow cookies that are stored on your computer, select Enable or Prompt.

   This setting enables persistently storing the auto-login credential cookie and, for the Mobile Web Client, the Siebel QuickStart cookie.
4. In Security settings, under Allow per-session cookies (not stored), select Enable or Prompt.

   This setting enables storing the session cookie and the Siebel Reports Server cookie during the length of the session.
5. Click OK, then click OK again.

To enable cookies using Internet Explorer 6.0

1. Choose Tools > Internet Options.
2. Click the Privacy tab.
3. In Privacy settings, click Advanced.

4 Verify that Override automatic cookie handling is checked. Also consider:

- If First-party Cookies is set to Accept, then all Siebel cookies are enabled.
- If First-party Cookies are blocked, you can still enable the session cookie or the Reports Server cookie by checking Always allow session cookies.

5 Click OK, then click OK again.

Configuring and Using Mobile Web Client 4

This chapter provides instructions for:

- Configuring the Mobile Web Client and connecting to the Siebel Remote Server
- Troubleshooting the Mobile Web Client
- Synchronizing using Siebel Remote
- Using the Siebel QuickStart agent with the Mobile Web Client

For more information about Siebel Remote and about extracting local databases for mobile users, see *Siebel Remote and Replication Manager Administration Guide*. See also *System Requirements and Supported Platforms*.

Setting Up and Connecting to the Siebel Remote Server

The Siebel Remote Server runs the Siebel Remote components and manages synchronization sessions with Mobile Web Clients. The Siebel Remote Server provides an interim storage area for data required to synchronize the mobile databases with the Siebel Database.

Siebel Remote clients must be able to connect to the Siebel Remote Server using TCP/IP. Verify that the correct hardware and software is installed on each client machine and that TCP/IP connectivity to the Siebel Remote Server is established.

Mobile Web Client Configuration Parameters

The Siebel Remote client reads parameters in the Siebel configuration file, such as siebel.cfg for Siebel Sales, to specify the location of the Siebel Server directories, Siebel File Server directories, and the Siebel Database installation. Before using Siebel Remote, you must set the values for the configuration parameters.

For more information on configuration parameters, see Appendix A, "Configuration Parameters."

For information on event logging, see *Siebel Server Administration Guide*.

Set the following parameters in the `[Siebel]` section of the configuration file:

- **ClientRootDir.** Name of the Siebel client installation directory.
- **DockRepositoryName.** Name of the Siebel Repository that you are currently using. This parameter must have the same value as the Siebel Server repository.

Set the following parameters in the `[Local]` section of the configuration file:

- **DockConnString.** Logical network address of the Siebel Server to which you want to connect for synchronization.

  It is recommended that every synchronization session occur within the corporate firewall. If your deployment must support synchronization through the Internet from outside the firewall, VPN is a good alternative. If this is the environment you are using, then the port for synchronizing with your server must be opened on your firewall. Also make sure your Internet service provider (ISP) does not block communication to this particular port.

  This parameter has the following format:

  ```
  siebel_server_name:network_protocol:sync_port_#:
  service:encryption:compression
  ```

  where:

  - *siebel_server_name* = The logical network address of the Siebel Server to which you want to connect for synchronization.
  - *network_protocol* = The name of the networking protocol to use. TCPIP is the only valid value and is the default value if nothing is specified.

- *sync_port_#* = The TCP/IP port number dedicated to the Synchronization Manager. The default value is 40400 if nothing is specified.

  NOTE: You can use the Server Administration screen to override the default value. To do this, specify a value for the Synchronization Manager (SynchMgr) component's `SyncPort` parameter, and restart the Siebel Server. You can also specify this port number as a command-line option when starting the Siebel Server. If you change this value, also update the configuration file on the client so it matches the server settings.

- *service* = The TCP/IP service you are requesting. SMI is the only valid value and is the default value if nothing is specified.
- *encryption* = The encryption package you are using. The encryption facility must match the type used by the server. Both MSCrypto and RSA are supported.

  All elements except the Siebel Server name are optional. If an item between other items is omitted, adjacent colons must be retained—as in the third example below, which omits the network protocol element. Examples of valid values for `DockConnString` are:

  - SIEBAPP1
  - SIEBAPP1:TCPIP:9000
  - SIEBAPP1::9000
  - SIEBAPP1:TCPIP:40400:SMI:RSA

- **DockTxnsPerCommit.** Number of transactions that Siebel Remote applies to the local database before performing a commit. You should set this parameter to a value that satisfies the needs at your site. The default is 500.

  - If you are using the Siebel Mobile Web Client to dock, set `DockTxnsPerCommit` to a high value. Merged transactions will not lock out other users. This enhances the performance of Siebel Remote.

- If you are using the stand-alone synchronizer, set `DockTxnsPerCommit` to a high value only if the program will be the only active user on the database. If the program will apply transactions while the user is accessing the database through the application, set a low value to prevent locking out other users while merging transactions.

- **TableOwner.** Name of the database account on the local database where the Siebel schema is installed. Default is SIEBEL.

Troubleshooting Mobile Web Client and Siebel Remote

This section describes some system failures that may affect Siebel Mobile Web Client users, and describes how to recover from them or avoid them.

NOTE: Depending on the kind of failure experienced, database changes and file attachments that were awaiting upload during the next synchronization session may be lost. The user may need to reenter these transactions and file attachments.

Communication System and Hardware Failures

Noisy or faulty communication lines may lead to communication errors within the Siebel Remote synchronization process. If an error is detected, Siebel Remote has built-in fault-tolerance features that continue to retransmit files in an attempt to synchronize successfully.

Hardware or Media Failure

If a local SQL Anywhere database becomes unusable because of a hardware or media failure, you must refresh the local database. To do this, run Database Extract for the client.

Make sure that client machines always operate with sufficient power, particularly when synchronizing, to minimize the risk of database corruption problems relating to power loss.

User Synchronization Options for Mobile Web Client

This section describes user synchronization options supported by Siebel Remote and Siebel Mobile Web Client.

Users access synchronization options by doing either of the following:

- Selecting File > Synchronize > Database from the application-level menus in the Siebel application.
- Starting Siebel Remote in stand-alone mode. The stand-alone synchronization feature allows mobile users to synchronize their local databases with the server database without starting the Siebel application.

Synchronization occurs in the background, so you can continue to use Siebel applications during synchronization.

The auto-synchronization option for running Siebel Remote in stand-alone mode helps maintain the frequency of synchronization. After initializing their local databases, mobile users enable or disable auto-synchronization by choosing View > User Preferences > DB Synchronization. For more information, see "Using Auto-Synchronization" on page 88.

Synchronization Dialog Box

The Siebel Remote synchronization dialog box shown in Figure 2 contains a list of synchronization actions.

Depending on your database options, the list may appear different from that in the example. For instance, if you do not have a local database, the dialog box may contain only the Connect to Server action.

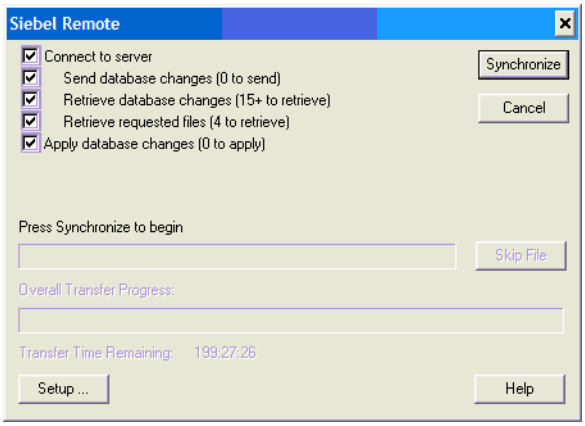

Figure 2. Siebel Remote Synchronization Dialog Box

Synchronization Actions

This section describes the available synchronization actions in the Siebel Remote synchronization dialog box.

- **Connect to server.** Connects to the server, dials the phone number if necessary, and performs version, schema, and database initialization checking. If a Local Database Initialization (dbinit) or upgrade is pending, this action downloads and applies the pending Local Database Initialization or upgrade.

  This action must run successfully for the following three actions to be invoked: Send database changes, Retrieve database changes, and Retrieve requested files.

- **Send database changes.** Sends the local transactions to the server by sending one or more DX files and associated attachment files to the server. This action displays the number of transactions that still need to be sent.

- **Retrieve database changes.** Retrieves transactions from the server by retrieving one or more DX transaction files and associated attachment files from the server. These files are generated by the Transaction Router on the Siebel Remote Server. This action displays the number of transactions that still need to be retrieved.

- **Retrieve requested files.** Retrieves user-requested attachment files from the server. This action displays the number of files that still need to be retrieved.
- **Apply database changes.** Applies database changes retrieved from the server to the local database. This action displays the number of transactions that still need to be applied.

Synchronization Action States

In the Siebel Remote synchronization dialog box, you can enable or disable each action by checking the check box to the left of the action. Explanations of the possible check box states are shown below:

Enabled. This action will run when its turn comes.

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

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

Finished. This action is finished.

Skipped. This action was skipped.

While an action is running, you can click the check box for the action to disable it before the action has finished. If an action is running when you disable it, it stops as soon as possible, and synchronization continues with the next action.

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

Item Status Field

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

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

Skip File Button

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

Overall Transfer Progress Panel

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

Transfer Time Remaining Field

This field contains the estimated time for completing the actions.

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

Synchronize/Stop Command Button

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

Clicking the button again (Stop) stops synchronization if it is still running. When synchronization finishes, the button changes to OK. Clicking the button again hides the synchronization dialog box.

If the dialog box is hidden while synchronization is running, invoking synchronization redisplays the dialog box. If synchronization is finished, invoking synchronization resets and redisplays the dialog box.

Cancel/Hide Button

Clicking the Synchronize button automatically hides the synchronization dialog box, unless you hold down SHIFT when you click the button. If the dialog box is hidden, you can redisplay it by clicking the corresponding icon in the system tray.

If the synchronization dialog box is displayed:

- If synchronization has not started, clicking Cancel closes the synchronization dialog box and aborts synchronization.
- If synchronization has started, the label on this button changes to Hide. Clicking this button hides the synchronization dialog box.

Setup Button

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

- **Retrieve Published Files Box.** When this check box is selected, synchronization retrieves all newly published files.

- **Retrieve Auto Update Files Box.** If this check box is selected, synchronization retrieves updates to local files marked for auto-update. Auto-update files that are not local or have not been requested are not retrieved.

  The auto-update flag is local to each node, so users can choose to update files automatically, without affecting other users. If you do not choose the Retrieve Auto Update Files option during this synchronization session, then synchronization marks the files that need to be updated. Synchronization then makes all auto-update files current during the next session, when Retrieve Auto Update Files is enabled.

  When the Mobile Web Client receives a transaction on a file table, synchronization decides whether to retrieve the file locally. The default is not to download files to the Mobile Web Client unless the file is requested. File screens generally have a request field that users can select to download the file during the next docking session (if the Retrieve Requested Files action is enabled). Files are also uploaded to the server by docking.

  If you change a file, you must upload the new file with the transaction to make the corporate database consistent. These files are stored near the corporate database on a file server. Name files carefully to avoid conflicts, such as two users attempting to modify a file at the same time.

- **Dial-up Networking Connection.** The Connection box allows users to select a dial-up networking connection. Leaving the box blank causes synchronization to use an existing network connection. Changes to the dial-up networking options takes effect the next time synchronization makes a connection to the server.

- **Auto-Start Siebel Remote Box.** If this check box is selected, Siebel Remote begins synchronization as soon as you invoke synchronization. The Siebel Remote synchronization dialog box is not displayed. If you want to display the dialog box throughout your session, press SHIFT when you click Start.

Using Auto-Synchronization

Auto-synchronization increases the frequency of synchronization sessions, thereby decreasing the volume of transactions for each session and shortening the average connect time.

The Auto-Synchronization Agent runs in the background at scheduled times to perform automatic synchronization when the user is connected to the network.

Follow the procedure below to invoke auto-synchronization and the available options. One of the options is a synchronization reminder that prompts the user to synchronize if a specified period passes without a synchronization session.

The Siebel Autosync shortcut is installed in the Startup folder when the Siebel client is installed. This enables the Auto-Synchronization Agent to be launched when the Windows session is started.

NOTE: Auto-synchronization can be enabled only if a local database exists on the client machine.

To enable auto-synchronization

1. Verify that the local database is initialized.
2. Log into the local database, and navigate to View > User Preferences > DB Synchronization.
3. Choose one of the available Auto-Synchronization options listed in Table 10.

Table 10. Auto-Synchronization Options

Option	Description
Enable Auto-Synchronization check box	Required to enable auto-synchronization.
User Confirmation check box	Optional.
Maximum Retries picklist	Defaults to zero, but recommend 2 or 3.
Maximum Network Latency picklist	Required. Sets a network latency that will prevent the auto-synchronization agent from invoking a synchronization session. The administrator establishes this policy. For example, at 56 KB, the threshold may be 200–300 milliseconds or higher.

4 Specify a value for the Synchronization Frequency picklist, as listed in Table 11, then complete other relevant options in this section.

Table 11. Synchronization Frequency Options

Option	Description
Default	Default is Empty. Same behavior as if auto-synchronization is disabled.
System boot up	Perform the next synchronization after the computer is started and operational. If no network connection is available, try again the next time the computer is rebooted.
Mobile Client Start up	Perform synchronization after the Mobile Web Client is started. If no network connection is available, try again the next time the client is started.
Hourly	Perform synchronization every hour at the specified time increment chosen in the *Hourly At* picklist. If the computer is not operational at the specified time, then perform the synchronization at the scheduled time.
Daily	Perform synchronization every day at the specified time entered in the *Daily At* field. If the computer is not operational at the specified hour, then perform the synchronization at the earliest time when the machine is operational.
Weekly	Perform synchronization every week on the specified day chosen in the *Weekly On* picklist, and at the specified time entered in the *Weekly At* field. If the computer is not operational at the specified time, then perform the synchronization at the earliest time when the machine is operational.

5 In the Synchronization Reminder form, check or pick the following:

- **Enable Synchronization Reminder.** Appears when the Mobile Web Client is running, and if the last synchronization was earlier than the minimum days between synchronization sessions.

  Reminds the user to perform synchronization by displaying the message "Perform database synchronization now?" Respond accordingly.

- **Min Days Between Sync Sessions.** Specifies the minimum number of days between synchronization sessions.

Siebel Mobile Web Client and Siebel QuickStart

Siebel QuickStart is an agent that is preloaded on a mobile user's machine at startup and reduces the time required to launch the Siebel Mobile Web Client.

NOTE: Siebel QuickStart can be used with the Siebel Mobile Web Client only, when connecting to the local database or Sample Database. It does not apply to Siebel Dedicated Web Client or Siebel Web Client.

Siebel QuickStart is enabled and loaded for the first time from the Siebel application login screen.

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 startup 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 the siebel.local.client cookie. For additional information about using cookies with Siebel applications, see "Using Cookies with Siebel Applications" on page 74.

NOTE: Users should disable Siebel QuickStart for existing application sessions before enabling it for another application session.

Enabling and Disabling Siebel QuickStart

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 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 startup 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 Appendix A, "Configuration Parameters."

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 Chapter 5, "Using Siebel Packager Utility."

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.

For more information about the `AutoStopDB` parameter, see "Data Source Parameters" on page 134.

5 Using Siebel Packager Utility

The Siebel Packager utility allows the Siebel administrator to assemble the Siebel client executable program and other installed files, including your custom configuration, into a customized installation package that is tailored to your needs. Siebel Packager packages installations for Siebel Mobile or Dedicated Web Client.

Siebel administrators can use these installation packages when installing Siebel eBusiness Applications for the first time or when upgrading from a previous version. Optionally, you can package the Siebel client installation as a single, self-extracting archive file.

Ways to Distribute Siebel Client Packages

After the Siebel client installation has been packaged, the package can be distributed to your users in several ways. For details, see "Making Your Customized Installer Available to End Users" on page 104.

- **Siebel Anywhere.** Distribute and execute the package automatically as a Siebel Anywhere kit.
- **CD-ROM.** Distribute the package to end users on CD-ROMs.
- **LAN, WAN, VPN, or modem.** Distribute the package across a LAN, WAN, VPN, or modem. Do this directly or using third-party software.
- **Other methods.** Distribute the package by email or FTP to end users.

General Process of Creating a Package

The Packager utility creates a standard installation package in two steps:

1. Gathers the Siebel components and files you specify, copies the standard InstallShield components into the client installer directory, and creates a packing list used by InstallShield.

2 (Optional.) Packages the Siebel client installer (prepared in the previous step) into a self-extracting archive, which, when executed, automatically decompresses and starts the Siebel client installer.

Preparing to Use the Siebel Packager Utility

Before using the Packager utility, follow the steps in this section.

For instructions on installing Siebel clients, see Chapter 2, "Installing Mobile and Dedicated Web Clients."

NOTE: This chapter refers to the Siebel client installation directory, such as C:\sea752\client, as *SIEBEL_CLIENT_ROOT*.

To prepare to use the Packager utility

1 Perform a Siebel client installation on the computer on which you will run the Packager utility.

The Packager uses the files from this model client installation (or another client installation, as specified when running the Packager) in creating the installation package.

During Siebel client installation, select *Typical*, or select *Custom* and make sure to select the Packager Utility option.

NOTE: If two Siebel clients are installed on the same computer, where one is used as a Mobile Web Client and the other is a master installation for Packager, make sure to exit the SQL Anywhere engine before running Packager. An installation that has an initialized local database should never be used as a master installation for creating packages.

2 Customize the model Siebel client installation so that it is identical to how you intend to package it. When you create the custom installer, the Packager utility reproduces this model installation.

   If you have custom Siebel repository (.srf) or configuration (.cfg) files, report files, Web templates, or other changes or additions, copy them to the appropriate subdirectories under *SIEBEL_CLIENT_ROOT*, or under the root directory of another installation that you will use to create the custom installation package.

   NOTE: The Packager utility can package only those files that reside in the *SIEBEL_CLIENT_ROOT* directory.

3 Make sure that you have sufficient free disk space on the computer on which you are installing the Packager utility and will create packages.

   During the packaging process, the Packager utility temporarily requires at least:

   - Three times the amount of disk space required by the Siebel Mobile and Dedicated Web Client software you are packaging, and
   - Twice the disk space required by the third-party software (provided with the Siebel eBusiness Applications) that you are packaging.

Siebel Modules for Packaging

The Siebel Mobile or Dedicated Web Client consists of the installable modules described in Table 12. These modules correspond to the subdirectories under the *SIEBEL_CLIENT_ROOT* directory, which are described in "Verifying the Siebel Client Directory Structure" on page 43. Additional subdirectories, other than those shown here, may apply for your client installations.

NOTE: When you create a package, you can decide which modules or files to include or exclude in the package for distribution to end users. Do not remove any modules or component subdirectories or files unless you know they will not be needed. Verify that your Siebel directory structure contains the files you require, including any modified files or other configuration changes.

Table 12. Siebel eBusiness Applications Modules for Packaging

Component	Description
ACTUATE	Actuate-related files for Reports, located in the *SIEBEL_CLIENT_ROOT*\actuate directory.
BIN	Siebel executable files (binaries) located in the *SIEBEL_CLIENT_ROOT*\bin directory, including the required DLL files, configuration files, and executable files such as siebel.exe. If you have customized the configuration files, replace the default configuration files in this directory with your own before you start the Packager utility. *Note:* When you create a package, include this module and all components in the bin directory, except for the user preferences file, *user_ID*&SiebelAppname.spf, and the session file, siebel.ses.
CHARTS	Charts server components for generating charts, located in the *SIEBEL_CLIENT_ROOT*\charts directory.
FONTS	Barcode font files, located in the *SIEBEL_CLIENT_ROOT*\fonts directory.
ISSTEMPL	Template files for the SIS (Siebel Interactive Selling) CDA application, located in the *SIEBEL_CLIENT_ROOT*\isstempl directory.

Table 12. Siebel eBusiness Applications Modules for Packaging

Component	Description
LOCAL	Location of the local database, local Siebel File System, and docking files for Siebel Remote, located in the *SIEBEL_CLIENT_ROOT*\local directory. *Note:* Include this module in order to create the local directory when you create a package for a full installation. However, you should not initialize a local database before you create the package. Each local database is unique to an individual user and should not be packaged.
LOCALE	Language-specific files, located in the *SIEBEL_CLIENT_ROOT*\locale directory. *Note:* Include this module and all components in the locale directory when you create a package for a full installation.
LOG	Log files from Siebel client operations (such as synchronization), located in the *SIEBEL_CLIENT_ROOT*\log directory. *Note:* Include this module in order to create the log directory when you create a package for a full installation.
MSGTEMPL	Message template files used by the Siebel client, located in the *SIEBEL_CLIENT_ROOT*\msgtempl directory. *Note:* Include this module and all components in the msgtempl directory when you create a package for a full installation.
OBJECTS	Object configuration template files (configured objects), located in the *SIEBEL_CLIENT_ROOT*\objects directory—the precompiled SRF file to distribute to end users. The objects directory must contain at least one SRF file before you start the Packager utility. *Note:* Include this module and all components in the objects directory when you create a package for a full installation.
PACKAGER	*Note:* It is recommended that you do *not* include the Packager utility itself when you create a package for distribution to end users.
PATCH_BACK	Removes modules that were applied as part of a patch. *Note:* It is recommended that you do *not* include this module when you create a package for distribution to end users.

Table 12. Siebel eBusiness Applications Modules for Packaging

Component	Description
PUBLIC	HTML, help, JavaScript, image, and other files for the Siebel client, located in the *SIEBEL_CLIENT_ROOT*\public directory. *Note:* Include this module and all components in the public directory when you create a package for a full installation.
REPORTS	Report template files located in the *SIEBEL_CLIENT_ROOT*\reports directory. If you have created your own reports, replace the standard report templates in this directory with your own, or add your own, before you start the Packager utility. *Note:* Include this module and all components in the reports directory when you create a package for a full installation.
SAMPLE	Location of the Sample Database and sample Siebel File System, located in the *SIEBEL_CLIENT_ROOT*\sample directory—if you have installed the Sample Database. *Note:* Generally, you would not distribute the Sample Database to your end users, who will access a local database (Mobile Web Client) or a server database (Dedicated Web Client). You may instead decide to distribute a separate client installer package that includes the Sample Database. If you do this, include the Sample Database, sample configuration files that refer to the Sample Database (located in *SIEBEL_CLIENT_ROOT*\bin*LANGUAGE*), and sample SRF files (located in *SIEBEL_CLIENT_ROOT*\objects).
SQLTEMPL	SQL template files, located in the *SIEBEL_CLIENT_ROOT*\sqltempl directory.
TEMP	Working report files, located in the *SIEBEL_CLIENT_ROOT*\temp directory. *Note:* Include this module in order to create the temp directory when you create a package for a full installation.

Table 12. Siebel eBusiness Applications Modules for Packaging

Component	Description
UPGRADE	Siebel Anywhere upgrade files retrieved by the user, located in the *SIEBEL_CLIENT_ROOT*\upgrade directory. *Note:* This module is applicable only to upgrades, not to new installations.
WEBTEMPL	Siebel Web templates, located in the *SIEBEL_CLIENT_ROOT*\webtempl directory. *Note:* Include this module and all components in the webtempl directory when you create a package for a full installation.

Running the Siebel Packager Utility

This section describes how to run the Siebel Packager utility. The Packager utility wizard guides you in creating the custom Siebel client installer.

NOTE: You must run the Packager once for the base Siebel client modules (BASE option), and once for each language pack you want to include. To include elements in the same package, you must specify the same package name each time.

To run the Siebel Packager utility

1. From the Windows Start menu, select Programs > Siebel Client 7.*x*.*x* > Packager.

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

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

3. Specify the following values:

- **Package.** The name of the package. This is used as the name of the self-extracting archive file (if you create one) and as the name of the subdirectory under *SIEBEL_CLIENT_ROOT*\packager\temp in which the custom installer is created.
- **Siebel Client.** The root-level directory of the Siebel client installation that is included in the custom installation. Accept the default, represented in this book as *SIEBEL_CLIENT_ROOT*.
- **Language Packs.** Specify BASE or specify an installed language pack (for example, ENU for U.S. English). If you want to include language packs in the customized installer, select a language pack.

4. At the bottom-right of the window, choose Full Install or Patch Install, based on your desired goal:
   - **Full Install.** Intended for full installations or upgrades of Siebel eBusiness Applications. This performs an entire installation, using the parameters in the siebel.ini file.
   - **Patch Install.** Copies only the packaged files, preserving the same directory structure as the source. Typically, this is used with an existing installation not requiring further customizing. When you run a patch installer, it prompts only for the existing installation directory.
5. Click Next and the Module Definition window appears.
6. In the Module Definition window:
   a. Choose the Siebel modules to be included in the custom installation package.

      A list of possible modules appears in the Modules list on the left. For explanations of some of these modules, see Table 12 on page 98.

b If you want to include or exclude a template, select an item in the Modules list. Notice that *.* appears in the Include Templates box on the right.

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

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

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

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

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

NOTE: When preparing a full installation, do not remove any module or components unless you know they will not be needed. See module descriptions in Table 12 on page 98.

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c Click Next and the Packaging screen appears.

7 To create the custom installer, click Start.

The Packager utility displays progress information while the Packager executes and creates the package.

8 (Optional.) After this process is finished, you can further customize the behavior of the packaged installer by editing the siebel.ini file. To do so, click the button labeled Edit siebel.ini. See "Customizing Siebel.ini Files" on page 105.

9 (Optional.) If you want to package the custom installer into a self-extracting archive, click Next.

NOTE: If you do not want to perform this step at this time, you can do it later by running the selfex.bat file in the directory *SIEBEL_CLIENT_ROOT*\Packager\Temp*package_name*.

10 (Optional.) In the Self-extracting Archive window, if you are producing an installer for BASE, click Start to package the self-extracting archive.

The Packager creates the archive—a single executable (.exe) file in the directory *SIEBEL_CLIENT_ROOT*\Packager\Temp*package_name*\selfex, and also specifies the name of the package in a message box. This step may take some time to complete, depending on the processing speed of the computer you are using. Verify the location of the executable file after the process has completed.

Making Your Customized Installer Available to End Users

After you have tested your customizations and are satisfied with the client installer you have created, make your customized installer available to end users. You can distribute your customized installer to end users using one of the methods described in this section. The suitability of each method will depend on many factors, including available network bandwidth.

Siebel Anywhere

You can distribute and execute the customized Siebel client installer automatically as a Siebel Anywhere kit.

User access to a Siebel Anywhere kit requires an existing installation of the Siebel client on the user's machine. Therefore, you can use Siebel Anywhere for upgrades, but not for an initial deployment or new installations.

For more information on using Siebel Anywhere, see *Siebel Anywhere Administration Guide*.

CD-ROM, Local Area Network, or Other Method

For new installations or for upgrades, you can distribute the customized Siebel client installer to end users on CD-ROM or local area network (LAN). You can also distribute the customized Siebel client installer across a WAN or VPN, using a modem, by email, or by FTP.

The customized Siebel client installer may optionally be in the form of a self-extracting archive file. Packaging the installer as a self-extracting archive is generally best for distribution methods such as using a modem, email, or FTP.

To distribute a customized Siebel client installer on CD-ROM or network

1. *CD-ROM:* Place the self-extracting archive file (*package_name*.exe) or installer package directory onto a CD-ROM, then distribute the CD-ROM to your users.
2. *Network:* Place the self-extracting archive file (*package_name*.exe) or installer package directory in a network-accessible directory, such as on a LAN. Make sure that all users have access to this directory.
3. Notify your users how to access the installer package and initiate the installation process. Optionally, users may need to copy files to their local machine, such as if you packaged a self-extracting archive file.

   The procedure users will follow varies according to how you distributed the package, how you created the package, and whether the package is a self-extracting archive file. Users can install a self-extracting archive package by running the archive file.

Customizing Siebel.ini Files

The siebel.ini file controls the behavior of the Siebel client installation. Separate versions of this file are created for packages for a base installation and those for language packs. The siebel.ini file is located in the following directories, where *package_name* is the name of your package:

- *SIEBEL_CLIENT_ROOT*\packager\temp*package_name* (for BASE)

- *SIEBEL_CLIENT_ROOT*\packager\temp*package_name**LANGUAGE* (where *LANGUAGE* is the subdirectory for the applicable language pack, such as ENU for U.S. English)

NOTE: The value of the `FolderName` parameter, described in "Key Parameters in Siebel.ini File" on page 106, must be the same in all siebel.ini files for the same package.

Review all applicable siebel.ini files and customize the files as necessary to make sure the client installation uses the correct settings for your specific environment.

NOTE: If you customize the siebel.ini file, do so at Step 8 on page 103 in "Running the Siebel Packager Utility" on page 101. This step occurs *after* you create the package itself, and *before* you (optionally) create a self-extracting archive file. If you customize the siebel.ini file before you create the package, those changes will not become part of the customized installer.

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

- Third-party software programs and versions that are required on the client computer
- System settings that improve performance
- Configuration of data sources
- Which installation screens end users see when they run the Siebel client installer
- Which shortcuts (icons) are created upon installation

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

Key Parameters in Siebel.ini File

The following parameters, located in different sections in the siebel.ini file, are generally already set appropriately, based on performing the master installation. Review these settings and modify those that require it.

- Set the `FolderName` parameter in the [Defaults] section for each language pack to the same value as the `FolderName` parameter in the [Defaults] section for the base installation. If you do so, the relevant shortcuts (icons) will be delivered to the same location under the Windows Start menu.
- Set the `RootDirectory` parameter in the [Defaults] section to the installation location on the target system—for a full, language pack, or patch (maintenance release) installation. By default, the parameter value is populated by the Packager utility to correspond to the staging location where you built the package—for example, C:\sea752\client. You can leave this value as is, or set it to another location on the target system.
- For Siebel Dedicated Web Client, set the `ServerDatabase` parameter in [ServerDatabase] to the appropriate database server for connected use, such as: DB2UDB, SQL Server, or Oracle80.
- Do not enclose the `DockConnString` parameter value in double quotes.
- If the `SystemDSN` parameter is set to no, the installer creates single-user data sources. This type of data source is visible only to the user who installed it.

  If `SystemDSN` is set to yes, the installer creates system data sources, which are shared by all users who log into that particular machine. You must have administrator privileges to create a system installation.

- You can use the `addLanguages` parameter to enable users to add language packs to an existing Siebel client installation.

  If `addLanguages` (in the [Dialog] section) is defined and set to yes, when the user installs, a single dialog box appears, listing all installed instances of the Siebel client. (This dialog box corresponds to the one described in Step 4 on page 33 in "Installing the Siebel Mobile and Dedicated Web Client" on page 32.) The user can choose a Siebel client instance to add a language pack to, or click Next to install a new Siebel client.

  If `addLanguages` is set to no, then an installation directory must be specified using the `RootDirectory` parameter.

  For a package installing a patch, do not use the `addLanguages` parameter.

NOTE: Do not enable any dialog boxes in a packaged installation, *except* the one described above for adding languages. Enabling any other dialog boxes in the Packager is redundant, because the necessary user input has already been captured by the initial installation. (If other dialog boxes are enabled, user input is ignored.)

Major Sections of the Siebel.ini File

The major sections of the siebel.ini file are as follows:

[Startup]—This section defines values needed for setup initialization. Examples include version number, patch install, application name, and so forth.

[AppCollision]—This section defines the file which defines a product. This file is then used to validate that no installations try to overwrite one another.

[StartupFiles]—This section defines third-party startup (.ini) files that may need to be updated or expanded during installation.

[DeleteFiles]—Defines any files that need to be deleted prior to file delivery.

[Module]—Defines component descriptions for use in the user interface.

[Module.Configuration]—This section defines what components or features to assign to a given setup type.

[Module.Destination]—This section defines where a component or feature should be installed on the end user's system.

[Regsvr32]—This section defines the files to register on Windows when using the regsvr32 utility.

[Prerequisites]—This section defines prerequisites for installation to proceed.

[Dialog]—This section defines what dialog boxes should be enabled or disabled in the installer at run time.

[Defaults]—This section defines default values to be used in the user interface of the installer, or the prompt to use if a dialog box is turned off.

[Behavior]—This section defines general installer behavior, such as whether to abort or continue on a failed condition.

[RunAfter]—This section defines the programs or functions to run or call after the installation is complete.

[CustomUninstall]—This section defines programs or what functions should be run or called during uninstallation.

[Icons]—This section defines what shortcuts (icons) to create on the end user's system.

Siebel.ini File Hierarchy and Organization

This section describes the hierarchy and organization of the siebel.ini file.

Sections Containing Child Sections

In sections like the following, a child subsection provides additional information about the parent section. Parent and child sections take the following format:

```
[Parent_Section_Name]
Child_Section_Name = Value
```

where *Child_Section_Name* is a key in the parent section.

```
[Child_Section_Name]
Key = Value
Key = Value
```

The key in the parent section tells the installer whether that element is enabled. If it is enabled, the installer looks to the child section whose name is the key from the parent.

In the following example, the [AppCollision] section is traversed. The installer finds a key (`GtwySrvr`) and determines if that check should be enabled. In this case, the check would be enabled if a Siebel Gateway was selected during installation. If so, the installer looks for the definition. The previous key (`GtwySrvr`) is redefined as a section, which then defines the behavior.

```
[AppCollision]
GtwySrvr          = $(Gateway Selected)=yes

[GtwySrvr]
Description       = Siebel Gateway
File              = gtwysrvr\bin\namesrvr.exe
```

Sections Without Child Sections

In sections like the following, all necessary information for the key is contained in the value:

```
[Section_Name]
Key = Value
```

In the following example, the installer displays a welcome dialog box. All necessary information for the key is contained in the value; no child section is required.

```
[Dialog]
Welcome = yes
```

Testing an Installer After Customizing the Siebel.ini File

After you customize the siebel.ini file, you should test the installer.

To test an installer

1. Finish modifying the siebel.ini file.
2. Run install.exe from the *SIEBEL_CLIENT_ROOT*\packager\temp*package_name* directory on the network installation server.
3. Repeat Step 1 and Step 2 until the siebel.ini file is configured to achieve the desired installation.

4 Test any self-extracting archive file you create.

NOTE: If you test a self-extracting archive file on the same machine on which you generated the package, the installer will overwrite the Siebel client directory. To install to a different location, specify an installation directory using the `RootDirectory` parameter in the siebel.ini file. Or, run the archive file on a different machine.

Configuration Parameters A

Siebel eBusiness Applications use configuration files to hold information that tells the Siebel clients how to function at startup. Examples of configuration files are siebel.cfg, used by Siebel Sales, and uagent.cfg, used by Siebel Call Center. Use the information presented in this appendix to help determine which parameters you must set to achieve optimal performance and to enable the features you require.

The parameters described in this appendix apply to deployments of the Siebel Mobile or Dedicated Web Client. Some parameters also apply to Siebel Servers.

Many parameters are primarily described in other books on *Siebel Bookshelf*.

NOTE: Not all of the configuration parameters used by Siebel applications are mentioned in this book. Some parameters are not documented on *Siebel Bookshelf*.

This appendix includes these sections:

- "Editing Configuration Files" on page 116 provides information to help you edit configuration files.
- "Configuration Parameters Index" on page 117 provides an alphabetical list of selected configuration parameters and provides references to where they are documented.
- "Siebel Application Parameters for Client" on page 128 describes some of the parameters in the `[Siebel]` section of the configuration file.
- "Data Source Parameters" on page 134 describes some of the parameters in data source sections of the configuration file.
- "Sample Selection from Configuration File" on page 144 provides an example of sections from the file uagent.cfg.

Initial values for parameters in the configuration files are either predefined by Siebel Systems or defined using values you specify during installation or at other times.

Some parameter values may be represented using the notation $(*param_name*). These parameter values are substituted automatically, such as during client installation. For example, the value of the `ConnectString` parameter for a data source that has not yet been configured appears as follows:

```
ConnectString = $(ConnectString)
```

Configuration files may also be updated when you initialize the local database for a Siebel Mobile Web Client, or when you run the LDAP/ADSI configuration utility. For more information about initializing the local database, see *Siebel Remote and Replication Manager Administration Guide*. For more information about the LDAP/ADSI configuration utility, see *Security Guide for Siebel eBusiness Applications*.

Siebel Client and Server Parameters

The parameters described in this appendix apply to deployments of the Siebel Mobile or Dedicated Web Client.

Some parameters, such as those in the `[SWE]` section of the configuration file, are also read by the Application Object Manager on the Siebel Server, and therefore apply also to deployments of the Siebel Web Client.

Each section of the configuration file identifies whether the parameters it contains apply only to Siebel client installations (for Siebel Mobile or Dedicated Web Client) or if they apply also to Siebel Server (for Siebel Web Client deployments).

NOTE: For configuration file parameters that apply only to Siebel Mobile and Dedicated Web Client, equivalent parameters are usually defined in the Server Manager as Siebel Server component parameters for the Application Object Manager. In a mixed-client deployment, you must make sure to set and maintain configuration file parameters and component parameters consistently, where appropriate. For more information about server component parameters, see *Siebel Server Administration Guide*.

Siebel Application Configuration Files

Table 13 lists several configuration files and their associated Siebel applications. Your installation may contain additional configuration files besides those listed.

The configuration files are located in the *SIEBEL_CLIENT_ROOT*\bin*LANGUAGE* directory on the Siebel Mobile or Dedicated Web Client, or in the *SIEBSRVR_ROOT*\bin*LANGUAGE* directory on the Siebel Server. The name of the configuration file varies, depending on the application you are using. Separate configuration files are provided for each supported language.

Table 13. Some Siebel Applications and Associated Configuration Files

Siebel Application	Configuration File
Siebel Call Center	uagent.cfg
Siebel Employee Relationship Management	erm.cfg
Siebel Marketing	market.cfg
Siebel Partner Manager	pmanager.cfg
Siebel Sales	siebel.cfg
Siebel Service	sfs.cfg

The eapps.cfg File

Another important configuration file is eapps.cfg. This file is located in *SWEAPPS_ROOT*\SWEApp\bin directory, where *SWEAPPS_ROOT* is the directory in which you installed the Siebel Web Server Extension (on the Web server).

These parameters apply in an environment supporting the Siebel Web Client. The file may need to be modified in scenarios such as configuring Web Single Sign-on (Web SSO), or adding new application virtual directories. Some of the key parameters in the eapps.cfg file are:

- `AnonPassword`
- `AnonUserName`
- `AnonUserPool`
- `AutomaticSession`

- CookieSession
- EncryptSessionId
- StatsPage
- URLSession

For more information about the eapps.cfg file and its parameters, see *Siebel Server Administration Guide*. See also the *Siebel Server Installation Guide* for the operating system you are using and *Security Guide for Siebel eBusiness Applications*.

Editing Configuration Files

The Siebel application configuration files are plain-text files, and can be edited manually using a text editor. You can add parameters and their values or change values for existing parameters.

When you edit configuration files, use a text editor that does not add non-text characters to the file. For example, use Microsoft Notepad instead of Microsoft Word or WordPad.

There are many reasons why you might edit configuration files. For example, you may want to do so at some point after the installation in order to enable or disable certain functionality and features. As appropriate, you must make changes in all configuration files for the applications you are using. For each new application you create, you must copy and edit a configuration file to suit your needs.

NOTE: A configuration parameter that is not needed can be commented out by inserting a semicolon at the start of the line.

To edit a Siebel configuration file

1. Create a backup copy of the default configuration file for which you want to edit parameter values, and save that file as a backup file.
2. Using any text editor, such as Notepad, open the default version of the configuration file.
3. Edit parameter values, as necessary, to obtain the desired application behavior.

4 Run a test using the configuration file that you edited.

5 If there is an error in your test, correct the error and try again, or restore the configuration file from the backup file.

6 If no error occurs, then use the modified configuration file.

Configuration Parameters Index

Table 14 contains an alphabetical listing of some of the configuration parameters from Siebel application configuration files such as siebel.cfg or uagent.cfg. This list shows the name of the section in which each parameter can be found and identifies where the parameter is documented. This list is not comprehensive.

Table 14. Index of Configuration Parameters

Configuration Parameter Name	Section Name	Where Documented
AccessDir	[Siebel]	"AccessDir" on page 128
AccessibleEnhanced	[SWE]	*Siebel eBusiness Applications Accessibility Guide*
ADSI	[SecurityAdapters]	*Security Guide for Siebel eBusiness Applications*
AllowAnonUsers	[SWE]	*Security Guide for Siebel eBusiness Applications*
ApplicationName	[Siebel]	"ApplicationName" on page 128
ApplicationPassword	Applicable security adapter sections, such as: [ADSI] [LDAP]	*Security Guide for Siebel eBusiness Applications*
ApplicationSplashText	[Siebel]	"ApplicationSplashText" on page 128
ApplicationStyle	[SWE]	*Siebel eBusiness Applications Accessibility Guide*
ApplicationTitle	[Siebel]	"ApplicationTitle" on page 128

Table 14. Index of Configuration Parameters

Configuration Parameter Name	Section Name	Where Documented
ApplicationUser	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
AutoStopDB	Applicable data source sections, including: [Local] [Sample]	"AutoStopDB" on page 135
BaseDN	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
CaptionPrefix	[Siebel]	"CaptionPrefix" on page 129
CaseInsensitive	Applicable data source sections, including: [Local] [Sample] [ServerDataSrc] [GatewayDataSrc]	"CaseInsensitive" on page 135
ClientRootDir	[Siebel]	"ClientRootDir" on page 129
CommConfigCache	[Communication]	*Siebel Communications Server Administration Guide*
CommConfigManager	[Communication]	*Siebel Communications Server Administration Guide*
CommConfigManagerName	[Communication]	*Siebel Communications Server Administration Guide*
CommEnable	[Communication]	*Siebel Communications Server Administration Guide*
CommLocalDriver	[Communication]	*Siebel Communications Server Administration Guide*
CommLogDebug	[Communication]	*Siebel Communications Server Administration Guide*
CommLogFile	[Communication]	*Siebel Communications Server Administration Guide*

Table 14. Index of Configuration Parameters

Configuration Parameter Name	Section Name	Where Documented
CommMaxLogKB	[Communication]	*Siebel Communications Server Administration Guide*
CommMaxMsgQ	[Communication]	*Siebel Communications Server Administration Guide*
CommReleaseLogHandle	[Communication]	*Siebel Communications Server Administration Guide*
CommReqTimeout	[Communication]	*Siebel Communications Server Administration Guide*
CommSimulate	[Communication]	*Siebel Communications Server Administration Guide*
ComponentName	[Siebel]	"ComponentName" on page 129
ConnectString	Applicable data source sections, including: [Local] [Sample] [ServerDataSrc] [GatewayDataSrc] [ActuateReports]	"ConnectString" on page 136 (data sources) *Siebel Reports Administration Guide* (ActuateReports)
ContactLogin	Applicable data source sections	"ContactLogin" on page 136
CORBADLL	[Siebel]	"CORBADLL" on page 129
CredentialsAttributeType	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
DataSource	[Siebel]	"DataSource" on page 129
DebugLevel	[EMail]	*Siebel Communications Server Administration Guide*
DefaultChartFont	[Siebel]	"DefaultChartFont" on page 129
DefaultMailClient	[EMail]	*Siebel Communications Server Administration Guide*

Table 14. Index of Configuration Parameters

Configuration Parameter Name	Section Name	Where Documented
DLL	Applicable data source sections, including: [Local] [Sample] [ServerDataSrc] [GatewayDataSrc]	"DLL" on page 136
DllName	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
DockConnString	Applicable data source sections, including: [Local]	"DockConnString" on page 136
DockRecvTxnsPerCommit	Applicable data source sections	"DockRecvTxnsPerCommit" on page 136
DockRepositoryName	[Siebel]	"DockRepositoryName" on page 129
DockTxnsPerCommit	Applicable data source sections, including: [Local]	"DockTxnsPerCommit" on page 137
EditFieldCaption	[SWE]	*Siebel Tools Reference*
EditFieldType	[SWE]	*Siebel Tools Reference*
Enable	[DataCleansing] [DeDuplication]	*Siebel Data Quality Administration Guide*
EnableCDA	[SWE]	*Siebel Server Installation Guide for UNIX* *Siebel Interactive Selling Applications Upgrade Guide*
EnableCORBA	[Siebel]	"EnableCORBA" on page 130
EnableEmailClientAutomation	[SWE]	*Siebel Communications Server Administration Guide*
EnableFQDN	[Siebel]	*Siebel Reports Administration Guide*

Table 14. Index of Configuration Parameters

Configuration Parameter Name	Section Name	Where Documented
EnableOLEAutomation	[Siebel]	"EnableOLEAutomation" on page 130
EnablePersonalization	[Siebel]	"EnablePersonalization" on page 130
EnableReportServer	[ActuateReports]	*Siebel Reports Administration Guide*
EnableScripting	[Siebel]	"EnableScripting" on page 130
EnableWebClientAutomation	[SWE]	"High Interactivity Deployment—ActiveX Requirements" on page 59 *Siebel Communications Server Administration Guide* *Siebel Object Interfaces Reference* *Upgrade Guide*
EncryptApplicationPassword	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
EncryptCredentialsPassword	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
EncryptPassword	[Siebel]	"EncryptPassword" on page 131
EnterpriseServer	Applicable data source sections, including: [Local] [ServerDataSrc]	"EnterpriseServer" on page 137
eProdCfgAutoMatchInstance	[InfraObjMgr]	*Product Administration Guide*
eProdCfgMaxNumbOfWorkerReuses	[InfraObjMgr]	*Product Administration Guide*
eProdCfgNumbOfCachedCatalogs	[InfraObjMgr]	*Product Administration Guide*
eProdCfgNumbOfCachedFactories	[InfraObjMgr]	*Product Administration Guide*
eProdCfgNumOfCachedObjects	[InfraObjMgr]	*Product Administration Guide*
eProdCfgNumbofCachedWorkers	[InfraObjMgr]	*Product Administration Guide*
eProdCfgSnapshotFlg	[InfraObjMgr]	*Product Administration Guide*
ExtendedKeyboard	[SWE]	*Applications Administration Guide*

Table 14. Index of Configuration Parameters

Configuration Parameter Name	Section Name	Where Documented
ExtensionType	Applicable data source sections	"ExtensionType" on page 137
FileSystem	Applicable data source sections, including: [Sample] [ServerDataSrc]	"FileSystem" on page 138
FQDN	[Siebel]	*Siebel Reports Administration Guide*
GatewayAddress	Applicable data source sections, including: [ServerDataSrc]	"GatewayAddress" on page 138
GatewayDataSrc	[DataSources]	"GatewayDataSrc" on page 134
Hidden	Applicable data source sections, including: [GatewayDataSrc]	"Hidden" on page 139
HighInteractivity	[SWE]	*Siebel Tools Reference*
InsensitivityFactor	Applicable data source sections, including: [Local] [Sample] [ServerDataSrc] [GatewayDataSrc]	"InsensitivityFactor" on page 139
InsUpdAllCols	Applicable data source sections	"InsUpdAllCols" on page 139
IntegratedSecurity	Applicable data source sections	"IntegratedSecurity" on page 140
JseCorbaConnector	[Siebel]	"JseCorbaConnector" on page 131
LDAP	[SecurityAdapters]	*Security Guide for Siebel eBusiness Applications*
ListRowStyle	[SWE]	*Siebel Tools Reference*
Local	[DataSources]	"Local" on page 134

Table 14. Index of Configuration Parameters

Configuration Parameter Name	Section Name	Where Documented
LocalDbODBCDataSource	[Siebel]	"LocalDbODBCDataSource" on page 132
LoginView	[SWE]	*Security Guide for Siebel eBusiness Applications*
LotusForm	[EMail]	*Siebel Communications Server Administration Guide*
MarkupLanguage	[SWE]	*Siebel Wireless Administration Guide*
MaxCachedCursors	Applicable data source sections, including: [Local] [Sample] [ServerDataSrc]	"MaxCachedCursors" on page 140
MaxCachedDataSets	Applicable data source sections, including: [Local] [Sample] [ServerDataSrc]	"MaxCachedDataSets" on page 140
MaxConnections	Applicable data source sections	"MaxConnections" on page 140
MaxCursorSize	Applicable data source sections, including: [ServerDataSrc]	"MaxCursorSize" on page 140
MessageBarUpdateInterval	[Siebel]	*Applications Administration Guide*
MultiCurrency	[Siebel]	"MultiCurrency" on page 132
NonSQL	Applicable data source sections	"NonSQL" on page 140
NumberOfListRows	[SWE]	*Object Types Reference* *Personalization Administration Guide* *Siebel Wireless Administration Guide* *Siebel Mobile Connector Guide*

Table 14. Index of Configuration Parameters

Configuration Parameter Name	Section Name	Where Documented
OLEAutomationDLL	[Siebel]	"OLEAutomationDLL" on page 132
OLEMessagePendingDelay	[Siebel]	"OLEMessagePendingDelay" on page 132
OutlookForm	[EMail]	*Siebel Communications Server Administration Guide*
PasswordAttributeType	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
PersonalizationLog	[Siebel]	"PersonalizationLog" on page 132
Port	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
PrefetchSize	Applicable data source sections, including: [ServerDataSrc]	"PrefetchSize" on page 141
PrimaryEnterprise	Applicable data source sections, including: [GatewayDataSrc]	"PrimaryEnterprise" on page 141
ProtocolName	[ActuateReports]	*Siebel Reports Administration Guide*
RemoteSearchServer	[Siebel]	"RemoteSearchServer" on page 132
RemoteSearchServerPath	[Siebel]	"RemoteSearchServerPath" on page 132
ReportCastDomain	[ActuateReports]	*Siebel Reports Administration Guide*
ReportCastHost	[ActuateReports]	*Siebel Reports Administration Guide*
ReportsDir	[Siebel]	"ReportsDir" on page 132
ReportServerName	[ActuateReports]	*Siebel Reports Administration Guide*
ReportsODBCDataSource	[Siebel]	"ReportsODBCDataSource" on page 132
RepositoryFile	[Siebel]	"RepositoryFile" on page 132

Table 14. Index of Configuration Parameters

Configuration Parameter Name	Section Name	Where Documented
RequestServer	Applicable data source sections, including: [ServerDataSrc]	"RequestServer" on page 141
RequiredIndicator	[SWE]	*Siebel Developer's Reference*
ReverseFillThreshold	Applicable data source sections, including: [Local] [Sample] [ServerDataSrc]	"ReverseFillThreshold" on page 141
RolesAttributeType	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
RoxDir	[ActuateReports]	*Siebel Reports Administration Guide*
Sample	[DataSources]	"Sample" on page 134
SAPRfcConnectString	[SAPSubsys]	*Siebel Connector for SAP R/3*
SAPRfcDestEntry	[SAPSubsys]	*Siebel Connector for SAP R/3*
SAPRfcPassword	[SAPSubsys]	*Siebel Connector for SAP R/3*
SAPRfcUserName	[SAPSubsys]	*Siebel Connector for SAP R/3*
ScriptingDLL	[Siebel]	"ScriptingDLL" on page 133
SearchDefName	[Siebel]	"SearchDefName" on page 133
SearchEngine	[Siebel]	"SearchEngine" on page 133
SearchInstallDir	[Siebel]	"SearchInstallDir" on page 133
SecureBrowse	[SWE]	*Security Guide for Siebel eBusiness Applications*
SecureLogin	[SWE]	*Security Guide for Siebel eBusiness Applications*
SecurityAdapter	[Siebel]	"SecurityAdapter" on page 133
ServerDataSrc	[DataSources]	"ServerDataSrc" on page 134

Table 14. Index of Configuration Parameters

Configuration Parameter Name	Section Name	Where Documented
ServerName	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
SharedCredentialsDN	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
SharedModeUsersDir	[Siebel]	"SharedModeUsersDir" on page 133
ShowMessageBar	[Siebel]	*Applications Administration Guide*
ShowWriteRecord	[SWE]	*Siebel Partner Relationship Management Administration Guide*
SiebelExtMailClientAttDir	[EMail]	*Siebel Communications Server Administration Guide*
SiebelUsernameAttributeType	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
SingleSignOn	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
SortCollation	Applicable data source sections, including: [Local] [Sample]	"SortCollation" on page 141
SqlStyle	Applicable data source sections, including: [Local] [Sample] [ServerDataSrc]	"SqlStyle" on page 143
SslDatabase	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
SystemSWFName	[SWE]	*Siebel Tools Reference*
SystemSWSName	[SWE]	*Siebel Tools Reference*

Table 14. Index of Configuration Parameters

Configuration Parameter Name	Section Name	Where Documented
TableOwner	Applicable data source sections, including: [Local] [Sample] [ServerDataSrc]	"TableOwner" on page 144
TempDir	[Siebel]	"TempDir" on page 133
TreeNode*X* (several parameters that are similarly named—for example, TreeNodeCollapseCaption)	[SWE]	*Siebel Tools Reference*
TrustToken	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
Type	[DataCleansing] [DeDuplication]	*Siebel Data Quality Administration Guide*
UpperCaseLogin	Applicable data source sections	"UpperCaseLogin" on page 144
UseAdapterUsername	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
UseRemoteConfig	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
UsernameAttributeType	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
UserSWFName	[SWE]	*Siebel Tools Reference*
UserSWSName	[SWE]	*Siebel Tools Reference*
UseSsl	Applicable security adapter sections	*Security Guide for Siebel eBusiness Applications*
Version	[Siebel]	"Version" on page 133
ViewPreloadSize	[SWE]	*Siebel Tools Reference*
View1	[Preload]	"Siebel Mobile Web Client and Siebel QuickStart" on page 91

Table 14. Index of Configuration Parameters

Configuration Parameter Name	Section Name	Where Documented
View2	[Preload]	"Siebel Mobile Web Client and Siebel QuickStart" on page 91
View*n*	[Preload]	"Siebel Mobile Web Client and Siebel QuickStart" on page 91
WebTemplatesVersion	[SWE]	*Siebel Tools Reference*

Siebel Application Parameters for Client

Table 15 defines Siebel application parameters that appear in the section [Siebel].

These parameters apply only to Siebel Mobile and Dedicated Web Client. For the Siebel Web Client, the parameters are defined as server parameters on the Application Object Manager.

Table 15. Siebel Client Application Parameters

Name	Description
AccessDir	Specifies the directory where Microsoft Access is installed.
ApplicationName	Name of the application object in the repository to use, such as Siebel Sales or Siebel Service. ApplicationName determines which splash screen appears and which set of menus is enabled.
ApplicationSplashText	Text that appears on a splash screen when starting up a Siebel application. The default varies by the application. If you are starting Siebel Sales, for example, ApplicationSplashText is set to Siebel Sales by default.
ApplicationTitle	Changing the text in the ApplicationTitle parameter in the configuration file changes the Application Title value in the multivalue group applets and the Title that appears on the left-hand side of the application title bar. As necessary, make this change in the appropriate configuration file for the intended application. For example, for Siebel Call Center, this parameter would be set, in the file uagent.cfg, to Siebel Call Center.

Table 15. Siebel Client Application Parameters

Name	Description
CaptionPrefix	Allows customizing of the title in the upper left-hand corner of the Siebel client application. Reads Siebel by default.
ClientRootDir	Specifies the directory where the Siebel client software is installed. For more information, see "Mobile Web Client Configuration Parameters" on page 79.
ComponentName	Specifies the Siebel Anywhere configuration that should be used during version check. Navigate to the Siebel Anywhere Administration > Configurations view to see the configurations. Change the setting for this parameter if you want this configuration file to be version-checked by a specific Siebel Anywhere configuration. For example, if you want to version-check the Siebel software used at one facility separately from the software used at another facility, create two Siebel Anywhere configurations appropriately named. Then, in the configuration file for each set of users, enter a different value for the ComponentName parameter. It is recommended to use only alphanumeric characters plus dashes and normal parentheses for the ComponentName parameter. If you want to use the Priority upgrade feature, the maximum character length for the Upgrade Component name should be 40.
CORBADLL	The Siebel extension layer for CORBA.
DataSource	Name of the default data source that appears in the Connect to drop-down list in the Siebel login screen. Must correspond to an existing data source defined in the configuration file. By default, this parameter is set to Local.
DefaultChartFont	Font name specification for chart applets. Defaults to Arial-10 normal.
DockRepositoryName	Allows the application to read repository information straight from the database, rather than from the Siebel repository file (SRF) file. The value should match the repository used for compiling the SRF file. For more information, see "Mobile Web Client Configuration Parameters" on page 79.

Table 15. Siebel Client Application Parameters

Name	Description
EnableCORBA	EnableCORBA is used to load CORBADLL. For all installations except CORBA Object Manager, this flag is FALSE by default. When using a configuration file with one of the CORBA Object Manager executables, ssomorbx.exe or ssomvisi.exe, the CORBA Object Manager installer sets the EnableCORBA parameter to TRUE.
EnableOLEAutomation	TRUE or FALSE. Enables OLE interfaces. This parameter must be set to TRUE (the default) in order for the Siebel Mobile or Dedicated Web Client to generate reports locally.
EnablePersonalization	Must be set to TRUE to activate the personalization (content targeting) functionality. Siebel workflow processes will not execute properly until personalization events are reloaded. For information on clearing and reloading personalization data, see *Personalization Administration Guide*.
EnableScripting	TRUE or FALSE. Enables use of Siebel Visual Basic or Siebel eScript. For more information, see "Configuring Client When Siebel VB or Siebel eScript Not Licensed" on page 42.

Table 15. Siebel Client Application Parameters

Name	Description
`EncryptPassword`	Determines whether to encrypt the user's password before passing it the RDBMS. It is used by customers who want to prevent their users from using SQL*Plus or some other RDBMS tool to directly log into the server database, rather than by using Siebel eBusiness Applications. When TRUE, a simple encryption algorithm is applied to the password before it is sent to the database. This occurs when users attempt to log into Siebel eBusiness Applications with their password. The users' Oracle login must also be set up with the encrypted version of the password. There is a special utility to help the administrator set these up. *Note:* `EncryptPassword` applies to the Dedicated Web Client (that is, connecting to the server database); however, these users must use the same authentication method that is implemented for users of the Siebel Web Client. This parameter does *not* apply to the Mobile Web Client (connecting to the local database). Encrypted passwords for mobile users may be stored in the server database for when such users connect to the server database (unless another authentication mechanism is used). For more information, see *Security Guide for Siebel eBusiness Applications*. For information about authentication options for local database synchronization for mobile users, see *Siebel Remote and Replication Manager Administration Guide*.
`JseCorbaConnector`	Required for CORBA support if you are using Siebel eScript and calling CORBA from eScript. This parameter defines the name of the eScript CORBA extension DLL. Change this setting, depending on the CORBA ORBs (Object Request Broker) that you are using: ■ Use corbavgn.dll for Inprise Visibroker ■ Use corborbx.dll for Iona ORBIX The default setting for this parameter is corbavgn.dll. *Note:* The `ScriptingDLL` parameter must be set to sscfjs.dll to select Siebel eScript as the scripting language. By default, the `ScriptingDLL` parameter is set to Visual Basic.

Table 15. Siebel Client Application Parameters

Name	Description
`LocalDbODBCDataSource`	Name of the ODBC data source that is set up to access the local database. It is used by a variety of features in the Siebel eBusiness Applications and in Siebel Tools. It should not need to be modified because it is correctly configured by the installation program.
`MultiCurrency`	TRUE or FALSE. Enables multicurrency support.
`OLEAutomationDLL`	Name of the DLL file that implements OLE interfaces.
`OLEMessagePendingDelay`	Controls the amount of time that the Siebel application waits for an OLE server to respond to a request before a timeout message appears: `Server not responding ...` This parameter should be set in milliseconds, contained within quotation marks. For example, for 15 seconds, set `OLEMessagePendingDelay` to 15000. The default setting is eight seconds (8000). You may want to increase the timeout on slow computers so that the timeout message does not appear as frequently.
`PersonalizationLog`	Add the following to the configuration file to view a log of all personalization activity: `PersonalizationLog = "C:\personalization.txt"` where C: is the drive where you want to store the log. The log may assist in the process of debugging your rules, events, and actions.
`RemoteSearchServer`	TRUE or FALSE. TRUE indicates that searches are performed on a remote machine; FALSE indicates that searches are performed on a local machine.
`RemoteSearchServerPath`	Indicates the name of the remote machine that performs searches.
`ReportsDir`	Directory where reports are installed. It is typically left blank.
`ReportsODBCDataSource`	Name of ODBC data source used to connect to modules such as Crystal Reports.
`RepositoryFile`	Name of the Siebel SRF file to use. `RepositoryFile` is the physical file that contains all runtime object definitions.

Table 15. Siebel Client Application Parameters

Name	Description
`ScriptingDLL`	Name of the shared library that implements Siebel Visual Basic or Siebel eScript. If the Siebel Server runs on a UNIX server machine, and you plan to use eScript, set the value of `ScriptingDLL` to sscfjs.so.
`SearchDefName`	Search definition from Siebel Tools to be used for searching.
`SearchEngine`	Defines the search engine to be used for searching. Currently, only Hummingbird SearchServer is supported, for which this parameter should be set to Fulcrum.
`SearchInstallDir`	File location of the Hummingbird SearchServer installation. Example: C:\Program Files\Fulcrum.
`SecurityAdapter`	Optional. May be set to LDAP, ADSI, or another appropriate value to specify the security adapter you are using. If you do not set `SecurityAdapter` to anything, this indicates that you are using database authentication. The value to which you set `SecurityAdapter` must be a valid value specified in the `[SecurityAdapters]` section of the configuration file. For more information about security adapter parameters, see *Security Guide for Siebel eBusiness Applications*.
`SharedModeUsersDir`	Directory where user preference files are stored. It is typically left blank, otherwise it must be set to a directory under a network shared drive, but it cannot be set to the shared drive itself. For example, if \\yourserver\common is the network shared drive, you cannot set `SharedModeUsersDir` to \\yourserver\common. Instead, set `SharedModeUsersDir` to a directory under \common. For more information, see "User Preferences and Siebel Clients" on page 25.
`TempDir`	Directory where temporary files should be created.
`Version`	Represents version of file. This parameter is for internal use only and is automatically maintained by Siebel Anywhere. When you create an upgrade kit for the configuration file, Siebel Anywhere increments this version string appropriately, based on the version information from the Upgrade Components screen. *Note:* When you perform a Siebel Anywhere upgrade, you must manually upgrade files from the upgraded Siebel client directory to the Siebel Server directory.

Data Source Parameters

This section describes parameters that pertain to the section [DataSources] and to individual data source sections that follow.

These parameters apply only to Siebel Mobile and Dedicated Web Client. For the Siebel Web Client, the parameters are defined as server parameters on the Application Object Manager.

Parameters for DataSources Section

Table 16 lists data sources in the Siebel configuration file, which appear in the section [DataSources]. Each data source also has its own section specifying parameters that apply to this data source.

Table 16. Data Sources

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

NOTE: If you want to prevent a data source from being displayed as a choice in the Connect To: portion of the Siebel login screen, add two slash characters (//) in front of the data source in the [DataSources] section of the configuration file. For example: //Sample = Sample.

Parameters for Individual Data Source Sections

Table 17 lists parameters that specify properties associated with the different data sources listed under [DataSources]. Each data source section defines the properties of the particular data source. See "Sample Selection from Configuration File" on page 144 for parameters in individual data source sections such as [Local] or [ServerDataSrc].

Table 17. Data Source Parameters

Name	Comment
AutoStopDB	TRUE or FALSE. Applies to Sample or Local data sources only. If TRUE, then the SQL Anywhere database engine exits when the user logs out. If FALSE (the default), then the database engine continues to run after the user logs out of the Siebel applications. See also "QuickStart and AutoStopDB Configuration Parameter" on page 93 and "Installing the Sample Database" on page 39. Regarding the local database, see also *Siebel Remote and Replication Manager Administration Guide*.
CaseInsensitive	TRUE or FALSE. If TRUE, notifies the client to work with the database in case-insensitive mode. See also the description of the InsensitivityFactor parameter for data sources. *Note:* Queries against fields of type DTYPE_ID are always case-sensitive, even if the CaseInsensitive parameter is set to TRUE. For more information, see *Applications Administration Guide*.

Table 17. Data Source Parameters

Name	Comment
`ConnectString`	Database-dependent string that defines how to connect to the database. For SQL Anywhere (for local database or Sample Database), the -q option hides the SQL Anywhere icon. The -c option indicates the initial cache size, and -ch indicates the limit of the cache size. The -m option indicates to the SQL Anywhere database engine to truncate the transaction log after each checkpoint. The `ConnectString` parameter is also used to specify the Gateway Name Server machine in the GatewayDataSrc section. In the Dedicated Web Client's configuration file, you must specify the Gateway Name Server's hostname, preferably in a fully qualified form like node.domain.xxx. Failure to specify this parameter correctly results in the Server Administration screens not being accessible. For more information on using connect strings for different server databases, see the *Siebel Server Installation Guide* for the operating system you are using.
`ContactLogin`	TRUE or FALSE. If TRUE, indicates that the corresponding data source uses contact login, rather than employee login. Because a contact user is generally not associated one-to-one with a database account, you must use a security adapter to support contact users. If FALSE, the data source is using employee login, rather than contact login.
`DLL`	Name of the DLL file to use for the database connector code. The names differ depending upon whether you are using Oracle, SQL Server, DB2, and so on.
`DockConnString`	Name of the docking server (Siebel Remote Server). It is the machine name of the Siebel Server against which the Mobile Web Client synchronizes. For more information on setting this parameter for the local database, see "Mobile Web Client Configuration Parameters" on page 79.
`DockRecvTxnsPerCommit`	Number of transactions received by the Mobile Web Client before a commit is issued to the database. The default value for this parameter is 10. Change the setting to: ■ A higher value if you have a fast network connection, such as a LAN. Increasing the value can provide better performance when synchronizing the Mobile Web Client with the server. ■ A lower value if you have a lower-bandwidth network connection, such as a modem.

Table 17. Data Source Parameters

Name	Comment
DockTxnsPerCommit	Number of transactions processed before a commit is issued to the database. For more information on setting this parameter for the local database, see "Mobile Web Client Configuration Parameters" on page 79.
EnterpriseServer	Name of the Siebel Enterprise Server.
ExtensionType	LINK or JOIN. This parameter indicates how data is retrieved from extension tables. It sets the default value for business components that do not have the Extension Type property defined. For more information on this parameter, see *Siebel Tools Online Help*.

Table 17. Data Source Parameters

Name	Comment

`FileSystem`	Specifies how the Mobile or Dedicated Web Client accesses the Siebel File System. Generally, `FileSystem` and other parameters identified below are set during the Siebel client installation.
	
	Mobile Web Client. The following scenario for setting the `FileSystem` parameter applies to the Siebel Mobile Web Client. The Siebel File System should be installed locally on a Mobile Web Client, so that it is accessible when the client is not connected to the network and can be synchronized using Siebel Remote. See also "Siebel Mobile Web Client and Siebel Remote" on page 21.
	
	■ Set the following parameter, where *FS_location* is a UNC location or a drive-letter path to the location on the client computer where the local Siebel File System was installed:
	
	`FileSystem = FS_location\att`
	
	Dedicated Web Client. The following scenarios for setting the FileSystem parameter apply to the Siebel Dedicated Web Client. Make sure that users on the Dedicated Web Client have physical access privileges for the Siebel File System directories.
	
	■ If the installation uses File System Manager (FSM), set the following parameters:
	
	`FileSystem = *FSM*`
	`GatewayAddress = Siebel_Gateway_hostname`
	`EnterpriseServer = Siebel_Enterprise_Server_name`
	
	■ If the installation does *not* use FSM, set the following parameter, where *FS_location* is a UNC location or a drive-letter path to the location on a network computer where the Siebel File System was installed:
	
	`FileSystem = FS_location\att`
	
	Note: If your networked Siebel File System resides on a UNIX server, you will require a cross-platform NFS file system mounting tool in order to connect from Siebel Dedicated Web Clients running on Windows machines.
	
	The system administrator must manually create the att subdirectory in the Siebel File System. If there is an existing File System installation, the administrator must move all file attachments from *FS_location* to *FS_location*\att.

`GatewayAddress`	Virtual IP address of the Siebel Gateway.

Table 17. Data Source Parameters

Name	Comment
Hidden	TRUE or FALSE. Determines if the data source shows up in the login screen's picklist of data sources.
InsensitivityFactor	Set to a positive integer value (default is 2). Applies only when the CaseInsensitive parameter is TRUE for the data source. The value controls the number of characters in each string that are treated as case-insensitive in a query. Not all database vendors support case-insensitivity efficiently, so this feature provides an approximate solution. See also the description of the CaseInsensitive parameter for data sources. Below is an example of the SQL WHERE clause generated when searching for an opportunity named New, when InsensitivityFactor is set to 2. WHERE ((S_OPTY.NAME LIKE 'ne%' OR S_OPTY.NAME LIKE 'Ne%'OR S_OPTY.NAME LIKE 'nE%'OR S_OPTY.NAME LIKE 'NE%') AND UPPER(S_OPTY.NAME)=UPPER('New')) The above example shows that all permutations of the first two letters of the string 'New' are checked. With a higher factor, the number of permutations grows exponentially, and performance suffers. *Note:* Do not set this parameter to a value higher than 13.
InsUpdAllCols	TRUE or FALSE. Ordinarily when the Siebel application generates INSERT or UPDATE statements to send to the database, the actual statement contains only the columns where data is present or has changed. When there are situations where you generate many statements on a particular table, the differences in the values being updated may prevent you from using an array interface supported by the DBMS. When this feature is set to TRUE, all columns are present in all INSERT and UPDATE statements. This automatically enables two statements issued against the same table in the same business component as part of a batch operation to use any existing array feature of the DBMS.

Table 17. Data Source Parameters

Name	Comment
IntegratedSecurity	TRUE or FALSE. When TRUE, the Siebel client is prevented from prompting the user for a username and password when the user logs in. Facilities provided in your existing data server infrastructure determine if the user should be allowed to log into the database. This parameter is set for your server data source. However, it is supported for Oracle and Microsoft SQL Server databases only. The default value is FALSE. For additional information, refer to your third-party documentation. For Oracle, refer to the OPS$ and REMOTE_OS_AUTHENT features. For Microsoft SQL Server, refer to Integrated Security.
MaxCachedCursors	Specifies the maximum number of SQL cursors that can be cached in memory for a database connection. The default is 16. Caching SQL cursors can improve response time and CPU usage because a SQL cursor does not have to be prepared each time it is executed. If memory usage is not a concern, you may consider increasing the value of this parameter.
MaxCachedDataSets	Specifies the maximum number of data sets that can be cached in memory for a database connection. The default is 16. A data set is the set of records that has been retrieved by the execution of a business component. Data-set caching applies only to those business components for which the Cache Data property has been set in Siebel Tools. Caching data sets for frequently visited business components can improve response time and CPU usage. If memory usage is not a concern, you may consider increasing the value of this parameter.
MaxConnections	Number of connections that can be made to the data source database server.
MaxCursorSize	Sets the total number of rows that can be returned in a result set. MaxCursorSize is intended for use *only* with IBM DB2 UDB for OS/390 and z/OS, and must be set as described in *Implementing Siebel eBusiness Applications on DB2 UDB for OS/390 and z/OS*. If you are using another database, do not set this parameter to anything other than the default value (-1), or database behavior is adversely affected. MaxCursorSize and PrefetchSize are used together, and must be set to the same value. See also the description for the PrefetchSize parameter.
NonSQL	TRUE or FALSE. Setting that indicates that the data source does not use an SQL DBMS to retrieve its data. This would be used only in conjunction with a specialized business component that would build internally. It would never be arbitrarily set by a Siebel customer.

Table 17. Data Source Parameters

Name	Comment
PrefetchSize	Sets the number of rows that the Siebel application reads initially as part of a query execution. PrefetchSize is intended for use *only* with IBM DB2 UDB for OS/390 and z/OS, and must be set as described in *Implementing Siebel eBusiness Applications on DB2 UDB for OS/390 and z/OS*. If you are using another database, do not set this parameter to anything other than the default value (-1), or database behavior is adversely affected. MaxCursorSize and PrefetchSize are used together, and must be set to the same value. See also the description for the MaxCursorSize parameter.
PrimaryEnterprise	The name of the Enterprise Server you want to administer from the client machine. Set this parameter to view or change information in the Server Administration screens.
RequestServer	If you are not using Resonate Central Dispatch, this is the name of the Siebel Server that should service requests from the Siebel client. If you are using Resonate Central Dispatch, this parameter should be left blank.
ReverseFillThreshold	When the current query contains many rows, it may be very inefficient to read sequentially through all of them if the user hits the End button. For this reason, the customer may configure a threshold value to invert the current sort, re-execute the query, and fill the data buffers from the end. This is hidden from the user.
SortCollation	Allows the user to specify sorting order on the local database or Sample Database. *Note:* The SortCollation parameter is not a default part of the configuration file, so it must be added manually in order to take effect. If this parameter is not present, sorting in Siebel applications when using SQL Anywhere uses the binary sort order as identified here. Customers using languages other than English (particularly those using accented characters) may prefer to use an appropriate setting from the list below. After this parameter is changed, the Siebel application must be restarted in order for the change to take effect. The valid values of the SortCollation parameter, supported by the SQL Anywhere database, consist of the following values: ISO 14651 Unicode multilingual (Default): default ISO 14651 Unicode multilingual ordering standard: 14651 (produces same results as default sort collation)

Table 17. Data Source Parameters

Name	Comment
`SortCollation` (continued)	Big5 (Traditional Chinese) binary order: `big5bin` Binary sort: `binary` (produces UTF-8 binary order) CP 850 Western European: no accent: `altnoacc` CP 850 Western European: lower case first: `altdict` CP 850 Western European: no case, preference: `altnocsp` CP 850 Scandinavian dictionary: `scandict` CP 850 Scandinavian: no case, preference: `scannocp` CP874 (TIS 620) Royal Thai dictionary order: `thaidict` CP932 (Japanese on Windows) Shift-JIS binary order: `sjisbin` CP932 (Japanese on Windows) Shift-JIS with Microsoft extensions binary order: `cp932bin` GB2312 (Simplified Chinese) binary order: `gb2312bin` GB 2312 (Simplified Chinese) Pinyin phonetic order: `gbpinyin` EUC JIS (Japanese on UNIX) binary order: `eucjisbin` EUC KSC (Korean) binary order: `euckscbin` ISO 8859-1 ('Latin-1') English, French, German dictionary order: `dict` ISO 8859-1 ('Latin-1') English, French, German no case: `nocase` ISO 8859-1 ('Latin-1') English, French, German no case, preference: `nocasep` ISO 8859-1 ('Latin-1') English, French, German no accent: `noaccent`

Table 17. Data Source Parameters

Name	Comment
SortCollation (continued)	ISO 8859-1 ('Latin-1') Spanish dictionary: espdict ISO 8859-1 ('Latin-1') Spanish no case: espnocs ISO 8859-1 ('Latin-1') Spanish no accent: espnoac ISO 8859-2 Hungarian dictionary: hundict ISO 8859-2 Hungarian no accents: hunnoac ISO 8859-2 Hungarian no case: hunnocs ISO 8859-5 Cyrillic dictionary: cyrdict ISO 8859-5 Cyrillic no case: cyrnocs ISO 8859-5 Russian dictionary: rusdict ISO 8859-5 Russian no case: rusnocs ISO 8859-7 Greek dictionary: elldict ISO 8859-9 Turkish dictionary: turdict ISO 8859-9 Turkish no accents: turnoac ISO 8859-9 Turkish no case: turnocs Unicode UTF-8 binary sort: utf8bin (produces same results as binary sort collation) *Note:* In the values above, no accent indicates that the accented and nonaccented characters are treated equivalently by the sort. No case indicates that the sort ignores case. Preference indicates that uppercase records appear before lowercase records where the letter is the same but the case differs.
SqlStyle	Indicates what kind of SQL to send to the database you are using. When generating SQL to send to a DBMS, the application needs to construct the SQL statement to suit the particular DBMS. The value of this parameter is automatically set by the Siebel client or server installer, according to database information you specified. The local database or Sample Database, based on SQL Anywhere, use Watcom. Server databases such as IBM DB2 Universal Database, Microsoft SQL Server, or Oracle use the style applicable to the particular DBMS.

Table 17. Data Source Parameters

Name	Comment
`TableOwner`	In a database, tables are identified by both their owner and their name. When queries that reference tables are issued, the tableowner must be included in those references (for example, SIEBEL.S_EVT_ACT, where SIEBEL is the tableowner). For more information on setting this parameter for the local database, see "Mobile Web Client Configuration Parameters" on page 79.
`UpperCaseLogin`	The default is FALSE. If set to TRUE, the user ID, when a user logs in, is converted to uppercase before it is sent to the database for authentication. This value is applicable only if the database is used for authentication; the value of the parameter is ignored when `SecurityAdapter` is set to a non-empty value. Use this parameter if you want to enforce a policy of having all database accounts in uppercase on a case-sensitive database, but you do not want users to worry about case when they type in their user names. *Note:* The value of `UpperCaseLogin` does not affect the password.

Sample Selection from Configuration File

The following is a selection of content from the configuration file uagent.cfg, for Siebel Call Center. On the left are parameter names, and on the right are sample values. Values are initially populated when you install. If you need to change any values, edit them according to how you want your system to function. Note that lines that start with semi-colons are not in effect or are comments only.

```
;; At the top of each section, we have listed if the parameters are

;; being read from the cfg file for Server based Object Manager

;; components

;; If the section below says "Client-only" section, then the parameter

;; values listed here will not be read from this cfg file but from

;; parameters as defined during the configuration for the Siebel Enterprise

;; In effect the parameter values will be read from the gatewaysrvr/shared

;; memory. If you need to change the values for any of these parameters
```

```
;; please use the Server Admin screens  or servermanager line mode to
;; change the values. At the top of each section, it also lists where
;; the parameter values are defined, i.e. are thay component parameters
;; or named subsystem parameters.(This is visible to the complete enterprise.)
;;
;; For Developers, If you need to change values during configuration
;; for Object Manager components, please change the srvrdefs.tdt file
;;
;; For Users, If you need to change the values after configuration
;; for Object Manager components, go to the relevant Server Admin screen
;; and update parameters.
;;
;;
;;
;; The following Siebel Section is a client-only section.
;; It is a part of object manager parameters for the server components
[Siebel]
RepositoryFile           = siebel.srf
ApplicationName          = Siebel Universal Agent
ApplicationTitle         = Siebel Call Center
ApplicationSplashText    = Siebel Call Center
Vertical                 =
ComponentName            = Siebel Call Center Client
ShowMessageBar           = User Enabled
MessageBarUpdateInterval = 120
DataSource               = Local
ClientRootDir            = d:\sea752\client
TempDir                  = d:\sea752\client\temp
Version                  = 100
```

Sample Selection from Configuration File

```
ClientFileServSupport    = TRUE
MultiCurrency            = TRUE
EnableScripting          = TRUE
EnableOLEAutomation      = TRUE
OLEAutomationDLL         = sscfole.dll
EnableCORBA              = FALSE
CORBADLL                 = sscfcorb.dll
JseCorbaConnector        = corbavgn.dll
ReportsODBCDataSource    = Siebel Reports: Access
ServerDbODBCDataSource   =
DockRepositoryName       = Siebel Repository
LocalDbODBCDataSource    = SEAW Local Db d:/sea752/client
DefaultChartFont         = Verdana-10-normal
Language                 = ENU
SrvrUpdateInterval       = 60
SrvrTimeOutInterval      = 600
EnablePersonalization    = TRUE
PersonalizationLog       =
DocumentIntegrator       = Microsoft Office
WebClientSiteDir         = d:\sea752\client\public\enu
AccessDir                = $(AccessRoot)
SearchEngine             = Fulcrum
SearchDefName            = Call Center Definition
SearchInstallDir         =
RemoteSearchServer       = True
RemoteSearchServerPath   = CHANGE_ME/tcpCHANGE_ME
EnableFQDN               = FALSE
FQDN                     = CHANGE_ME
; SecurityAdapter        = LDAP
```

```
; UsernameBCField        =

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

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

[Local]
Docked                   = FALSE
ConnectString           = d:\sea752\client\local\sse_data.dbf  -q -m -x NONE -gp
4096 -c40m -ch60m
TableOwner               = SIEBEL
DLL                      = SSCDW8.DLL
SqlStyle                 = Watcom
MaxCachedCursors         = 16
MaxCachedDataSets        = 16
ReverseFillThreshold     = 100
CaseInsensitive          = FALSE
InsensitivityFactor      = 2
DockTxnsPerCommit        = 500
```

Sample Selection from Configuration File

```
DockConnString           = FALSE

ChartServer              = localhost:8001

ChartImageFormat         = png

AutoStopDB               = FALSE

EnterpriseServer         = CHANGE_ME

RequestServerName        = CHANGE_ME

UseCachedExternalContent = TRUE


[Sample]

Docked                   = FALSE

ConnectString           = d:\sea752\client\sample\UTF8\sse_samp.dbf -q -m -x NONE
-gp 4096 -c40m -ch60m

TableOwner               = SIEBEL

DLL                      = SSCDW8.DLL

SqlStyle                 = Watcom

MaxCachedCursors         = 16

MaxCachedDataSets        = 16

ReverseFillThreshold     = 100

CaseInsensitive          = TRUE

InsensitivityFactor      = 2

FileSystem               = d:\sea752\client\sample\files

ChartServer              = localhost:8001

ChartImageFormat         = png

SymbolicURLSuffix        = _Demo

AutoStopDB               = FALSE


[ServerDataSrc]

Docked                   = TRUE

ConnectString            = $(ConnectString)
```

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

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

Sample Selection from Configuration File

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