

Siebel Brightware™

Installation Guide

Version 8.1.6

ORACLE®

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About This Guide

This document describes how to install and configure Oracle's Siebel Brightware. It is intended for anyone involved in installing, configuring, and administering the software. This includes, but is not limited to: System Administrators, Mail Administrators, Database Administrators, and Siebel Brightware Administrators and Supervisors.

We assume that each administrator has a working knowledge of their area (for example, the DBA knows how to install and administer a database).

Here's overview of this document:

- [Chapter 2, "System Requirements"](#) – Provides detailed information about system hardware and software requirements.
- [Chapter 3, "Database Installation"](#) – Provides instructions for setting up the Siebel Brightware and Datamart databases on SQL Server or Oracle.
- [Chapter 4, "The Siebel Brightware Installer"](#) – Provides instructions for installing the Siebel Brightware Server and other Siebel Brightware system components on Windows and Solaris systems.
- [Chapter 5, "Upgrading Siebel Brightware"](#) – Provides instructions for upgrading pre-8.1.x installations to the latest version of Siebel Brightware.
- [Chapter 6, "Post-Installation Tasks and Reference"](#) – Provides information about post-installation tasks.

Related Documentation

For more information about Siebel Brightware, please see these documents installed into the `\edocs\Brightware\doc` directory:

- *Agent Guide*
- *Contact Center Console Guide*
- *Knowledge Engineer Handbook*
- *Implementation Guide*
- *Integration Development Kit Guide*
- *Analytics Overview Guide*
- *DB Administrator Guide*
- *Report Developer Guide*

Conventions Used in This Manual

The following typographic conventions are used in this guide:

- Menus, buttons, icons, and field names are bold:
 - “Select **Add Response**.”
 - “The **To:** and **CC:** fields are used to redirect messages.”
- Headings, document, and chapter titles are italicized. Italics are also used to introduce a new term:
 - “Refer to the *Contact Center Console Guide* for more information.”
 - “The Message Reader breaks incoming email into its linguistic components, a process called *parsing*.”

- Notes are flagged in the left margin:



This icon flags a note.

- Cautions are flagged in the left margin:

This icon flags a caution.



- Product names, job titles, and Siebel Brightware object names are capitalized:
 - “Siebel Brightware supports SQL Server 2000 and Oracle databases.”
 - “Ask your System Administrator for a list of login IDs.”
 - “Add Agents and Groups from the Contact Center Console.”
- Programming code and system messages appear in a fixed-width font:
“Set-request-condition (<condition>)”
- [Hyperlinks](#) - If viewing a document online, you can navigate through it using hyperlinks, which appear in blue text. Although not displayed in blue, the Table of contents and index entries are also hyperlinks.

If You Need Help

Technical Support is available to customers who have an active maintenance and support contract with Oracle. Technical Support engineers can help you install, configure, and maintain your Oracle application.

This guide contains general troubleshooting guidelines intended to empower you to resolve problems on your own. If you are still unable to identify and correct an issue, contact Technical Support for assistance.

Information to Provide

Before contacting Oracle's Siebel Technical Support, try resolving the problem yourself using the information provided in this guide. If you cannot resolve the issue on your own, be sure to gather the following information and have it handy when you contact technical support. This enables your Oracle support engineer to more quickly assess your problem and get you back up and running more quickly.

Please be prepared to provide Technical Support the following information:

Contact information

- Your name and role in your organization.
- Your company's name
- Your phone number and best times to call you
- Your e-mail address

Product and platform

- In which Oracle product did the problem occur?
- What version of the product do you have?
- What is your operating system version? RDBMS? Other platform information?

Specific details about your problem

- Did your system crash or hang?
- What system activity was taking place when the problem occurred?
- Did the system generate a screen error message? If so, please send us that message. (Type the error text or press the Print Screen button and paste the screen into your email.)
- How did the system respond to the error?
- What steps have you taken to attempt to resolve the problem?
- What other information would we need to have (supporting data files, steps we'd need to take) to replicate the problem or error?

Problem severity

- Clearly communicate the impact of the case (Severity I, II, III, IV) as well as the Priority (Urgent, High, Medium, Low, No Rush).
- Specify whether the problem occurred in a production or test environment.

Contacting Oracle's Siebel Technical Support

You can contact Technical Support online, by email, or by telephone.

Worldwide Support Center

Telephone: 800-214-0400 or 650-341-0700

Oracle's Siebel SupportWeb

<https://ebusiness.siebel.com/supportweb/>

Email Support

mailto: siebelsupport@oracle.com

System Requirements

Siebel Brightware Server

Table 2-1. Siebel Brightware Server Hardware Requirements

Component	Minimum Required	Notes
Memory (RAM)	512 MB free	
Disk Space	275 MB free	
Processor	Pentium III 500	



X Server is required for Solaris installations.

Table 2-2. Siebel Brightware Server Software Requirements

Component	Minimum Required	Notes
Operating System	Windows 2000 Server with Service Pack 4 Windows 2000 Advanced Server with Service Pack 4 Windows 2003 Server Solaris 8, Solaris 9	Windows 2000 Server supports 4GB RAM and 4 processors. Advanced Server is required for Web Clustering. It supports 8GB RAM and 8 processors. Solaris users must apply the operating system patches specified on the Sun Web site for the 1.3.0 Java Runtime Environment (JRE).
Network	10 MBPS (or faster) Ethernet connection	A 100 MBPS Ethernet connection is recommended.
Mail Systems	SMTP/POP3/IMAP	The corporate mail system must be installed prior to Siebel Brightware installation.

Knowledge Manager

Table 2-3. Knowledge Manager Hardware Requirements

Component	Minimum Required	Notes
Memory (RAM)	256 MB free	To edit Knowledge Bases in a disconnected environment, the Knowledge Manager can be installed separately onto another computer (i.e., a laptop).
Disk Space	175 MB free	
Processor	Pentium III 500	



X Server is required for Solaris installations.

Table 2-4. Knowledge Manager Software Requirements

Component	Minimum Required	Notes
Operating System	Windows 2000 Advanced Server with Service Pack 4 Windows XP Professional Windows 2003 Server Solaris 8, Solaris 9	
Network	High-speed network connection to Siebel Brightware Server	In order to update Knowledge Bases modified in a disconnected environment, a connection to a running Siebel Brightware Server is required.

Contact Center Console / Agent Desktop / DB Admin

Table 2-5. Contact Center Software Requirements

Component	Minimum Required	Notes
Web Browser	Microsoft Internet Explorer 5.5 or 6.0 Netscape 6.1, 6.2, or 7.0	
Screen Resolution	1024 x 768 or higher	Resolutions lower than this may impede functionality.

Siebel Brightware Database Server

Table 2-6. Siebel Brightware Database Server Hardware Requirements

Component	Minimum Required	Notes
Memory (RAM)	For a company expecting 3000 requests per day, a minimum of 1 GB RAM is recommended. For a company expecting 5000 requests per day, 1.5 - 2 GB RAM is recommended.	See your database vendor installation recommendations for other hardware and software requirements.

Table 2-7. Siebel Brightware Database Disk Space Requirements (4 Months)

Messages per Day	Disk Space Required	Notes
1000	6 GB	Your longevity may vary depending on the type of messages you receive and other variables specific to your environment.
2000	11 GB	
5000	26 GB	



It is not recommended to keep more than 4 to 6 months worth of data.

Table 2-8. Siebel Brightware Database Server Software Requirements

Component	Minimum Required	Notes
Database	Microsoft SQL 2000 with Service Pack 3 Oracle 8i (8.1.7.4) Oracle 9i (9.2.0.6)	If you are running 9i, make sure you have Oracle Text in your database configuration. To add it, modify the configuration to include JServer and Intermedia. The Siebel Brightware Database Server supports Oracle 8i on Sun Solaris, while it supports Oracle 9i on both Sun Solaris and IBM AIX.



The database server and client software must be installed prior to installing the Siebel Brightware Server. Both Siebel Brightware and Datamart databases can be installed on one server. However, for optimum performance we recommend separate computers.

Datamart Database Server

Table 2-9. Datamart Database Server Hardware Requirements

Component	Minimum Required	Notes
Memory (RAM)	For a company expecting 3000 requests per day, a minimum of 1 GB RAM is recommended. For a company expecting 5000 requests per day, 1.5 - 2 GB RAM is recommended.	See your database vendor installation recommendations for other hardware and software requirements.

Table 2-10. Datamart Database Disk Space Requirements (1 Year)

Messages per Day	Disk Space Requirements	Notes
1000	12 GB	Your longevity may vary depending on the types of messages you receive and other variables specific to your environment.
2000	24 GB	
5000	60 GB	

Table 2-11. Datamart Database Server Software Requirements

Component	Minimum Required	Notes
Database	Microsoft SQL 2000 with Service Pack 3 Oracle 8i (8.1.7.4) Oracle 9i (9.2.0.6)	



The database server and client software must be installed prior to installing the Siebel Brightware Server. Both Siebel Brightware and Datamart databases can be installed on one server. However, for optimum performance we recommend separate computers.



Siebel Brightware Analytics report templates require Crystal Decisions Crystal Enterprise 8.0. Crystal Reports 8.0 does not support Windows 2003, so Analytics Reports cannot be run on Windows 2003 Server.

Database Installation

This chapter provides instructions for installing the Siebel Brightware and Analytics Datamart databases. The Siebel Brightware database stores Siebel Brightware Contact Center configuration information and transactional data; the Datamart database stores transactional data in a form optimized for reporting.

The database installation is typically performed by the Database Administrator (DBA). If you are not a DBA, we recommend working closely with that person during the install.



The database installation and upgrade scripts are only available AFTER you run the Siebel Brightware Installer as described in Chapter 4. However, it is important to know the information in this chapter as you will need to provide information about several database settings during the install process. Review the Pre-Installation Checklists provided in this chapter prior to running the Siebel Brightware Installer as instructed in Chapter 4.

If you are reinstalling an existing installation of Siebel Brightware 8.1, please turn to [“Changing Initial Siebel Brightware Server Component Settings”](#), on page 63 for instructions.

General Information

Administrators please note:

- All Siebel Brightware and Datamart databases must run on the same version of the database software. For example, if the Siebel Brightware production database runs on Oracle 8i, then the Datamart (and any other databases, such as an archive database) must also run on Oracle 8i. Patches or upgrades applied to the production database must also be applied to other databases to keep them in sync.
- Databases should be created with 8-bit ASCII character support.

Creating a database with 7-bit ASCII (US7ASCII) character support may result in e-mail processing failure.

- If you are running Unix you must use an Oracle database.
- The database(s) should be backed up regularly using your platform’s native backup utility and monitored to insure adequate disk and transaction log space. We recommend daily backups of the production database and periodic verification that the backups can be successfully restored.
- The scripts used to create the Siebel Brightware production database are also used to create any development, archive, or baseline databases that you plan to use.
- Databases can share a server or reside on separate computers. We recommend using separate computers for the Siebel Brightware and Datamart databases.

Oracle Notes



The default installation configuration in a UNIX environment is 7 Bit and should be changed to 8 Bit.

When installing the Oracle database software you can select any of the installation options as appropriate or desired for your specific environment. However, none of the options presented need to be selected in order to use the databases. Recommendations are as follows:

- For Siebel Brightware: Set `DB_Block_Size = 4096`
- For Datamart: Set `DB_Block_Size = 16384` (or 32768 on platforms that support it)

Siebel Brightware Database Installation

To create the Siebel Brightware database you will execute two SQL scripts. The first sets the initial database size and sets up user logins, roles, data files, log files, segment space (SQL), and table space (Oracle). The second script creates the database schema (such as the tables, views, indexes, sequences, stored procedures, triggers, and constraints).

Read the comments within each script file for important information about the need to change some paths so that the script executes properly.

SQL Server 2000: Siebel Brightware Database Installation

The installation is straightforward once you've completed several preliminary tasks. Use the checklist below to make sure these are complete before running the scripts.

Pre-Installation Checklist

Before running the installation scripts make sure you have:

- _____ Installed SQL Server software on the database server computer(s).
- _____ Secured access to a database account with system administrator privileges.
- _____ Set a minimum of 500 MB temporary database space (tempdb). For instructions see [“Setting Temporary Database Space in SQL Server”](#), on page 14.
- _____ Determined the amount of disk space required (see [Table 2-7, on page 8](#)). These amounts are enough for four months of mail.

Running the SQL Installation Scripts

To run the scripts:

1. Log in to the administrator's account and go to the **SQL Server Query Analyzer**. Select **Open** from the **File** menu and expand the directory tree to display the Siebel Brightware scripts (located at \Database-Scripts>ContactCenter\SQLServer).
2. Select the script you want to run (see table below). Determine where you want the data and log files installed on your system and create this directory on the server. To override the default setting, edit the script and globally replace “c:\mssql\data” with the directory name you want to use.



The script takes several minutes to complete, depending on the script you're using and the speed of your server.

3. If you're using the database utilities, run the *CCAdmin-SQLServer.sql* script (see table below).
4. Select **Disconnect** from the **File** menu to exit the administrator's account.
5. Then reconnect under the database owner's account; select **Connect** from the **File** menu to login. The default login/password is dbadmin/sanrafael.
6. Select the *install-SQLServer.sql* script and click **Execute**.



If you're installing an archive, development, or baseline database, use a text editor to globally replace "BWTracking" with a new name in both the *Tracking Sql Server* and *install-SQLserver* scripts.

Table 3-1. Siebel Brightware Database Installation Scripts: SQL Server 2000

Database Platform: SQL Server 2000	Notes
Scripts are located at: \Database-Scripts\ContactCenter\SQLServer	
<p>Step 1: Select one of the following scripts (based on your estimated number of requests per day) and run it from the system administrator's account.</p> <p>If you expect to receive approximately:</p> <ul style="list-style-type: none"> 1000 requests/day, use <i>Tracking-Sql-Server-small.sql</i> 2000 requests/day, use <i>Tracking-Sql-Server-medium.sql</i> 5000 requests/day, use <i>Tracking-Sql-Server-large.sql</i> 	<p>The <i>Tracking SQL Server</i> scripts create:</p> <ul style="list-style-type: none"> - the physical database - Siebel Brightware (Contact Center) logins - Siebel Brightware (Contact Center) users - file groups
<p>Step 2 (Optional): If you intend to use the Siebel Brightware database utilities, from the system administrator's account also run the script: <i>CCAdmin-SQLServer.sql</i>.</p>	<p>The <i>CCAdmin-SQLServer.sql</i> script adds udsadmin as a database user.</p>
<p>Step 3: From the newly created database owner's account, run the script: <i>install-SQLServer.sql</i>.</p> <p>The Siebel Brightware database owner's default login/password is: <i>dbadmin/sanrafael</i>.</p>	<p>The <i>install-SQLServer.sql</i> script creates the database tables, views, triggers, stored procedures, constraints, and indexes.</p>

Setting Temporary Database Space in SQL Server

To set temporary database space in SQL (tempdb):

1. From the SQL Enterprise Manager, expand the directory index and select **Tempdb**.
2. Select **Properties** from the menu by clicking the right mouse button.
3. Select the **Data Files** tab.
4. Check (click) the **Automatically grow file** checkbox.
5. Select **In megabytes** from the File Properties pane.
6. Enter **500** and click **OK**.

This completes the SQL-Server 2000 Siebel Brightware Database installation.

Oracle: Siebel Brightware Database Installation

The installation is straightforward once you've completed several preliminary tasks. Use the checklist below to make sure these are complete before running the scripts.

Pre-Installation Checklist

Before running the installation scripts make sure you have:

- _____ Installed the Oracle server and Oracle SQL*Plus software on the database computer and that an Oracle instance with an open database is running.

When creating the database, select UTF8 for the Character Set and National Character Set.

- _____ Secured access to a database account with system administrator privileges.
- _____ Selected an *oratabspace* script (large, medium, or small) that meets your needs (see tables below).
- _____ Determined where you want the data and log files installed on your system and created this directory on the database server. To override the default setting edit the *oratabspace* script, globally replacing “c:\oradata” with the directory name you want to use.
- _____ Determined the amount of disk space required (see [Table 2-7, on page 8](#)). These amounts are enough for four months of mail.
- _____ When creating the Oracle database, set the Compatible Parameter to 8.1.0.
- _____ Verified that one table space defined as TEMPORARY exists. To do this, run the following query:

```
select tablespace_name, contents
from user_tablespaces
where contents = 'TEMPORARY' and status != 'INVALID';
```

If you have created TEMPORARY during the instance creation using the default setting, check the size, initial, and next parameters. They should be at least 500MB, 10MB, and 10MB, respectively. If they do not meet the minimum size, delete the table space and recreate it using the following script.

If no rows are returned create a temporary table space by running the following script:

```
create tablespace TEMP
datafile C:\oradata\TEMP_file1.dat' size 500M
default storage
(initial 10M next 10M minextents 1 maxextents unlimited pctincrease 0)
online temporary;
```

Running the Oracle Installation Scripts

To run the scripts:

1. Log into the system administrator account.
2. Run the *oratabspace* script you selected (see table below) from the SQL*Plus prompt.
3. If you're using the database utilities, run the *CCAdmin-Oracle.sql* script (see table below).
4. Logoff and login from the database owner's account. The default login/password is dbadmin/sanrafael.

5. Run the `install-oracle.sql` script for your platform, either `install-oracle8i.sql` or `install-oracle9i.sql`.
6. The system will generate errors as it attempts to delete objects that don't yet exist; these can be disregarded.

This completes the Siebel Brightware Database installation.

Table 3-2. Siebel Brightware Database Installation Scripts: Oracle 8i

Database Platform: Oracle 8i	Purpose
Scripts are located at: \Database-Scripts\ContactCenter\Oracle8i	
<p>Step 1: Select one of the following scripts (based on your estimated number of requests per day). Run this script from the system administrator's account.</p> <p>If you expect to receive approximately: 1000 requests/day, use <code>oratablespace-small.sql</code> 2000 requests/day, use <code>oratablespace-medium.sql</code> 5000 requests/day, use <code>oratablespace-large.sql</code></p>	<p>The <code>oratablespace</code> scripts create:</p> <ul style="list-style-type: none"> - the physical database - table spaces - log files - Brightware (Contact Center) logins
<p>Step 2 (Optional): If you intend to use the Brightware database utilities, from the system administrator's account, also run the script: <code>CCAdmin-Oracle.sql</code>.</p>	<p>The <code>CCAdmin-Oracle.sql</code> script adds <code>udsadmin</code> as a database user.</p>
<p>Step 3: From the newly created database owner's account, run: <code>install-oracle8i.sql</code>.</p> <p>The Brightware database owner's default login/password is: <code>dbadmin/sanrafael</code>.</p>	<p>The <code>install-oracle8i.sql</code> script creates the database tables, views, triggers, stored procedures, constraints, and indexes.</p>



Do not use the script `oratablespace-dev.sql`. This script creates a very small database and should be for testing only, not for production.

Table 3-3. Siebel Brightware Database Installation Scripts: Oracle 9i

Database Platform: Oracle 9i	Purpose
Scripts are located at: \Database-Scripts\ContactCenter\Oracle9i	
<p>Step 1: Select one of the following scripts (based on your estimated number of requests per day). Run this script from the system administrator's account.</p> <p>If you expect to receive approximately:</p> <ul style="list-style-type: none"> 1000 requests/day, use <i>orablespace-small.sql</i> 2000 requests/day, use <i>orablespace-medium.sql</i> 5000 requests/day, use <i>orablespace-large.sql</i> 	<p>The <i>orablespace</i> scripts create:</p> <ul style="list-style-type: none"> - the physical database - table spaces - log files - Siebel Brightware (Contact Center) logins
<p>Step 2 (Optional): If you intend to use the Siebel Brightware database utilities, from the system administrator's account, also run the script: <i>CCAdmin-Oracle.sql</i>.</p>	<p>The <i>CCAdmin-Oracle.sql</i> script adds udsadmin as a database user.</p>
<p>Step 3: From the newly created database owner's account, run: <i>install-oracle9i.sql</i>.</p> <p>The Siebel Brightware database owner's default login/password is: <i>dbadmin/sanrafael</i>.</p>	<p>The <i>install-oracle9i.sql</i> script creates the database tables, views, triggers, stored procedures, constraints, and indexes.</p>



Do not use the script *orablespace-dev.sql*. This script creates a very small database and should be for testing only, not for production.

Datamart Database Installation

The procedure for creating the Datamart database is similar to the one used to create the Siebel Brightware database.

SQL Server 2000: Datamart Database Installation

The installation is straightforward once you've completed several preliminary tasks. Use the checklist below to make sure these are complete before running the scripts.

Pre-Installation Checklist

Before running the installation scripts make sure you have:

- ___ Installed SQL Server software on the database server computer(s).
- ___ Secured access to a database account with system administrator privileges.
- ___ Determined where you want the data and log files installed on your system and created this directory on the server. To override the default setting edit the *create_datamart_database_SQLServer* script (see table below), and globally replace “d:\mssql\data\datamart” with the directory name you want to use.
- ___ Set a minimum of 500 MB temporary database space (tempdb). For instructions see [“Setting Temporary Database Space in SQL Server”](#), on page 14.
- ___ Determined the amount of disk space required (see [Table 2-10](#), on page 9). These amounts are enough for one year of mail.

Running the SQL Installation Scripts

To run the scripts:

1. Log in to the administrator's account and go to the **SQL Server Query Analyzer**. Select **Open** from the **File** menu and expand the directory tree to display the Datamart scripts (located at \Database\Scripts\Datamart\MSSQLServer).
2. Select the *create_datamart_database_SQLServer.sql* script and click **Execute**.



The script takes several minutes to complete, depending on the script you're using and the speed of your server.

3. Select **Disconnect** from the **File** menu to exit the administrator's account.
4. Then reconnect under the database owner's account; select **Connect** from the **File** menu to login. The default login/password is dbadmin/sanrafael.
5. Select the *install_datamart_schema_SQLServer.sql* script (see table below) and click **Execute**.
6. Set the temporary database space on the SQL Server instance. See [“Setting Temporary Database Space in SQL Server”](#), on page 14.

This completes the SQL Server 2000 Datamart database installation procedure.

For SQL	
Memory	Minimum SQL Server Memory: Set to [½ of the total available RAM]*
Memory	Maximum Memory = Set to [All available RAM – 50 MB]* (i.e. leave 50 MB free)
Memory	Reserve Physical Memory for SQL: set to ON*
Processor	Processors for parallel execution: set to Use all available processors
Processor	Boost SQL Server Priority on Windows: set to ON
Connections	Default connection options>ANSI nulls: set to ON
Connections	Allow other SQL Servers to connect remotely...: set to OFF
Connections	Default connection options>ANSI nulls defined on: set to ON
Server Settings	Allow Triggers to be Fired: set to ON
Database Settings	Default Index Fill Factor: set to Default
Database Settings	Recovery Interval: 0
Options (Database Property Options)	Set Auto Create Statistics: set to ON (check)
Options (Database Property Options)	Set Auto Update Statistics: set to ON (check)

*Assuming no other applications are housed on this machine (i.e. the database server is dedicated to the SQL Server database).

Table 3-4. Datamart Installation Scripts: SQL Server 2000

Database Platform: SQL Server 2000	Notes
<p>Step 1: From the system administrator's account run the script: <i>create_datamart_database_SQLServer.sql</i>.</p> <p>Scripts are located at \Database-Scripts\Datamart\MSSQLServer.</p>	<p>Creates:</p> <ul style="list-style-type: none"> - the physical database - Datamart logins - Datamart users - file groups
<p>Step 2: From the newly created database owner's account, run the script: <i>install_datamart_schema_SQLServer.sql</i>.</p> <p>The default Datamart database owner's account login/password is: <i>dbadmin/sanrafael</i>.</p> <p>The default Datamart database user's account login/password is: <i>dmuser/sanrafael</i>.</p>	<p>Creates the database tables, views, triggers, stored procedures, constraints, and indexes.</p>

Oracle: Datamart Database Installation

The installation is straightforward once you've completed several preliminary tasks. Use the checklist below to make sure these are complete before running the scripts.

Pre-Installation Checklist

Before running the installation scripts make sure you have:

- _____ Installed the Oracle server and Oracle SQL*Plus software on the database computer and that an Oracle instance with an open database is running.

When creating the database, select UTF8 for the Character Set and National Character Set.

- _____ Secured access to a database account with system administrator privileges.
- _____ Determined where you want the data and log files installed on your system and created this directory on the database server. To override the default setting edit the *oratabspace* script, globally replacing “d:\oradata\datamart” with the directory path you want to use.
- _____ Determined the amount of disk space required (see [Table 2-10, on page 9](#)).
- _____ Verified that one table space defined as TEMPORARY exists. To do this run the following query:

```
select tablespace_name, contents
from user_tablespaces
where contents = 'TEMPORARY' and status != 'INVALID';
```

If you have created TEMPORARY during the instance creation using the default setting, check the size, initial, and next parameters. They should be at least 500MB, 10MB, and 10MB, respectively. If they do not meet the minimum size, delete the table space and recreate it using the following script.

If no rows are returned create a temporary table space by running the following script:

```
create tablespace TEMP
datafile C:\oradata\TEMP_file1.dat' size 500M
default storage
(initial 10M next 10M minextents 1 maxextents unlimited pctincrease 0)
online temporary;
```


Running the Installation Scripts

To run the Oracle installation scripts:

1. Log into the system administrator account.
2. Run the *create_datamart_database_Oracle.sql* script (see table below).
3. Logoff and login from the database owner's account. The default login/password is dbadmin/sanrafael.
4. Run the *install_datamart_schema_Oracle.sql* script.
5. The system will generate errors as it attempts to delete objects that don't yet exist; these can be disregarded.

This completes the Oracle Datamart database installation procedure.

Table 3-5. Datamart Installation Scripts: Oracle

Database Platform: Oracle 8i and 9i	Notes
<p>Step 1: From the system administrator's account run the script: <i>create_datamart_database_Oracle.sql</i></p> <p>Scripts are located at \Database-Scripts\Datamart\Oracle.</p>	<p>Creates:</p> <ul style="list-style-type: none"> - the physical database - Datamart logins - Datamart users - file groups
<p>Step 2: From the newly created database owner's account, run the script: <i>install_datamart_schema_Oracle.sql</i>.</p> <p>The default Datamart database owner's account login/password is: <i>dbadmin/sanrafael</i>.</p> <p>The default Datamart database user's account login/password is: <i>dmuser/sanrafael</i>.</p>	<p>Creates database tables, views, triggers, stored procedures, constraints, and indexes.</p>



Do not use the script *create_datamart_database_Oracle_verysmall.sql*. This script creates a very small database and should be for testing only, not for production.

The Siebel Brightware Installer

This chapter contains instructions for running the Siebel Brightware Installer, which installs the Siebel Brightware Server and other Siebel Brightware components. These tasks are typically completed by the System Administrator. If you are not a System Administrator we recommend working closely with that person during the install.

Before You Install

For a smooth installation, make sure the following tasks are complete before starting the installation:

- _____ Determine whether your existing corporate inbox can serve as the gateway for email routing, or whether you need to set up another inbox exclusively for this purpose.
- _____ Set the computer you'll be installing on to display all hidden files, and close any open applications.

When you receive the Siebel Brightware software from edocs, it will contain the following Siebel Brightware installers: “install.bin” (for UNIX) and “install.exe” (for Windows). After you run these installers as described later in this chapter, you will get the following:

- The Database-Scripts directory contains the scripts used to create the Siebel Brightware Contact Center and Datamart databases (described in Chapter 3), including upgrade scripts for customers upgrading from earlier versions (described in Chapter 5).
- The Docs folder contains all Siebel Brightware user documentation in Adobe Acrobat (PDF) format. The Acrobat Reader installation program is included. Once installed, documentation can be displayed by clicking the **Help** button on any Siebel Brightware application.

Before you start the Siebel Brightware Server, you will need to install and configure the Siebel Brightware database. If you're using Analytics, install and configure the Datamart database, (see [“Database Installation”](#), on page 11 for more information).

Analytics Installation Notes

We recommend that you install the Datamart database, Analytics Engine, Crystal Reports software, and the Crystal Report templates on a separate computer, along with database and Web server software.

You will need to set up a website for the reports on the report server (i.e. a virtual directory in IIS) so people can access them. To save time, determine the URL for the Reporting computer before installing the Siebel Brightware Server (as the installer will prompt you for it).

Siebel Brightware Installation

Before running the install script, review the checklist below to confirm that all preliminary tasks are complete. To avoid interruptions during the install, have the required variables at hand; a complete list appears below. When you're ready, turn to [“Installing Siebel Brightware Components”, on page 30](#) to begin the installation.



If you're installing on Solaris, please review the section [“Notes for Solaris Users”, on page 27](#) before running the installer.



If you're upgrading from a pre-8.1.x version of Siebel Brightware please see [Chapter 5, “Upgrading Siebel Brightware”, on page 37](#).

Before You Begin

For a successful installation, you should have the following information. If helpful, use the space provided to record your settings and to serve as future reference. We recommend using the installer-provided defaults, unless you have a specific reason for doing otherwise.

Target Directories

Determine the directory where you want the Siebel Brightware Server software installed.

- On Windows:

Target folder _____

- Default: C:\edocs\Brightware.

- On Solaris:

Target directory _____

- Default: /usr/local/edocs/Brightware/.

LDAP (Lightweight Directory Access Protocol) Server Settings

Siebel Brightware uses LDAP to handle address book information. If you don't know what your LDAP server and organization names are see your Mail Administrator.

- LDAP Server name _____

Siebel Brightware Server Listening Ports

Determine which ports the server will listen on for HTTP requests.

- Port Number _____

- Default: 7001

- Secure Port Number _____

- Default: 7002

Number of Active Agents

Consult your official License Agreement to determine the number of agents to be configured during the installation.

Localization Information

Determine the language you want to use on the Siebel Brightware desktops, and to process incoming requests. The default is English.

Report Server URL

- Report Server URL _____

Database Information

SQL Installations

- Siebel Brightware database:
 - Server name _____
 - Default: name of the computer the installer is running on.
 - Database name _____
 - Default: BWTracking80
 - Port number _____
 - Default: 1433
- Datamart database:
 - Server name _____
 - Default: name of the computer installer is running on.
 - Database name _____
 - Default: BWDatamart80
 - Port number _____
 - Default: 1433

Oracle Installations

- Siebel Brightware database:
 - Server name _____
 - Default: name of the computer installer is running on.
 - Database name _____
 - Default: BWTracking80
 - Port number _____

- Default: 1521
- Datamart database:
 - Server name_____
 - Default: name of the computer installer is running on.
 - Database name_____
 - Default: BWDatamart80
 - Port number_____
 - Default: 1521

Knowledge Manager

If you are installing only the Knowledge Manager on a computer, you will need to provide the installer with the following information:

- Siebel Brightware Server name_____
- Port number_____
- Default: 7001

Split Deployment

If you intend to install the Siebel Brightware desktops on a separate computer you will need to provide the name and port number of that server during the installation.

- Web Desktop Server name_____
- Port number_____
- Default: 7001

Web Clustering

If you intend to use Web Clusters, you will need at least three available systems and provide the name of the Management Server, names of the Clustered Servers (there will be at least two), and a valid Multicast Address.

- Management Server Hostname_____
- Clustered Server Hostnames_____
- Multicast Address_____
- Default: 237.0.0.1

Notes for Solaris Users

If you're installing on a Solaris computer, please note:

- You must use an Oracle database (with the UTF8 as the Character Set and National Character Set). Refer to “[System Requirements](#)”, on page 5 for more information.
- If you haven't done so already, you will need to apply the operating system patches required by the 1.3.1 Java Runtime Environment (JRE) before installing the Siebel Brightware Server. You'll find the Patches at: <http://java.sun.com/j2se/1.3/jre/download-solaris.html>.
- You must log in as root, or su to root, before running the installer.
- The default installation directory on Unix computers is `/usr/local/edocs/Brightware/`.
- Run the `setown.sh` as root (after modifying it if necessary). See the next step for details.
- Run the `setanalytics.sh` on the server where Analytics components are installed (after modifying the script if necessary). See the next step for details.
- After the scripts are run successfully, you can start the Siebel Brightware Server by logging in as the `eservice` user. You can start the server in console mode by running the `startserver.sh` from the root of the installation directory or as a daemon by running `/etc/init.d/eserviced start`.

Siebel Brightware: The `setown.sh` Script

The Siebel Brightware installer places a script in `/usr/local/edocs/Brightware/` called “`setown.sh`”. The `setown.sh` script:

- Can be configured to create a new user named `eservice` for you; alternately you can create the user yourself; and/or elect to use a different user name. (These options are described in the Unix installation procedures below.)
- Changes the owner of all Siebel Brightware files (including the daemon files) to `eservice` and sets permission to `rwxrwx---` (770).
- Creates symbolic links in the run level 3 (`/etc/rc3.d/`) and run level 0 (`/etc/rc0.d/`) directories to control startup and shut down of the `eservice` daemon. If you prefer you can edit the script to create the start-up link in run level 5. The links are:


```
ln -s /etc/init.d/eserviced S99fp
```

 where: S indicates Start and 99 launches the `eservice` daemon after the primary infrastructure daemons have been launched.


```
ln -s /etc/init.d/eserviced K01fp
```

 where: K indicates Kill and 01 shuts down the `eservice` daemon before the primary infrastructure daemons have been shut down.
- Adds the daemon control file `/etc/init.d/eserviced` to your system.
- Creates the directory `/var/edocs/Brightware/` for the daemon's startup and shut down log files.

For more information on using and configuring daemons please refer to your operating system documentation.



Note that the user created by the `setown.sh` script has no password. To complete the installation use your site's preferred utility to assign a password to the `eservice` account.

Analytics: The `setanalytics.sh` Script

The Analytics installer places a script in `/usr/local/edocs/Brightware/` called “`setanalytics.sh`”. The `setanalytics.sh` script:

- Can be configured to create a new user named `eservice` for you; alternately you can create the user yourself; and/or elect to use a different user name. (These options are described in the Unix installation procedures below.) `setanalytics.sh` sets these for you. If you change them there, you must also change them in the following files in the `analytics/bin` directory:

- `et12002_0.sh`
- `purge2002_0.sh`
- `compact2002_0.sh`
- `service.sh`
- `taskscheduler.sh`



Make sure you use the same user name for Analytics as you used for Siebel Brightware.

- Changes the owner of all Siebel Brightware files (including the daemon files) to `eservice` and sets permission to `rw-rw-r-- (770)`.
- Creates symbolic links in the run level 3 (`/etc/rc3.d/`) and run level 0 (`/etc/rc0.d/`) directories to control startup and shut down of the `etlscheduler` daemon. If you prefer, you can edit the script to create the start-up link in run level 5. The links are:

```
ln -s /etc/init.d/etlscheduler S99taskscheduler
```

where: **S** indicates Start and **99** launches the Siebel Brightware daemon after the primary infrastructure daemons have been launched.

```
ln -s /etc/init.d/etlscheduler K01taskscheduler
```

where: **K** indicates Kill and **01** shuts down the Siebel Brightware daemon before the primary infrastructure daemons have been shut down.

- Adds the daemon control file `/etc/init.d/taskscheduler` to your system.
- Creates the directory `/var/edocs/Brightware/` for the daemon's startup and shut down log files.

For more information on using and configuring daemons please refer to your operating system documentation.

Web Clustering

Web Clustering allows two or more clustered Siebel Brightware Servers to serve Web Channel requests. In a clustered Web Channel configuration, there is one Management Siebel Brightware Server and one or more Clustered Siebel Brightware Server instances. The Management Server does not participate in the Web Channel cluster but it may host other channels such as email and chat.

The clustered servers are configured during the installation process. To use Web Channel clustering, select the “Clustered” option when asked about Clustered Deployment during installation. The installer prompts for the Management Server name and Clustered Server hostnames. Also, a unique Multicast Address is required for the cluster; a default address is provided. If the default multicast address is used by other applications in your LAN, select an address not in use. Then continue with the installation.

The product will need to be installed on each of the clustered servers, as well as the Management Server, using the same Clustered Deployment parameters (host names and multicast address).



The installation on clustered servers is required to be identical.

After installation, start the Siebel Brightware Server on the Management Server using the **startserver** command (or the Siebel Brightware Server NT Service or UNIX daemon). After the Management Server is running, start the clustered servers using the **startcluster** command (or the clustered Siebel Brightware Server NT Service or UNIX daemon).

When all the servers are up, the state of the cluster can be monitored from the WebLogic Console. For information about administering the cluster, please refer to the WebLogic documentation.

Additional information for configuring WebLogic for Web Clustering can be found at the BEA WebLogic web site:

<http://www.bea.com/index.shtml>

and at the BEA WebLogic Workshop:

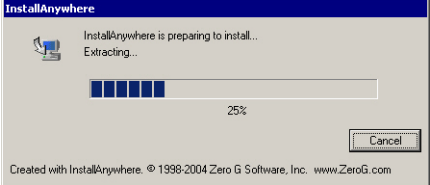
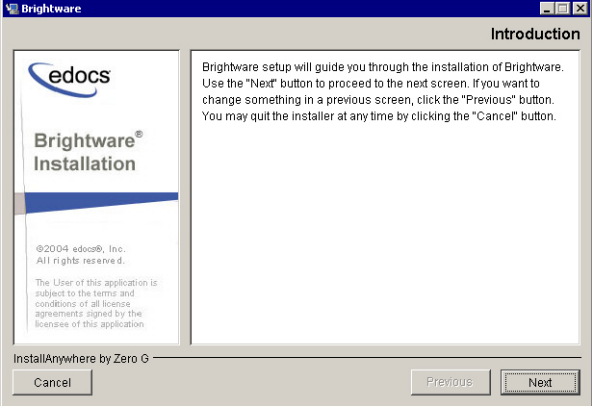
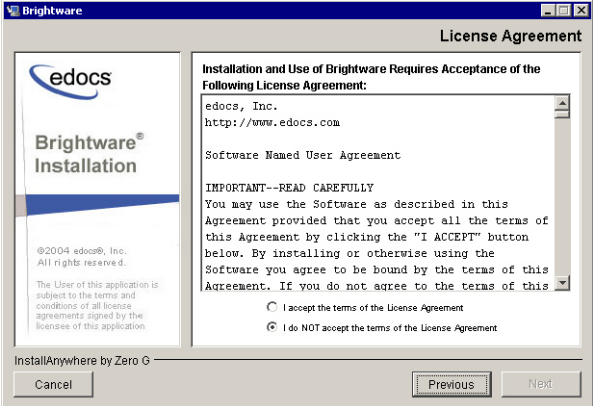
<http://e-docs.bea.com/workshop/docs70/help/guide/deployment/conClusteringWorkshopWebServices.html>.

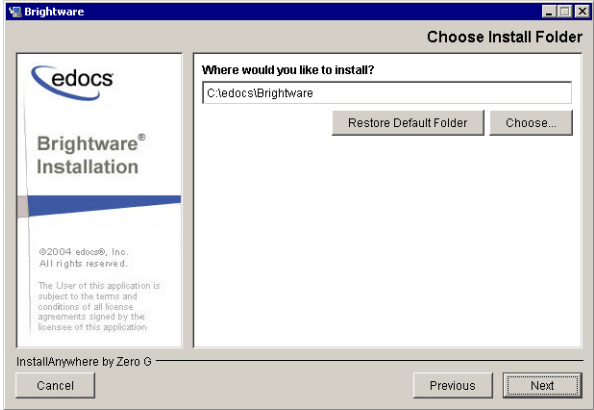
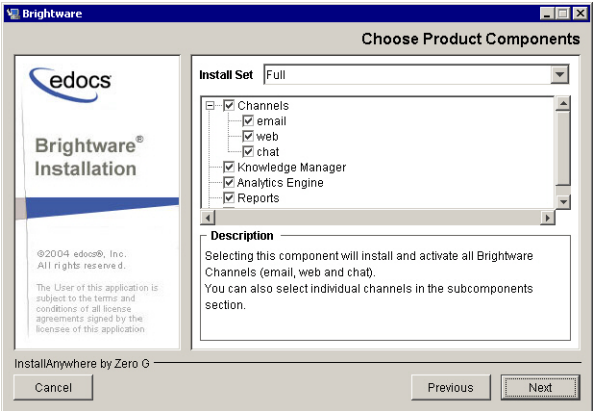
For information on system administration visit:

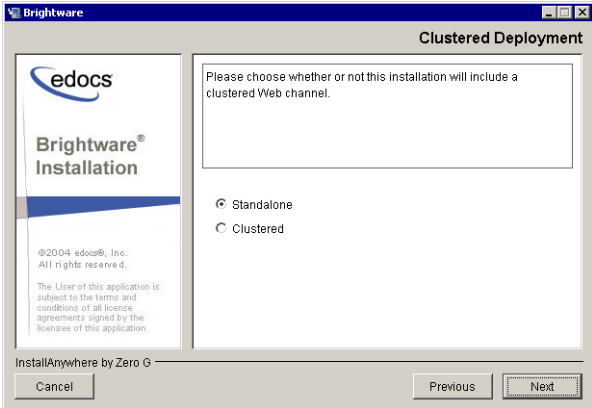
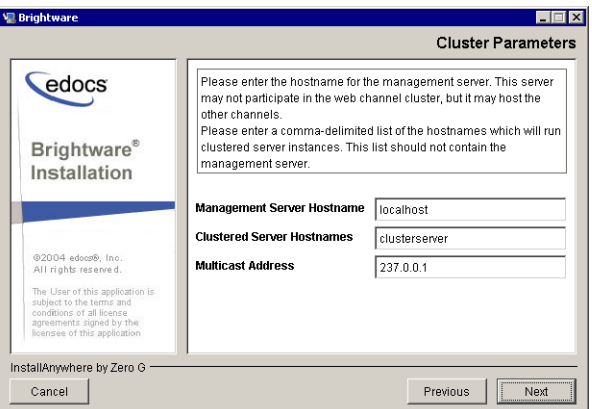

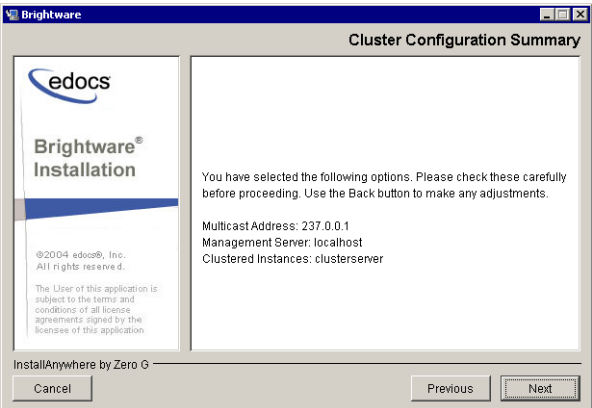

<http://e-docs.bea.com/wls/docs70/admin.html>.

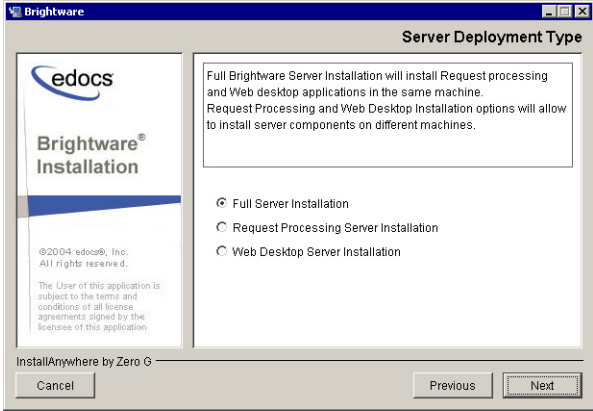
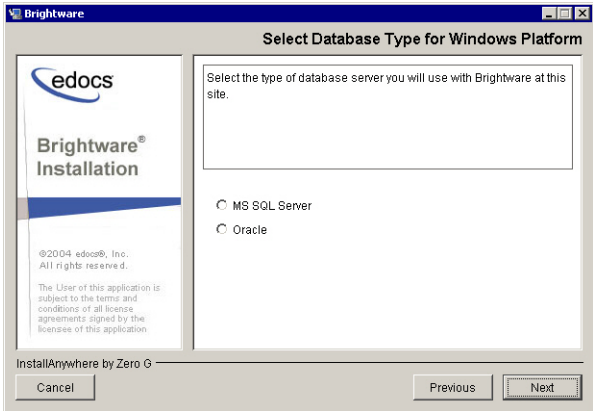

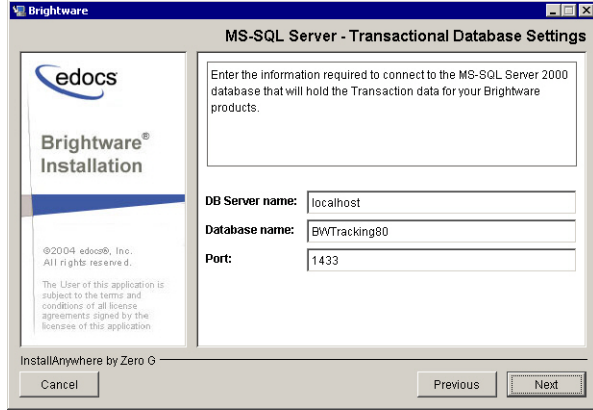
Installing Siebel Brightware Components

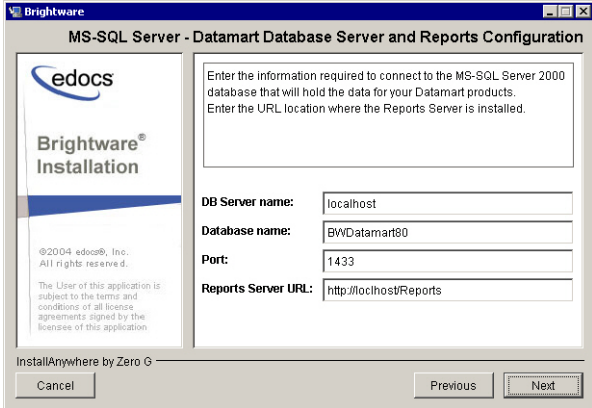
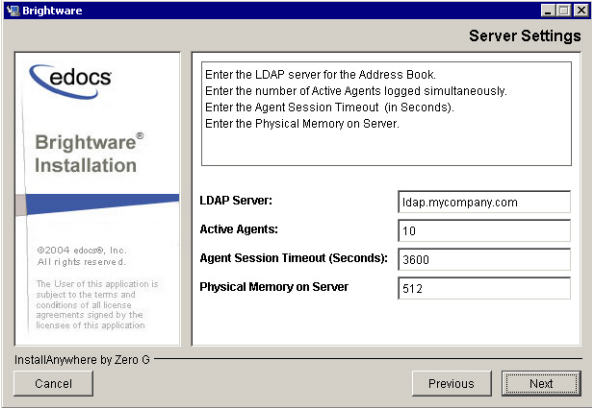
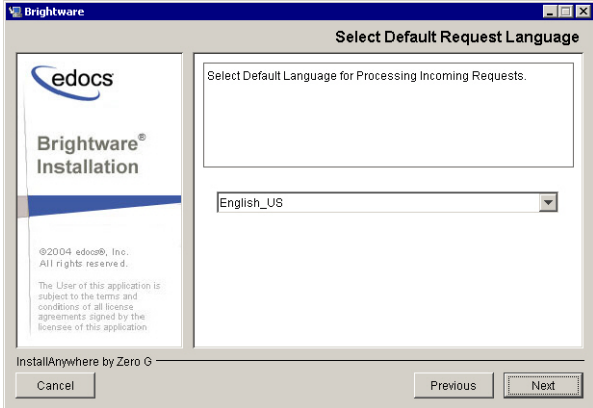
The following procedure is used for installing on both Windows and Solaris computers. Click **Next** in the install script to display the next screen, click **Previous** to go back one screen.

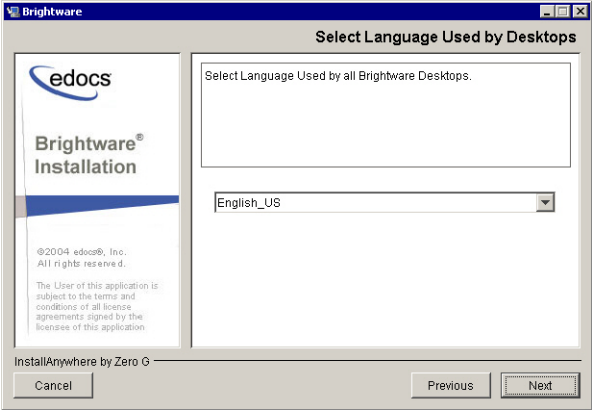
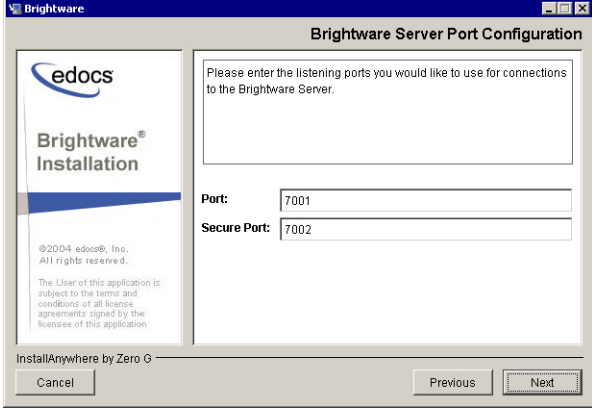
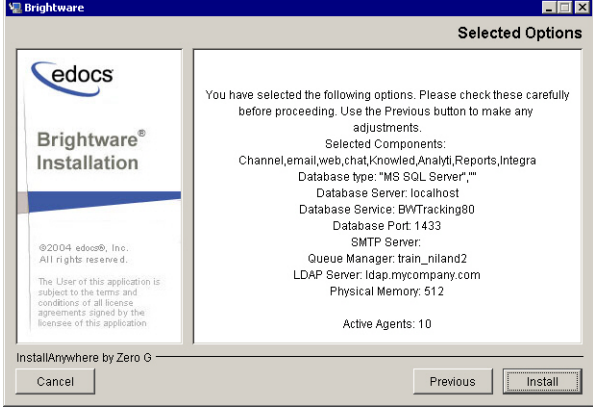
Step	Description	Dialog Box / Notes
1.	<p>Click the installation executable (install.exe or install.bin) for your platform.</p> <p>The program will take some time to open.</p>	 <p>The screenshot shows a dialog box titled 'InstallAnywhere'. The main text reads 'InstallAnywhere is preparing to install...' and 'Extracting...'. Below this is a progress bar with five blue segments, and the percentage '25%' is displayed. A 'Cancel' button is located at the bottom right. At the very bottom, it says 'Created with InstallAnywhere. © 1998-2004 Zero G Software, Inc. www.ZeroG.com'.</p>
2.	<p>On the Introduction screen, click Next.</p>	 <p>The screenshot shows the 'Introduction' screen of the Brightware installer. On the left is the edocs logo and 'Brightware® Installation'. The main text area says: 'Brightware setup will guide you through the installation of Brightware. Use the "Next" button to proceed to the next screen. If you want to change something in a previous screen, click the "Previous" button. You may quit the installer at any time by clicking the "Cancel" button.' At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons.</p>
3.	<p>On the License Agreement screen, click the I accept the terms of the License Agreement option, then click Next.</p>	 <p>The screenshot shows the 'License Agreement' screen. It features the edocs logo and 'Brightware® Installation' on the left. The main text area contains the following information: 'Installation and Use of Brightware Requires Acceptance of the Following License Agreement:', 'edocs, Inc.', 'http://www.edocs.com', 'Software Named User Agreement', and 'IMPORTANT--READ CAREFULLY'. It then states: 'You may use the Software as described in this Agreement provided that you accept all the terms of this Agreement by clicking the "I ACCEPT" button below. By installing or otherwise using the Software you agree to be bound by the terms of this Agreement. If you do not agree to the terms of this Agreement...' At the bottom, there are two radio buttons: 'I accept the terms of the License Agreement' (which is selected) and 'I do NOT accept the terms of the License Agreement'. 'Cancel', 'Previous', and 'Next' buttons are also present.</p>

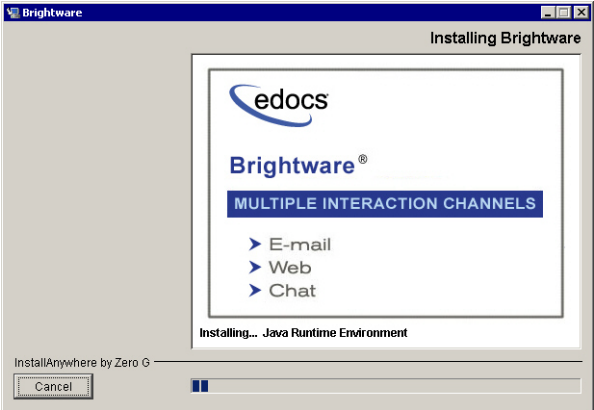
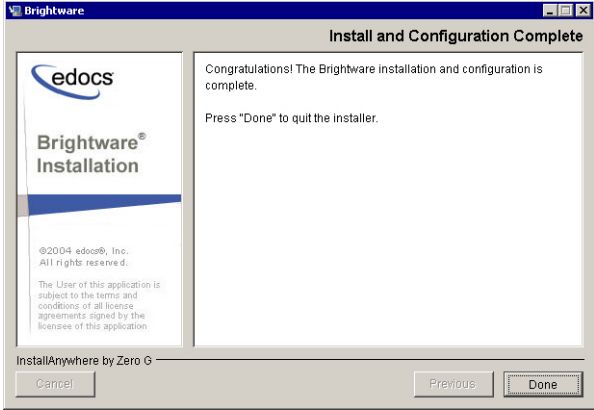
<p>4.</p>	<p>On the Choose Install Folder screen,</p> <ul style="list-style-type: none"> ■ Accept the default. ■ Type the name and path of the directory where you want to install. ■ Click the Choose button to browse to a specific folder. <p>When you have determined the install path, click Next.</p>	 <p>If a previous version of the software is detected, the Previous Siebel Brightware Installation Found screen appears. Select "Reconfigure already installed product" (appends or modifies the current installation)," Reinstall eServicePerformer/Brightware" (uninstalls the current installation and initiates a reinstallation of the software), or click Cancel to exit the installation.</p>
<p>5.</p>	<p>On the Choose Product Components screen select the components to install. Use the scroll bar to view all the options.</p> <p>Select an option from the Feature Set drop-down list for a preset component selection set or select components individually.</p> <p>Click a component to view the description in the Description text box.</p> <ul style="list-style-type: none"> ■ Install the Channels to install the Siebel Brightware functions (email, web, or chat). ■ Install the Knowledge Manager to use Siebel Brightware's advanced Natural Language Processing features. The Knowledge Manager can be installed on a separate computer. ■ Install the Analytics Engine and Reports components to use Siebel Brightware reports. ■ Install the Integration Kit if you intend to perform software integration. <p>Click the Next button.</p>	

<p>6a.</p>	<p>On the Clustered Deployment screen, select whether this install will include a Clustered web channel or function as a Standalone.</p> <p>Click the Next button.</p>	
<p>6b.</p>	<p>If you selected Clustered, you need to supply the Management Server Hostname, any Clustered Server Hostnames, and the Multicast Address on the Cluster Parameters screen. A default Multicast Address is supplied.</p> <p>Click the Next button.</p>	 <p> The Management Server cannot participate in the Web Channel cluster.</p>
<p>6c.</p>	<p>If you selected Clustered and supplied the Web Cluster information, a confirmation screen is presented.</p> <p>On the Cluster Configuration Summary screen, the Web Cluster options you selected are displayed.</p> <p>Click the Previous button to return to the previous screen to make adjustments, or click Next if the settings are appropriate.</p>	 <p> When installing on the Clustered Servers, the installation settings must be exactly the same for each server.</p>

<p>7.</p>	<p>If you've selected the Email or Web channels install components, you will be offered the option, on the Server Deployment Type screen, of performing a full or split deployment (placing all the components on one server, or putting the Request Processing and Desktop components on separate computers to improve performance).</p> <ul style="list-style-type: none"> ■ Full Server Installation (places all components on this computer). ■ Request Processing Server Installation (places Natural Language Processing and routing intelligence on this computer). ■ Web Desktop Server Installation (places software required for hosting the Desktop applications on this computer). <p>Click the Next button.</p>	
<p>8.</p>	<p>On the Select Database Type screen, indicate your database server type.</p> <p>If you select Oracle, the install will prompt you to select the version (8i or 9i).</p> <p>Click the Next button.</p>	 <p> The SQL Server option is not available in the Solaris installer.</p>
<p>9.</p>	<p>On the Transactional Database Settings screen, type your Siebel Brightware database information.</p>	

<p>10.</p>	<p>On the Datamart Database Server and Reports Configuration screen, type your Datamart database information and the URL for the Reports Server.</p>	 <p>The screenshot shows a dialog box titled "MS-SQL Server - Datamart Database Server and Reports Configuration". On the left is the "Brightware Installation" logo and copyright information. The main area contains instructions: "Enter the information required to connect to the MS-SQL Server 2000 database that will hold the data for your Datamart products. Enter the URL location where the Reports Server is installed." Below this are four input fields: "DB Server name:" with "localhost", "Database name:" with "BWDatamart80", "Port:" with "1433", and "Reports Server URL:" with "http://localhost/Reports". At the bottom are "Cancel", "Previous", and "Next" buttons.</p>
<p>11.</p>	<p>On the Server Settings screen, type the Siebel Brightware Server parameters for your LDAP server, the number of agents you estimate will be active at one time, and the desired agent session timeout (default: 3600 seconds, or 1 hour) and the amount of physical memory (RAM) on the Server.</p>	 <p>The screenshot shows a dialog box titled "Server Settings". On the left is the "Brightware Installation" logo and copyright information. The main area contains instructions: "Enter the LDAP server for the Address Book. Enter the number of Active Agents logged simultaneously. Enter the Agent Session Timeout (in Seconds). Enter the Physical Memory on Server." Below this are four input fields: "LDAP Server:" with "ldap.mycompany.com", "Active Agents:" with "10", "Agent Session Timeout (Seconds):" with "3600", and "Physical Memory on Server" with "512". At the bottom are "Cancel", "Previous", and "Next" buttons.</p>
<p>12.</p>	<p>On the Select Default Request Language screen, indicate the default language you want to use for processing incoming requests. The default is English_US.</p>	 <p>The screenshot shows a dialog box titled "Select Default Request Language". On the left is the "Brightware Installation" logo and copyright information. The main area contains the instruction: "Select Default Language for Processing Incoming Requests." Below this is a dropdown menu with "English_US" selected. At the bottom are "Cancel", "Previous", and "Next" buttons.</p>

<p>13.</p>	<p>On the Select Language Used By Desktops screen, indicate the language you want to use for the Siebel Brightware desktops. The default is English_US.</p>	
<p>14.</p>	<p>Enter the port numbers you want the server to listen on for HTTP requests on the Siebel Brightware Server Port Configuration screen.</p>	
<p>15.</p>	<p>Verify your installation settings on the Selected Options screen. Click Previous to make changes or click Install to complete the installation.</p>	

<p>16.</p>	<p>The installer copies the program files to your computer. This may take a few minutes.</p>	
<p>17.</p>	<p>Click Done to exit the installer.</p>	

Upgrading Siebel Brightware

Upgrade Paths

This chapter describes how to upgrade to the current version of Siebel Brightware.

If upgrading from pre-8.x Siebel Brightware, go to the [“Upgrading from a pre-8.x Siebel Brightware Installation”](#), on page 37.

If upgrading from an 8.x.x Siebel Brightware installation, go to the [“Upgrading from an 8.1.x Siebel Brightware Installation”](#), on page 55.

Upgrading from a pre-8.x Siebel Brightware Installation

1. Verify you have the equipment and software required to run Siebel Brightware (see [Chapter 2, “System Requirements”](#), on page 5).
2. Prepare to shut down the Siebel Brightware Server:
 - Use the Contact Center Console to stop all the inbound message channels (email, chat and web).
 - Close out as many messages as possible.
 - Log out all users from the Siebel Brightware product.
3. Shut down the Siebel Brightware Server.
4. Make a backup of the entire hard disk on which Siebel Brightware is installed.
5. Uninstall the existing Siebel Brightware product. Windows users can run Uninstall eServicePerformer.exe located at C:\Program Files\Firepond\UninstallerData\. Solaris users can run Uninstall_eserviceperformer located at /usr/local/firepond/uninstallerdata. This will not remove your databases. Refer to [“Uninstalling Siebel Brightware Components”](#), on page 39.
6. Delete the Siebel Brightware root directory. The specific directory name for your installation will depend on version and original installation choices.
7. Place the Siebel Brightware CD in the CD drive on the server.
8. Open the installer for your operating system. Refer to [Chapter 4](#) of this Installation Guide for installation-specific instructions.
9. Restore your modified Siebel Brightware files from the backup. These files might include:
 - Analytics reports that have been modified or created (..\Firepond\analytics\Reports\).
 - Normalization and Morphology files that were modified (..\Firepond\lib\common\dictonaries\).
 - Language-detector.xml if it was modified (..\Firepond\lib\common\dictonaries\).
 - All Knowledge Base (KB) files that you have saved as files.

- The variable-pool.xml file if it was modified (..\Firepond\). Check your variable-pool.xml file for the following lines:

```
<var name="LDAP_AUTHENTICATION"></var>
<var name="LDAP_PRINCIPAL"></var>
<var name="LDAP_CREDENTIALS"></var>
```

You must add these lines if they do not exist. Add them immediately after the line:

```
<var name="LDAP_BASEDN" />
```

Check the variable-pool.xml file for one of these lines:

```
<var name="DB_VERSION">"Oracle 9i", ""</var>           for Oracle 9i users
<var name="DB_VERSION">"Oracle 8i", ""</var>         for Oracle 8i users
<var name="DB_VERSION"></var>                         for SQL Server users
```

You must add the appropriate line, based on the database management system you are using, if it does not exist. Add it immediately after the line:

```
<var name="DB_TYPE">          </var>
```

- The custom user dictionary file userdic.tlx (..\Firepond\lib\common\dictionaries\spell-lexicons\).
10. Restore modifications within XML files such as custom logging settings and memory sizes (..\Firepond\fpconfig). Do not overwrite files in the \fpconfig\ directory with backed up files from your previous version. Doing so could cause serious errors. You may carefully modify the new files. Please contact Oracle Technical Support for advice and specific instructions for modifying XML files.
 11. Run the configure.cmd file, located in the \Firepond\ folder, if you change any of the XML files within the \fpconfig\ directory or if you modify the variable-pool.xml file.
 12. Complete the database upgrade tasks: “[Upgrading An Existing Siebel Brightware Database](#)”, on page 40. Depending on the type of database you are running, refer to: “[SQL Server Upgrades](#)”, on page 41 for SQL, or “[Oracle Database Upgrades](#)”, on page 46 for Oracle.
 13. If upgrading from a pre-6.0 version of Siebel Brightware (a version that does not support Business Unit processing), complete the post-installation configuration tasks outlined in [Chapter 6, “Basic Siebel Brightware Configuration”](#).
 14. If upgrading from Siebel Brightware 6.0 or 6.01, for each Siebel Brightware Business Unit you will need to:
 - Configure Business Unit Inbound and Outbound Channel settings.
 - Associate a Knowledge Base with the Business Unit.
 - Create Business Unit Routing rules, as appropriate.
 - Create Queue Assignment Rules, as appropriate.

For assistance with these and other Business Unit configuration tasks, refer to the *Contact Center Console Guide* (Admin: Channel, Admin: Business Units, Admin: Routing Rules, and Supervise: Assignment Rules Views).

15. Start the Siebel Brightware Server or Service and verify the system is working properly.



Note: (Oracle 8i users only) If you are running Analytics and want to view the Original Message Info or Reply Message Info reports, you must have the Oracle 9.2.0.6 ODBC driver installed. Install the Oracle 9i Client Tools to get this driver.

Uninstalling Siebel Brightware Components

Depending on the version, the uninstaller may indicate either eServicePerformer or Siebel Brightware. In addition to the instructions below, you may need to manually remove the \Firepond directory. However, be aware that the \Firepond directory contains customized files for your system, such as knowledge bases, that should be backed up.

Windows

To uninstall Siebel Brightware from Windows:

1. Use the **Add/Remove Programs** option. From the **Start** menu, select **Settings**, click **Control Panel**, and then click **Add/Remove Programs**.
2. Select **Firepond eServicePerformer/Brightware** from the list of programs and click **Change/Remove** to uninstall.

Solaris

To uninstall Siebel Brightware from Solaris:

1. Log in as (or su to) root.
2. Go to the /usr/local/bin/firepond/ directory (or to the directory where Siebel Brightware is installed), then to the /UninstallerData directory.
3. Run the shell script:

```
Uninstall_eServicePerformer
```

or

```
Uninstall_Brightware
```
4. To complete the uninstall, remove the following daemon files: /etc/init.d/eserviced, /etc/init.d/rc.bw, /etc/rc0.d/K01bw, and /etc/rc3.d/S99bw.

Upgrading An Existing Siebel Brightware Database

No single script upgrades an earlier version of the Siebel Brightware database to the most recent version. To complete the transition you must run a series of scripts.

The “[Database Upgrade Chart - SQL Server](#)”, on page 41 and the “[Database Upgrade Chart - Oracle](#)”, on page 46 describe the upgrade process for all versions. The scripts can be found in the Database-Scripts directory after you install the Siebel Brightware components as described in Chapter 4. All Siebel Brightware databases must run on the same version of the database software. Patches or upgrades applied to the production database must also be applied to any other databases in use to keep them in sync.

A database backup should be restored to a development environment and the upgrade scripts run against a successfully restored backup. Running the scripts will ensure that any upgrade errors may be detected and resolved prior to upgrading the production database.

Approximate Timeframes

A database containing one million requests or less averages around eight hours to upgrade, depending on database server specifications.

To identify the number of requests contained within the Transactional database, run the query:

```
SELECT COUNT(*) as TotalMsgs
FROM   Msg, Attachment
WHERE  Msg.MsgID = Attachment.MsgID
AND    Attachment.AttachmentTypeCode = 23004
AND    MsgData IS NOT NULL ;
```

If the Transactional Database contains records exceeding one million and/or server specifications are below minimum requirements, the upgrade process will take considerably longer.



The Datamart database contains a duplication of the data contained in the Transactional database, therefore, retaining this information in the Transactional Database may be considered redundant. If the database exceeds 1 million records, Oracle suggests that the Transaction Database be purged to retain a more manageable number of records. Keeping the number of records in the Transactional Database to a minimum will not only ensure optimal system performance, but will minimize the time required for upgrading - thus ensuring minimum system down-time.

IN SITUATIONS WHERE THE TRANSACTIONAL DATABASE CANNOT BE PURGED, THE UPGRADE TIMEFRAME WILL BE INCREASED, POSSIBLY RESULTING IN ADDITIONAL CONSULTING FEES.

Note for 5.01 Customers

For customers upgrading from Version 5.01, we have introduced a reporting database called the Datamart (BWDatamart). The Datamart database is used only for running reports. When the Datamart database is installed the database is empty. Therefore, the database must be populated with data to enable reports to be viewed.

The ETL (Extract Transform Load) process - used to populate data from the Transaction Database into the Datamart Database - averages around 1500 records per hour, depending on server performance. Populating the Datamart database with six (6) months of historical data may take up to a week to complete (based upon a daily average of 1500 emails). Therefore, please carefully

consider the amount of historical data needed and plan for the time required for transferring this data to the Datamart database.

SQL Server Upgrades

Table 5-1. Database Upgrade Chart - SQL Server

Version of Siebel Brightware to be upgraded	Script or Procedure to upgrade Siebel Brightware
From 3.0, 3.5, or 3.6	b39-b40-SQLServer7.sql
From 4.0, 5.0, or 5.1	b40-5.0-SQLServer7.sql
From 6.0 or 6.1	Follow the procedure: “Executing the SQL Scripts” , on page 41.
From 2002 (7.0)	Follow the procedure: “Executing the SQL Scripts” , on page 41.
From 2002 (7.1)	Follow the procedure: “Executing the SQL Scripts” , on page 41.

Executing the SQL Scripts

The following steps should be followed to upgrade a 5.01 or 6.01 database to version 8:

1. Ensure all Users are logged out of the Agent and Supervisor Desktops.
2. Stop and shut-down the Siebel Brightware Server Standalone, Task (ETL) Scheduler and Answer services.
3. Make a backup of the existing Transactional (BWTracking) and Reporting (BWDatamart) database in the SQL Server 7/2000 environment (should be preformed by the DBA).
4. Restore the database(s) to the SQL Server 2000 environment (see prerequisites).



If you are restoring to a different SQL Server (a separate or new server) you will need to recreate the database login accounts.

5. Set the database transaction log to grow automatically.
 - Right-click the database and select **Properties**.
 - Click the **Transaction Log** tab.
 - Make sure the **Automatically grow file** property is checked in the File Properties section (see suggested settings below). Once this has been completed, you will be ready to begin running scripts on the database.
6. **For Version 5.01 Customers Only**
 Upgrade the Transactional database from the version 5.01 schema to the version 6.01 schema. To do this, upgrade scripts need to be run against the Transactional (BWTracking) database to continue the upgrade process. Run the following scripts in the order (and by the user) specified:
 - b41-SQL7-database-1.sql – Run as “sa”
 - b41-SQL7-database-2-[size].sql – Run as “sa”

- b41-SQL7-database-3.sql – Run as “sa”
- b41-SQL7-schema-1.sql – Run as “dbadmin” (password = “sanrafael”)
- b41-SQL7-schema-2.sql – Run as “dbadmin”
- b41-SQL7-schema-3.sql – Run as “dbadmin”
- b41-SQL7-schema-4.sql – Run as “dbadmin”
- b41-SQL7-schema-5.sql – Run as “dbadmin”
- b43-SQL7-database-1.sql – Run as “sa”
- b43-SQL7-schema-1.sql – Run as “dbadmin”
- b43-SQL7-schema-2.sql – Run as “dbadmin”

7. **For Version 6.01 Customers**

Upgrade the Transactional database from the version 6.01 schema to the version 7.1 schema. Assuming that the database schema is currently in Version 6.01 format, proceed with the following scripts to convert the schema to the Version 7.1 format.

- b47-SQLServer-database.sql – Run as “sa”
 - b47-SQLServer-initial.sql – Run as “dbadmin” (password = “sanrafael”)
 - b47-SQLServer-schema-1.sql – Run as “dbadmin”
 - b47-SQLServer-schema-2.sql – Run as “dbadmin”
 - b47-SQLServer-schema-3.sql – Run as “dbadmin”
 - b47-SQLServer-schema-4.sql – Run as “dbadmin”
 - b47-SQLServer-schema-5.sql – Run as “dbadmin”
- If you encounter this error, you may disregard:
Server: Msg 3703, Level 11, State 7, Line 1
Cannot drop the index 'Msg.XIE4Msg', because it does not exist in the system catalog.
- b47-SQLServer-schema-6.sql – Run as “dbadmin”
 - b47-SQLServer-schema-7.sql – Run as “dbadmin”
 - b47-SQLServer-schema-8.sql – Run as “dbadmin”
 - b47-SQLServer-schema-9.sql – Run as “dbadmin”
 - b47-SQLServer-schema-10.sql – Run as “dbadmin”
 - b58-SQLServer-schema-11.sql – Run as “dbadmin”

8. **For Version 7.1 Customers**

The database schema is now in version 7.1 format. Proceed with the following scripts to convert the schema to the Version 8.x format.

- b81-SQLServer-schema-1.sql – Run as “dbadmin”
- b81-SQLServer-schema-2.sql – Run as “dbadmin”
- b81-SQLServer-schema-3.sql – Run as “dbadmin”
- b81-SQLServer-schema-4.sql – Run as “dbadmin”
- b81-SQLServer-schema-5.sql – Run as “dbadmin”
- b81-SQLServer-schema-6.sql – Run as “dbadmin”
- b813-SQLServer-schema.sql – Run as “dbadmin”
- b815-SQLServer-schema.sql – Run as “dbadmin”
- b816-SQLServer-schema.sql – Run as “dbadmin”

9. Uninstall the old 5.01 or 6.01 software (Answer Agent, Siebel Brightware Server, etc.).

10. Install the 8.x software on the Siebel Brightware Server.

Note: You may choose to install the 8.x software temporarily on the Database Server in order to process the upgradeDB utilities faster. You may then uninstall the software after this process has been completed but be sure to configure the software to point to the upgraded transactional database when installing.

11. **IMPORTANT**

This step must be completed after the SQL upgrade scripts have completed successfully and before the Siebel Brightware Server has been started.

Run the upgradeDB_6to7.cmd batch file to upgrade the message body class from Version 6 to Version 7. Launch the process located in the (root) Siebel Brightware installation directory, from a DOS window or command prompt (not by clicking on the file).

Access the batch file as follows:

- Navigate to the Siebel Brightware Directory

```
C:\>program files\edocs\Brightware
```

- Launch the procedure.

Note: The character set is the only required parameter.

Upon successful completion, you should see similar confirmation text in the display window:

```
C:\Program Files\edocs\Brightware>upgradeDB_6to7 iso-8859-1
.
.
.
Transferred 257000 so far .....
Transferred 258000 so far .....
Transferred total of 258018
Upgrade Completed for Closed messages ...
```

12. **IMPORTANT**

This step must be completed after the upgradeDB_6to7.cmd process has completed successfully and before the Siebel Brightware Server has been started.

Run the upgradeDB.cmd batch file to upgrade the message body class from Version 7 to Version 8. Launch the process from the same (root) Siebel Brightware installation directory as in the previous step, from a DOS window or command prompt.

Access the batch file as follows:

- Navigate to the Siebel Brightware Directory

```
C:\>cd program files\edocs\Brightware
```

- Launch the procedure.

Upon successful completion, you should see similar confirmation text in the display window:

```
C:\Program Files\edocs\Brightware>upgradeDB
Connecting to DBs
Fragment Update Completed
Msg Update Completed
```

13. Upgrade the Datamart Database: Run the following scripts against the Datamart (BWDatamart) Database in order to upgrade it to Version 8 schema. The scripts must be executed in the order specified, starting with the script that matches your situation.
 - `upgrade_datamart_schema_FromVer2toVer3_SQLServer.sql` – Run as “dbadmin”
 - `upgrade_datamart_schema_FromVer3_SQLServer.sql` – Run as “dbadmin”
 - `upgrade_datamart_schema_FromVer40_SQLServer.sql` – Run as “dbadmin”
 - `upgrade_datamart_schema_FromVer71to80_SQLServer.sql` – Run as “dbadmin”
14. If you are installing on a Windows platform, Oracle recommends that the Siebel Brightware Server be set to run as a service.
 - Access the Services dialog (From the **Control Panel** select **Administrative Tools** and then click **Services**).
 - Set the Siebel Brightware Server Standalone service to start automatically.
 - Start the Siebel Brightware Server Standalone service (applies to non-clustered environments only).
15. Next, but before starting the Siebel Brightware Server, make a backup of all email in the production mailbox. This is a preventative step and should be conducted for failover.

Upgrading the SQL Server Analytics Datamart Database

No single script upgrades Analytics 2.0 to Analytics 8.x. To upgrade, you must run a series of scripts until you are updated to the current version. All scripts can be found in the `\Database-Scripts\Datamart\MSSQLServer\upgrade` directory.



All Siebel Brightware databases must run on the same version of the database software.

Determine the version of Analytics you are currently running, and follow the directions until you are upgraded to the current version.

To upgrade Analytics version 2.0 or 2.01 to version 3.0

Run the upgrade script:

```
upgrade_datamart_schema_FromVer2toVer3_SQLServer.sql
```

To upgrade Analytics version 3.0 to version 4.0

Run the upgrade script:

```
upgrade_datamart_schema_FromVer3_SQLServer.sql
```

To upgrade Analytics version 4.0 to version 7.1

Run the upgrade script:

```
upgrade_datamart_schema_FromVer40_SQLServer.sql
```

To upgrade Analytics version 7.1 to version 8.1.x

Run the upgrade script:

```
upgrade_datamart_schema_FromVer41_SQLServer.sql
```


To upgrade Analytics version 8.1.3 to 8.1.3+

Run the upgrade script:

```
upgrade_datamart_schema_FromVer813_SQLServer.sql
```

Oracle Database Upgrades

Table 5-2. Database Upgrade Chart - Oracle

Version of Siebel Brightware to be upgraded	Script or Procedure to upgrade Siebel Brightware
From 3.0, 3.5, or 3.6	b39-b40-Oracle8.sql
From 4.0, 5.0, or 5.1	b40-5.0-Oracle.sql
From 6.0 or 6.1	Follow procedure for 6.0 to 7.1 “To Upgrade Oracle Database from Version 6.0 or 7.0 to 8.x” , on page 48.
From 2002 (7.0)	Follow procedure for 7.0 to 7.1 “To Upgrade Oracle Database from Version 6.0 or 7.0 to 8.x” , on page 48.
From 2002 (7.1)	Follow procedure for 7.1 to 8.x “Oracle8i/Oracle9i Upgrade Procedure: 2002 (7.1) to 8.x” , on page 53

To Upgrade Oracle Databases from Version 5.0 to 6.0

Run all scripts from SQL*Plus. Run the b41-Oracle8i-tablespace script from the system administrator account and the b41-Oracle8i-schema scripts from the database owner’s account. Depending on the amount of data being processed, the database upgrade process may take several minutes to several hours for very large installations.

- You must run the schema scripts from the dbadmin account. Failure to do so may result in database-related problems that are difficult to diagnose and solve.

Important Notes

- If the current ownership of the schema is *brightware/brightware*, you will continue to use that username and password for Siebel Brightware. If your current ownership of the schema is *dbadmin/sanfrael*, you will continue to use that username and password for Siebel Brightware.
- Review the short instruction section at the beginning of each script file before running it.
- Execute each script in the proper sequence. Each script must execute successfully before the next one in the series is run. If you encounter errors while running a script take corrective action as necessary before proceeding to the next script.
- The Upgrade-oratablespace script grants the ALTER TABLE privilege to the brightware account, but you may wish to set this manually as well from the system administrator account. If this does not occur you’ll receive an error during the upgrade.
- Do not stop or kill a session while a script is running.

Before You Begin

- Determine which Upgrade-oratablespace script (small, medium, or large) is appropriate, based on the number of email requests you receive each day. Use the chart in [“Siebel Brightware Database Server”](#), on page 8.
- Verify that the C:\ORADATA directory exists to hold script log and data files. The scripts create all required table spaces and data files and assume that the C:\ORADATA directory is available. You can overwrite this default option by globally replacing “C:\ORADATA” with a different directory name in each script. If you’re running the scripts remotely, make sure that the C:\ORADATA directory exists on both the remote and local computers. Log and temporary work files are created on the local computer, data files are created on the remote computer.
- Verify that the original database has been upgraded to Oracle 8i.
- Verify that the initialization parameter “compatible” is set to Oracle 8i.
- Verify that adequate Rollback segment and Temporary segment space has been allocated to protect your data.
- Verify that no users are connected to the database, and that you are connected to the database you want to upgrade.

Oracle Upgrade Procedure: 5.0 to 6.0

1. Shut down all Siebel Brightware components.
2. Backup the existing database.
3. From the system administrator’s account run the appropriate Upgrade-oratablespace script, select one:
 - b41-Oracle8i-tablespace-small.sql
 - b41-Oracle8i-tablespace-medium.sql
 - b41-Oracle8i-tablespace-large.sql
4. From the database owner’s account run the following scripts in sequence:
 - b41-Oracle8i-schema-1.sql
 - b41-Oracle8i-schema-2.sql
 - b41-Oracle8i-schema-3.sql
 - b41-Oracle8i-schema-4.sql
 - b41-Oracle8i-schema-5.sql
 - b41-Oracle8i-schema-6.sql
 - b41-Oracle8i-schema-7.sql
5. Backup the upgraded database.

This completes the Oracle database upgrade from version 5.0 to 6.0.

To Upgrade Oracle Database from Version 6.0 or 7.0 to 8.x

If you've been using a pre-6.0 version of Siebel Brightware, be sure to complete the steps described in the [“Database Upgrade Chart - Oracle”](#), on page 46 before running the 2002 scripts.

Run all scripts from SQL*Plus. Run the b47-Oracle8i-database.sql script from the system administrator account and the Oracle8i-schema scripts from the database owner's account.

Depending on the amount of data being processed, the database upgrade process may take several minutes to several hours for very large installations.

Important Notes

- If the current ownership of the schema is *brightware/brightware*, you will continue to use that username and password for Siebel Brightware. If your current ownership of the schema is *dbadmin/sanfrael*, you will continue to use that username and password for Siebel Brightware.
- Review the short instruction section at the beginning of each script file before running it.
- Execute each script in the proper sequence. Each script must execute successfully before the next one in the series is run. If you encounter errors while running a script, take corrective action as necessary before proceeding to the next script.
- If you are running Oracle 8i, make sure you have Oracle Text in your database configuration. To add it, modify the configuration to include JServer and Intermedia.
- Do not stop or kill a session while a script is running.
- If upgrading from version 2002 (7.0) to version 7.1, only run the b58-Oracle8i-schema-11.sql script.
- There are different procedures to follow depending on if you intend to migrate to Oracle9i:
 - If you do not intend to upgrade Oracle8i refer to [“Oracle8i Upgrade Procedure: 6.0 to 2002 \(7.1\)”](#), on page 49 or [“Oracle8i Upgrade Procedure: 2002 \(7.0\) to 2002 \(7.1\)”](#), on page 50.
 - If you intend to upgrade Oracle8i to Oracle9i refer to [“Oracle8i to Oracle9i Upgrade Procedure: 6.0 to 2002 \(7.1\)”](#), on page 51 or [“Oracle8i to Oracle9i Upgrade Procedure: 2002 \(7.0\) to 2002 \(7.1\)”](#), on page 52.

Before You Begin

- Verify that the C:\ORADATA directory exists to hold script log and data files. The scripts create all required table spaces and data files and assume that the C:\ORADATA directory is available. You can overwrite this default option by globally replacing “C:\ORADATA” with a different directory name in each script. If you're running the scripts remotely make sure that the C:\ORADATA directory exists on both the remote and local computers. Log and temporary work files are created on the local computer, data files are created on the remote computer.
- Verify that adequate Rollback segment and Temporary segment space has been allocated to protect your data.
- Verify that no users are connected to the database, and that you are connected to the database you want to upgrade.

Oracle8i Upgrade Procedure: 6.0 to 2002 (7.1)

1. Shut down all Siebel Brightware components.
2. Backup the existing database.
3. From the system administrator's account run the script:
`b47-Oracle8i-database.sql`
4. From the database owner's account run the following scripts in sequence:
`b47-Oracle8i-initial.sql`
`b47-Oracle8i-schema-1.sql`
`b47-Oracle8i-schema-2.sql`
`b47-Oracle8i-schema-3.sql`
`b47-Oracle8i-schema-4.sql`
`b47-Oracle8i-schema-5.sql`
`b47-Oracle8i-schema-6.sql`
`b47-Oracle8i-schema-7.sql`
`b47-Oracle8i-schema-8.sql`
`b47-Oracle8i-schema-9.sql`
`b47-Oracle8i-schema-10.sql`
`b58-Oracle8i-schema-11.sql`
5. Back up the upgraded database.
6. To complete the upgrade, run the following script to upgrade the message body class. Run the script from the Siebel Brightware installation directory.
`UpgradeDB.sh <character set> [username password]`
The script takes three parameters: character set, username, and password.
 - <character set> is the character set encoding used on your Siebel Brightware 6.01 Answer Agent server. For example "iso-8859-1" is a character set used for Western languages.
 - Username and password are those of your Siebel Brightware database.

This completes the Oracle database upgrade from version 6.0 to 2002 (7.1).

Oracle8i Upgrade Procedure: 2002 (7.0) to 2002 (7.1)

1. Shut down all Siebel Brightware components.
2. Backup the existing database.
3. From the system administrator's account run the following script:
`b47-Oracle8i-database.sql`
4. From the database owner's account run the following script:
`b58-Oracle8i-schema-11.sql`
5. Backup the upgraded database.
6. To complete the upgrade, run the following script to upgrade the message body class. Run the script from the Siebel Brightware installation directory.

```
UpgradeDB.sh <character set> [username password]
```

The script takes three parameters: character set, username, and password.

- <character set> is the character set encoding used on your Siebel Brightware 6.01 Answer Agent server. For example "iso-8859-1" is a character set used for Western languages.
- Username and password are those of your Siebel Brightware database.

This completes the Oracle database upgrade from version 2002 (7.0) to 2002 (7.1).

Oracle8i to Oracle9i Upgrade Procedure: 6.0 to 2002 (7.1)

If you intend to migrate from Oracle 8i to Oracle 9i during the Siebel Brightware database upgrade, you must complete the upgrade and migration tasks in the following order:

- Run the scripts to complete the 6.0 to 2002 (7.1) upgrade procedure for 8i.
- Migrate to Oracle 9i following the instructions provided by Oracle.
- Run the Siebel Brightware 9i upgrade script.
- Then run the final script to upgrade the message body class.

Upgrade Procedure

1. Shut down all Siebel Brightware components.
2. Backup the existing database.
3. From the system administrator's account run the script:


```
b47-Oracle8i-database.sql
```
4. From the database owner's account run the following scripts in sequence:


```
b47-Oracle8i-initial.sql
b47-Oracle8i-schema-1.sql
b47-Oracle8i-schema-2.sql
b47-Oracle8i-schema-3.sql
b47-Oracle8i-schema-4.sql
b47-Oracle8i-schema-5.sql
b47-Oracle8i-schema-6.sql
b47-Oracle8i-schema-7.sql
b47-Oracle8i-schema-8.sql
b47-Oracle8i-schema-9.sql
b47-Oracle8i-schema-10.sql
b58-Oracle8i-schema-11.sql
```
5. Backup the upgraded database.
6. After completing the Oracle 8i update procedure, upgrade the Oracle software to 9i.
7. Once Oracle is updated to 9i, run the script:


```
b60-Oracle9i-schema.sql
```
8. To complete the upgrade, run the following script to upgrade the message body class. Run the script from the Siebel Brightware installation directory.


```
UpgradeDB.sh <character set> [username password]
```

The script takes three parameters: character set, username, and password.

 - <character set> is the character set encoding used on your Siebel Brightware 6.01 Answer Agent server. For example "iso-8859-1" is a character set used for Western languages.
 - Username and password are those of your Siebel Brightware database.

This completes the Oracle 8i to 9i database upgrade from version 6.0 to 2002 (7.1).

Oracle8i to Oracle9i Upgrade Procedure: 2002 (7.0) to 2002 (7.1)

If you intend to migrate from Oracle 8i to Oracle 9i during the Siebel Brightware database upgrade, you must complete the upgrade and migration tasks in the following order:

- Run the scripts to complete the 2002 (7.0) to 2002 (7.1) upgrade procedure for 8i.
- Migrate to Oracle 9i following the instructions provided by Oracle.
- Run the Siebel Brightware 9i upgrade script.
- Then run the final script to upgrade the message body class.

Upgrade Procedure

1. Shut down all Siebel Brightware components.
2. Backup the existing database.
3. From the system administrator's account run the following script:
`b47-Oracle8i-database.sql`
4. From the database owner's account run the following script:
`b58-Oracle8i-schema-11.sql`
5. Backup the upgraded database.
6. After completing the Oracle 8i update procedure, upgrade the Oracle software to 9i.
7. Once Oracle is updated to 9i, run the script:
`b60-Oracle9i-schema.sql`
8. To complete the upgrade, run the following script to upgrade the message body class. Run the script from the Siebel Brightware installation directory.

```
UpgradeDB.sh <character set> [username password]
```

The script takes three parameters: character set, username, and password.

- <character set> is the character set encoding used on your Siebel Brightware 7.0 Answer Agent server. For example "iso-8859-1" is a character set used for Western languages.
- Username and password are those of your Siebel Brightware database.

This completes the Oracle 8i to 9i database upgrade from version 2002 (7.0) to 2002 (7.1).

Oracle8i/Oracle9i Upgrade Procedure: 2002 (7.1) to 8.x

These scripts can be used to upgrade both Oracle8i and Oracle9i databases.

1. Shut down all Siebel Brightware components.
2. Backup the existing database.
3. From the dbadmin account run one of the following scripts:
 - b81-Oracle8i-schema-1.sql
 - b81-Oracle8i-schema-2.sql
 - b81-Oracle8i-schema-3.sql
 - b81-Oracle8i-schema-4.sql
 - b81-Oracle8i-schema-5.sql
 - b81-Oracle8i-schema-6.sql
 - b81-Oracle8i-schema-7.sql
 - b81-Oracle8i-schema-8.sql
 - b81-Oracle8i-schema-9.sql
 - b81-Oracle8i-schema-10.sql
 - b812-Oracle-schema.sql
 - b813-Oracle-schema.sql
 - b815-Oracle-schema.sql
 - b816-Oracle-schema.sql
4. Backup the upgraded database.
5. Install the 8.x software.
6. Run the following script to upgrade the message body class. Run the script from the Siebel Brightware installation directory, in a command window (not by clicking on it).

```
UpgradeDB.cmd [username password]
```

The script takes three parameters: username, and password.

- Username and password are those of your Siebel Brightware database.

It is important for the Database Administrator to monitor the rollback segment during this procedure. If the rollback segments overflow, the UpgradeDB script will cause an exception. The command file portion will need to be re-run.

This completes the Oracle8i database upgrade from version 2002 (7.1) to 8.x.

Upgrading the Oracle Analytics Datamart Database

No single script upgrades Analytics 2.0 to Analytics 8.x. To upgrade, you must run a series of scripts until you are updated to the current version. All scripts can be found in the \Database-Scripts\Datamart\ directory.



All Siebel Brightware databases must run on the same version of the database software.

Determine the version of Analytics you are currently running, and follow the directions until you are upgraded to the current version.

To upgrade Analytics version 2.0 or 2.01 to version 3.0

Run the upgrade script:

```
upgrade_datamart_schema_FromVer2toVer3_Oracle8i.sql
```

To upgrade Analytics version 3.0 to version 4.0

Run the upgrade script:

```
upgrade_datamart_schema_FromVer3_Oracle8i.sql
```

To upgrade Analytics version 4.0 to version 7.1

Run the upgrade script:

```
upgrade_datamart_schema_FromVer40_Oracle8i.sql
```

To upgrade Analytics version 7.1 to version 8.x (Oracle 8i)

1. Run the upgrade scripts:

```
upgrade_datamart_schema_FromVer41_Oracle8i.sql
```

2. Copy the **upgradedm.jar** file to \program files\edocs\Brightware\common\lib\ on your computer.

3. Copy the **Upgrade Ora8i_Datamart.bat** file to \program files\edocs\Brightware\ on your computer.

4. Edit the BAT file. Instructions are provided within the BAT file.

5. Execute the BAT file.

To upgrade Analytics version 7.1 to version 8.x (Oracle 9i)

Run the upgrade script:

```
upgrade_datamart_schema_FromVer41_Oracle9i.sql
```

To upgrade Analytics version 8.x to 8.1.x

Run the upgrade script:

```
upgrade_datamart_schema_FromVer8x_Oracle.sql.
```

To upgrade Analytics version 8.1.3 to 8.1.3+

Run the upgrade script:

```
upgrade_datamart_schema_FromVer813_Oracle.sql
```

Oracle: Uninstalling the Datamart Schema

```
uninstall_datamart_schema_Oracle.sql
```

SQL Server: Uninstalling the Datamart Schema

```
uninstall_datamart_schema_SQLServer.sql
```

Upgrading from an 8.1.x Siebel Brightware Installation

1. Verify you have the equipment and software required to run Siebel Brightware (see [Chapter 2, “System Requirements”, on page 5](#)).
2. Prepare to shut down the Siebel Brightware Server:
 - Use the Contact Center Console to stop all the inbound message channels (email, chat and web).
 - Close out as many messages as possible.
 - Log out all users from the Siebel Brightware product.
3. Shut down the Siebel Brightware Server.
4. Make a backup of the entire hard disk on which Siebel Brightware is installed.
5. Uninstall the existing Siebel Brightware product. Windows users can run Uninstall eServicePerformer.exe located at C:\Program Files\Firepond\UninstallerData\. Solaris users can run Uninstall_eserviceperformer located at /usr/local/firepond/uninstallerdata. This will not remove your databases. Refer to: [“Uninstalling Siebel Brightware Components”, on page 39](#).
6. Delete the Siebel Brightware root directory. The specific directory name for your installation will depend on version and original installation choices.
7. Place the Siebel Brightware CD in the CD drive on the server.

8. Open the installer for your operating system. Refer to [Chapter 4](#) of this Installation Guide for installation-specific instructions.
9. Restore your modified Siebel Brightware files from the backup. These files might include:
 - Analytics reports that have been modified or created (..\Brightware\analytics\Reports\).
 - Normalization and Morphology files that were modified (..\Brightware\lib\common\dictonaries\).
 - Language-detector.xml if it was modified (..\Brightware\lib\common\dictonaries\).
 - All Knowledge Base (KB) files that you have saved as files.
 - The variable-pool.xml file if it was modified (..\Brightware\). Check your variable-pool.xml file for the following lines:

```
<var name="LDAP_AUTHENTICATION"></var>
<var name="LDAP_PRINCIPAL"></var>
<var name="LDAP_CREDENTIALS"></var>
```

You must add these lines if they do not exist. Add them immediately after the line:

```
<var name="LDAP_BASEDN" />
```

Check the variable-pool.xml file for one of these lines:

```
<var name="DB_VERSION">"Oracle 9i", ""</var>           for Oracle 9i users
<var name="DB_VERSION">"Oracle 8i", ""</var>         for Oracle 8i users
<var name="DB_VERSION"></var>                         for SQL Server users
```

You must add the appropriate line, based on the database management system you are using, if it does not exist. Add it immediately after the line:

```
<var name="DB_TYPE">      </var>
```

- The custom user dictionary file userdic.tlx (..\Brightware\lib\common\dictonaries\spell-lexicons\).
10. Restore modifications within XML files such as custom logging settings and memory sizes (..\Brightware\fpconfig). Do not overwrite files in the \fpconfig\ directory with backed up files from your previous version. Doing so could cause serious errors. You may carefully modify the new files. Please contact Siebel Brightware Technical Support for advice and specific instructions for modifying XML files.
 11. Run the configure.cmd file, located in the \Firepond\ folder, if you change any of the XML files within the \fpconfig\ directory or if you modify the variable-pool.xml file.
 12. If you are using Oracle 8i as your database management system, run these upgrade scripts on the tracking (Contact Center) database (you must run these scripts from SQL Plus as user dbadmin): Do not run scripts for versions at or below your current Siebel Brightware versions as these scripts have already been applied to your database. For instance, if you are currently running Siebel Brightware 8.1.2, run only the b813 and b815 scripts.
 - Database-Scripts\ContactCenter\Oracle8i\upgrade\b812-Oracle-schema.sql
 - Database-Scripts\ContactCenter\Oracle8i\upgrade\b813-Oracle-schema.sql
 - Database-Scripts\ContactCenter\Oracle8i\upgrade\b815-Oracle-schema.sql
 - Database-Scripts\ContactCenter\Oracle8i\upgrade\b816-Oracle-schema.sql
 13. If you are using Oracle 9i as your database management system, run these upgrade scripts on the tracking (Contact Center) database (you must run these scripts from SQL Plus as user

dbadmin). Do not run scripts for versions at or below your current Siebel Brightware versions as these scripts have already been applied to your database. For instance, if you are currently running Siebel Brightware 8.1.2, run only the b813 and b815 scripts.

- Database-Scripts\ContactCenter\Oracle9i\upgrade\b812-Oracle-schema.sql
 - Database-Scripts\ContactCenter\Oracle9i\upgrade\b813-Oracle-schema.sql
 - Database-Scripts\ContactCenter\Oracle9i\upgrade\b815-Oracle-schema.sql
 - Database-Scripts\ContactCenter\Oracle9i\upgrade\b816-Oracle-schema.sql
14. If you are using Microsoft SQL Server as the database management system, run this script on the tracking (Contact Center) database as user dbadmin. Do not run scripts for versions at or below your current Siebel Brightware versions as these scripts have already been applied to your database. For instance, if you are currently running Siebel Brightware 8.1.3, run only the b815 script.
- \Database-Scripts\ContactCenter\SQLServer\upgrade\b813-SQLServer-schema.sql
 - \Database-Scripts\ContactCenter\SQLServer\upgrade\b815-SQLServer-schema.sql
 - \Database-Scripts\ContactCenter\SQLServer\upgrade\b816-SQLServer-schema.sql
15. Start the Siebel Brightware Server or Service and verify the system is working properly.

Note: (Oracle 8i users only) If you running Analytics and want to view the *Original Message Info* or *Reply Message Info* reports, you must have the Oracle 9.2.0.6 ODBC driver installed. Install the Oracle 9i Client Tools to get this driver.

Upgrading the Knowledge Base

To Upgrade the Knowledge Base from Version 5.01 to 8 follow the steps below:

1. Create a directory in the install folder called **Backup KB**.
2. Copy the 5.01 or 6.01 Knowledge Base and place into the Backup KB folder.
3. Open a Command Window (DOS Window).
4. CD to the root of the Siebel Brightware Install Directory. For example:


```
cd c:\Program Files\Brightware
```
5. Run the Knowledge Base Importer by typing **startkbimporter** followed by a space and the location of the Backup Knowledge Base. For example:


```
c:\Program Files\edocs\Brightware startkbimporter c:\Program Files\Firepond\Backup KB\lab2.kb
```
6. A copy of the updated Knowledge Base will be placed into the root of the C:\ drive and will retain the same name.
7. Next open the Knowledge Manager and click the **File** menu and select **Load KB from Disk**. Next browse to the root of the C:\ drive and select the Knowledge Base file and click **Open**.
8. Finally click the **File** menu and select **Save KB As** and select the **Database Option**, at this point you may re-name the Knowledge Base or leave as is and click **OK**.

The Knowledge Base has now been ported from a previous version and has been saved to the Database.

Post-Installation Tasks and Reference

This chapter includes procedures for completing post installation configuration tasks, such as options for setting up proxying, configuring spell checking, using the Secure Email Portal, and other administrative tasks. It also includes step-by-step instructions for using the Contact Center Console to configure the basic Siebel Brightware implementation so you can start processing messages right away.

Basic Siebel Brightware Configuration

This procedure guides you through the process of implementing a basic Siebel Brightware system using the Contact Center Console interface.

Step 1. Start the Siebel Brightware Server

- From the Windows **Start** menu, select **Programs** and click **edocs**, then click **Brightware Server**. As you're starting the server for the first time several error messages will appear. For Example:

```
2002-04-29 14:30:12,691 [Thread-4] WARN fp.protocol.inbound - No
mailboxes for reading mail have been specified in the Management
Console. Stopping the Inbound Mail Handler.
```

These warnings can be ignored, they will not reappear once the server has been properly configured.

- When running Siebel Brightware in UNIX: Siebel Brightware software will not run when you are logged in as root user. Please log in as eservice before starting the Siebel Brightware Server.



To run the Integration Listener program, it must be run from the same directory as the Siebel Brightware Server with the variable-pool.xml file located in the same directory. The variable-pool.xml file is installed into the installation directory and should not be moved.

Step 2. Log into the Contact Center Console as Administrator

1. Open a browser window and enter the address of the Contact Center. The default URL is: `http://<server name>:7001/ContactCenter.html`
2. Select **Contact Center Console** to display the login screen.
3. Click the text link: "If you wish to login as Administrator, please [click here](#)." to display the password prompt.
4. Leave the **Password** field empty (the default password is blank). You will then be prompted to create a new password of your choice.



In the future, to change the Admin password use the Applications: Options view on the Console.

Step 3. Configure the Outbound Mail Handler Settings

1. Click the Admin: Channels view on the desktop to display the Channels view.
2. Select **Options for Outbound Email**.
3. Enter the name of your mail server in the **Server Name** field. Accept the default values for the other Outbound Mail settings.
4. Enter the name of the LDAP server, as well as any other required settings. Refer to the Contact Center Console Guide for more information.
5. Click **Save** to return to the Channels view.

Step 4. Configure the Inbound Mail Handler Settings

1. From the Channels view select **Options for Inbound Email**.
2. Under Mail Servers (at the bottom of the screen) click **New** to open the **Email Server Settings** screen.
3. Enter the name of your mail server.
4. Enter the user name that corresponds to the mailbox you will be reading inbound mail from.
5. Enter the password to that account.
6. Select a Protocol, either IMAP or POP3. We recommend IMAP if the specified server supports it.
7. Use the default Thread Count (1).
8. Click **Save** to return to the Channels view.



If you expect mail volume to exceed 15,000 messages per day, you may want to change the Thread Count and related Console settings to improve performance. For assistance in adjusting these settings for high volume conditions please contact edocs Technical Support. The phone number for Technical Support in your area can be found in [“If You Need Help”](#), on page 2.

Step 5. Create a Contact Center Console User

1. Go to the Admin: Users view.
2. Click the **Add** button.
3. Enter the new user's name and address information.
4. Assign them to the Initial and Exception Business Units.
5. Check all Permission boxes to give this user full access to the Console views (Admin, Supervise, Monitor).
6. Click **Save** to return to the Admin: Users view.

Step 6: Set Address Mapping in the Initial Business Unit

Contact Center Console includes two default Business Units: Initial and Exception (the Initial Business Unit is sometimes called the Default Business Unit). If you plan on using only one Business Unit in your implementation, you will use the Initial Business Unit.



The default Business Units can be renamed but not deleted.

The Exception Business Unit acts as a holding area for incoming mail in the event that Siebel Brightware cannot determine which Business Unit to place a message in. In other words, it performs exception error handling. This type of error might occur if a Business Unit was inadvertently removed, or the system was being re-configured during message processing. Similarly, the Exception Queue in each Business Unit handles queue-related exception errors.

You must establish mailbox mapping records for both the Initial and Exception Business Units, and for any new Business Units you create. For the Initial Business Unit (and any you add) you will:

- Create a new mapping record specifying the mailbox you want to read messages from and the address you wish to appear in the From: field on outbound messages and messages sent as AutoAcknowledgments. (For more information about AutoAcknowledgment messages please refer to the section on “Supervise: Queues View” in the *Contact Center Console Guide*.)
- Edit the default mapping record, which handles errors in the event a message cannot be delivered. The default mapping addresses will be identical to the ones used in your New mapping record in each Business Unit.

Unless you have a specific reason for sending outbound mail from a mailbox other than the one it was addressed to, the Outbox and Ackbox addresses will be the same as the Inbox address. If you wish to specify more than one From: and AutoAcknowledgment (AutoAck) address you can set up additional mapping records.

To set address mapping in the Initial Business Unit:

1. Go to the Admin: Business Units view.
2. Select the Initial Business Unit from the drop-down list and click the **Edit** button to edit the Default mapping record.
3. In the Mail Boxes box, click **Edit**.
4. In the **OutBox** and **AckBox** fields enter the address you want to appear in the From: field on outgoing mail and AutoAcknowledgment messages, respectively.
5. Press **OK** to return to the Admin: Business Units screen.
6. In the Mail Boxes box, click **Add** to create the main mailbox mapping record for the Initial Business Unit.
7. In the **InBox** field enter the address of the user specified in the Inbound Email options of the Channels screen. In the OutBox and AckBox fields enter the address you want to appear in the From: field on outgoing mail and AutoAcknowledgment messages, respectively.
8. Press **Save** to return to the Admin: Business Units screen.

Step 7: Set Address Mapping in the Exception Business Unit

In the Exception Business Unit you need only edit the default mapping record. Unless you have a specific reason for sending outbound mail from a mailbox other than the one it was addressed to, the Outbox and Ackbox addresses will be the same as the Inbox address.

1. Select the Exception Business Unit from the drop-down list, and click the **Edit** button.
2. In the **OutBox** and **AckBox** fields enter the address you want to appear in the From: field on outgoing mail and AutoAcknowledgment messages, respectively.



Unless you have a specific reason for sending outbound mail from a mailbox other than the one it was addressed to, the From: and Ackbox addresses will be the same as the Inbox address.

3. Click **Save** to return to the Admin: Business Units screen.
4. Click **Save** again to save all your edits.

Step 8: Create Additional Business Units

1. On the Admin: Business Units view click **New**, and configure any additional Business Units you want to use.
2. Go to the Admin: Rules view and create any rules to route messages to the appropriate Business Unit. If you're using multiple Knowledge Bases you should also set up rules for routing messages to different Knowledge Bases.

Step 9: Change Login to User

1. Log off as the Administrator.
2. Log in again as the User you created in Step 5.

Step 10: Create an Agent

1. Go to the Supervise: Agents view and click the **New** button.
2. Select the Default Business Unit in the Business Unit drop-down box.
3. Enter the required information for this agent. By default the agent will be assigned to the Initial Queue.
4. Assign the new agent to the Default and Exception queues as well by checking those boxes in the Queues Assigned Directly list.

Step 11: Add the New Agent to the Exception Business Unit

1. Go to the Admin: Business Units view.
2. Select the Exception Business Unit from the drop-down list and click the **Edit** button.
3. Assign the new User to the Exception Business Unit by checking the box next to their name in the Agents list.

This completes the basic Siebel Brightware post-installation configuration tasks; you are now ready to process mail.

Step 12: Start Mail Processing

1. Go to the Admin: Channels view.
2. Click the Outbound Mail **Start** and Inbound Mail **Start** buttons to start mail processing.

To further refine your system, you can create additional Queues and rules to route messages to them; create responses in the Response Library, create groups and assign messages to them. For information about creating and configuring these objects, please refer to the *Contact Center Console Guide*.

Changing Initial Siebel Brightware Server Component Settings

To update the Siebel Brightware system parameters set when installing, re-run the Siebel Brightware Installer.

To reconfigure the Siebel Brightware Server component settings:

1. Shut down all edocs applications.
2. Rerun the Siebel Brightware Installer.
3. Click through the first set of installer screens until you encounter the screen that says “The Brightware Installer has found a previous eServicePerformer/Brightware installation in the selected path.”
4. Select the **Reconfigure already installed product** option.
5. Re-enter your configuration settings, making adjustments as required. Your previously entered settings will appear as the default values.

Configuring Concierge

In order for Concierge to work within your Siebel Brightware system, you must configure a file. Perform the following steps to configure Concierge for use with the software:

1. Open the file called **concierge.jsp** located in the deployment directory:
`\edocs\Brightware\config\eservice\applications\DefaultWebApp_myserver\concierge\jsp\`.
2. Modify the **setKB** function including the:
 - Business Unit the Knowledge Base is assigned to (within the Contact Center Console).
 - Knowledge Base that contains the Web Rules you want to use.

```
concierge.setKB("Sales", "/Sales.kb");
```



If the Knowledge Base you choose is assigned to more than one business unit, requests that are escalated (to email or chat) will be routed to the business unit with the highest alphabetic ranking.

3. Save and close the JSP file.

Disabling Spell Checking

There are two ways to globally turn off spell checking: temporarily, and permanently.

To globally turn off spell checking (temporarily):

- Edit `startserver.cmd` and add the following command-line parameter to Java in `startserver.cmd`:

```
-Dcom.firepond.nlp.spellcute=false
```

This will need to be done every time after `configure.cmd` has been run, as this operation re-generates the `startserver.cmd` file.

To globally disable spell checking (permanently):

1. Edit the `server-commands.xml` file, which is used by **configure** to create **startserver**. In this case, add the italicized line among the other system properties:

```
<!-- startserver -->
  <cmdfile path="$USER_INSTALL_DIR$/startserver">
    [...]
    <property
      name="com.firepond.nlp.spell.execute">false</property>
```

The property defaults to true, so it need only be used to turn spelling off.

2. Run `configure.cmd` to re-generate the `startserver.cmd` file.

Changing the Dictionary Language

The language(s) for the Spell Checker dictionary can be changed.

To change the dictionary language:

1. Shut down the Siebel Brightware Server.
2. Open the **email-common.xml** file, located in the <installation path>\fpconfig\ folder.
3. Locate the following lines in the email-common.xml file:

```
<prop name="MainLexicon1" value="lib/common/dictionaries/spell-lexicons/ssceXX.tlx,file" type="unique"></prop>
<prop name="MainLexicon2" value="lib/common/dictionaries/spell-lexicons/ssceXX2.clx,file" type="unique"></prop>
```

These lines are repeated several times. Each pair represents a language dictionary. The XX in the code sample above appears as follows:

- **am** – American English
- **br** – British English
- **da** – Danish
- **du** – Dutch
- **fr** – French
- **ge** – German
- **it** – Italian
- **po** – Portuguese
- **sp** – Spanish
- **sw** – Swedish

Delete the lines that represent the languages you do not need.

4. Save the **email-common.xml** file.
5. Run the **configure.cmd** file, located in the \edocs\Brightware\ folder.
6. Start the Siebel Brightware Server.

Disabling Checking for Customer History

Disabling history checking can be useful for integrations where all messages coming into the Siebel Brightware system appear to be from a single address.

To turn off history checking, the **check.for.customer.history** parameter will need to be turned off in the config.cml file:

```
<application cluster="no"
name="firepond.email.webagent.application" type="Application">

<instance

instance-of="firepond.components.email.webagent.Component"
name="com.firepond.webagent.WebAgent">

<parameter-group>

<parameter-group name="email.webagent">

<parameter name="check.for.customer.history" value="false"/>

<parameter name="trace" value="true"/>

<parameter name="session.timeout" value="3600"/>

<parameter name="resources.name"
value="com.firepond.il8n.webagent"/>

<parameter name="country" value="US"/>

<parameter name="language" value="en"/>

</parameter-group>

</parameter-group>

</instance>

</application>
```

Setting Siebel Brightware Server Port Number

The Oracle's Siebel Brightware server uses port 7001 as the default. Follow these steps to change the port number:

1. The port is specified in the **providers.xml** file which is contained within the weblogic-platform.jar file (installed at \edocs\Brightware\platform\). Locate the com.firepond.webapp.port parameter within providers.xml and edit the value.

```
<param>
  <name>com.firepond.webapp.port</name>
  <value>7001</value>
</param>
```

2. The port is also specified in the **variable-pool.xml** (installed at \edocs\Brightware\). Locate the APP_SERVER_PORT variable and edit the value.

```
<var name="APP_SERVER_PORT">7001</var>
```

3. Run the **configure.cmd** file (installed at \edocs\Brightware\).

