



SIEBEL[®] 7
eBusiness

**SIEBEL DISCONNECTED
ANALYTICS ONLINE HELP**

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Overview of Disconnected Analytics

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

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

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

Components of Disconnected Analytics Applications

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

- A personalized version of Siebel Analytics dashboards

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

- Personalized and secure data from the Siebel Analytics enterprise database

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

- Disconnected Analytics Application Manager

This utility allows you to update your local application data and use different Disconnected Analytics applications while disconnected from the network.

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

- The local (that is, the laptop) repository

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

- The local Web Catalog

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

- An SQL Anywhere database

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

- A schema

About Dashboards and Content in Disconnected Analytics

Disconnected Analytics presents shared content in the form of dashboards. The look and feel of the Siebel Analytics dashboards in Disconnected Analytics is the same as that of the dashboards you find on the network. However, the number of dashboards in Disconnected Analytics, their layouts, and their subject areas may be different from those on the network.

Data in Disconnected Analytics

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

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

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

Content Sharing in Disconnected Analytics

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

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

Overview of Disconnected Analytics

About Dashboards and Content in Disconnected Analytics

The Disconnected Analytics Application Manager User Interface

2

After you start the Disconnected Analytics Application Manager, you see the window shown in [Figure 1](#) (minimized) and [Figure 2 on page 12](#) (expanded).

- The default or minimized view is described in “[Default Disconnected Analytics Application Manager Window.](#)”
- The expanded view is described in “[Expanded Disconnected Analytics Application Manager Window](#)” on page 11.

Default Disconnected Analytics Application Manager Window

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



Figure 1. The Default Disconnected Analytics Application Manager Window

The buttons in this window and their functions are described in [Table 1](#).

Table 1. Buttons in Minimized Disconnected Analytics Application Manager Window

Button	Description	Tasks Performed by This Button
Application: (Dropdown box)	Application dropdown box— Lists the Disconnected Analytics applications on your computer	Selecting a Siebel Disconnected Analytics application. See “Using More Than One Disconnected Analytics Application” on page 20.
Start	Starts the application shown in the Application dropdown list	See “Starting a Disconnected Analytics Application” on page 16.
Synchronize	Runs the synchronization for the application shown in the Application dropdown list	See “Process of Synchronizing Disconnected Analytics Applications” on page 23.
Delete	Deletes the application shown in the Application dropdown list	See “Deleting a Disconnected Analytics Application” on page 21.
Get Server Info	Gets information from the server about the application shown in the Application dropdown list	See “Updating Disconnected Analytics Application Data” on page 22.
Help	Opens this help file	Not applicable.
Close	Closes the Disconnected Analytics Application Manager	Exits the application manager.
Advanced > >	Expands this screen (see Figure 2 on page 12)	Not applicable.

Expanded Disconnected Analytics Application Manager Window

[Figure 2](#) shows the Disconnected Analytics Application Manager window after you click the Advanced button. The appearance of the window on your laptop may differ in some details from the illustration. For an explanation of the areas shown, see [“Areas of the Expanded Disconnected Analytics Application Manager Window”](#) on page 13.

The Disconnected Analytics Application Manager User Interface

Expanded Disconnected Analytics Application Manager Window

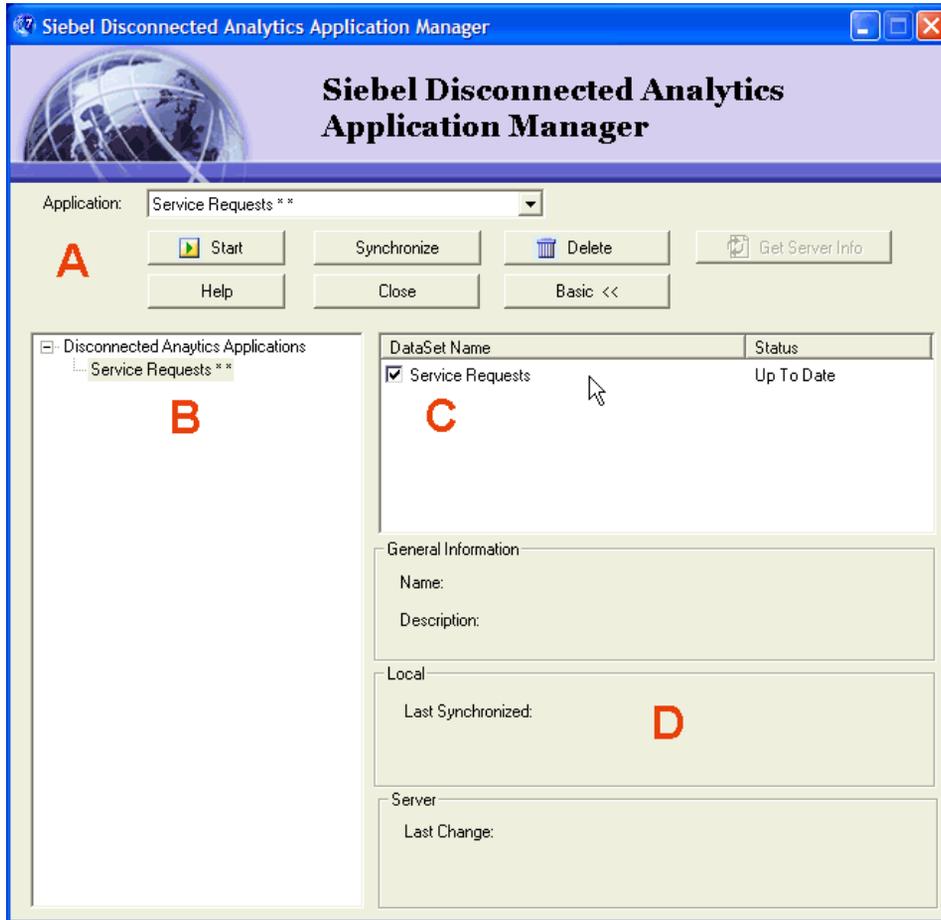


Figure 2. Expanded Disconnected Analytics Application Manager Window

Areas of the Expanded Disconnected Analytics Application Manager Window

Table 2 describes the dialog window areas and the type of information displayed in those areas.

Table 2. Areas of the Expanded Siebel Disconnected Analytics Manager Window

Area	Description
A: Default screen (buttons)	Perform main user tasks: <ul style="list-style-type: none"> ■ Start applications ■ Synchronize applications ■ Delete applications
B: Applications List	Lists the Disconnected Analytics applications on your computer. The application currently in use is marked with an asterisk.
C: Synchronization Window	<ul style="list-style-type: none"> ■ Displays the current <i>applications</i> you have selected (in area B) and their synchronization status. ■ Display the current <i>data sets</i> you have selected from the list and their synchronization status. In this list, the column DataSet Name is the name assigned the dataset by the Siebel Analytics administrator, and the column Status is the status of the dataset—either Out of Date or Up To Date. Note that an Online dataset is always given the status Out of Date.

Table 2. Areas of the Expanded Siebel Disconnected Analytics Manager Window

Area	Description
D: Status Area Note that the information displayed in this area changes depending on what is displayed in the Synchronization Window (area C).	<p data-bbox="605 361 1250 413">Displays current status of the item selected. The Get Server Info button updates the information displayed in this area.</p> <hr/> <p data-bbox="605 435 1115 461">When <i>applications</i> are displayed in this window:</p> <ul data-bbox="605 475 1208 666" style="list-style-type: none"><li data-bbox="605 475 1208 527">■ General Information area displays comments about the application.<li data-bbox="605 541 1148 593">■ Repository area displays the repository name and timestamp.<li data-bbox="605 607 1190 666">■ Web Catalog area displays the Web Catalog name and timestamp. <hr/> <p data-bbox="605 689 1022 715">When <i>data</i> is displayed in this window:</p> <ul data-bbox="605 729 1226 916" style="list-style-type: none"><li data-bbox="605 729 1226 781">■ General Information area displays comments about this data set.<li data-bbox="605 795 1210 847">■ Local area displays the last synchronization time of this data set.<li data-bbox="605 861 1226 916">■ Server area displays the timestamp (on the server) of this data set.

Process of Using Disconnected Analytics Applications

3

Before you can use the Disconnected Analytics Application Manager, you must first receive an installation file with instructions from your administrator.

Once this software has been installed on your laptop computer, you can do the following tasks:

- [“Starting a Disconnected Analytics Application” on page 16](#)

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

- [“Using More Than One Disconnected Analytics Application” on page 20](#)

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

- [“Deleting a Disconnected Analytics Application” on page 21](#)

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

- [“Updating Disconnected Analytics Application Data” on page 22](#)

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

Starting a Disconnected Analytics Application

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

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

NOTE: Always synchronize the application before you start it. Otherwise the data you use may not be up to date.

To start a Disconnected Analytics application

- 1** From the desktop, open the Disconnected Applications Manager by selecting Start > Programs > Siebel Analytics > Siebel Analytics Disconnected Applications Manager.
- 2** In the Application dropdown box, click the Disconnected Analytics application you want to start.
- 3** Click Start. The Siebel Analytics login screen opens.

Proceed to [“Connecting to the Local Disconnected Analytics Application”](#) on page 16.

Connecting to the Local Disconnected Analytics Application

You connect to Disconnected Analytics as a local instance or as a network instance. This section describes how to connect to Disconnected Analytics as a local instance—the Disconnected Analytics application on your desktop.

To connect to a local Disconnected Analytics application

- 1** In the Disconnected Analytics Application Manager, click Start.

- 2 In the Siebel Analytics login screen, click Log In.

NOTE: Do not enter the password.

The application starts and the Siebel Intelligence Dashboard appears inside a Microsoft Internet Explorer browser window.

Connecting to the Siebel Analytics Server on the Network

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

To connect to the Siebel Analytics server

- 1 In the Disconnected Analytics Application Manager, click Get Server Info.
- 2 In the Login to the Server to synchronize screen, enter your User ID (network login) and password.



The screenshot shows a dialog box titled "Login to the Server to synchronize". It has a blue title bar with a question mark icon and a close button. The dialog contains three input fields: "UserID:" with the text "Administrator", "Password:" with masked characters, and "Server URL:" with the text "http://siebelanalytics/analytics/saw.dll". There are "OK" and "Cancel" buttons at the bottom.

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

- 3 Click OK.

You are connected to the Siebel Analytics server.

After Connecting to the Siebel Analytics Server

Once connected to the Siebel Analytics Web, you can access the Disconnected Analytics applications set up by your administrator. The part of the dashboard that contains the Disconnected link is shown in [Figure 3](#). From the series of hypertext links at the top of the Siebel Intelligence Dashboard Web page, click the Disconnected link appearing at the top right corner of the browser screen.



Figure 3. Siebel Analytics Dashboard — Disconnected Analytics Link

Downloading Data From Disconnected Applications Web Page

When you click the Disconnected link, the Disconnected Applications Web page shown in [Figure 4](#) opens. You see a list of the various Disconnected Analytics applications available to you.

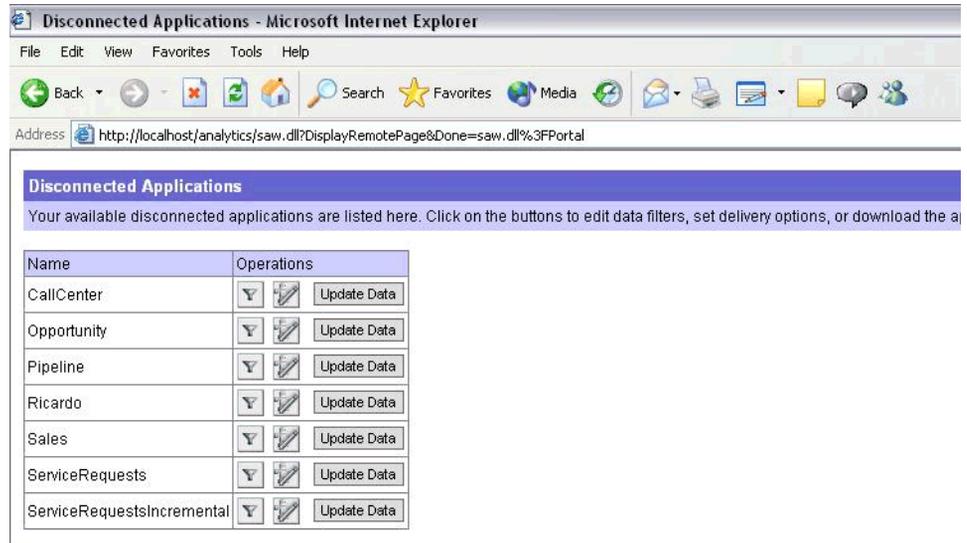


Figure 4. Siebel Disconnected Analytics Web—Disconnected Applications Page

On this Web page, you can do the following:

- Download the data on the Siebel Analytics server to your laptop
 - To download data from this Web page, click Update Data.
 - In the File Download window, select Open.
- Set personalized data filters for each of the applications

NOTE: For setting data filters or changing subscription options, see *Analytics Web Online Help*.

After Starting a Disconnected Analytics Application

The only two differences between the appearance of a local Disconnected Analytics application and a Siebel Analytics Web application are:

- The URL shown:
 - The local Disconnected Analytics application URL is
`http://localhost:8080/sawd?Dashboard`
 - The Siebel Analytics Web application URL is that of the network server running the application.
- The appearance of the Siebel Analytics (sa) icon in the system tray after you have started the local application:



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

Using More Than One Disconnected Analytics Application

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

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

To use a different Disconnected Analytics application

- 1** Log off your current Disconnected Analytics application by closing the Web browser window.
- 2** If it is not already running, start Disconnected Analytics Application Manager.

- 3 In the Applications dropdown box or Applications list tree, select the application you want to start.

NOTE: The current application is marked with an asterisk.

- 4 Click Start.

The Login to the Server to synchronize dialog box appears.

- 5 Proceed as in [“Connecting to the Local Disconnected Analytics Application” on page 16.](#)

Deleting a Disconnected Analytics Application

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

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

To delete a Disconnected Analytics application

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

The application is deleted.

Updating Disconnected Analytics Application Data

This procedure updates the Disconnected Analytics application data you have already downloaded, and is the activity you will probably perform most with Disconnected Analytics Application Manager. The updated information comes from the Siebel Analytics server. When the procedure is finished, the new data timestamp is shown in the Status area Server box (see Area D of [“Expanded Disconnected Analytics Application Manager Window”](#) on page 11).

To update Disconnected Analytics application data

- 1** In the Applications dropdown box or Applications list tree, select the application you want to update.
- 2** Click Get Server Info.

The Login to the Server to synchronize dialog box appears.

- 3** Proceed as in [“Connecting to the Siebel Analytics Server on the Network”](#) on page 17.

The data set is updated and displays a current timestamp.

For more information about updating data through synchronization, see [Chapter 4, “Process of Synchronizing Disconnected Analytics Applications.”](#)

Troubleshooting a Disconnected Analytics Application Update

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

Process of Synchronizing Disconnected Analytics Applications

4

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

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

Modes of Disconnected Analytics Synchronization

There are two synchronization modes for Disconnected Analytics:

- Online synchronization

In this mode the Siebel Analytics server generates the personalized data upon request. See [“Running Online Disconnected Analytics Application Synchronizations”](#) on page 24.

- CD ROM-based synchronization

This mode updates data, repository, Web Catalog and schema changes. See [“Running CD-ROM Synchronization of Disconnected Analytics”](#) on page 25.

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

Running Online Disconnected Analytics Application Synchronizations

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

NOTE: If the Synchronize button is not enabled, follow the procedure given in [“Updating Disconnected Analytics Application Data” on page 22](#), then continue with the following procedure.

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

To run an online Disconnected Analytics application synchronization

1 Click Synchronize.

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

2 Click Yes.

a A dialog box appears. It shows a progress bar to indicate that data is being downloaded.

- To list the actions being performed, click Advanced in the dialog box.

The progress bar continues to the end.

b A second dialog box may appear, stating that a synchronization update of previously downloaded data has not been completed. The Synchronize button in this case may become an Update button.

- If you want to download the files again, click Yes.
- If you want to apply the downloaded files, click No.

A statement that the update is finished appears in the dialog box.

- 3 Click OK.

The Disconnected Analytics application has been synchronized.

Running CD-ROM Synchronization of Disconnected Analytics

If a data set is very large, it may be distributed on a CD-ROM file. Synchronizing data from a CD-ROM also synchronizes the repository, Web Catalog, and schema.

To run a CD-ROM-based Disconnected Analytics application synchronization

- From the CD-ROM directory, double-click the .dad file.

The synchronization runs and updates the data.

Process of Synchronizing Disconnected Analytics Applications

Running CD-ROM Synchronization of Disconnected Analytics

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