



# **Siebel Installation Guide for Microsoft Windows**

Siebel Innovation Pack 2014  
November 2014

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# 1

## What's New in This Release

*Siebel Installation Guide for Microsoft Windows* describes the installation and initial configuration of Oracle's Siebel Business Applications. The installation and configuration tasks are covered for Siebel Enterprise Server software, Siebel Web Server Extension (SWSE), Siebel Mobile Web Clients, Siebel Tools, and other installable Siebel modules.

**NOTE:** Siebel Innovation Pack 2014 is a continuation of the Siebel 8.1/8.2 release. This innovation pack is provided for Siebel CRM version 8.1.1.14 and version 8.2.2.14. The *Siebel Installation Guide* for the operating system you are using is for installing Siebel Innovation Pack 2014.

### What's New in Siebel Installation Guide for Microsoft Windows, Siebel Innovation Pack 2014

Table 1 lists the changes in this revision of the documentation to support this release of the software.

Table 1. What's New in Siebel Installation Guide for Microsoft Windows, Siebel Innovation Pack 2014

Topic	Description
<a href="#">"Installation-Related Changes for Siebel Innovation Pack 2014" on page 25</a>	<p>New topic. Summarizes several important Siebel CRM product changes affecting this guide.</p> <p>It is strongly recommended that customers installing Siebel Innovation Pack 2014 also install Siebel Patchset 1 or later, where available.</p> <p>Note that <i>Siebel Maintenance Release Guide</i> is no longer provided for the current release. Versions for prior releases are still available on My Oracle Support.</p>
<a href="#">"Roadmap for Installing Siebel Business Applications in a Migration Installation Case (Existing Installation)" on page 39</a>	<p>Updated topic. Customers must reset any passwords in the siebns.dat file on the Siebel Gateway Name Server that were previously encrypted using RC4 encryption. For more information, see <i>Siebel Security Guide</i>.</p>
<a href="#">"Installing Siebel Enterprise Server" on page 42</a> <a href="#">"Installing the Siebel Web Server Extension" on page 49</a>	<p>Modified topics. Updated these tasks and related topics.</p>

Table 1. What's New in Siebel Installation Guide for Microsoft Windows, Siebel Innovation Pack 2014

Topic	Description
<p><a href="#">"Installing Siebel Enterprise Server Components and Siebel Web Server Extension in Unattended Mode" on page 56</a></p> <p><a href="#">"Installing Siebel Web Clients and Siebel Tools in Unattended Mode" on page 170</a></p>	<p>Modified topics. Updated these tasks, which can be used for new installations, for migration installations, or for adding languages to existing installations.</p>
<p><a href="#">"Installation-Related Changes for Siebel Innovation Pack 2014" on page 25</a></p> <p>Chapter 4, "Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension"</p> <p><a href="#">"Installing the Siebel Database" on page 108</a></p>	<p>Modified topics. In the current release, the Siebel Configuration Wizards have been updated in several ways.</p>
<p>Multiple topics</p>	<p>Modified topics. Removed references to Microsoft Windows 2003 and Microsoft IIS 6.</p>
<p><a href="#">"Installing the Siebel Web Server Extension as a New Installation" on page 50</a></p>	<p>Modified topic. For the Cryptographic Seed option, removed the reference to <i>Siebel Security Guide</i>.</p>
<p><a href="#">"Configuring the Siebel Enterprise" on page 67</a></p> <p><a href="#">"Process of Configuring the Siebel Web Server Extension" on page 82</a></p>	<p>Modified topics.</p> <p><b>CAUTION:</b> It is strongly recommended to use TLS for best security, where possible. Using SSL is not recommended for secure environments. For more information, see <i>Siebel Security Guide</i>. See also 1944467.1 on My Oracle Support.</p>
<p><a href="#">"Configuring the Siebel Server" on page 77</a></p> <p><a href="#">"Enabling Siebel Open UI" on page 129</a></p> <p><a href="#">"Installing the Siebel Web Client" on page 157</a></p>	<p>Modified topics.</p> <p>For new installations of the current release, a new option in the Siebel Server Configuration Wizard and in the Siebel Web Client installer lets you enable either Siebel Open UI or high interactivity for applicable employee applications.</p> <p>The topic about configuring Siebel Open UI also mentions some configuration tasks related to the CSS stylesheets that might be required after performing a migration installation.</p>

Table 1. What's New in Siebel Installation Guide for Microsoft Windows, Siebel Innovation Pack 2014

Topic	Description
<p><a href="#">"Installing the Siebel Database" on page 108</a></p> <p><a href="#">"Logging in to Your Siebel Application" on page 179</a></p>	<p>Modified topics. In the current release, the license keys for Siebel CRM base applications do not need to be entered manually. The license keys are provided in the seed data that is imported into a new Siebel database.</p> <p>The license keys are also part of the seed data that is imported into an existing database as part of Incremental Repository Merge or database upgrade operations. For more information about performing these operations, see <i>Siebel Database Upgrade Guide</i>.</p>
<p><a href="#">"Obtaining Updated Siebel Repository Files"</a></p>	<p>Removed topic. For the current release, updated Siebel Repository files (SRF) are provided with new installations and migration installations of Siebel CRM. Customers do not have to obtain updated SRF files separately, as was required for Siebel Innovation Pack 2013.</p>
<p><a href="#">"Enabling and Disabling Server Component Groups" on page 126</a></p>	<p>Modified topic. Added information about changes for some server component groups in the current release, including the new Disconnected Mobile Synchronization group (alias MobileSync).</p>
<p><a href="#">"Limitations for Installing Additional Languages" on page 137</a></p>	<p>Modified topic. Limitations for adding languages have changed for Siebel Web Client and Siebel Tools, for the current release. Certain limitations for previous releases no longer apply. The applicable limitations are now the same as those for Siebel Enterprise Server and SWSE.</p>
<p><a href="#">"Installing and Deploying Additional Languages" on page 142</a></p>	<p>Modified topic. Provided additional information about the task of adding languages to an existing installation, using the unattended installation method. This topic now also includes information applicable to Siebel Web Client and Siebel Tools.</p>
<p><a href="#">"Installing the Siebel Web Client" on page 157</a></p> <p><a href="#">"Installing Siebel Tools" on page 164</a></p> <p><a href="#">"Verifying Installation for the Siebel Web Client" on page 201</a></p> <p><a href="#">"Verifying Installation for Siebel Tools" on page 204</a></p> <p><a href="#">"Uninstalling Siebel Web Clients or Siebel Tools" on page 266</a></p>	<p>Modified topics. Updated these tasks and other topics based on changes in the installers for these modules, affecting both new installations and migration installations (a new type of patch installation for these modules).</p>

Table 1. What's New in Siebel Installation Guide for Microsoft Windows, Siebel Innovation Pack 2014

Topic	Description
"Installing and Configuring Siebel Management Agents and Siebel Management Server"  Multiple topics	Removed chapter and modified topics elsewhere. Siebel Management Server and Siebel Management Agent are no longer provided or supported for the current release. For more information, see <a href="#">"Installation-Related Changes for Siebel Innovation Pack 2014"</a> on page 25.
<a href="#">"About Siebel CRM Releases"</a> on page 272	Modified topic. Updated this topic based on changes in the installers for Siebel Web Clients and Siebel Tools.
<a href="#">"About the Siebel Network Image"</a> on page 349	Modified topic. Installing Siebel Web Clients and Siebel Tools for the current release no longer requires media for Siebel CRM version 8.1.1 or version 8.2.2.
<a href="#">"Siebel Installation Media Contents"</a> on page 351	Modified topic. For version 8.1.1.14, <i>3rdparty</i> JAR files are not used when creating the Siebel network image.
Appendix B, "Siebel Configuration Wizard Reference"	Removed appendix. The information in this appendix has been updated and consolidated into <a href="#">Chapter 4, "Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension."</a>

## What's New in Siebel Installation Guide for Microsoft Windows, Version 8.1/8.2, Rev. A

[Table 2 on page 17](#) lists the changes in this revision of the documentation to support this release of the software. The new features described in [Table 2](#) are available in Siebel CRM version 8.1.1.11, Siebel CRM, version 8.2.2.4, and later.



Table 2. What's New in Siebel Installation Guide for Microsoft Windows, Version 8.1/8.2, Rev. A

Topic	Description
<p><a href="#">"Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment" on page 33</a></p> <p><a href="#">"Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case (Existing Database)" on page 36</a></p> <p><a href="#">"Roadmap for Installing Siebel Business Applications in a Migration Installation Case (Existing Installation)" on page 39</a></p> <p><a href="#">"About Installing Siebel Business Applications" on page 271</a></p>	<p>Modified topics. Updated these and other topics to mention Siebel Patchset releases. Also updated them to mention the requirement to obtain the updated Siebel Repository files (SRF).</p> <p><b>NOTE:</b> The requirement to obtain updated SRF files no longer applies in Siebel Innovation Pack 2014, as noted in <a href="#">"What's New in Siebel Installation Guide for Microsoft Windows, Siebel Innovation Pack 2014" on page 13</a>.</p>
<p><a href="#">"Configuring the Siebel Server" on page 77</a></p>	<p>Modified topics. Deleted references to configuring Siebel Server synchronization for Microsoft Exchange Server. For more information, see <i>Siebel Server Sync Guide</i>.</p>
<p><a href="#">"Configuring the SWSE Logical Profile" on page 82</a></p> <p><a href="#">"Verifying the Siebel Virtual Directories on the Web Server" on page 147</a></p> <p><a href="#">"Removing the SWSE Configuration" on page 257</a></p>	<p>Modified topics. The task for configuring the SWSE logical profile now includes an option to specify the virtual Web site name in which the virtual directories for the Siebel applications will be created.</p> <p>The HTTP and HTTPS port number options apply to the virtual Web site name that you specify. The virtual directories are no longer created in the virtual Web site named <i>Siebel</i> unless this name is explicitly specified.</p>
<p><a href="#">"Obtaining Updated Siebel Repository Files"</a></p>	<p>Modified topic. Customers need the updated Siebel Repository files (SRF) before running Incremental Repository Merge or upgrading the Siebel database.</p> <p><b>NOTE:</b> The requirement to obtain updated SRF files no longer applies in Siebel Innovation Pack 2014, as noted in <a href="#">"What's New in Siebel Installation Guide for Microsoft Windows, Siebel Innovation Pack 2014" on page 13</a>.</p>
<p><a href="#">"Limitations for Installing Additional Languages" on page 137</a></p>	<p>Modified topic. Updated the information about limitations for Siebel Web Clients and Siebel Tools.</p>
<p><a href="#">"Before Logging in to Your Siebel Application" on page 179</a></p>	<p>Modified topic. The Siebel Web Clients support tabbed browsing.</p>
<p><a href="#">"Uninstallation Options for Siebel Modules" on page 252</a></p>	<p>Modified topic. Updated the information about rollback uninstalls.</p>

Table 2. What's New in Siebel Installation Guide for Microsoft Windows, Version 8.1/8.2, Rev. A

Topic	Description
<a href="#">"Planning Disk Space and Configuration Requirements" on page 279</a>	Modified topic. Some of the information in this topic was formerly presented in <i>Siebel System Requirements and Supported Platforms</i> on Oracle Technology Network.
<a href="#">"Requirements for Configuring Anonymous Users for the Siebel Web Server Extension" on page 310</a>	Modified topic. Updated the information about configuring anonymous users for employee applications and customer applications.
Chapter 12, <a href="#">"Requirements for Installing and Configuring Siebel Business Applications"</a>  Chapter 13, <a href="#">"Configuring the RDBMS"</a>  Chapter 14, <a href="#">"Creating the Siebel Installation Image on the Network"</a>	Modified chapters. These are now chapters instead of appendixes.

## What's New in Siebel Installation Guide for Microsoft Windows, Version 8.1/8.2

[Table 3 on page 18](#) lists the changes in this revision of the documentation to support this release of the software. The new features described in [Table 3](#) are available in Siebel CRM version 8.1.1.11, Siebel CRM, version 8.2.2.4, and later.

Table 3. What's New in Siebel Installation Guide for Microsoft Windows, Version 8.1/8.2

Topic	Description
Multiple topics	Modified topics. For Siebel CRM version 8.1.1.9 and later, and for Siebel CRM version 8.2.2.2 and later, the system requirements and supported platform certifications are available from the Certifications tab on My Oracle Support. Updated references throughout this guide. For more information, see 1492194.1 (Article ID) on My Oracle Support
<a href="#">"Installation-Related Changes for Siebel Innovation Pack 2013" on page 28</a>	New topic. Summarizes several important changes to the installers for Siebel Enterprise Server and Siebel Web Server Extension (SWSE), affecting both new installations and patch installations. Patch installations for these server modules are also called migration installations. The installation for the Siebel Sample Database has also changed.
<a href="#">"Roadmap for Installing Siebel Business Applications in a Migration Installation Case (Existing Installation)" on page 39</a>	New topic. Summarizes the installation tasks for the current release that you perform for existing installations of Siebel Business Applications.

Table 3. What's New in Siebel Installation Guide for Microsoft Windows, Version 8.1/8.2

Topic	Description
<a href="#">"Installing Siebel Enterprise Server as a New Installation" on page 42</a>	Modified topic. Describes the updated method of performing a new installation of Siebel Enterprise Server.
<a href="#">"Installing Siebel Enterprise Server as a Migration Installation" on page 46</a>	New topic. Describes how to perform a migration installation of Siebel Enterprise Server for the current release. This method replaces the patch installation method formerly described in <i>Siebel Maintenance Release Guide</i> on My Oracle Support.
<a href="#">"Installing the Siebel Web Server Extension as a New Installation" on page 50</a>	Modified topic. Describes the updated method of performing a new installation of SWSE.
<a href="#">"Installing the Siebel Web Server Extension as a Migration Installation" on page 53</a>	New topic. Describes how to perform a migration installation of SWSE for the current release. This method replaces the patch installation method formerly described in <i>Siebel Maintenance Release Guide</i> on My Oracle Support.
<a href="#">"Installing Siebel Enterprise Server Components and Siebel Web Server Extension in Unattended Mode" on page 56</a>	Modified topic. Describes the updated method of creating a response file. Also includes updated information about performing an unattended installation.
<a href="#">"About Database Updates for the Current Release" on page 103</a> <a href="#">"About Siebel CRM Releases" on page 272</a>	Modified topics. For an existing installation of Siebel CRM version 8.1.1.x or version 8.2.2.x, running Incremental Repository Merge is required after you install the current release (Siebel Innovation Pack 2013 or later) in a migration installation.
<a href="#">"Installing the Stored Procedures and User-Defined Functions on IBM DB2" on page 107</a>	Modified topic. Includes information that is applicable to IBM DB2 64-bit databases.
<a href="#">"Enabling Siebel Open UI" on page 129</a>	Modified topic. Includes updated information about enabling Siebel Open UI for the current release.
<a href="#">"Updating the CRC Parameter" on page 132</a>	New topic. This topic formerly appeared in <i>Siebel Maintenance Release Guide</i> on My Oracle Support.
<a href="#">"Obtaining Updated Siebel Repository Files"</a>	Modified topic. Includes updated information about obtaining updated SRF files for the current release.  <b>NOTE:</b> For Siebel Innovation Pack 2014, it is no longer necessary to obtain updated SRF files for new installations. For more information, see <a href="#">"Installation-Related Changes for Siebel Innovation Pack 2014" on page 25</a> .

Table 3. What's New in Siebel Installation Guide for Microsoft Windows, Version 8.1/8.2

Topic	Description
<a href="#">"Installing and Deploying Siebel Business Applications with Multiple Languages" on page 133</a>	Modified topic. Includes updated information about adding languages to an existing installation of the same version by configuring the Siebel Enterprise Server or SWSE installer to run in unattended mode (silent mode). Some limitations that formerly applied for adding languages for earlier releases no longer apply.
<a href="#">"Importing Locale-Specific Data into the Siebel Repository" on page 145</a>	New topic. This topic formerly appeared in <i>Siebel Maintenance Release Guide</i> on My Oracle Support.
<a href="#">"Restarting the Web Server" on page 148</a>	New topic. This topic formerly appeared in <i>Siebel Maintenance Release Guide</i> on My Oracle Support. Use this topic in conjunction with <a href="#">"Requirements for Stopping and Starting the Web Server" on page 309</a> .
<a href="#">"Installing the Siebel Web Client as a New Installation" on page 158</a> <a href="#">"Installing Siebel Web Clients and Siebel Tools in Unattended Mode" on page 170</a>	Modified topics. Corrected the name of the Siebel Web Client installer program for Siebel CRM version 8.1.1.
<a href="#">"Installing Siebel Tools as a New Installation" on page 165</a> <a href="#">"Installing Siebel Web Clients and Siebel Tools in Unattended Mode" on page 170</a>	Modified topics. Corrected the name of the Siebel Tools installer program for Siebel CRM version 8.1.1.
<a href="#">"Installing the Siebel Web Client as a New Installation" on page 158</a> <a href="#">"Verifying Installation for the Siebel Web Client" on page 201</a> <a href="#">"File and Directory Naming Conventions" on page 287</a>	Modified topics. Corrected references to the default installation directory for the Siebel Web Client installer for Siebel CRM version 8.2.2.
<a href="#">"Installing Siebel Tools as a New Installation" on page 165</a> <a href="#">"Verifying Installation for Siebel Tools" on page 204</a> <a href="#">"File and Directory Naming Conventions" on page 287</a>	Modified topics. Corrected references to the default installation directory for the Siebel Tools installer for Siebel CRM version 8.2.2.

Table 3. What's New in Siebel Installation Guide for Microsoft Windows, Version 8.1/8.2

Topic	Description
<a href="#">"Installing the Siebel Web Client as a Migration Installation" on page 162</a>	<p>New topic. Describes how to perform a patch installation of the Siebel Web Client for the current release. This information was previously published in <i>Siebel Maintenance Release Guide</i> on My Oracle Support.</p> <p><b>NOTE:</b> For Siebel Innovation Pack 2014, Siebel Web Client supports migration installation, a new type of patch installation. For more information, see <a href="#">"Installation-Related Changes for Siebel Innovation Pack 2014" on page 25</a>.</p>
<a href="#">"Installing Siebel Web Clients and Siebel Tools in Unattended Mode" on page 170</a>	<p>Modified topic. Includes updated information about saving a response file and performing an unattended installation.</p>
<a href="#">"Installing Siebel Tools as a Migration Installation" on page 168</a>	<p>New topic. Describes how to perform a patch installation of Siebel Tools for the current release. This information was previously published in <i>Siebel Maintenance Release Guide</i> on My Oracle Support.</p> <p><b>NOTE:</b> For Siebel Innovation Pack 2014, Siebel Tools supports migration installation, a new type of patch installation. For more information, see <a href="#">"Installation-Related Changes for Siebel Innovation Pack 2014" on page 25</a>.</p>
<a href="#">"Installing and Using the Siebel Sample Database" on page 174</a>	<p>Modified topic. Includes updated information about installing a new Siebel Sample Database for the current release.</p>
<a href="#">"Postinstallation Tasks for High Interactivity Clients" on page 177</a>	<p>New topic. This topic formerly appeared in <i>Siebel Maintenance Release Guide</i> on My Oracle Support.</p>
<a href="#">"Verifying the ODBC Data Source" on page 208</a>	<p>Updated topic. The <i>Siebel Security Guide</i> now describes installing the Oracle Database Client for the current release.</p>
<a href="#">"Installing Siebel Management Server as a Patch Installation" on page 234</a>	<p>New topic. Describes how to perform a patch installation of the Siebel Management Server for the current release. This information was previously published in <i>Siebel Maintenance Release Guide</i> on My Oracle Support.</p> <p><b>NOTE:</b> For Siebel Innovation Pack 2014, Siebel Management Server and Siebel Management Agent are no longer provided or supported. For more information, see <a href="#">"Installation-Related Changes for Siebel Innovation Pack 2014" on page 25</a>.</p>
<a href="#">"About Uninstalling Siebel Business Applications" on page 251</a>	<p>Modified topic. Describes the full uninstallation and rollback uninstallation options for the current release, and describes the applicable requirements and limitations. Rollback uninstallation for Siebel Enterprise Server and SWSE is available only after performing a migration installation.</p>

Table 3. What's New in Siebel Installation Guide for Microsoft Windows, Version 8.1/8.2

Topic	Description
<a href="#">"Rolling Back the Siebel Enterprise Server" on page 262</a>	New topic. Describes how to roll back an installation of the current release to an earlier version. You can perform this task after you have performed a migration installation for Siebel Enterprise Server.
<a href="#">"Rolling Back the Siebel Web Server Extension" on page 265</a>	New topic. Describes how to roll back an installation of the current release to an earlier version. You can perform this task after you have performed a migration installation for SWSE.
<a href="#">"About Installing Siebel Business Applications" on page 271</a>	Modified topic. Includes updates because of changes in the Siebel Enterprise Server and SWSE installers.
<a href="#">"About Siebel CRM Releases" on page 272</a>	Modified topic. Summarizes the major Siebel CRM installable modules. Mentions the new migration installation type for Siebel Enterprise Server and SWSE. Mentions the new installer for the Siebel Sample Database.
<a href="#">"About Oracle Configuration Manager" on page 276</a>	Modified topic. It is now recommended to specify valid My Oracle Support credentials for Oracle Configuration Manager during the installation of Siebel Enterprise Server or SWSE. Oracle Configuration Manager is installed with both new installations and migration installations, and it is configured automatically after the installation.
<a href="#">"Creating the Siebel File System" on page 289</a>	Modified topic. Includes information about configuring the Siebel File System to exclude certain file types, as determined by their file extensions.
<a href="#">"General Requirements for Installing and Configuring Siebel Enterprise Server Components" on page 297</a>  <a href="#">"Requirements for Installing and Configuring the Siebel Server" on page 301</a>	Modified topics. For the current release, you cannot add new Siebel Enterprise Server components to an existing installation by using the Siebel Enterprise Server installer.
<a href="#">"Installing the Web Server" on page 306</a>	Modified topic. Includes information about enabling 32-bit applications for Microsoft IIS 7.5.

Table 3. What's New in Siebel Installation Guide for Microsoft Windows, Version 8.1/8.2

Topic	Description
<a href="#">"About the Siebel Network Image" on page 349</a> and other topics	Modified topics. For Siebel Enterprise Server and SWSE, you create a Siebel image only for the current release. For Siebel CRM version 8.1.1.11 or later, the Siebel Image Creator no longer presents a choice of full or patch image, and the image you create does not include a version 8.1.1 installer. Siebel CRM version 8.1.1 or version 8.2.2 media or Siebel images are not used for Siebel Enterprise Server or SWSE.  For Siebel Sample Database, you create a Siebel image only for the current release.
<a href="#">"Requirements for Running Siebel Image Creator" on page 357</a>  <a href="#">"Creating a Siebel Installation Image" on page 359</a>	Modified topics. Includes information about running Siebel Image Creator in unattended mode.

## About the Microsoft Windows and UNIX Versions of This Guide

This book is published in separate versions for Microsoft Windows or UNIX operating systems:

- *Siebel Installation Guide for Microsoft Windows*
- *Siebel Installation Guide for UNIX*

**NOTE:** For operating system support details, including supported versions and product support exceptions, see the [Certifications tab on My Oracle Support](#).

In this guide, *Windows* refers to all of the Microsoft Windows operating system versions that are supported for server or client platforms (for applicable Siebel modules) for this release. The supported versions are listed in the [Certifications tab on My Oracle Support](#).

Supported UNIX operating systems include IBM AIX, HP-UX, Linux, and Oracle Solaris (for SPARC).

In *Siebel Installation Guide for UNIX*, supported Linux operating systems are usually discussed in generic terms and are not differentiated. However, some information in this guide applies only to particular Linux operating systems.

Both the Windows and UNIX versions of this guide contain information about installing client-based modules, such as Siebel Web Clients or Siebel Tools, on Microsoft Windows.

*Siebel Installation Guide for UNIX* does not contain detailed information about installing Siebel Enterprise Server and Siebel Web Server Extension (SWSE) on Windows.

*Siebel Installation Guide for UNIX* does not contain information about either Microsoft SQL Server or Microsoft Internet Information Services (Microsoft IIS).

*Siebel Installation Guide for Microsoft Windows* does not contain information about UNIX-based Web servers.

**NOTE:** The *Siebel Installation Guides* for prior Siebel CRM version 8.1.1.x and version 8.2.2.x releases are available on [My Oracle Support](#), at 1461732.1 (Article ID).

### Additional Information

User interface references in this guide assume that you are using Siebel Open UI. The procedures in this guide assume that you do not use left-hand navigation. For information about implementing left-hand navigation, see *Siebel Fundamentals for Siebel Open UI*.

For more information about third-party products, such as supported operating systems or RDBMS platforms, Web servers, Visual Mining NetCharts, and so on, see the Certifications tab on My Oracle Support (<https://support.oracle.com>).

For Siebel CRM version 8.1.1.9 and later, and for Siebel CRM version 8.2.2.2 and later, the system requirements and supported platform certifications are available from the Certifications tab on My Oracle Support. For more information, see 1492194.1 (Article ID) on My Oracle Support.



# 2

## Overview of Installing Siebel Business Applications

This chapter provides an overview of installing Siebel Business Applications. It includes the following topics:

- [Installation-Related Changes for Siebel Innovation Pack 2014 on page 25](#)
- [Installation-Related Changes for Siebel Innovation Pack 2013 on page 28](#)
- [Before You Install Siebel Business Applications on page 30](#)
- [Overview of Siebel Business Applications Server Architecture on page 32](#)
- [Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment on page 33](#)
- [Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case \(Existing Database\) on page 36](#)
- [Roadmap for Installing Siebel Business Applications in a Migration Installation Case \(Existing Installation\) on page 39](#)

## Installation-Related Changes for Siebel Innovation Pack 2014

The *Siebel Installation Guide* for the operating system you are using, for Siebel Innovation Pack 2014, describes several product changes and requirements that affect your installation tasks and the overall flow of these tasks. See also all of the relevant references in [Chapter 1, “What’s New in This Release.”](#)

- **Documentation is for Siebel Innovation Pack 2014.** The *Siebel Installation Guide* for the operating system you are using is for installing the Siebel CRM software for Siebel Innovation Pack 2014. This term is used for the following Siebel CRM releases:
  - Siebel CRM version 8.1.1.14
  - Siebel CRM version 8.2.2.14

References to the *current release* usually refer to either of these releases or the particular release you are installing. This term might also refer to functionality that changed relative to previous releases or other functionality that applies to the latest release. Some version references might indicate the Siebel database version. The current release includes new functionality and the functionality from previous Siebel CRM version 8.1.1.x and version 8.2.2.x releases (including Siebel Innovation Packs or Siebel Fix Packs).

Separate versions of the *Siebel Bookshelf* are no longer provided for Siebel CRM version 8.1.1.x and version 8.2.2.x. However, previous versions of the *Siebel Bookshelf* are still available. The *Siebel Installation Guides* for prior Siebel CRM version 8.1.1.x and version 8.2.2.x releases are available on My Oracle Support, at 1461732.1 (Article ID).

- **Installing Siebel Patchset 1 or later is strongly recommended.** It is strongly recommended that customers installing Siebel Innovation Pack 2014 also install Siebel Patchset 1 or later, where available. For the readme documents for individual Siebel Patchset releases, see *Siebel Patchset Installation Guide for Siebel CRM*, 1614310.1 (Article ID) on My Oracle Support. See also 1600520.1 (Article ID) on My Oracle Support and see [“About Siebel CRM Releases” on page 272](#).
- **Siebel Maintenance Release Guide on My Oracle Support is no longer provided for the current release.** You can obtain versions of this guide for Siebel Innovation Pack 2013 or earlier releases in case the information provided is useful for your situation. The versions of this guide for prior releases are provided here:
  - Version 8.1.1.x *Siebel Maintenance Release Guide* on My Oracle Support, 880452.1 (Article ID)
  - Version 8.2.2.x *Siebel Maintenance Release Guide* on My Oracle Support, 1441523.1 (Article ID)
- **You can enable Siebel Open UI during initial installation and configuration.** For new installations of the current release, a new option in the Siebel Server Configuration Wizard and in the Siebel Web Client installer lets you specify whether to enable Siebel Open UI or high interactivity for Siebel Business Applications. For more information, see [“Configuring the Siebel Server” on page 77](#) and [“Installing the Siebel Web Client” on page 157](#). See also [“Enabling Siebel Open UI” on page 129](#).
- **Siebel Configuration Wizards have changed.** The Siebel Configuration Wizards have been updated in several ways, including the following:
  - The wizard screens are larger.
  - Some controls appear on screens differently than before, and some of the task flows and options have changed.
  - Where available, you can view option descriptions by clicking the Help button.
  - The wizards support saving response files from the GUI, for unattended configuration. You can perform unattended configuration for all of the supported configuration modes.
  - To help you to verify that the configuration completed successfully, the log file is referenced at the end of the configuration task.
  - The Siebel Server Configuration Wizard provides the ability to specify whether to enable Siebel Open UI or high interactivity for applicable employee applications.
  - You can enable a new component group, Disconnected Mobile Synchronization (MobileSync), by using the Siebel Server Configuration Wizard. See also [“Enabling and Disabling Server Component Groups” on page 126](#).For more information, see [Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension,”](#) and [“Installing the Siebel Database” on page 108](#).
- **Customers no longer need to obtain updated Siebel Repository (SRF) files.** For the current release, updated Siebel Repository files are provided with new installations and migration installations of Siebel CRM. Customers do not have to obtain updated SRF files separately, as was required for Siebel Innovation Pack 2013.

- **Siebel Web Client and Siebel Tools installers have changed.** For Siebel Web Client and Siebel Tools, the installers for the current release have changed significantly, as follows:
  - The user interface has been updated for these installers.
  - Installing the current release as a new installation is a one-step task, using only the installer for the current release. Installing the current release as a patch installation uses the same installer. Network images for these modules are needed for the current release only. (The media for CRM version 8.1.1 or version 8.2.2 is no longer needed for these modules.)
  - Patch installations for these modules are now *migration installations*, similar to those for Siebel Enterprise Server and Siebel Web Server Extension. (This type of installation was introduced in Siebel Innovation Pack 2013.)
  - Performing unattended installation for these modules has changed.
  - Installing new languages for these modules has changed.
  - Uninstallation and rollback for these modules have changed.
  - The Siebel Web Client installer provides the ability to specify whether to enable Siebel Open UI or high interactivity for applicable employee applications.

For more information, see [Chapter 7, "Installing Siebel Web Clients and Siebel Tools."](#) See also [Chapter 11, "Uninstalling Siebel Business Applications,"](#) and [Chapter 14, "Creating the Siebel Installation Image on the Network."](#)

- **License keys are in seed data.** In the current release, the license keys for Siebel CRM base applications do not need to be entered manually. The license keys are provided in the seed data that is imported into a new Siebel database. For more information, see ["Installing the Siebel Database" on page 108.](#) See also ["Logging in to Your Siebel Application" on page 179.](#)

The license keys are also part of the seed data that is imported into an existing database as part of Incremental Repository Merge or database upgrade operations. For more information about performing these operations, see *Siebel Database Upgrade Guide*.

- **Siebel Management Server and Siebel Management Agent are no longer provided.** Siebel Management Server and Siebel Management Agent, which were formerly used with Siebel Application Deployment Manager, are no longer provided or supported for the current release. For more information, see the statement of direction on My Oracle Support, 1640801.1 (Article ID). For more information about Siebel Application Deployment Manager, see *Siebel Application Deployment Manager Guide* on *Siebel Bookshelf*.

## Related Topics

["Installation-Related Changes for Siebel Innovation Pack 2013" on page 28](#)

[Chapter 4, "Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension"](#)

["Enabling Siebel Open UI" on page 129](#)

[Chapter 5, "Installing the Siebel Database on the RDBMS"](#)

[Chapter 7, "Installing Siebel Web Clients and Siebel Tools"](#)

[Chapter 11, "Uninstalling Siebel Business Applications"](#)

["About Siebel CRM Releases" on page 272](#)

[Chapter 14, "Creating the Siebel Installation Image on the Network"](#)

# Installation-Related Changes for Siebel Innovation Pack 2013

Siebel Innovation Pack 2013 and later includes several critical product changes and requirements that affect your installation tasks and the overall flow of these tasks. Some of the following documentation and product changes are only for the Siebel Enterprise Server and Siebel Web Server Extension (SWSE) installers. See also all of the relevant references in [Chapter 1, "What's New in This Release,"](#) and see previous versions of this guide. The *Siebel Installation Guides* for prior Siebel CRM version 8.1.1.x and version 8.2.2.x releases are available on My Oracle Support, at 1461732.1 (Article ID).

- **Changes in documentation scope.** Note the following changes in scope for the installation documentation:
  - You use the *Siebel Installation Guide* for the operating system you are using to perform new installations of Siebel Innovation Pack 2013. For existing deployments, you now also use this guide to perform patch installations, which are also called migration installations.
  - For Siebel Innovation Pack 2013, the applicable *Siebel Maintenance Release Guide* on My Oracle Support still provides key information for both new installations and patch installations, but it no longer contains detailed instructions for performing patch installations. For version 8.1.1.x, see 880452.1 (Article ID). For version 8.2.2.x, see 1441523.1 (Article ID).
- **Siebel CRM media and Siebel Image Creator have changed.** You obtain the media for the current release from Oracle Software Delivery Cloud. Use the Siebel Image Creator utility to create a Siebel network image from which you can perform a new installation or a migration installation for Siebel Enterprise Server and SWSE. No separate media or installers are provided or used for Siebel CRM version 8.1.1 or version 8.2.2 for these modules.
- **Patch installation model has changed.** Starting in Siebel CRM version 8.1.1.11 and version 8.2.2.4, each Siebel Innovation Pack release is packaged as a complete base release. For an existing installation of Siebel Enterprise Server and SWSE, to apply the current release as a patch installation, you perform a *migration installation*.

In a migration installation, the installer uses information about your existing installation to perform a new installation. The existing installation directory is first renamed to a backup location, and the new installation uses the original Oracle home name and location. The installer then migrates your customized files from the existing installation to the new installation. A report identifies any conflicts between your customized files and the files delivered by the installer.

**NOTE:** For Siebel Innovation Pack 2014, Siebel Web Client and Siebel Tools also support migration installations. For more information, see ["Installation-Related Changes for Siebel Innovation Pack 2014"](#) on page 25.

- **Uninstallation and rollback have changed.** Uninstallation and rollback to a previous version have changed for Siebel Enterprise Server and SWSE because of the installer changes. To be able to roll back to a previous version, you must have retained the backup directory to which the previous installation was moved during a migration installation.

To roll back a migration installation and revert to the previous installation, you must stop the Siebel services, rename the new installation to a backup location, rename the original installation to its original location (matching the Oracle home and location), and restart the services. Other tasks might also be required, depending on your changes to the Siebel database and the Siebel Repository.

**NOTE:** For Siebel Innovation Pack 2014, similar changes also apply to Siebel Web Client and Siebel Tools. For more information, see [“Installation-Related Changes for Siebel Innovation Pack 2014” on page 25.](#)

- **Installer user interface has changed.** The user interface for the new installers for Siebel Enterprise Server and SWSE has changed, relative to the previous installers, which were also based on Oracle Universal Installer. The complete installation flow is displayed on the left-hand side of each screen to show key steps and installation progress. To help you to verify that the installation completed successfully, the postinstallation validation is built into the installers, and the installer log files are referenced at the end of the installation task.

**NOTE:** For Siebel Innovation Pack 2014, similar changes also apply to Siebel Web Client and Siebel Tools. For more information, see [“Installation-Related Changes for Siebel Innovation Pack 2014” on page 25.](#)

- **Language installation options have changed.** The new installers for Siebel Enterprise Server and SWSE support adding languages to an existing installation of the same version, by using unattended mode (silent mode) only. After adding languages in this case, you must run the Configuration Wizards for the Siebel Server and the SWSE, and perform the tasks to add new languages.
- **Limitation for installing Siebel Enterprise Server components.** The new installer for Siebel Enterprise Server does not support adding Siebel Enterprise components to an existing installation.
- **Siebel Configuration Wizards are updated.** In general, after you perform a migration installation for Siebel Enterprise Server or SWSE, you do not have to run the Siebel Configuration Wizards again. However, if you have to run these wizards for some reason, then you must run the wizards that were installed for the current release.
- **Running Incremental Repository Merge is required, for an existing installation.** If you install the current release as a patch installation (in which case you perform migration installations for existing installations of Siebel Enterprise Server and SWSE), then you must use the Incremental Repository Merge feature to update your Siebel database to the current release.
- **Updated Siebel Repository (SRF) files are available.** You must obtain updated Siebel Repository (SRF) files after you install a new Siebel database, before you run Incremental Repository Merge, or before you upgrade your Siebel database.

**NOTE:** The requirement to obtain updated SRF files no longer applies in Siebel Innovation Pack 2014, as noted in [“What’s New in Siebel Installation Guide for Microsoft Windows, Siebel Innovation Pack 2014” on page 13.](#)

- **Updated Siebel Sample Database installer.** The Siebel Sample Database installer is now provided for Siebel CRM version 8.1.1.11 or version 8.2.2.4 and later.
- **Siebel Patchset releases have replaced Siebel Quick Fix releases.** For Siebel CRM version 8.1.1.11 and version 8.2.2.4 and later, individual Siebel Quick Fix releases are no longer provided. Instead, monthly Siebel Patchset releases are provided, each of which provides several fixes. The fixes are provided on a cumulative basis in each Siebel Patchset release.

### Related Topics

[“Installation-Related Changes for Siebel Innovation Pack 2014” on page 25](#)

[Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)

[“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#)

[Chapter 7, “Installing Siebel Web Clients and Siebel Tools”](#)

[Chapter 11, “Uninstalling Siebel Business Applications”](#)

[“About Siebel CRM Releases” on page 272](#)

[Chapter 14, “Creating the Siebel Installation Image on the Network”](#)

## Before You Install Siebel Business Applications

Before you install Siebel Business Applications, you must perform the preinstallation tasks. Many of these tasks are described in *Siebel Deployment Planning Guide*.

- 1 Review hardware and software requirements.  
For more information, see the Certifications tab on My Oracle Support.
- 2 Review the worksheet in [Appendix A, “Siebel Deployment Planning Worksheet,”](#) and fill it in as you prepare for installing Siebel Business Applications.
- 3 Plan and prepare for your deployment.
- 4 Configure clustering for the server on which you will install the Siebel Gateway Name Server. Clustering is strongly recommended for production environments.
- 5 Determine your load-balancing strategy.

For more information, see [“Planning Siebel Server Load Balancing” on page 278](#) and [“Process of Configuring Load Balancing for Siebel Business Applications” on page 120](#).

- 6 Configure your RDBMS.

**NOTE:** You can configure the RDBMS at any point before you run the Siebel Database Configuration Wizard. Most of the database tasks described in this guide do not apply if you have an existing Siebel database, such as in an upgrade environment.

This task applies only for [“Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment” on page 33](#). For more information, see [“Planning RDBMS Installation and Configuration” on page 280](#) and [Chapter 13, “Configuring the RDBMS.”](#)

- 7 Obtain the Siebel media and create a Siebel installation image on the network, from which you will perform installations.

Obtain the media for the current release of Siebel Business Applications, such as Siebel CRM version 8.1.1.14 or version 8.2.2.14. For more information, see [Chapter 14, "Creating the Siebel Installation Image on the Network."](#)

- 8 Create directories for Siebel Business Applications software and directories for the Siebel File System.

For more information, see ["File and Directory Naming Conventions" on page 287](#) and ["Creating the Siebel File System" on page 289](#).

- 9 Create the required Siebel accounts.

For more information, see ["Creating the Siebel Service Owner Account" on page 293](#).

#### **Related Books**

*Siebel Deployment Planning Guide*

*Deploying Siebel Open UI*

*Siebel Security Guide*

*Siebel Performance Tuning Guide*

*Siebel System Administration Guide*

Certifications tab on My Oracle Support

*Install & Configure Advisor: Siebel Innovation Pack 2014 (8.1.1.14/8.2.2.14)*, 1934028.1 (Article ID) on My Oracle Support

## Overview of Siebel Business Applications Server Architecture

Figure 1 on page 32 illustrates a simplified architecture for the server elements in your Siebel deployment, after you have initially installed and configured the software. For a more detailed illustration, see *Siebel Deployment Planning Guide*.

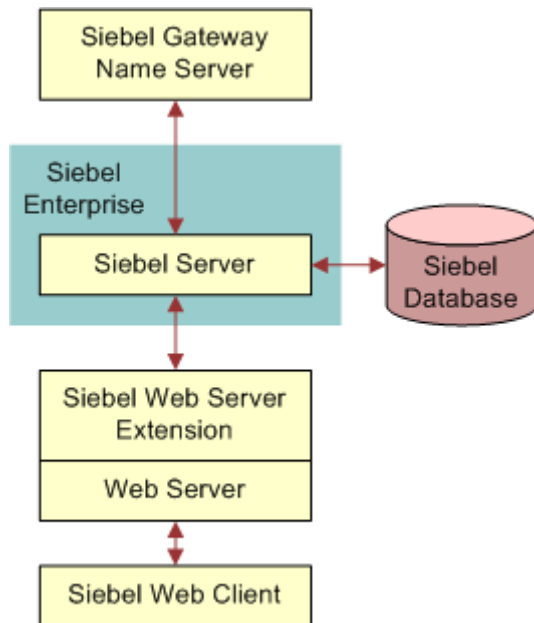


Figure 1. Simplified Architecture for a Siebel Deployment

The Siebel CRM installation and configuration process requires multiple tasks that you perform in a general sequence that depends on your installation case. For more information, see:

- [“Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment” on page 33](#)
- [“Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case \(Existing Database\)” on page 36](#)
- [“Roadmap for Installing Siebel Business Applications in a Migration Installation Case \(Existing Installation\)” on page 39](#)



## Installation Guidelines

Follow these general guidelines for your installations:

- Before installing any Siebel module, review all documented requirements.
- You install Siebel Gateway Name Server once for each Siebel Enterprise.
- You install Siebel Database Configuration Utilities once, typically with the first Siebel Server installed.
- In general, you can install each item in sequence and perform its associated configuration tasks, or you can install all of the items and then perform the configuration tasks. However, some requirements apply to the sequence in which you must perform configuration tasks.
- Requirements associated with authenticating access to the Siebel Gateway Name Server can affect your overall installation and configuration process, particularly for a new deployment with no existing Siebel database. This issue affects the installation and configuration task sequence, as shown in the illustrations in the two roadmap topics that follow. For more information, see [“Requirements for Siebel Gateway Name Server Authentication” on page 299](#).
- Multiple instances of Siebel Server and Siebel Web Server Extension (SWSE) are typically installed for medium-sized or larger deployments.
- It is recommended that, after you install the current release for each applicable Siebel module, you install the latest Siebel Patchset release, where available. For more information, see [“About Siebel CRM Releases” on page 272](#).

### Related Topics

[“About Siebel CRM Releases” on page 272](#)

[“Requirements for Siebel Gateway Name Server Authentication” on page 299](#)

### Related Books

*Siebel Deployment Planning Guide*

*Siebel Security Guide*

*Siebel System Administration Guide*

Certifications tab on My Oracle Support

# Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment

Use this roadmap to guide you in performing the installation and configuration tasks for deploying the current release of Siebel CRM, where there is no existing installation or Siebel database. The current release is Siebel CRM version 8.1.1.14 or version 8.2.2.14 (Siebel Innovation Pack 2014).

Figure 2 on page 34 presents a simplified view of the installation and configuration tasks for server-based modules that apply for a new deployment.

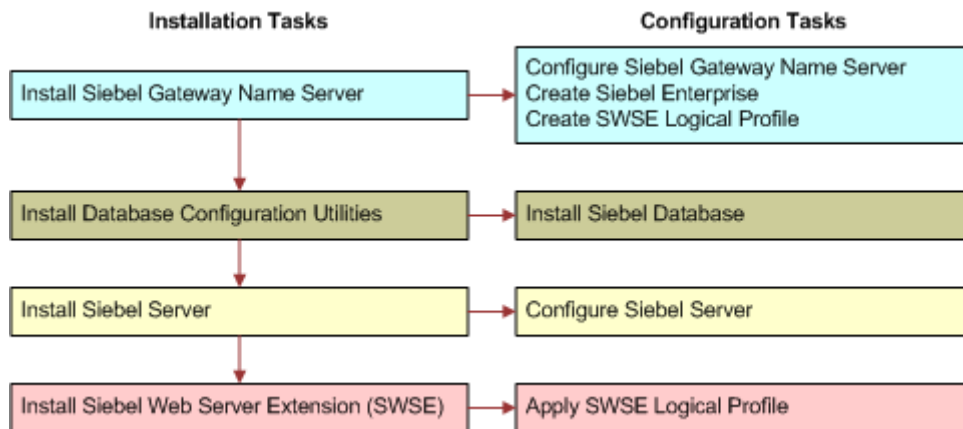


Figure 2. Installing and Configuring Servers for a New Deployment

A Siebel database must exist before you can configure the Siebel Server, in order to provide authentication for access to the Siebel Gateway Name Server. You install Database Configuration Utilities and the first Siebel Server on the same computer where you install Siebel Gateway Name Server.

**NOTE:** It is recommended that, for each applicable Siebel module, you install the latest Siebel Patchset release, where available. Install the patchset after you install the current release and before you run the Siebel Configuration Wizards. In some cases, installing a particular Siebel Patchset release might be required. For more information, see [“About Siebel CRM Releases” on page 272.](#)

The installation process for Siebel Business Applications for a new deployment requires multiple tasks that you perform in the following general sequence:

- 1 Create the network images for all applicable releases of Siebel CRM:
  - Create a network image for the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14.
  - Create a network image for the latest Siebel Patchset release, where available.See [Chapter 14, “Creating the Siebel Installation Image on the Network.”](#)
- 2 For the Siebel Enterprise Server, install the current release. Install the following Siebel Enterprise Server components:
  - a Siebel Gateway Name Server
  - b Siebel Server (install with the Siebel Gateway Name Server)
  - c Database Configuration Utilities (install with the first Siebel Server)

See [Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension.”](#)

**3** Configure the following Siebel Enterprise Server modules, in the sequence shown:

- a** Siebel Gateway Name Server
- b** Siebel Enterprise on the Siebel Gateway Name Server computer

See [Chapter 4, "Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension."](#)

**4** Configure the RDBMS.

See [Chapter 13, "Configuring the RDBMS."](#)

**5** Install the Siebel database.

This task installs a Siebel database for the current release. This database contains schema changes, Siebel Repository changes, and seed data for Siebel CRM functionality through the current release.

See [Chapter 5, "Installing the Siebel Database on the RDBMS."](#)

**6** Configure the Siebel Server, and perform the postinstallation tasks.

**NOTE:** For a new deployment, you installed a Siebel Server and the Database Configuration Utilities on the Siebel Gateway Name Server computer. Configuring and deploying this Siebel Server is optional. You must run the Database Configuration Wizard and install the Siebel database *before* you can configure this Siebel Server or any Siebel Server. For more information, see ["Requirements for Siebel Gateway Name Server Authentication" on page 299](#). You must install and configure a Siebel Server before you can configure the Siebel Web Server Extension (SWSE).

See [Chapter 4, "Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension,"](#) and [Chapter 6, "Additional Postinstallation and Configuration Tasks."](#)

**7** For the Siebel Web Server Extension (SWSE), install the current release.

See [Chapter 3, "Installing Siebel Enterprise Server Components and the Siebel Web Server Extension."](#)

**8** Configure the Siebel Web Server Extension in the following sequence:

- a** Configure the logical profile for the SWSE on the Siebel Gateway Name Server computer.
- b** Apply the SWSE logical profile on the Web server computer where you installed SWSE.

See [Chapter 4, "Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension,"](#) and [Chapter 6, "Additional Postinstallation and Configuration Tasks."](#)

**9** (Optional) If you are using Siebel load balancing, then generate the load balancing configuration file `lbconfig.txt` after installing and configuring participating Siebel Servers. Place the file in the SWSE logical profile directory, and reapply the logical profile.

For more information, see ["Process of Configuring Load Balancing for Siebel Business Applications" on page 120](#).

**10** For Siebel Mobile Web Clients or Developer Web Clients, install the current release.

See [Chapter 7, "Installing Siebel Web Clients and Siebel Tools."](#)

- 11** For Siebel Tools, install the current release.  
See [Chapter 7, “Installing Siebel Web Clients and Siebel Tools.”](#)
- 12** Verify the installation of Siebel Business Applications modules.  
See [Chapter 8, “Verifying and Troubleshooting Your Installation.”](#)
- 13** (Optional) Install additional Siebel modules.  
See [Chapter 10, “Installing Siebel Charts.”](#)
- 14** (Optional) Install and configure additional Siebel Server instances or additional Web server and SWSE instances if they are required for your deployment.
- 15** Install any required third-party products.  
See the Certifications tab on My Oracle Support. See also the *Siebel Business Applications Third-Party Bookshelf* in the product media pack on Oracle Software Delivery Cloud.
- 16** (Optional) Install Siebel Search software.  
For specific guidelines and requirements about installing search software, see *Siebel Search Administration Guide*.
- 17** Perform any additional postinstallation tasks.  
See [Chapter 6, “Additional Postinstallation and Configuration Tasks.”](#)

#### Related Topics

[“Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case \(Existing Database\)” on page 36](#)

[“Roadmap for Installing Siebel Business Applications in a Migration Installation Case \(Existing Installation\)” on page 39](#)

## Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case (Existing Database)

Use this roadmap to guide you in performing the installation and configuration tasks for deploying the current release of Siebel CRM, where there is an existing Siebel database, such as when you are upgrading to the current release. The current release is Siebel CRM version 8.1.1.14 or version 8.2.2.14 (Siebel Innovation Pack 2014).

Figure 3 on page 37 presents a simplified view of the installation and configuration tasks for server-based modules that apply in an upgrade installation case. You install Database Configuration Utilities with the first installed Siebel Server.

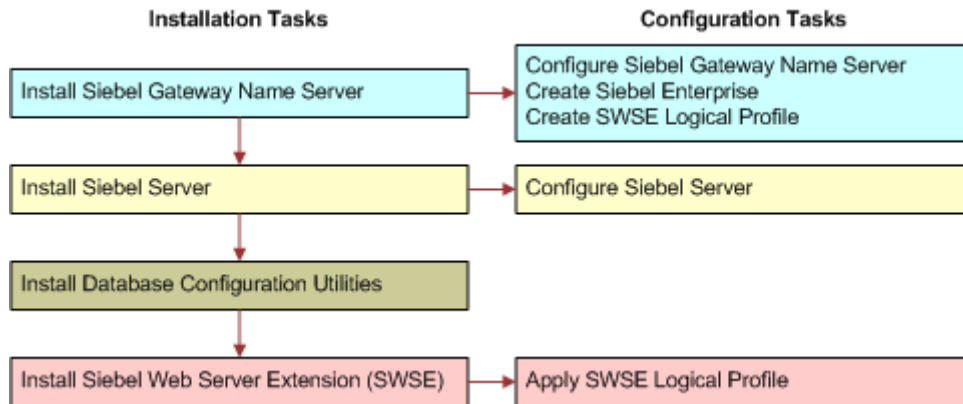


Figure 3. Installing and Configuring Servers in an Upgrade Case

**NOTE:** It is recommended that, for each applicable Siebel module, you install the latest Siebel Patchset release, where available. Install the patchset after you install the current release and before you run the Siebel Configuration Wizards. In some cases, installing a particular Siebel Patchset release might be required. For more information, see [“About Siebel CRM Releases” on page 272](#).

This roadmap does not include the database upgrade tasks. Before you upgrade, you must have installed at least one Siebel Server with Database Configuration Utilities and installed Siebel Tools. For more information about upgrading, see [“About Installing in Upgrade Environments” on page 274](#) and see *Siebel Database Upgrade Guide*.

The installation process for Siebel Business Applications in an upgrade installation case requires multiple tasks that you perform in the following general sequence:

- 1 Create the network images for all applicable releases of Siebel CRM:
  - Create a network image for the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14.
  - Create a network image for the latest Siebel Patchset release, where available.See [Chapter 14, “Creating the Siebel Installation Image on the Network.”](#)
- 2 For the Siebel Enterprise Server, install the current release. Install the following Siebel Enterprise Server components:
  - a Siebel Gateway Name Server
  - b Siebel Server
  - c Database Configuration Utilities (install with the first Siebel Server)See [Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension.”](#)

- 3 Configure the following Siebel Enterprise Server modules, in the sequence shown:
  - a Siebel Gateway Name Server
  - b Siebel Enterprise on the Siebel Gateway Name Server computerSee [Chapter 4, "Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension,"](#) and [Chapter 6, "Additional Postinstallation and Configuration Tasks."](#)
- 4 Configure the Siebel Server, and perform the postinstallation tasks.

**NOTE:** You must install and configure a Siebel Server before you can configure the Siebel Web Server Extension (SWSE).

See [Chapter 4, "Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension,"](#) and [Chapter 6, "Additional Postinstallation and Configuration Tasks."](#)
- 5 For the Siebel Web Server Extension (SWSE), install the current release.  
See [Chapter 3, "Installing Siebel Enterprise Server Components and the Siebel Web Server Extension."](#)
- 6 Configure the Siebel Web Server Extension (SWSE) in the following sequence:
  - a Configure the logical profile for the SWSE on the Siebel Gateway Name Server computer.
  - b Apply the SWSE logical profile on the Web server computer where you installed SWSE.See [Chapter 4, "Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension,"](#) and [Chapter 6, "Additional Postinstallation and Configuration Tasks."](#)
- 7 (Optional) If you are using Siebel load balancing, then you also generate the load balancing configuration file `lbconfig.txt` after installing and configuring participating Siebel Servers. Place the file in the SWSE logical profile directory, and reapply the logical profile.  
For more information, see ["Process of Configuring Load Balancing for Siebel Business Applications" on page 120.](#)
- 8 For Siebel Mobile Web Clients or Developer Web Clients, install the current release.  
See [Chapter 7, "Installing Siebel Web Clients and Siebel Tools."](#)
- 9 For Siebel Tools, install the current release.  
See [Chapter 7, "Installing Siebel Web Clients and Siebel Tools."](#)
- 10 Verify the installation of Siebel Business Applications modules.  
See [Chapter 8, "Verifying and Troubleshooting Your Installation."](#)
- 11 (Optional) Install additional Siebel modules.  
See [Chapter 10, "Installing Siebel Charts."](#)
- 12 (Optional) Install and configure additional Siebel Server instances or additional Web server and SWSE instances if they are required for your deployment.
- 13 Install any required third-party products.  
See the Certifications tab on My Oracle Support. See also the *Siebel Business Applications Third-Party Bookshelf* in the product media pack on Oracle Software Delivery Cloud.

**14** (Optional) Install Siebel Search software.

For specific guidelines and requirements about installing search software, see *Siebel Search Administration Guide*.

**15** Perform any additional postinstallation tasks.

See [Chapter 6, "Additional Postinstallation and Configuration Tasks."](#)

**Related Topics**

["Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment"](#) on page 33

["Roadmap for Installing Siebel Business Applications in a Migration Installation Case \(Existing Installation\)"](#) on page 39

## Roadmap for Installing Siebel Business Applications in a Migration Installation Case (Existing Installation)

Use this roadmap to guide you in performing the installation tasks for deploying the current release of Siebel CRM, where there is an existing installation of a prior version. This is the migration installation case (patch installation). The current release is Siebel CRM version 8.1.1.14 or version 8.2.2.14 (Siebel Innovation Pack 2014).

Use this roadmap when you have an existing Siebel Business Applications installation of a prior version, such as Siebel CRM version 8.1.1 or 8.1.1.11, or Siebel CRM version 8.2.2 or 8.2.2.4. You must perform the patch installation tasks for any existing installed software. Patch installation is also called migration installation.

**NOTE:** It is recommended that, for each applicable Siebel module, you install the latest Siebel Patchset release after you install the current release. In some cases, installing a particular Siebel Patchset release might be required. For more information, see ["About Siebel CRM Releases"](#) on page 272.

This roadmap does not include the following tasks that apply in a migration installation case:

- Customers must run Incremental Repository Merge. Before you do this, you must have installed at least one Siebel Server with Database Configuration Utilities and installed Siebel Tools. For more information about running Incremental Repository Merge, see *Siebel Database Upgrade Guide*.
- Customers must reset any passwords in the siebns.dat file on the Siebel Gateway Name Server that were previously encrypted using RC4 encryption. In the current release, such passwords are encrypted using AES instead of RC4. For more information about reencrypting these passwords, see *Siebel Security Guide*.

The installation process for Siebel Business Applications in a patch installation case requires multiple tasks that you perform in the following general sequence:

- 1 Create the network images for all applicable releases of Siebel CRM:
  - Create a network image for the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14.
  - Create a network image for the latest Siebel Patchset release, where available.See [Chapter 14, “Creating the Siebel Installation Image on the Network.”](#)
- 2 For the Siebel Enterprise Server software, install the current release as a migration installation for each existing installation (migration installation case).  
See [Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension.”](#)
- 3 For the Siebel Web Server Extension (SWSE), install the current release as a migration installation for each existing installation (migration installation case).  
See [Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension.”](#)
- 4 For Siebel Mobile Web Clients or Developer Web Clients, install the current release as a migration installation for each existing installation (migration installation case).  
See [Chapter 7, “Installing Siebel Web Clients and Siebel Tools.”](#)
- 5 For Siebel Tools, install the current release as a migration installation for each existing installation (migration installation case).  
See [Chapter 7, “Installing Siebel Web Clients and Siebel Tools.”](#)
- 6 Verify the installation of Siebel Business Applications modules.  
See [Chapter 8, “Verifying and Troubleshooting Your Installation.”](#)
- 7 Perform any additional postinstallation tasks.  
See [Chapter 6, “Additional Postinstallation and Configuration Tasks.”](#)

### Related Topics

[“Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment” on page 33](#)

[“Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case \(Existing Database\)” on page 36](#)



# 3

## Installing Siebel Enterprise Server Components and the Siebel Web Server Extension

This chapter explains how to install the Siebel Enterprise Server and the Siebel Web Server Extension. Use the Siebel Enterprise Server installer to install Siebel Gateway Name Server, Siebel Server, Siebel Database Configuration Utilities, and EAI Connector support files. Both new installations and migration installations are described. This chapter includes the following topics:

- [About Installing Siebel Business Applications on page 41](#)
- [Installing Siebel Enterprise Server on page 42](#)
- [Installing the Siebel Web Server Extension on page 49](#)
- [Installing Siebel Enterprise Server Components and Siebel Web Server Extension in Unattended Mode on page 56](#)

### About Installing Siebel Business Applications

Before installing Siebel Enterprise Server components or Siebel Web Server Extension, review the following and perform any necessary preinstallation tasks:

- [“Before You Install Siebel Business Applications” on page 30](#)
- [“Installation and Configuration Methods by Deployment Type” on page 294](#)
- [Chapter 12, “Requirements for Installing and Configuring Siebel Business Applications”](#)

After installation, you configure server modules using the Siebel Configuration Wizards. Perform configuration after installing the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14, and then installing the latest Siebel Patchset release, where available.

The migration installation tasks are a new type of patch installation provided for Siebel Enterprise Server and SWSE installers. You perform migration installations using the same installers (for the current release) that you use for new installations. A migration installation applies settings from your existing installation to a new installation. The existing Oracle home name, installation location, installation languages, server configuration data, and other settings are used for the new installation. Before the new installation is performed, the existing installation is moved to a backup location and can no longer be used.

#### Related Topics

- [“Installation-Related Changes for Siebel Innovation Pack 2014” on page 25](#)
- [“Installation-Related Changes for Siebel Innovation Pack 2013” on page 28](#)
- [Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)

# Installing Siebel Enterprise Server

This topic provides instructions for installing the Siebel Enterprise Server components, using the GUI installation method, as part of standard Siebel Business Applications deployment. The Siebel Enterprise Server installer verifies that you have the required software at the necessary version levels for installing Siebel Business Applications software.

**NOTE:** This topic includes instructions for installing Siebel Enterprise Server as a new installation or as a migration installation. For an existing installation, you perform a migration installation instead of a new installation.

This topic contains the following information:

- [“Installing Siebel Enterprise Server as a New Installation” on page 42](#)
- [“Installing Siebel Enterprise Server as a Migration Installation” on page 46](#)

## Related Topics

[“About Installing Siebel Business Applications” on page 41](#)

[“Installing Siebel Enterprise Server Components and Siebel Web Server Extension in Unattended Mode” on page 56](#)

[Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)

[Chapter 6, “Additional Postinstallation and Configuration Tasks”](#)

[“Verifying Installation for the Siebel Enterprise Server” on page 191](#)

[Chapter 11, “Uninstalling Siebel Business Applications”](#)

[Chapter 12, “Requirements for Installing and Configuring Siebel Business Applications”](#)

## Related Books

*Siebel Security Guide*

*Siebel Global Deployment Guide*

## Installing Siebel Enterprise Server as a New Installation

Use the following procedure to install Siebel Enterprise Server as a new installation for Siebel CRM version 8.1.1.14 or version 8.2.2.14. This topic is part of [“Installing Siebel Enterprise Server” on page 42](#).

**NOTE:** Use this procedure only when Siebel Enterprise Server is not already installed. Where an earlier version of Siebel Enterprise Server is already installed, you perform a migration installation instead, as described in [“Installing Siebel Enterprise Server as a Migration Installation” on page 46](#).

This task is a step in:

- [“Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment” on page 33](#)
- [“Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case \(Existing Database\)” on page 36](#)

### **To install Siebel Enterprise Server as a new installation**

- 1 Review [“About Installing Siebel Business Applications”](#) on page 41.

For example, if you are installing a Siebel Server that will communicate with an existing installation of Siebel Gateway Name Server on another computer, then make sure that the Siebel Gateway Name Server is running.

- 2 Log on to the server computer, using an account with administrative privileges, such as the Siebel service owner account that you recorded in the copy that you made earlier of the worksheet in [Appendix A, “Siebel Deployment Planning Worksheet.”](#)

Whether you log on using the Siebel service owner account or using another account, the account that you use must belong to the Windows domain of the Siebel Enterprise Server and must have full write permissions to the Siebel File System.

- 3 Shut down all of the open programs that are running on the server.

- 4 In Windows Explorer, navigate to the Siebel image location for the current release. Then navigate to the directory where the installer is located. Navigate to `Siebel_Image\Windows\Server\Siebel_Enterprise_Server\Disk1\install`.

In this path, *Siebel\_Image* is the directory for your version-specific Siebel network image, such as `C:\Siebel_Install_Image\8.1.1.14` or `C:\Siebel_Install_Image\8.2.2.14`.

- 5 To start the Siebel Enterprise Server installer, double-click `setup.bat`.

The Siebel Enterprise Server installer displays the Welcome screen.

- 6 Click Next.

The Oracle Configuration Manager screen appears, which prompts for email contact information.

- 7 Enter your My Oracle Support credentials and click Next.

Oracle Configuration Manager software is installed on the target computer. For more information, see [“About Oracle Configuration Manager”](#) on page 276.

The Select Installation Task screen appears. The New Installation task is selected by default.

- 8 To perform a new installation of Siebel Enterprise Server software where no existing installation of Siebel CRM version 8.1.1.x or version 8.2.2.x is present, click Next.

The New Installation Details screen appears.

- 9 Enter a name for your installation and specify the installation location, and then click Next. (Note the installation name and location for future reference.) Note the following:

- The default installation name (Oracle Home Name) is `SES_HOME`. The value that you specify is used in the parent program folder name for the Oracle Universal Installer software. (A separate program folder is created for the Siebel Configuration Wizards for this installation.) If you have an existing installation, then you must specify a new name for the new installation.

- The default installation path (Oracle Home Location) for a new installation is C:\siebel\8.1.1.14.0\ses or C:\siebel\8.2.2.14.0\ses or a similar value. Accept the default path or specify a different fully qualified path by typing it directly or by clicking Browse. If you have an existing installation, then you must specify a new path for the new installation.

For more information about Oracle home and installation path requirements, see ["File and Directory Naming Conventions" on page 287](#).

The Select Siebel Enterprise Server Components screen appears.

- 10 Choose the Siebel Enterprise Server components that you want to install. Choose one or more of the following options, and click Next:

- Gateway Name Server
- Siebel Server
- Database Configuration Utilities
- EAI Connector

Install all of the Siebel Enterprise Server components that you might need on this server computer.

You can install the Database Configuration Utilities only with a Siebel Server. In other words, you cannot install Database Configuration Utilities unless you are also installing Siebel Server.

For more information about different ways of deploying Siebel Enterprise Server components, see ["Installation and Configuration Methods by Deployment Type" on page 294](#).

**NOTE:** You cannot use this installer again later to add components to this installation.

The Select Languages screen appears. All of the languages that were included in the Siebel network image for Siebel Enterprise Server are available for selection.

- 11 Select the languages that you want to install, and click Next. You must select at least one language in order to proceed.

To select a language, you click the name of the language in the Available box and then use the arrow controls to move it into the Selected box.

You specify languages to install in order to run Siebel Business Applications using these languages. The files that are specific to the languages chosen in this step will be copied to your computer.

If you install the software with a single language, then this language serves as the primary (base) language, in which your server messages and log files will display. If you install the software with multiple languages, then when you configure the Siebel Server you can specify which installed languages to deploy and which installed language is the primary language.

**NOTE:** You can add languages to an existing installation by running the installer in unattended mode (silent mode). For more information about installing and deploying languages, see ["Installing and Deploying Siebel Business Applications with Multiple Languages" on page 133](#).

The Program Folder Name screen appears.

- 12** In the Program Folder Name screen, click Next to accept the default location for the program shortcuts for the Siebel Configuration Wizards for this installation. Or, modify the program folder name, and click Next.

By default, for a U.S. English (ENU) installation, the shortcuts are created in *Siebel Enterprise Server 8.1.1.14.0* or *Siebel Enterprise Server 8.2.2.14.0*. The default program group name and shortcut names are in the language in which the installer ran.

The following shortcuts are created:

- *Siebel Enterprise Configuration*, which is created with Siebel Gateway Name Server installation
- *Siebel Server Configuration*, which is created with Siebel Server installation
- *Database Server Configuration*, which is created with Database Configuration Utilities installation

The Summary screen appears. This screen displays the location where the Siebel Enterprise Server software will be installed.

- 13** Review the information in the Summary screen. Before you proceed, confirm that you have met all of the installation requirements, such as for disk space. Then do one of the following:

- To begin installing the Siebel Enterprise Server software, click Install. You can also click Install after saving a response file.
- To save a response file to use for an unattended installation later, click Save Response File, and then save the file from the dialog box that appears. If you are not also installing at this time, then click Cancel after you save the response file. For information about performing unattended installations, see [“Installing Siebel Enterprise Server Components and Siebel Web Server Extension in Unattended Mode” on page 56](#).

The Installation Progress screen appears. The Siebel Enterprise Server software is installed into the directory that you specified in [Step 9 on page 43](#).

- 14** When the Next button becomes available, the installation is complete. Click Next.

The Finish Installation screen appears. This screen indicates whether the installation was successful and shows the location of the installer log file. You can access this file to review the installation results.

- 15** To close the installer, click Close.

The Siebel Enterprise Server installation is now finished. The shortcuts for the Siebel Configuration Wizards were created in the program folder that you specified in [Step 12 on page 45](#).

- 16** After installing the Siebel Enterprise Server software:

- Verify the Siebel Enterprise Server installation, as described in [“Verifying Installation for the Siebel Enterprise Server” on page 191](#).
- Install the latest Siebel Patchset release, where available. Then verify the installation again.
- Start the Siebel Enterprise Configuration Wizard so that you can configure the components that you installed, as described in [Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension.”](#)

- Perform any additional postinstallation steps, as described in [Chapter 6, "Additional Postinstallation and Configuration Tasks."](#)

**17** Repeat this procedure on each computer where you are installing the Siebel Enterprise Server software.

## Installing Siebel Enterprise Server as a Migration Installation

Use the following procedure to install Siebel Enterprise Server as a migration installation for Siebel CRM version 8.1.1.14 or version 8.2.2.14. Migration installation is a type of patch installation.

**NOTE:** Use this procedure only when an earlier version of Siebel Enterprise Server is already installed (Siebel CRM version 8.1.1.x or version 8.2.2.x). Otherwise, you must follow the steps in ["Installing Siebel Enterprise Server as a New Installation"](#) on page 42 instead.

During a migration installation, the original Siebel Enterprise Server installation directory is renamed from *Original Name* to *Original Name\_pre8.1.1.14.0* or *Original Name\_pre8.2.2.14.0*. For example, if the original installation directory name was *ses*, then this directory is renamed to *ses\_pre8.1.1.14.0* or *ses\_pre8.2.2.14.0*. The new Siebel Enterprise Server installation directory is named *Original Name*, such as *ses*. Retain the original installation directory, in case you choose to perform a rollback uninstallation later. For more information, see ["Rolling Back the Siebel Enterprise Server"](#) on page 262.

This topic is part of ["Installing Siebel Enterprise Server"](#) on page 42.

This task is a step in ["Roadmap for Installing Siebel Business Applications in a Migration Installation Case \(Existing Installation\)"](#) on page 39.

### **To install Siebel Enterprise Server as a migration installation**

**1** Review ["About Installing Siebel Business Applications"](#) on page 41.

For example, if you are installing a Siebel Server that will communicate with an existing installation of Siebel Gateway Name Server on another computer, then make sure that the Siebel Gateway Name Server is running on that computer.

**2** (Optional) Shut down the Siebel CRM modules to be updated on this computer.

For example, stop the services for the Siebel Gateway Name Server, Siebel Server, and Oracle Configuration Manager. Also shut down any running instances of the Siebel Server Manager (*srvrmgr*). If you do not shut down the Siebel Gateway Name Server, Siebel Server, and Oracle Configuration Manager modules, then the installer shuts them down.

**NOTE:** Also stop the service for Siebel Management Agent. This module was installed with Siebel Server for Siebel CRM version 8.1.1 or version 8.2.2 through version 8.1.1.11 or version 8.2.2.4. In the current release, Siebel Management Agent and Siebel Management Server are no longer provided or supported.

- 3 Log on to the server computer, using an account with administrative privileges, such as the Siebel service owner account that you recorded in the copy that you made earlier of the worksheet in [Appendix A, "Siebel Deployment Planning Worksheet."](#)

Whether you log on using the Siebel service owner account or using another account, the account that you use must belong to the Windows domain of the Siebel Enterprise Server and must have full write permissions to the Siebel File System.

- 4 Shut down all of the open programs that are running on the server.
- 5 In Windows Explorer, navigate to the Siebel image location for the current release. Then navigate to the directory where the installer is located. Navigate to *Siebel\_Image\Windows\Server\Siebel\_Enterprise\_Server\Disk1\install*.

In this path, *Siebel\_Image* is the directory for your version-specific Siebel network image, such as C:\Siebel\_Install\_Image\8.1.1.14 or C:\Siebel\_Install\_Image\8.2.2.14.

- 6 To start the Siebel Enterprise Server installer, double-click setup.bat.

The Siebel Enterprise Server installer displays the Welcome screen.

- 7 Click Next.

The Oracle Configuration Manager screen appears, which prompts for email contact information.

- 8 Enter your My Oracle Support credentials and click Next.

Oracle Configuration Manager software is installed on the target computer. For more information, see ["About Oracle Configuration Manager" on page 276](#).

The Select Installation Task screen appears.

- 9 To perform a migration installation of the Siebel Enterprise Server software where an existing prior installation of Siebel CRM version 8.1.1.x or version 8.2.2.x is present, choose Migration Installation, and click Next.

The Installation Migration Details screen appears.

- 10 Confirm or select the name and location of your existing installation, and then click Next. Do the following:

- Confirm the existing installation name, or select it from the drop-down list. The value that you specify is used in the parent program folder name for the Oracle Universal Installer software. (A separate program folder is created for the Siebel Configuration Wizards for this installation.)
- Confirm the existing installation location, or select it from the drop-down list.

For more information about Oracle home and installation path requirements, see ["File and Directory Naming Conventions" on page 287](#).

The Program Folder Name screen appears.

- 11 In the Program Folder Name screen, click Next to accept the default location for the program shortcuts for the Siebel Configuration Wizards for this installation. Or, modify the program folder name, and click Next.

By default, for a U.S. English (ENU) installation, the shortcuts are created in *Siebel Enterprise Server 8.1.1.14.0* or *Siebel Enterprise Server 8.2.2.14.0*. The default program folder name and shortcut names are in the language in which the installer ran.

The following shortcuts are created:

- *Siebel Enterprise Configuration*, which is created with Siebel Gateway Name Server installation
- *Siebel Server Configuration*, which is created with Siebel Server installation
- *Database Server Configuration*, which is created with Database Configuration Utilities installation

The Summary screen appears. This screen displays the location where the Siebel Enterprise Server software will be installed.

- 12 Review the information in the Summary screen. Before you proceed, confirm that you have met all of the installation requirements, such as for disk space. Then do one of the following:
  - To begin installing the Siebel Enterprise Server software, click Install. You can also click Install after saving a response file.
  - To save a response file to use for an unattended installation later, click Save Response File, and then save the file from the dialog box that appears. If you are not also installing at this time, then click Cancel after you save the response file. For information about performing unattended installations, see [“Installing Siebel Enterprise Server Components and Siebel Web Server Extension in Unattended Mode” on page 56](#).

The Installation Progress screen appears. The Siebel Enterprise Server software is installed into the directory that you specified in [Step 10 on page 47](#).

- 13 When the Next button becomes available, the installation is complete. Click Next.

The Finish Installation screen appears. This screen indicates whether the installation was successful and shows the location of the installer log file. You can access this file to review the installation results. This screen also shows the new location of the original installation, which the installer moved before it performed the new installation.

- 14 Review the report that is generated about any conflicts between your customized files and the files that are delivered by the Siebel Enterprise Server installer. As needed, copy any of your customized files from the original installation to the new migrated installation.

Conflicts are identified in the file `overwrittenfiles_timestamp.log`, which is created in the `ORACLE_HOME\cfgtool\logs\oui` directory (in the new Siebel Enterprise Server installation).



**15** To close the installer, click Close.

The Siebel Enterprise Server installation is now finished. The shortcuts for the Siebel Configuration Wizards are created in the program folder that you specified in [Step 11 on page 48](#).

After the migration process is complete, then the installer starts the services for the Siebel Gateway Name Server, Siebel Server, and Oracle Configuration Manager. Note that the software that runs is part of the new installation you are migrating to, not part of the original installation.

**16** After installing the Siebel Enterprise Server software:

- Verify the Siebel Enterprise Server installation, as described in [“Verifying Installation for the Siebel Enterprise Server” on page 191](#).
- Install the latest Siebel Patchset release, where available. Then verify the installation again.
- Perform any additional postinstallation steps, as described in [Chapter 6, “Additional Postinstallation and Configuration Tasks.”](#)

**17** Repeat this procedure on each computer with a Siebel Enterprise Server installation to be migrated.

## Installing the Siebel Web Server Extension

This topic provides instructions for installing the Siebel Web Server Extension (SWSE) on your Web server computer, using the GUI installation method, as part of standard Siebel Business Applications deployment.

**NOTE:** This topic includes instructions for installing the SWSE as a new installation or as a migration installation. For an existing installation, you perform a migration installation instead of a new installation.

The installation program sets up the Siebel directory structures and copies the required files and components to the target location on the Web server.

The SWSE installer verifies that you have the required software at the necessary version levels for installing Siebel Business Applications software.

This topic contains the following information:

- [“Installing the Siebel Web Server Extension as a New Installation” on page 50](#)
- [“Installing the Siebel Web Server Extension as a Migration Installation” on page 53](#)

### Related Topics

[“About Installing Siebel Business Applications” on page 41](#)

[“Installing Siebel Enterprise Server Components and Siebel Web Server Extension in Unattended Mode” on page 56](#)

[Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)

[Chapter 6, “Additional Postinstallation and Configuration Tasks”](#)

[“Verifying Installation for the Siebel Web Server Extension” on page 199](#)

[Chapter 11, “Uninstalling Siebel Business Applications”](#)

[Chapter 12, “Requirements for Installing and Configuring Siebel Business Applications”](#)

### Related Books

*Siebel Security Guide*

*Siebel Global Deployment Guide*

## Installing the Siebel Web Server Extension as a New Installation

Use the following procedure to install the Siebel Web Server Extension (SWSE) as a new installation for Siebel CRM version 8.1.1.14 or version 8.2.2.14.

**NOTE:** Use this procedure only when SWSE is not already installed. Where an earlier version of SWSE is already installed, you perform a migration installation instead, as described in [“Installing the Siebel Web Server Extension as a Migration Installation” on page 53](#).

This topic is part of [“Installing the Siebel Web Server Extension” on page 49](#).

This task is a step in:

- [“Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment” on page 33](#)
- [“Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case \(Existing Database\)” on page 36](#)

### *To install the SWSE as a new installation*

- 1 Review [“About Installing Siebel Business Applications” on page 41](#).
- 2 Log on to the Web server computer as the operating system administrator.
- 3 In Windows Explorer, navigate to the Siebel image location for the current release. Then navigate to the directory where the installer is located. Navigate to `Siebel_Image\Windows\Server\Siebel_Web_Server_Extension\Disk1\install`.  
In this path, *Siebel\_Image* is the directory for your version-specific Siebel network image, such as `C:\Siebel_Install_Image\8.1.1.14` or `C:\Siebel_Install_Image\8.2.2.14`.
- 4 To start the SWSE installer, double-click `setup.bat`.  
The SWSE installer displays the Welcome screen.
- 5 Click Next.  
The Oracle Configuration Manager screen appears, which prompts for email contact information.

- 6 Enter your My Oracle Support credentials and click Next.

Oracle Configuration Manager software is installed on the target computer. For more information, see [“About Oracle Configuration Manager” on page 276](#).

The Select Installation Task screen appears. The New Installation task is selected by default.

- 7 To perform a new installation of Siebel Web Server Extension software where no existing installation of Siebel CRM version 8.1.1.x or version 8.2.2.x is present, click Next.

The New Installation Details screen appears.

- 8 Enter a name for your installation and specify the installation location, and then click Next. (Note the installation name and location for future reference.) Note the following:

- The default installation name (Oracle Home Name) is EAPPWEB\_HOME. The value that you specify is used in the parent program folder name for the Oracle Universal Installer software. (A separate program folder is created for the SWSE Configuration Wizard for this installation.) If you have an existing installation, then you must specify a new name for the new installation.
- The default installation path (Oracle Home Location) for a new installation is C:\siebel\8.1.1.14.0\sweapp or C:\siebel\8.2.2.14.0\sweapp or a similar value. Accept the default path or specify a different fully qualified path by typing it directly or by clicking Browse. If you have an existing installation, then you must specify a new path for the new installation.

For more information about Oracle home and installation path requirements, see [“File and Directory Naming Conventions” on page 287](#).

**CAUTION:** Do not specify the Web server installation directory as the directory in which to install SWSE. Doing this results in configuration errors later.

The Select Languages screen appears. All of the languages that were included in the Siebel network image for SWSE are available for selection.

- 9 Select the languages that you want to install, and click Next. You must select at least one language in order to proceed.

To select a language, you click the name of the language in the Available box and then use the arrow controls to move it into the Selected box.

You specify languages to install in order to run applications using these languages. The files that are specific to the languages chosen in this step will be copied to your computer.

If you install the software with a single language, then this language serves as the primary (base) language, in which your server messages and log files will display. If you install the software with multiple languages, then when you configure the SWSE you can specify which installed languages to deploy and which installed language is the primary language.

You must install and deploy on the SWSE the superset of all of the languages required by the Application Object Managers that connect to it. It is strongly recommended that you install and deploy, or at least install, all of the languages that are installed in the Siebel Enterprise Server.

**NOTE:** You can add languages to an existing installation by running the installer in unattended mode (silent mode). For more information about installing and deploying languages, see [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

For a new installation, the Cryptographic Seed screen appears.

- 10** (New installation only) Enter the cryptographic seed that you will use for your SWSE installation.

The cryptographic seed is a random number (random seed) that is used in generating a random cryptographic key for encrypting session IDs.

The Program Folder Name screen appears.

- 11** In the Program Folder Name screen, click Next to accept the default location for the program shortcut for the SWSE Configuration Wizard for this installation. Or, modify the program folder name, and click Next.

By default, for a U.S. English (ENU) installation, the shortcut is created in *Siebel Web Server Extension 8.1.1.14.0* or *Siebel Web Server Extension 8.2.2.14.0*. The default program folder name and shortcut name are in the language in which the installer ran. The SWSE installer creates a shortcut called *Siebel Web Server Extension Configuration*.

The Summary screen appears. This screen displays the location where the SWSE software will be installed.

- 12** Review the information in the Summary screen. Before you proceed, confirm that you have met all of the installation requirements, such as for disk space. Then do one of the following:
- To begin installing the SWSE software, click Install. You can also click Install after saving a response file.
  - To save a response file to use for an unattended installation later, click Save Response File, and then save the file from the dialog box that appears. If you are not also installing at this time, then click Cancel after you save the response file. For information about performing unattended installations, see [“Installing Siebel Enterprise Server Components and Siebel Web Server Extension in Unattended Mode” on page 56](#).

The Installation Progress screen appears. The SWSE software is installed into the directory that you specified in [Step 8 on page 51](#).

- 13** When the Next button becomes available, the installation is complete. Click Next.

The Finish Installation screen appears. This screen indicates whether the installation was successful and shows the location of the installer log file. You can access this file to review the installation results.

- 14** To close the installer, click Close.

The SWSE installation is now finished. The shortcut for the SWSE Configuration Wizard was created in the program folder that you specified in [Step 11 on page 52](#).

- 15** After installing the SWSE software:

- Verify the SWSE installation, as described in [“Verifying Installation for the Siebel Web Server Extension” on page 199](#).
- Install the latest Siebel Patchset release, where available. Then verify the installation again.

- Configure the SWSE logical profile and then apply it to the SWSE, as described in [“Process of Configuring the Siebel Web Server Extension” on page 82](#). You must have already configured the Siebel Enterprise Server components.
- Perform any additional postinstallation steps, as described in [Chapter 6, “Additional Postinstallation and Configuration Tasks.”](#)

**16** Repeat this procedure on each computer where you are installing the SWSE software.

## Installing the Siebel Web Server Extension as a Migration Installation

Use the following procedure to install the Siebel Web Server Extension (SWSE) as a migration installation for Siebel CRM version 8.1.1.14 or version 8.2.2.14. Migration installation is a type of patch installation.

**NOTE:** Use this procedure only when an earlier version of SWSE is already installed (Siebel CRM version 8.1.1.x or version 8.2.2.x). Otherwise, you must follow the steps in [“Installing the Siebel Web Server Extension as a New Installation” on page 50](#) instead.

During a migration installation, the original SWSE installation directory is renamed from *Original Name* to *Original Name\_pre8.1.1.14.0* or *Original Name\_pre8.2.2.14.0*. For example, if the original installation directory name was *sweapp*, then this directory is renamed to *sweapp\_pre8.1.1.14.0* or *sweapp\_pre8.2.2.14.0*. The new SWSE installation directory is named *Original Name*, such as *sweapp*. Retain the original installation directory, in case you choose to perform a rollback uninstallation later. For more information, see [“Rolling Back the Siebel Web Server Extension” on page 265](#).

This topic is part of [“Installing the Siebel Web Server Extension” on page 49](#).

This task is a step in [“Roadmap for Installing Siebel Business Applications in a Migration Installation Case \(Existing Installation\)” on page 39](#).

### ***To install the SWSE as a migration installation***

- 1** Review [“About Installing Siebel Business Applications” on page 41](#).
- 2** (Optional) Stop the Oracle Configuration Manager service for the existing installation of SWSE. If you do not shut down this service, then the installer shuts it down.
- 3** Stop the Microsoft IIS services:
  - Stop the IIS Administration service.
  - Stop the World Wide Web Publishing service.
- 4** Log on to the Web server computer as the operating system administrator.

- 5 In Windows Explorer, navigate to the Siebel image location for the current release. Then navigate to the directory where the installer is located. Navigate to *Siebel\_Image\Windows\Server\Siebel\_Web\_Server\_Extension\Disk1\install*.

In this path, *Siebel\_Image* is the directory for your version-specific Siebel network image, such as C:\Siebel\_Install\_Image\8.1.1.14 or C:\Siebel\_Install\_Image\8.2.2.14.

- 6 To start the SWSE installer, double-click setup.bat.

The SWSE installer displays the Welcome screen.

- 7 Click Next.

The Oracle Configuration Manager screen appears, which prompts for email contact information.

- 8 Enter your My Oracle Support credentials and click Next.

Oracle Configuration Manager software is installed on the target computer. For more information, see ["About Oracle Configuration Manager" on page 276](#).

The Select Installation Task screen appears.

- 9 To perform a migration installation of the SWSE software where an existing prior installation of Siebel CRM version 8.1.1.x or version 8.2.2.x is present, choose Migration Installation, and click Next.

The Installation Migration Details screen appears.

- 10 Confirm or select the name and location of your existing installation, and then click Next. Do the following:

- Confirm the existing installation name, or select it from the drop-down list. The value that you specify is used in the parent program folder name for the Oracle Universal Installer software. (A separate program folder is created for the SWSE Configuration Wizard for this installation.)
- Confirm the existing installation location, or select it from the drop-down list.

For more information about Oracle home and installation path requirements, see ["File and Directory Naming Conventions" on page 287](#).

The Program Folder Name screen appears.

- 11 In the Program Folder Name screen, click Next to accept the default location for the program shortcut for the SWSE Configuration Wizard for this installation. Or, modify the program folder name, and click Next.

By default, for a U.S. English (ENU) installation, the shortcut is created in *Siebel Web Server Extension 8.1.1.14.0* or *Siebel Web Server Extension 8.2.2.14.0*. The default program folder name and shortcut name are in the language in which the installer ran. The SWSE installer creates a shortcut called *Siebel Web Server Extension Configuration*.

The Summary screen appears. This screen displays the location where the SWSE software will be installed.

**12** Review the information in the Summary screen. Before you proceed, confirm that you have met all of the installation requirements, such as for disk space. Then do one of the following:

- To begin installing the SWSE software, click Install. You can also click Install after saving a response file.
- To save a response file to use for an unattended installation later, click Save Response File, and then save the file from the dialog box that appears. If you are not also installing at this time, then click Cancel after you save the response file. For information about performing unattended installations, see [“Installing Siebel Enterprise Server Components and Siebel Web Server Extension in Unattended Mode” on page 56](#).

The Installation Progress screen appears. The SWSE software is installed into the directory that you specified in [Step 10 on page 54](#).

**13** When the Next button becomes available, the installation is complete. Click Next.

The Finish Installation screen appears. This screen indicates whether the installation was successful and shows the location of the installer log file. You can access this file to review the installation results. This screen also shows the new location of the original installation, which the installer moved before it performed the new installation.

**14** Review the report that is generated about any conflicts between your customized files and the files that are delivered by the SWSE installer. As needed, copy any of your customized files from the original installation to the new migrated installation.

Conflicts are identified in the file `overwrittenfiles_timestamp.log`, which is created in the `ORACLE_HOME\cfgtool\logs\oui` directory (in the new SWSE installation).

**15** To close the installer, click Close.

The SWSE installation is now finished. The shortcut for the SWSE Configuration Wizard was created in the program folder that you specified in [Step 11 on page 54](#).

After the migration process is complete, then the installer restarts the service for the Oracle Configuration Manager. Note that the software that runs is part of the new installation you are migrating to, not part of the original installation.

**16** Restart the Web server:

- Start the World Wide Web Publishing service.
- Start the IIS Administration service.

After the migration process is complete, then the installer starts the services for the Oracle Configuration Manager. Note that the software that runs is part of the new installation you are migrating to, not part of the original installation.

**17** After installing the SWSE software:

- Verify the SWSE installation, as described in [“Verifying Installation for the Siebel Enterprise Server” on page 191](#).
- Install the latest Siebel Patchset release, where available. Then verify the installation again.
- Perform any additional postinstallation steps, as described in [Chapter 6, “Additional Postinstallation and Configuration Tasks.”](#)

**18** Repeat this procedure on each computer with an SWSE installation to be migrated.

## Installing Siebel Enterprise Server Components and Siebel Web Server Extension in Unattended Mode

The installer programs for Siebel Enterprise Server and Siebel Web Server Extension support an optional *unattended installation*, which is an installation that has been preconfigured to require no user input when the installation program runs. You can save a response file in a regular installer session. Then you can run the installer at the command line with certain flags appended to the installer command to execute the response file. Together, these tasks constitute installing in unattended mode.

You can perform unattended installations for better performance when installing software on multiple server computers. Or, you might perform unattended installations if user input during an installation is not allowed in your environment, as might be the case in some secure environments. An unattended installation prepackages all of the required parameters so that you only have to execute a command to perform the installation.

You can use unattended mode to perform a new installation or migration installation of the current release, or to add languages to an existing installation of the current release. To add languages, you must use this method.

**CAUTION:** Unattended installations provide no direct feedback or error notification. Therefore, you must test your settings in a development environment before system-wide deployment in a production environment. It is strongly recommended that you become thoroughly familiar with GUI installation and configuration for any Siebel modules for which you intend to perform unattended installation or configuration.

This topic contains the following information:

- [“Guidelines for Installing Servers in Unattended Mode” on page 57](#)
- [“Saving an Installation Response File” on page 57](#)
- [“Editing an Oracle-Provided Installation Response File” on page 58](#)
- [“Performing an Installation in Unattended Mode” on page 58](#)

### Related Topics

- [“About Installing Siebel Business Applications” on page 41](#)
- [“Installing Siebel Enterprise Server” on page 42](#)
- [“Installing the Siebel Web Server Extension” on page 49](#)
- [“About Configuring Siebel Business Applications” on page 61](#)
- [“Installing and Deploying Additional Languages” on page 142](#)
- [“Verifying Installation for the Siebel Enterprise Server” on page 191](#)
- [“Verifying Installation for the Siebel Web Server Extension” on page 199](#)



Chapter 12, “Requirements for Installing and Configuring Siebel Business Applications”

## Guidelines for Installing Servers in Unattended Mode

Review the following guidelines for installing Siebel Enterprise Server or Siebel Web Server Extension in unattended mode:

- **Keep track of the response file results.** Because the unattended installation session is controlled by the response file, you must keep careful track of the result each response file will yield when you perform an unattended installation.

For example, depending on your selections when you generated a response file for Siebel Enterprise Server, the unattended installation performed with this file might install any or all of the Siebel Enterprise Server components: Siebel Gateway Name Server, Siebel Server, Siebel Database Configuration Utilities, or EAI Connectors.

- **Create the response file on a computer similar to the target computer.** When you run the installer as described in [“Saving an Installation Response File” on page 57](#), installer validations are done as if you were performing a real installation. It is strongly recommended that you run the installer on a computer that has similar resources and configuration settings as the target computer on which the installation will be performed, as described in [“Performing an Installation in Unattended Mode” on page 58](#). Unattended installations must meet all of the documented requirements, including those described in [Chapter 12, “Requirements for Installing and Configuring Siebel Business Applications.”](#)
- **Validate the installation.** Validate each installation after it has completed, as described in [“Verifying Installation for the Siebel Enterprise Server” on page 191](#) and [“Verifying Installation for the Siebel Web Server Extension” on page 199](#).

To install Siebel Enterprise Server components or Siebel Web Server Extension and the specified Siebel language packs using unattended mode, perform the following tasks:

- [“Saving an Installation Response File” on page 57](#)
- [“Editing an Oracle-Provided Installation Response File” on page 58](#)
- [“Performing an Installation in Unattended Mode” on page 58](#)

## Saving an Installation Response File

Perform the following steps to save an installation response file to be used in an unattended installation of Siebel Enterprise Server or SWSE.

**NOTE:** If you are adding languages to an existing installation of the current release, then do not use this procedure. Instead, follow the procedure in [“Editing an Oracle-Provided Installation Response File” on page 58](#).

### *To save an installation response file*

- 1 Navigate to the Siebel image location where the installer is located.

- 2 Start the installer for Siebel Enterprise Server or Siebel Web Server Extension (SWSE).

For information about starting these installers, see [“Installing Siebel Enterprise Server” on page 42](#) and [“Installing the Siebel Web Server Extension” on page 49](#).

- 3 Provide input to the installer wizard, as in a normal GUI installation.
- 4 In the Summary screen, click Save Response File.

- 5 Specify the location of the response file, for example, C:\temp\sesi nstal l . rsp, and save the file.

A response file is generated that includes data that is derived from the input that you made during the installer session.

- 6 After the response file is saved, click Cancel.

The installer session ends.

In addition to saving the response file at the location that you specified at the command line, the installer creates the Siebel installation directory at the location that you specified in the installer session (for example, C:\temp\sesi nstal l . rsp). Although the Siebel module is not installed (because you clicked Cancel), this directory contains a subdirectory called i nventory, which includes information about the product inventory.

See [“Performing an Installation in Unattended Mode” on page 58](#) for information about performing a Siebel Enterprise Server or SWSE installation in unattended mode, using the response file that you just generated.

## Editing an Oracle-Provided Installation Response File

If you are adding languages to an existing Siebel Enterprise Server or SWSE installation, then you must edit an Oracle-provided installation response file instead of saving a response file from the installer. For detailed information about the task of adding languages, see [“Installing and Deploying Additional Languages” on page 142](#).

## Performing an Installation in Unattended Mode

Perform the following steps to perform an unattended installation of Siebel Enterprise Server or Siebel Web Server Extension.

First, you must save an installation response file as described in [“Saving an Installation Response File” on page 57](#) or prepare an installation response file for adding languages as described in [“Editing an Oracle-Provided Installation Response File” on page 58](#). Then you run the installer command as shown in the following procedure. For detailed information about the task of adding languages, see [“Installing and Deploying Additional Languages” on page 142](#).

### *To perform an installation in unattended mode*

- 1 (For add language operations only) Uninstall any Siebel Patchset release that you have installed on top of the current release, for each installed Siebel module for which you are adding languages.
- 2 Navigate to the Siebel image location where the installer is located.

- 3 Place the response file that you previously generated or edited into the correct Siebel image directory for the Siebel module (where the installer program is located), so that the file can be read when you run the installer.

**NOTE:** Always back up any existing valid response file before replacing it with a new file.

- 4 Open a DOS command window.
- 5 Run a command like the following to start the Siebel Enterprise Server or Siebel Web Server Extension installer:

```
setup.bat -silent -responseFile path_to_installation_response_file
```

In this command, *path\_to\_installation\_response\_file* is the full path and name of a response file to be executed (for example, C:\temp\sesinstall.rsp).

This command runs the installer in unattended mode and specifies the location of the response file to be executed. No installer screens are displayed, and no further user input is prompted for after the installer starts. The installation result depends on the content of the specified response file.

- 6 Validate the installation after it has completed.  
For more information, see [“Verifying Installation for the Siebel Enterprise Server” on page 191](#) and [“Verifying Installation for the Siebel Web Server Extension” on page 199](#).
- 7 (For add language operations only) Reinstall any previously installed Siebel Patchset release that you uninstalled in [Step 1 on page 58](#). Then validate the installation again.



# 4

## Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension

This chapter explains how to configure Siebel Enterprise Server components and the Siebel Web Server Extension. It includes the following topics:

- [About Configuring Siebel Business Applications on page 61](#)
- [Starting a Siebel Configuration Wizard on page 62](#)
- [Configuring the Siebel Gateway Name Server on page 66](#)
- [Configuring the Siebel Enterprise on page 67](#)
- [Installing the Siebel Database on page 76](#)
- [Configuring the Siebel Server on page 77](#)
- [Process of Configuring the Siebel Web Server Extension on page 82](#)
- [More Information About Using the Siebel Configuration Wizards on page 91](#)

### About Configuring Siebel Business Applications

The main Siebel Enterprise Server components that you can install are Siebel Gateway Name Server, Siebel Server, and Database Configuration Utilities. After installing one or more of these modules, or installing the Siebel Web Server Extension (SWSE), you configure them by using one of the Siebel Configuration Wizards, as described in this chapter.

The Siebel Configuration Wizard framework supports configuration tasks for the Siebel Enterprise Server components, the Siebel database, and the SWSE. Multiple configuration wizards are provided for these modules, supporting different configuration tasks. Within each task, most of the screens provide explanatory information about the settings you are prompted to make. Some configuration wizard tasks can be run multiple times, while others must be run only once.

The Configuration Wizard automatically runs in the language that you are currently using, if the language is supported for this purpose. Make sure that you have the correct language set at the operating system level. For more information, see [“About The Language in Which Siebel Installers and Wizards Run” on page 283](#).

Keep track of which configuration tasks you have performed and which you have not yet performed. Some tasks to configure Siebel Business Applications modules or to remove configuration data have dependencies on other tasks having been performed. Removing existing configuration data is required before uninstalling particular modules.

In general, after you perform a migration installation of the current release for Siebel Enterprise Server or SWSE, you do not have to run the Siebel Configuration Wizards again. However, if you do have to run these wizards for any reason, then you must run the wizards that were installed for the current release.

The Configuration Wizard displays in its title bar the name *Siebel Configuration Wizard*. The options that it displays depend on which module you are configuring. (Sometimes this guide refers to the Siebel Configuration Wizard to mean any or all of the Configuration Wizards. Or, depending on the context, this guide might instead refer to a wizard using a more specific name, such as the Siebel Server Configuration Wizard.)

The Configuration Wizard displays fields and selectable options, such as check boxes or radio buttons. Where it is available, you can click Help to display help text with more information about the settings. Which options appear, and some of the default values, depend on prior selections. Wizard tasks might branch in several different ways. The sequence of items listed in the tables in this chapter might not correspond to specific wizard tasks.

The Siebel Configuration Wizards support the initial configuration of Siebel Business Applications and also let you modify settings for an existing Siebel Enterprise. To reconfigure an existing Siebel Server, you can remove an existing Siebel Server configuration and then re-create it. Alternatively, to modify settings for an existing Siebel Enterprise or Siebel Server, you can use Siebel Server Manager. For more information, see *Siebel System Administration Guide*.

Use the Windows Control Panel to change whether a Siebel service starts automatically or manually, or to change the user name or password under which the service runs.

**NOTE:** You cannot operate any Siebel Enterprise Server components until you have configured them. Also, you must be running the Siebel Gateway Name Server in order to configure the Siebel Enterprise or the Siebel Server.

The Siebel Configuration Wizards also support removing configuration data, which is a necessary part of uninstalling the Siebel Business Applications software.

### Related Topics

["Installation-Related Changes for Siebel Innovation Pack 2014" on page 25](#)

["Installation-Related Changes for Siebel Innovation Pack 2013" on page 28](#)

[Chapter 3, "Installing Siebel Enterprise Server Components and the Siebel Web Server Extension"](#)

["Starting a Siebel Configuration Wizard" on page 62](#)

["More Information About Using the Siebel Configuration Wizards" on page 91](#)

[Chapter 12, "Requirements for Installing and Configuring Siebel Business Applications"](#)

["Process of Removing Configuration Data" on page 256](#)

## Starting a Siebel Configuration Wizard

Use the following procedure to start a Siebel Configuration Wizard. You start the wizard by using a Windows shortcut or from the command line. For more information about the command-line syntax elements, see ["Siebel Configuration Wizard Syntax Elements" on page 94](#). For UNIX-based procedures, see *Siebel Installation Guide for UNIX*.

### Related Topics

["About Configuring Siebel Business Applications" on page 61](#)

[“More Information About Using the Siebel Configuration Wizards” on page 91](#)

## Starting a Siebel Configuration Wizard Using a Windows Shortcut

Use the following procedure to start a Siebel Configuration Wizard by using a Windows shortcut.

### *To start a Siebel Configuration Wizard using a Windows shortcut*

- 1 On a computer where you installed Siebel Enterprise Server software, choose Start, All Programs, Siebel Enterprise Server 8.1.1.14.0 or 8.2.2.14.0, and then *Config\_Type*.

In this menu command, *Config\_Type* is the type of configuration you want to perform, such as:

- Siebel Enterprise Configuration
- Siebel Server Configuration
- Database Server Configuration

Go to [Step 3 on page 63](#).

- 2 On a computer where you installed Siebel Web Server Extension, choose Start, All Programs, Siebel Web Server Extension 8.1.1.14.0 or 8.2.2.14.0, and then Siebel Web Server Extension Configuration.
- 3 Respond to each prompt in the Configuration Wizard that you are running, then click Next to go to the next screen, or to complete the configuration.
  - For configuring the Siebel Gateway Name Server, see [“Configuring the Siebel Gateway Name Server” on page 66](#).
  - For configuring the Siebel Enterprise, see [“Configuring the Siebel Enterprise” on page 67](#).
  - For installing the Siebel database, see [“Installing the Siebel Database” on page 76](#).
  - For configuring the Siebel Server, see [“Configuring the Siebel Server” on page 77](#).
  - For configuring the Siebel Web Server Extension (SWSE), see [“Process of Configuring the Siebel Web Server Extension” on page 82](#).

**NOTE:** You can click Cancel to exit the Configuration Wizard before you complete the configuration.

After you specify or confirm all of your selections, the summary screen appears.

- 4 In the summary screen, do one of the following:
  - Click Next again to complete the configuration. Go to the next step.
  - Optionally save a response file in this screen, to use in an unattended configuration, then click Cancel to exit the Configuration Wizard without completing configuration.
- 5 After configuration is complete, click Exit to exit the Configuration Wizard.

To help you to verify that the configuration completed successfully, the log file is referenced at the end of the configuration task.

## Starting a Siebel Configuration Wizard at the Command Line

Use the following procedure to start a Siebel Configuration Wizard at the command line.

### *To start a Siebel Configuration Wizard at the command line*

- 1 Open a DOS command window.
- 2 Navigate to the `config` subdirectory of the installed Siebel module that you want to configure within your `SIEBEL_ROOT` directory. For example, for Siebel CRM version 8.1.1.14:
  - For configuring the Siebel Gateway Name Server or the Siebel Enterprise, navigate to a directory like the following on the Siebel Gateway Name Server computer:  
C: \siebel\8.1.1.14.0\ses\config. Also navigate to this directory if you are configuring an SWSE logical profile.
  - For configuring the Siebel Server or the Siebel database, navigate to a directory like the following, on the Siebel Server computer: C: \siebel\8.1.1.14.0\ses\config.
  - For configuring the Siebel Web Server Extension (SWSE), navigate to a directory like the following, on the Web server computer: C: \siebel\8.1.1.14.0\seapp\config.

To start the Configuration Wizard to configure in GUI mode, go to the next step. Use the same commands if you are generating a response file for unattended configuration. To perform an unattended configuration, go to [Step 4 on page 65](#).

- 3 Enter a command similar to the following to start the Configuration Wizard:

```
install_path\config\config.bat -mode mode_name
```

where:

- *install\_path* is the installation path for the installed Siebel module
- *mode\_name* specifies the Configuration Wizard to run, and is one of the following:
  - `enterprise` is for the Siebel Enterprise Configuration Wizard (includes tasks for configuring Siebel Gateway Name Server, Siebel Enterprise, and SWSE logical profile)
  - `siebsrvr` is for the Siebel Server Configuration Wizard
  - `dbsrvr` is for the Siebel Database Configuration Wizard
  - `swse` is for the Siebel Web Server Extension Configuration Wizard

Example commands follow for the modules listed, for Siebel CRM version 8.1.1.14.

Siebel Enterprise Configuration Wizard:

```
C: \siebel\8.1.1.14.0\ses\config\config.bat -mode enterprise
```

Siebel Server Configuration Wizard:

```
C: \siebel\8.1.1.14.0\ses\config\config.bat -mode siebsrvr
```

Siebel Database Configuration Wizard:

```
C: \siebel\8.1.1.14.0\ses\config\config.bat -mode dbsrvr
```



Siebel Web Server Extension Configuration Wizard:

```
C:\siebel\8.1.1.14.0\sweapp\config\config.bat -mode swse
```

For an unattended configuration, go to the next step. Otherwise, go to [Step 5 on page 65](#).

- 4 For an unattended configuration, you save and later execute separate response files for configuring the Siebel Gateway Name Server, Siebel Enterprise, SWSE logical profile, Siebel database, Siebel Server, or Siebel Web Server Extension. Do one of the following:
  - If you are generating a response file, then go to [Step 5 on page 65](#) and continue the configuration process. In the summary screen, choose the option to save a configuration file, then cancel the wizard. Then, to perform the unattended configuration of the same component, restart the wizard as described in the next paragraph.
  - If you are executing a response file that you saved in a previous configuration session, then start the wizard using the `-responseFile` option, specifying the name of the response file to execute. Use a command similar to the following:

```
install_path\config\config.bat -mode mode_name -responseFile file_name
```

where:

- *install\_path* is the installation path for the installed Siebel module (see examples in [Step 3 on page 64](#))
- *mode\_name* specifies the Configuration Wizard to run (see examples in [Step 3 on page 64](#))
- *file\_name* is the name of the response file that you are executing

If you are generating a response file, then go to the next step. If you are executing a response file, then the Configuration Wizard runs in unattended mode and completes configuration.

- 5 Respond to each prompt in the Configuration Wizard that you are running, then click Next to go to the next screen or to complete the configuration.
  - For configuring the Siebel Gateway Name Server, see ["Configuring the Siebel Gateway Name Server" on page 66](#).
  - For configuring the Siebel Enterprise, see ["Configuring the Siebel Enterprise" on page 67](#).
  - For installing the Siebel database, see ["Installing the Siebel Database" on page 76](#).
  - For configuring the Siebel Server, see ["Configuring the Siebel Server" on page 77](#).
  - For configuring the Siebel Web Server Extension (SWSE), see ["Process of Configuring the Siebel Web Server Extension" on page 82](#).

**NOTE:** You can click **Cancel** to exit the Configuration Wizard before you complete the configuration.

After you specify or confirm all of your selections, the summary screen appears.

- 6 In the summary screen, do one of the following:
  - Click Next again to complete the configuration. Go to the next step.

- Optionally save a response file in this screen, to use in an unattended configuration, then click Cancel to exit the Configuration Wizard without completing configuration.

7 After configuration is complete, click Exit to exit the Configuration Wizard.

To help you to verify that the configuration completed successfully, the log file is referenced at the end of the configuration task.

## Configuring the Siebel Gateway Name Server

After you install the Siebel Gateway Name Server, you run the Siebel Configuration Wizard (Siebel Enterprise Configuration) to configure the Siebel Gateway Name Server.

This task is a step in:

- [“Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment” on page 33](#)
- [“Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case \(Existing Database\)” on page 36](#)

### Related Topics

[“About Configuring Siebel Business Applications” on page 61](#)

[“Starting a Siebel Configuration Wizard” on page 62](#)

[“More Information About Using the Siebel Configuration Wizards” on page 91](#)

[“Requirements for Installing and Configuring Siebel Enterprise Server Components” on page 296](#)

### *To configure the Siebel Gateway Name Server*

1 Start the Siebel Enterprise Configuration Wizard.

For more information, see [“Starting a Siebel Configuration Wizard” on page 62](#).

2 Choose Create New Configuration, then Configure a New Gateway Name Server.

3 Provide input as described in [Table 4 on page 67](#). Click Next to go to the next screen.

Where it is available, click Help to display help text with more information about the settings.

**NOTE:** You can click Cancel to exit the Configuration Wizard before you complete the configuration.

After you specify or confirm all of your selections, the summary screen appears.

4 In the summary screen, do one of the following:

- Click Next again to complete the configuration. Go to the next step.
- Optionally save a response file in this screen, to use in an unattended configuration, then click Cancel to exit the Configuration Wizard without completing configuration.

- 5 After configuration is complete, click Exit to exit the Configuration Wizard.

To help you to verify that the configuration completed successfully, the log file is referenced at the end of the configuration task.

## Configuration Settings for the Siebel Gateway Name Server

Table 4 on page 67 describes the settings that are requested in the Siebel Configuration Wizard for configuring the Siebel Gateway Name Server. Where it is available, you can click Help to display help text with more information about the settings.

Table 4. Settings for Configuring the Siebel Gateway Name Server

Setting in Siebel Configuration Wizard	Description
Gateway Name Server TCP/IP Port	Specify the port number that this Siebel Gateway Name Server uses for connections from Siebel Server or other components. The default port number is 2320.
Language for Server Messages and Logs	The primary language, which is used for server messages and log files. Language support must be present on the server on which you have installed the software. See also <a href="#">“Installing and Deploying Siebel Business Applications with Multiple Languages”</a> on page 133.  <b>NOTE:</b> This option does not appear for a single-language installation. In this case, the installed language is used as the primary language.
Autostart Gateway Name Server System Service	Specify whether to start the Siebel Gateway Name Server system service automatically when the operating system starts.

## Configuring the Siebel Enterprise

The task for configuring the Siebel Enterprise lets you configure authentication using Siebel security adapters, TLS or SSL encryption, and related settings. Many of the security settings also apply to configuring the SWSE logical profile. For detailed information about the security settings in the Configuration Wizards, see *Siebel Security Guide*.

**CAUTION:** It is strongly recommended to use TLS for best security, where possible. Using SSL is not recommended for secure environments. For more information, see *Siebel Security Guide*. See also 1944467.1 on My Oracle Support.

**NOTE:** After you initially configure the Siebel Enterprise, you can use this wizard to modify many of the configuration settings for an existing Siebel Enterprise. You can also configure many of these settings in the Siebel Server Configuration Wizard, to override Siebel Enterprise-level settings for the current Siebel Server. In addition, you can modify the Siebel Enterprise configuration by using Siebel Server Manager. For more information, see *Siebel System Administration Guide*.

This task is a step in:

- [“Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment” on page 33](#)
- [“Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case \(Existing Database\)” on page 36](#)

### Related Topics

[“About Configuring Siebel Business Applications” on page 61](#)

[“Starting a Siebel Configuration Wizard” on page 62](#)

[“More Information About Using the Siebel Configuration Wizards” on page 91](#)

[“Requirements for Installing and Configuring Siebel Enterprise Server Components” on page 296](#)

### *To configure the Siebel Enterprise*

- 1 Start the Siebel Enterprise Configuration Wizard.

For more information, see [“Starting a Siebel Configuration Wizard” on page 62](#).

- 2 Choose Create New Configuration, then Configure a New Enterprise in a Gateway Name Server.

- 3 Provide input as described in [Table 5 on page 69](#). Click Next to go to the next screen.

Where it is available, click Help to display help text with more information about the settings.

**NOTE:** You can click Cancel to exit the Configuration Wizard before you complete the configuration.

After you specify or confirm all of your selections, the summary screen appears.

- 4 In the summary screen, do one of the following:

- Click Next again to complete the configuration. Go to the next step.
- Optionally save a response file in this screen, to use in an unattended configuration, then click Cancel to exit the Configuration Wizard without completing configuration.

- 5 After configuration is complete, click Exit to exit the Configuration Wizard.

To help you to verify that the configuration completed successfully, the log file is referenced at the end of the configuration task.

### Configuration Settings for the Siebel Enterprise

[Table 5 on page 69](#) describes the settings that are requested in the Siebel Configuration Wizard for configuring a new Siebel Enterprise or modifying an existing Siebel Enterprise. Where it is available, you can click Help to display help text with more information about the settings.

For requirements and restrictions for these parameters, see [“Requirements for Installing and Configuring Siebel Enterprise Server Components” on page 296](#). For additional information about many of these parameters, see *Siebel System Administration Guide* and *Siebel Security Guide*.

Parameters that are set as a result of configuring the Siebel Enterprise are set at the Siebel Enterprise level or set for named subsystems such as for a data source or security adapter.

Table 5. Settings for Configuring the Siebel Enterprise

Setting in Siebel Configuration Wizard (Parameter)	Description
Gateway Name Server Authentication User Account Name	Specify the user name for the account, usually a database account, that you are using for Siebel Gateway Name Server authentication. For more information about this account and the associated requirements, see <a href="#">“Requirements for Siebel Gateway Name Server Authentication”</a> on page 299.  <b>NOTE:</b> The first time that you configure a Siebel Enterprise (before authentication settings have been propagated to the Siebel Gateway Name Server), the user account name and password fields have no effect.
Gateway Name Server Authentication User Account Password	Specify the password for the account that you are using for Siebel Gateway Name Server authentication.
Gateway Name Server Host Name	Specify the host name of the computer on which the Siebel Gateway Name Server is installed. For more information, see <a href="#">“Restrictions on Host Names for Siebel Gateway Name Server and Siebel Server”</a> on page 286.
Gateway Name Server TCP/IP Port	Specify the port number that the Siebel Gateway Name Server uses for connections from Siebel Server or other components. The default port number is 2320. Use the port number that you specified when you configured the Siebel Gateway Name Server.
Siebel Enterprise Name	Specify the name that you want for the Siebel Enterprise. For more information, see <a href="#">“Restrictions on Names for Siebel Enterprise and Siebel Server”</a> on page 287.
Enterprise Description (EnterpriseDesc)	Provide a short description for the Siebel Enterprise.
Primary Siebel File System (FileSystem)	Specify the location or locations of the Siebel File System. For more information, see <a href="#">“Creating the Siebel File System”</a> on page 289.
Database Platform	The RDBMS options for the Siebel database are: <ul style="list-style-type: none"> <li>■ Oracle Database Enterprise Edition</li> <li>■ IBM DB2 UDB for Linux UNIX Windows</li> <li>■ IBM DB2 UDB for z/OS</li> <li>■ Microsoft SQL Server</li> </ul>

Table 5. Settings for Configuring the Siebel Enterprise

Setting in Siebel Configuration Wizard (Parameter)	Description
Microsoft SQL Server Host Name	(Microsoft SQL Server only)
Microsoft SQL Server Database Name	(Microsoft SQL Server only)
Database Table Owner (TableOwner)	(Oracle Database, DB2, or DB2 for z/OS only)
IBM DB2 Database Alias	(DB2 only)
Current IBM DB2 SQL ID / Group Name	(DB2 for z/OS only)
Oracle SQLNet Connect String	(Oracle Database only)
Siebel Database User Account Name	(For all database platforms)
Siebel Database User Account Password	(For all database platforms)

Table 5. Settings for Configuring the Siebel Enterprise

Setting in Siebel Configuration Wizard (Parameter)	Description
Enterprise Security Authentication Profile	<p>The options are:</p> <ul style="list-style-type: none"> <li>■ Database Authentication (default). Corresponds to SecAdptMode parameter value DB.</li> <li>■ Lightweight Directory Access Protocol (LDAP) Authentication. Corresponds to SecAdptMode parameter value LDAP.</li> <li>■ Custom Security Authentication, using the Security SDK. Corresponds to SecAdptMode parameter value CUSTOM.</li> <li>■ Active Directory (ADSI) Authentication (Windows only). Corresponds to SecAdptMode parameter value ADSI.</li> </ul> <p>Database authentication is enabled by default. After you configure a different security adapter, that adapter is not yet enabled for use.</p> <p>If you enable a security adapter after configuring it, then manually set the parameter SecAdptMode using one of the listed values. For example, do so for an Application Object Manager component for which you are enabling a security adapter, such as the security adapter for LDAP.</p> <p><b>NOTE:</b> Although database authentication is supported for development environments only, it is strongly recommended that you keep database authentication enabled for the Siebel Enterprise. As applicable for your deployment, enable any non-database security adapter for individual servers or components only, using Server Manager.</p> <p>For customers using Active Directory, it is generally recommended that you use the LDAP security adapter instead of the ADSI security adapter.</p> <p>If, later in the same Configuration Wizard session, you select the option Propagate Authentication Settings to the Gateway Name Server, then the settings are also propagated for Siebel Gateway Name Server authentication. For more information, see <a href="#">"Requirements for Siebel Gateway Name Server Authentication" on page 299</a>. For more information about all of the authentication options, see <i>Siebel Security Guide</i>.</p>

Table 5. Settings for Configuring the Siebel Enterprise

Setting in Siebel Configuration Wizard (Parameter)	Description
Security Adapter Name (named subsystem)	<p>In general, it is recommended that you accept the default security adapter name. The default name depends on the type of security adapter that you are configuring. Default names are as follows:</p> <ul style="list-style-type: none"> <li>■ DBSecAdpt</li> <li>■ LDAPSecAdpt</li> <li>■ CUSTOMSecAdpt</li> <li>■ ADSISecAdpt</li> </ul> <p>If you enable a security adapter after configuring it, then manually set the parameter SecAdptName to the same name. For example, do so for an Application Object Manager component for which you are enabling a security adapter, such as the security adapter for LDAP. For more information about all of the authentication options, see <i>Siebel Security Guide</i>.</p>
Security Authentication Library CRC Checksum (CRC)	<p>LDAP, ADSI, or custom authentication only.</p> <p><b>NOTE:</b> This option does not apply to database authentication. The same is true for <i>all of the remaining authentication settings, except those for Siebel Gateway Name Server authentication.</i></p>
Directory Server Domain Name (ServerName)	LDAP or ADSI authentication only.
LDAP Port Configuration (Port)	LDAP authentication only. The default port numbers are 389 or 636 (secure).
Network TCP/IP Port Number (Port)	LDAP authentication only.
Siebel Username Attribute (UsernameAttributeType)	LDAP or ADSI authentication only.
Siebel Password Attribute (PasswordAttributeType)	LDAP authentication only.
Credentials Attribute (CredentialsAttributeType)	LDAP, ADSI, or custom authentication only.
LDAP Roles Attribute (optional) (RolesAttributeType)	LDAP, ADSI, or custom authentication only.



Table 5. Settings for Configuring the Siebel Enterprise

Setting in Siebel Configuration Wizard (Parameter)	Description
Shared Database Account Distinguished Name (SharedCredentialsDN)	LDAP, ADSI, or custom authentication only.
Store shared database user credentials as parameters	LDAP or ADSI authentication only.
Shared Database Account	LDAP or ADSI authentication only.
Shared Database Account Password	LDAP or ADSI authentication only.
Siebel Application Distinguished Name (DN) (ApplicationUser)	LDAP, ADSI, or custom authentication only.
Application Password (ApplicationPassword)	LDAP or ADSI authentication only.
Configure Web Single Sign-On (Web SSO) (SingleSignOn)	LDAP or ADSI authentication only.
User Specification (UserSpec)	LDAP or ADSI authentication only.
Shared Secret (TrustToken)	LDAP or ADSI authentication only.
SSL Database Certificate File (SslDatabase)	LDAP authentication only.
Hash User Passwords (HashUserPwd)	LDAP, ADSI, or custom authentication only.
Hash Database Passwords (HashDBPwd)	LDAP, ADSI, or custom authentication only.
Salt User Passwords (SaltUserPwd)	LDAP, ADSI, or custom authentication only.
Salt Attribute (SaltAttributeType)	LDAP, ADSI, or custom authentication only.

Table 5. Settings for Configuring the Siebel Enterprise

Setting in Siebel Configuration Wizard (Parameter)	Description
Security Adapter Mapped User Name (UseAdapterUserName)	LDAP, ADSI, or custom authentication only.
Siebel User ID Attribute (SiebelUsernameAttributeType)	LDAP, ADSI, or custom authentication only.
Base Distinguished Name (DN) (BaseDN)	LDAP or ADSI authentication only.
Propagate Change (PropagateChange)	LDAP or ADSI authentication only.
Propagate Authentication Settings to the Gateway Name Server	Select this option to propagate authentication settings that you made to the Siebel Gateway Name Server.  <b>NOTE:</b> The first time that you specify the Siebel Gateway Name Server authentication settings at the start of the task, you must select this check box. Subsequently, select this box only when you are changing existing settings.
Microsoft SQL Server Port Number	(Microsoft SQL Server only)  This option appears only when database authentication for Siebel Gateway Name Server authentication is used, and you are propagating authentication settings to the Siebel Gateway Name Server.
Additional Tasks for Configuring the Enterprise	The items listed represent categories of additional optional selections for creating a new Siebel Enterprise.  <ul style="list-style-type: none"> <li>■ Enterprise Network Security Encryption Type</li> <li>■ Charts Server Settings</li> <li>■ Data Quality Products and Connectors</li> </ul>
Tasks for Modifying Enterprise Configurations	The items listed represent categories of optional selections for modifying an existing Siebel Enterprise.  <ul style="list-style-type: none"> <li>■ Enterprise Network Security Encryption Type</li> <li>■ Charts Server Settings</li> <li>■ Data Quality Products and Connectors</li> <li>■ Enterprise Security Authentication Default</li> </ul>

Table 5. Settings for Configuring the Siebel Enterprise

Setting in Siebel Configuration Wizard (Parameter)	Description
Charts Server Host Name (DSChartServer)	Appears only if you selected Charts Server Settings in a prior screen. Specify the host name and the port number of the computer where you are running the Siebel Charts server. Use the format <i>Charts_server_hostname:port_number</i> . See <a href="#">“Changing the Siebel Charts Server Used by Siebel Web Clients” on page 249</a> .
Chart Image Format (DSChartImageFormat)	Appears only if you selected Charts Server Settings in a prior screen. Choose png (the default), jpg, or gif. Accepting the default is recommended. The value must be in lower case. See <a href="#">“Changing the Siebel Charts Server Used by Siebel Web Clients” on page 249</a> .
Siebel Data Quality Matching	Appears only if you selected Data Quality Products and Connectors in a prior screen. Choose None or Siebel Data Quality Connector.
Security Encryption Level or Type (Crypt and ConnType)	<p>This setting and all of the remaining items appear only if you selected Enterprise Network Security Encryption Type in a prior screen. Options are:</p> <ul style="list-style-type: none"> <li>■ SISNAPI Without Encryption</li> <li>■ SISNAPI Using RSA Encryption Algorithm</li> <li>■ SISNAPI Using TLS 1.2</li> <li>■ SISNAPI Using SSL 3.0</li> <li>■ SISNAPI Using Enhanced SSL 3.0 (requires hardware proxy)</li> <li>■ SISNAPI Using Microsoft Crypto Enhanced API Encryption</li> </ul> <p><b>CAUTION:</b> It is strongly recommended to use TLS for best security, where possible. Using SSL is not recommended for secure environments. For more information, see <i>Siebel Security Guide</i>. See also 1944467.1 on My Oracle Support.</p>
Certificate File Name (CertFileName)	This item and all of the remaining items appear only if you selected one of the TLS or SSL options in Security Encryption Level or Type. For more information, see <i>Siebel Security Guide</i> .
Certificate Authority (CA) Certificate File Name (CACertFileName)	For more information, see <i>Siebel Security Guide</i> .

Table 5. Settings for Configuring the Siebel Enterprise

Setting in Siebel Configuration Wizard (Parameter)	Description
Private Key File Name (KeyFileName)	For more information, see <i>Siebel Security Guide</i> .
Private Key File Password (KeyFilePassword)	For more information, see <i>Siebel Security Guide</i> .
Enable Peer Authentication (PeerAuth)	For more information, see <i>Siebel Security Guide</i> .
Validate Peer Certificate (PeerCertValidation)	For more information, see <i>Siebel Security Guide</i> .

## Installing the Siebel Database

If you do not have an existing Siebel database, then you have to use the Siebel Database Configuration Wizard to install this database. This task is described in [Chapter 5, “Installing the Siebel Database on the RDBMS.”](#)

Before you install the Siebel database, you must review the guidelines described for your RDBMS in [Chapter 13, “Configuring the RDBMS.”](#)

This task is a step in [“Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment” on page 33](#). When you are following the task sequence in this roadmap, you must perform the Siebel database tasks before you can configure the Siebel Server, as described in the following topic.

### Related Topics

[“About Configuring Siebel Business Applications” on page 61](#)

[“Starting a Siebel Configuration Wizard” on page 62](#)

[“More Information About Using the Siebel Configuration Wizards” on page 91](#)

[Chapter 5, “Installing the Siebel Database on the RDBMS”](#)

[“Requirements for Installing and Configuring the Siebel Database” on page 312](#)

[Chapter 13, “Configuring the RDBMS”](#)

## Configuring the Siebel Server

Running the Siebel Server Configuration Wizard assumes that you have performed all of the prerequisite configuration tasks: configuring the Siebel Gateway Name Server and the Siebel Enterprise and installing the Siebel database.

After you have installed Siebel Server and performed the prerequisite tasks, you run the Siebel Server Configuration Wizard to perform the Create New Configuration task as shown. This wizard includes the tasks described in this topic.

**NOTE:** If you do not yet have a Siebel database, then you must configure the RDBMS and install the Siebel database before you can configure the Siebel Server: the case that corresponds to the first roadmap topic identified in the following list.

This task is a step in:

- [“Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment” on page 33](#)
- [“Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case \(Existing Database\)” on page 36](#)

**NOTE:** Run the Siebel Server Configuration Wizard without using the flag for skipping validation, so that the wizard validates that the Siebel Gateway Name Server is running. If it is not running, then the wizard does not let you proceed with the configuration.

### Related Topics

[“About Configuring Siebel Business Applications” on page 61](#)

[“Starting a Siebel Configuration Wizard” on page 62](#)

[“More Information About Using the Siebel Configuration Wizards” on page 91](#)

[“Requirements for Installing and Configuring Siebel Enterprise Server Components” on page 296](#)

### *To configure the Siebel Server*

- 1 Start the Siebel Server Configuration Wizard.

For more information, see [“Starting a Siebel Configuration Wizard” on page 62](#).

- 2 Choose Create New Configuration.

- 3 Provide input as described in [Table 6 on page 78](#). Click Next to go to the next screen.

Where it is available, click Help to display help text with more information about the settings.

**NOTE:** You can click Cancel to exit the Configuration Wizard before you complete the configuration.

After you specify or confirm all of your selections, the summary screen appears.

- 4 In the summary screen, do one of the following:

- Click Next again to complete the configuration. Go to the next step.

- Optionally save a response file in this screen, to use in an unattended configuration, then click Cancel to exit the Configuration Wizard without completing configuration.

**5** After configuration is complete, click Exit to exit the Configuration Wizard.

To help you to verify that the configuration completed successfully, the log file is referenced at the end of the configuration task.

## Configuration Settings for the Siebel Server

Table 6 on page 78 describes the settings that are requested in the Siebel Configuration Wizard for configuring the Siebel Server. Where it is available, you can click Help to display help text with more information about the settings.

For requirements for and restrictions on these parameters, see [“Requirements for Installing and Configuring Siebel Enterprise Server Components” on page 296](#). For additional information about many of these parameters, see *Siebel System Administration Guide* and *Siebel Security Guide*.

**NOTE:** After you have already configured a Siebel Server, you can modify its configuration using Siebel Server Manager, as described in *Siebel System Administration Guide*.

Table 6. Settings for Configuring the Siebel Server

Setting in Siebel Configuration Wizard (Parameter)	Comment or Description
Gateway Name Server Authentication User Account Name	Specify the user name for the account that you are using for Siebel Gateway Name Server authentication.
Gateway Name Server Authentication User Account Password	Specify the password for the account that you are using for Siebel Gateway Name Server authentication.
Gateway Name Server Host Name	Specify the host name of the computer on which the Siebel Gateway Name Server is installed.
Gateway Name Server TCP/IP Port	Specify the port number that the Siebel Gateway Name Server uses for connections from Siebel Server or other components. The default port number is 2320. Use the port number that you specified when you configured the Siebel Gateway Name Server.
Siebel Enterprise Name	Specify the name of the Siebel Enterprise that you previously configured.
Siebel Server Name (Server)	Represents the name of the Siebel Server configuration instance, as it is stored in the Siebel Gateway Name Server. For more information, see <a href="#">“Restrictions on Names for Siebel Enterprise and Siebel Server” on page 287</a> .
Siebel Server Description (ServerDesc)	Provide a short description for the Siebel Server.

Table 6. Settings for Configuring the Siebel Server

Setting in Siebel Configuration Wizard (Parameter)	Comment or Description
Enable Component Groups	Specify one or more component groups to enable for this Siebel Server. For more information about component groups, see <i>Siebel System Administration Guide</i> .
Specify Client User Interface (EnableOpenUI)	<p>Specify the client user interface for Siebel applications on this Siebel Server. Select one of the following options:</p> <ul style="list-style-type: none"> <li>■ Open UI</li> <li>■ High Interactivity</li> </ul> <p>Your selection sets the parameter EnableOpenUI to True (for Siebel Open UI) or to False (for high interactivity) for the Application Object Managers in the component groups that you are enabling on this Siebel Server. For more information, see <a href="#">“Enabling Siebel Open UI” on page 129</a>.</p>
Language for Server Messages and Logs (Lang)	<p>The primary language, which is used for server messages and log files. Language support must be present on the server on which you have installed the software. See also <a href="#">“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133</a>.</p> <p><b>NOTE:</b> This option does not appear for a single-language installation. In this case, the installed language is used as the primary language.</p>
Deployed Languages	<p>Specifies the installed languages that you want to deploy. Application Object Manager components are created for each of these languages.</p> <p><b>NOTE:</b> This option does not appear for a single-language installation. In this case, the installed language is automatically deployed when you configure the Siebel Server.</p> <p>After initially configuring the Siebel Server, you can deploy languages that you installed but did not deploy by running the Siebel Server Configuration Wizard again and choosing the task Add Language Support for the Siebel Server.</p> <p>For more information, see <a href="#">“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133</a> and <a href="#">“Enabling and Disabling Language-Specific Application Object Managers and Adding Languages” on page 127</a>.</p>

Table 6. Settings for Configuring the Siebel Server

Setting in Siebel Configuration Wizard (Parameter)	Comment or Description
<p>Siebel Connection Broker Port (PortNumber)</p>	<p>Specify the TCP/IP port number for the Siebel Connection Broker component (alias SCBroker). The default port number is 2321.</p> <p><b>NOTE:</b> This port number is used for all of the communications between SCBroker and other components, including the Web server and SWSE. Make sure that the port number that you specify for SCBroker is not occupied by any other applications, other Siebel components (such as Siebel Gateway Name Server), or other Siebel Server instances. You also specify this port number when you configure the SWSE, as described in <a href="#">“Applying the SWSE Logical Profile” on page 88</a>.</p> <p>For more information about the SCBroker component, see <i>Siebel Deployment Planning Guide</i> and <i>Siebel System Administration Guide</i>.</p> <p>If you want to change an SCBroker port number later, then use Siebel Server Manager to specify a value for the Static Port Number parameter (alias PortNumber).</p>
<p>Network TCP/IP Port for Synchronization Manager (SyncPort)</p>	<p>Specify the TCP/IP port number for the Synchronization Manager component, which is part of Siebel Remote. The default port number is 40400.</p>
<p>Additional Tasks for Configuring the Siebel Server</p>	<p>Specify subtasks for additional configuration of the Siebel Server. Options include:</p> <ul style="list-style-type: none"> <li>■ Server-Specific Security Encryption Settings. Use this task to configure TLS or SSL communications between this Siebel Server and other servers.</li> <li>■ Server-Specific Security Authentication Profile Assignment. Use this task to assign an existing security adapter to this Siebel Server or to specific components.</li> </ul> <p><b>CAUTION:</b> It is strongly recommended to use TLS for best security, where possible. Using SSL is not recommended for secure environments. For more information, see <i>Siebel Security Guide</i>. See also 1944467.1 on My Oracle Support.</p>
<p>Certificate File Name (CertFileName)</p>	<p>For the Server-Specific Security Encryption Settings task.</p>
<p>Certificate Authority (CA) Certificate File Name (CACertFileName)</p>	<p>For the Server-Specific Security Encryption Settings task.</p>



Table 6. Settings for Configuring the Siebel Server

Setting in Siebel Configuration Wizard (Parameter)	Comment or Description
Private Key File Name (KeyFileName)	For the Server-Specific Security Encryption Settings task.
Security Adapter Name (SecAdptName and SecAdptMode)	For the Server-Specific Security Authentication Profile Assignment task. Specify the existing security adapter you are assigning to this Siebel Server or to individual server components.
Security Authentication Scope for Server	For the Server-Specific Security Authentication Profile Assignment task. Options are: <ul style="list-style-type: none"> <li>■ Set this configuration for the entire Siebel Server (server level)</li> <li>■ Set this configuration for specific Object Managers (component level)</li> </ul>
Select Object Managers for Security Adapter	For the Server-Specific Security Authentication Profile Assignment task. The option appears if you specify that you want to configure security for individual Application Object Managers or other server components. Optionally, use Server Manager for this purpose.
Clustering Configuration	Clustering options include: <ul style="list-style-type: none"> <li>■ Clustered using virtual host name</li> <li>■ Clustered using virtual IP address</li> <li>■ Not clustered</li> </ul>
Siebel Server Cluster Virtual Host Name/IP	This option appears if you chose either of the two clustering options.
Siebel Server Cluster Virtual Host Name	This option appears if you chose the first clustering option (Clustered using virtual host name).
Siebel Server Cluster Virtual IP	This option appears if you chose the second clustering option (Clustered using virtual IP address).
Autostart Siebel Server System Service	Specify whether to start the Siebel Server when Windows starts.
Start Siebel Server System Service During Configuration	Specify whether to start the Siebel Server system service after the configuration has successfully executed. <p><b>NOTE:</b> After configuring the Siebel Server, it is still necessary to restart the Siebel Server manually for your configuration selections to take effect.</p>

# Process of Configuring the Siebel Web Server Extension

To configure the Siebel Web Server Extension (SWSE), perform the following tasks:

- 1 [“Configuring the SWSE Logical Profile” on page 82](#)
- 2 [“Applying the SWSE Logical Profile” on page 88](#)

This process is a step in:

- [“Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment” on page 33](#)
- [“Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case \(Existing Database\)” on page 36](#)

## Related Topics

- [“About Configuring Siebel Business Applications” on page 61](#)
- [“Starting a Siebel Configuration Wizard” on page 62](#)
- [“More Information About Using the Siebel Configuration Wizards” on page 91](#)
- [“Additional Tasks for the Siebel Web Server Extension and the Web Server” on page 146](#)
- [“Requirements for Installing and Configuring the Siebel Web Server Extension” on page 304](#)

## Configuring the SWSE Logical Profile

This procedure describes how to configure an SWSE logical profile. The same steps apply whether you are configuring the first SWSE logical profile, reconfiguring the same profile with different settings, or configuring any additional profile. This task is a step in [“Process of Configuring the Siebel Web Server Extension” on page 82](#).

### *To configure the SWSE logical profile*

- 1 Start the Siebel Enterprise Configuration Wizard.  
For more information, see [“Starting a Siebel Configuration Wizard” on page 62](#).
- 2 Choose Create New Configuration, then Configure a New Siebel Web Server Extension Logical Profile.
- 3 Provide input as described in [Table 7 on page 83](#). Click Next to go to the next screen.

Where it is available, click Help to display help text with more information about the settings.

**NOTE:** You can click Cancel to exit the Configuration Wizard before you complete the configuration.

After you specify or confirm all of your selections, the summary screen appears.

- 4 In the summary screen, do one of the following:
  - Click Next again to complete the configuration. Go to the next step.
  - Optionally save a response file in this screen, to use in an unattended configuration, then click Cancel to exit the Configuration Wizard without completing configuration.
- 5 After configuration is complete, click Exit to exit the Configuration Wizard.

To help you to verify that the configuration completed successfully, the log file is referenced at the end of the configuration task.

### Configuration Settings for the SWSE Logical Profile

Table 7 on page 83 lists the settings requested in the Siebel Configuration Wizard for configuring the SWSE logical profile. Where it is available, you can click Help to display help text with more information about the settings.

In the table, parameters might be identified by name and by the section of the eapps.cfg file in which they appear. For example, [/SiebelApp\_lang] might be [/callcenter\_deu], which is the Siebel Call Center application for German.

See also the topics in “Additional Tasks for the Siebel Web Server Extension and the Web Server” on page 146.

Table 7. Settings for Configuring the SWSE Logical Profile

Setting in Siebel Configuration Wizard	Parameter in eapps.cfg File	Comment or Description
Siebel Enterprise Name	[/SiebelApp_lang] ConnectionString	Part of the ConnectString value represents the Siebel Enterprise name.
Siebel Web Server Extension Logical Profile Name	Not applicable	By default, this location is the admn\Webserver directory under the home directory of the installed Siebel Enterprise Server component (such as Siebel Gateway Name Server).  For example, for Siebel CRM version 8.1.1.14 on Windows, the default SWSE logical profile location is C:\siebel\8.1.1.14.0\ses\gtwysrvr\admn\Webserver.  You specify this location later when you configure the SWSE, as described in “Applying the SWSE Logical Profile” on page 88.

Table 7. Settings for Configuring the SWSE Logical Profile

Setting in Siebel Configuration Wizard	Parameter in eapps.cfg File	Comment or Description
Language for Server Messages and Logs	[swe] Language	The primary language, which is used for server messages and log files. Specify the same primary language that you selected when configuring the Siebel Enterprise Server software. See also <a href="#">“Installing and Deploying Siebel Business Applications with Multiple Languages”</a> on page 133.  <b>NOTE:</b> This option does not appear for a single-language installation. In this case, the installed language is used as the primary language.
Collect Application-Specific Statistics	[swe] AllowStats	Indicates whether to collect application-specific statistics.
Compression Type	[/SiebelApp_lang] ConnectionString	Specify the type of compression to use for communications between the SWSE and the Siebel Servers. Part of the ConnectString value represents the compression type.  Possible values are None or ZLIB.
HTTP 1.1-Compliant Firewall / Enable Web Compression	[defaults] DoCompression	For more information, see <a href="#">“Enabling HTTP Compression for Siebel Business Applications”</a> on page 149.
Login Session Timeout Value	[defaults] GuestSessionTimeout	The total number of seconds that a guest session can remain inactive before the guest user is logged out and the session is closed.  Default value: 300 (in seconds)
Active Session Timeout Value	[defaults] SessionTimeout	The total number of seconds that a session can remain inactive before the user is logged out and the session is closed.  Default value: 900 (in seconds)

Table 7. Settings for Configuring the SWSE Logical Profile

Setting in Siebel Configuration Wizard	Parameter in eapps.cfg File	Comment or Description
Web Site Name	None	<p>Specify the name of the virtual Web site that this Web server uses for Web browser connections for Siebel applications. The virtual directories for the Siebel applications are created in this virtual Web site.</p> <p>The HTTP and HTTPS port number options apply to the virtual Web site that you specify with this option. For any custom virtual Web site name, the port numbers that you specify cannot be the same as those that are already in use for Default Web Site.</p> <p>Default value: Default Web Site</p>
HTTP Port Number	[defaults] HTTPPort	<p>Specify the port number that this Web server uses for Web browser connections.</p> <p>The HTTP port number option applies to the virtual Web site that you specify. For any custom virtual Web site name, the port number that you specify cannot be the same as the corresponding port number that is already in use for Default Web Site.</p> <p>Default value: 80</p>
HTTPS Port Number	[defaults] HTTPSPort	<p>Specify the port number that this Web server uses for secure Web browser connections.</p> <p>The HTTPS port number option applies to the virtual Web site that you specify. For any custom virtual Web site name, the port number that you specify cannot be the same as the corresponding port number that is already in use for Default Web Site.</p> <p>Default value: 443</p>
FQDN	[defaults] EnableFQDN FQDN	<p>If you specify a fully qualified domain name, then the value is stored in the FQDN parameter, and EnableFQDN is set to TRUE.</p>

Table 7. Settings for Configuring the SWSE Logical Profile

Setting in Siebel Configuration Wizard	Parameter in eapps.cfg File	Comment or Description
High Interactivity or Employee User Login Name and Password	[defaults] AnonUserName AnonPassword	<p>The Siebel user ID that starts the anonymous session from which an end user is shown the login page for an employee application.</p> <p>The employee applications use these parameters, which are defined in the [defaults] section.</p> <p>The EncryptedPassword parameter specifies whether passwords are encrypted in the eapps.cfg file.</p> <p>For more information about anonymous users, see <a href="#">“Requirements for Configuring Anonymous Users for the Siebel Web Server Extension”</a> on page 310.</p>
Password Encryption	[defaults] EncryptedPassword	<p>Specifies whether to encrypt all of the passwords stored in the eapps.cfg file. By default, EncryptedPassword is TRUE. For more information about managing encrypted passwords, see <i>Siebel Security Guide</i>.</p>
Standard Interactivity or Contact User Login Name and Password	[/SiebelApp_lang] AnonUserName AnonPassword	<p>The Siebel user ID that starts the anonymous session from which an end user is shown the login page for a customer application. This anonymous user must have access to any public view in the Siebel application.</p> <p>For customer applications only, these parameters are defined in application-specific sections of the eapps.cfg file. These values override the values defined in the [defaults] section, which are used by employee applications.</p> <p>The EncryptedPassword parameter specifies whether passwords are encrypted in the eapps.cfg file.</p> <p>For more information about anonymous users, see <a href="#">“Requirements for Configuring Anonymous Users for the Siebel Web Server Extension”</a> on page 310.</p>

Table 7. Settings for Configuring the SWSE Logical Profile

Setting in Siebel Configuration Wizard	Parameter in eapps.cfg File	Comment or Description
Siebel Enterprise Security Token	[/SiebelApp_lang] SiebEntTrustToken	<p>A password that is used to update static files on the Web server.</p> <p>The EncryptedPassword parameter specifies whether passwords are encrypted in the eapps.cfg file.</p> <p>For more information about this token, see <a href="#">“About the Siebel Enterprise Security Token” on page 152</a>.</p>
Web Server-Specific Statistics: Default Statistics Page for Web Server	[defaults] statspage	<p>The default value is _stats.swe. It is recommended that you change the default value, so that the Web server statistics are saved into a different file name.</p>
Select the Connection Protocol and Encryption	Not applicable	<p>Specify if you are using TLS (Transport Layer Security) or SSL (Secure Sockets Layer) for communication between Siebel Servers and the SWSE.</p> <p>Choices are TCP/IP (no encryption, the default), TLS, or SSL.</p> <p>TLS or SSL settings for SWSE must be compatible with those for Siebel Servers that connect to this Web server.</p> <p>The wizard prompts for remaining parameters related to TLS or SSL only if you select one of these options.</p> <p>For more information about TLS, SSL, and the related parameters defined in the [ConnMgmt] section of the eapps.cfg file, see <i>Siebel Security Guide</i>.</p> <p><b>CAUTION:</b> It is strongly recommended to use TLS for best security, where possible. Using SSL is not recommended for secure environments. For more information, see <i>Siebel Security Guide</i>. See also 1944467.1 on My Oracle Support.</p>

Table 7. Settings for Configuring the SWSE Logical Profile

Setting in Siebel Configuration Wizard	Parameter in eapps.cfg File	Comment or Description
Deploy SSL or TLS in the Enterprise	Not applicable	Specify if you are using TLS (Transport Layer Security) or SSL (Secure Sockets Layer) for communication between Siebel Servers and the SWSE.  <b>CAUTION:</b> It is strongly recommended to use TLS for best security, where possible. Using SSL is not recommended for secure environments. For more information, see <i>Siebel Security Guide</i> . See also 1944467.1 on My Oracle Support.
Certificate File Name	[ConnMgmt] CertFileName	For more information, see <i>Siebel Security Guide</i> .
Certification Authority (CA) Certificate File Name	[ConnMgmt] CACertFileName	For more information, see <i>Siebel Security Guide</i> .
Private Key File Name and Password	[ConnMgmt] KeyFileName KeyFilePassword	For more information, see <i>Siebel Security Guide</i> .
Enable Peer Authentication	[ConnMgmt] PeerAuth	For more information, see <i>Siebel Security Guide</i> .
Validate Peer Authentication	[ConnMgmt] PeerCertValidation	For more information, see <i>Siebel Security Guide</i> .

## Applying the SWSE Logical Profile

This procedure describes the steps for applying a logical profile to a specific installed instance of SWSE. You perform the same procedure for each SWSE. This task is a step in [“Process of Configuring the Siebel Web Server Extension” on page 82](#).

**NOTE:** When the SWSE and the Web server are on a different computer from the Siebel Gateway Name Server (as is typical), then, after creating the profile as described in [“Configuring the SWSE Logical Profile” on page 82](#), you must either copy the profile directory to the Web server computer or provide remote access to the directory for the task described in this topic. For example, on Windows you might map the profile directory to the applicable drive on the remote computer.

On Microsoft Windows with Microsoft IIS, you can precustomize which virtual directories to create on the Web server. For more information, see [“Creating Custom Virtual Directories” on page 147](#). When you configure the SWSE and add new virtual directories, existing virtual directories are not deleted.

For information about where the virtual directories are created on Microsoft IIS, see [“Verifying the Siebel Virtual Directories on the Web Server” on page 147](#). For information about supported versions of Microsoft IIS, see the Certifications tab on My Oracle Support. See also [“Installing the Web Server” on page 306](#).



***To apply the SWSE logical profile***

- 1 Determine which SWSE logical profile to use for this installed instance of SWSE.
- 2 Verify access to the logical profile directory, if it is located on a remote computer.
- 3 If you will be using load balancing, then make sure that you created the lbconfig.txt file and placed it in the SWSE logical profile directory.

For more information, see [“Process of Configuring Load Balancing for Siebel Business Applications” on page 120](#).

- 4 Start the Siebel Web Server Extension Configuration Wizard.

For more information, see [“Starting a Siebel Configuration Wizard” on page 62](#).

- 5 Choose Apply an SWSE Logical Profile.
- 6 Provide input as described in [Table 8 on page 90](#). Click Next to go to the next screen.

Where it is available, click Help to display help text with more information about the settings.

**NOTE:** You can click Cancel to exit the Configuration Wizard before you complete the configuration.

After you specify or confirm all of your selections, the summary screen appears.

- 7 In the summary screen, do one of the following:
  - Click Next again to complete the configuration. Go to the next step.
  - Optionally save a response file in this screen, to use in an unattended configuration, then click Cancel to exit the Configuration Wizard without completing configuration.
- 8 After configuration is complete, click Exit to exit the Configuration Wizard.

To help you to verify that the configuration completed successfully, the log file is referenced at the end of the configuration task.

## Configuration Settings for the SWSE

Table 8 on page 90 lists the settings requested in the SWSE Configuration Wizard for configuring the SWSE: applying the SWSE logical profile. Where it is available, you can click Help to display help text with more information about the settings.

Table 8. Settings for Configuring the SWSE

Setting in SWSE Configuration Wizard	Comment or Description
Deployed Languages	<p>Specifies the installed languages that you want to deploy on the Web server and the SWSE.</p> <p>Each language that you select must be an installed language. For each deployed language and each application, a separate section is created in the eapps.cfg or eapps_sia.cfg file. For example, Siebel Call Center uses the sections named [/callcenter_lang]. Part of the ConnectString value represents the three-letter code for the deployed language.</p> <p><b>NOTE:</b> This option does not appear for a single-language installation. In this case, the installed language is automatically deployed when you configure the SWSE.</p> <p>After initially configuring the SWSE, you can deploy languages that you installed but did not deploy by running the SWSE Configuration Wizard again and choosing the task Add Language Support for the SWSE Configuration.</p> <p>For more information, see <a href="#">“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133</a>.</p>
Select a Load Balancer	<p>Specify whether you are using Siebel native load balancing, third-party load balancing, or no load balancing. Specify no load balancing for a deployment with a single Siebel Server. For more information, see <a href="#">“Process of Configuring Load Balancing for Siebel Business Applications” on page 120</a>.</p>
Siebel Server Host Name (Siebel Server)	<p>The host name of the Siebel Server computer. Specify this for a deployment with a single Siebel Server.</p>
Siebel Connection Broker Port	<p>The Siebel Connection Broker (SCBroker) port number on the Siebel Server computer, as you specified in <a href="#">“Configuring the Siebel Server” on page 77</a>. Specify this port number for a deployment with a single Siebel Server. The default port number for SCBroker is 2321.</p>
Host Name or Virtual IP Address for Third-Party Load Balancer	<p>A host name or virtual IP address for use with a third-party load balancer.</p>

Table 8. Settings for Configuring the SWSE

Setting in SWSE Configuration Wizard	Comment or Description
Network Port Number for Third-Party Load Balancer	A network port number for use with a third-party load balancer.
Siebel Web Server Extension Logical Profile Location	The location of the SWSE logical profile that you created in <a href="#">“Configuring the SWSE Logical Profile”</a> on page 82.

## More Information About Using the Siebel Configuration Wizards

This topic includes the following information about using the Siebel Configuration Wizards:

- [“Where to Find Configuration Tasks”](#) on page 92
- [“Siebel Configuration Wizards Associated with Installable Components”](#) on page 93
- [“Siebel Configuration Wizard Syntax Elements”](#) on page 94
- [“Options for Configuring the Siebel Gateway Name Server, the Siebel Enterprise, and the SWSE Logical Profile”](#) on page 95
- [“Options for Configuring the Siebel Server”](#) on page 96
- [“Options for Configuring the Siebel Web Server Extension”](#) on page 97
- [“About Configuring the Siebel Web Server Extension”](#) on page 98

### Related Topics

- [“About Configuring Siebel Business Applications”](#) on page 61
- [“Starting a Siebel Configuration Wizard”](#) on page 62
- Chapter 5, [“Installing the Siebel Database on the RDBMS”](#)
- Chapter 6, [“Additional Postinstallation and Configuration Tasks”](#)
- [“Process of Removing Configuration Data”](#) on page 256
- Chapter 13, [“Configuring the RDBMS”](#)

## Where to Find Configuration Tasks

The configuration tasks for Siebel Business Applications are described in the following locations, as shown in [Table 9](#). This topic is part of ["More Information About Using the Siebel Configuration Wizards" on page 91](#).

Table 9. Where to Find Configuration Tasks

Module to Configure	Where Documented
Siebel Gateway Name Server	<a href="#">"Configuring the Siebel Gateway Name Server" on page 66</a>
Siebel Enterprise	<a href="#">"Configuring the Siebel Enterprise" on page 67</a>
Siebel database	<a href="#">"Installing the Siebel Database" on page 76</a>
Siebel Server	<a href="#">"Configuring the Siebel Server" on page 77</a>
Siebel Web Server Extension (SWSE)	<a href="#">"Process of Configuring the Siebel Web Server Extension" on page 82</a>

## Siebel Configuration Wizards Associated with Installable Components

Table 10 lists the Siebel Configuration Wizards that are associated with selected installable server-based components in Siebel Business Applications. This topic is part of “[More Information About Using the Siebel Configuration Wizards](#)” on page 91.

Table 10. Configuration Wizards for Siebel Business Applications Components

Installed Component	Associated Siebel Configuration Wizard
Siebel Enterprise Server: Siebel Gateway Name Server	<p>The Siebel Enterprise Configuration Wizard (or Siebel Configuration Wizard) is the wizard associated with this component. Use this wizard to configure the Siebel Gateway Name Server, the Siebel Enterprise, and the SWSE logical profile.</p> <p>Run the Siebel Enterprise Configuration Wizard on the Siebel Gateway Name Server computer. (You installed this component using the Siebel Enterprise Server installer.)</p> <p>The associated Windows shortcut is named Siebel Enterprise Configuration. The shortcut runs a command similar to the following:</p> <pre>C: \siebel \8. 1. 1. 14. 0\ses\config\config.bat -mode enterprise</pre> <pre>C: \siebel \8. 2. 2. 14. 0\ses\config\config.bat -mode enterprise</pre>
Siebel Enterprise Server: Database Configuration Utilities	<p>The Siebel Database Configuration Wizard is the Configuration Wizard associated with this component. Use this wizard to install the Siebel database. Also use it to perform other tasks to set up the database to support your installed Siebel Business Applications and languages.</p> <p>Run the Siebel Database Configuration Wizard on the Siebel Server computer. (You installed Siebel Database Configuration Utilities using the Siebel Enterprise Server installer.)</p> <p>The associated Windows shortcut is named Database Server Configuration. The shortcut runs a command similar to the following:</p> <pre>C: \siebel \8. 1. 1. 14. 0\ses\config\config.bat -mode dbsrvr</pre> <pre>C: \siebel \8. 2. 2. 14. 0\ses\config\config.bat -mode dbsrvr</pre>

Table 10. Configuration Wizards for Siebel Business Applications Components

Installed Component	Associated Siebel Configuration Wizard
<p>Siebel Enterprise Server: Siebel Server</p>	<p>The Siebel Server Configuration Wizard is the wizard associated with this component. Use this wizard to configure the Siebel Server.</p> <p>Run the Siebel Server Configuration Wizard on the Siebel Server computer. (You installed this component using the Siebel Enterprise Server installer.)</p> <p>The associated Windows shortcut is named Siebel Server Configuration. The shortcut runs a command similar to the following:</p> <pre>C:\siebel\8.1.1.14.0\ses\config\config.bat -mode siebsrvr</pre> <pre>C:\siebel\8.2.2.14.0\ses\config\config.bat -mode siebsrvr</pre>
<p>Siebel Web Server Extension (SWSE)</p>	<p>The Siebel Web Server Extension Configuration Wizard (or SWSE Configuration Wizard) is the Configuration Wizard associated with this component. Use this wizard to configure the physical SWSE.</p> <p>Before configuring the SWSE, you must have created an SWSE logical profile using the Siebel Enterprise Configuration Wizard. Run this wizard on the Siebel Gateway Name Server computer. (You installed this component using the Siebel Enterprise Server installer.)</p> <p>Then run the SWSE Configuration Wizard on the Web server computer. (You installed the SWSE using the SWSE installer.)</p> <p>The associated Windows shortcut for the SWSE Configuration Wizard is named Siebel Web Server Extension Configuration. The shortcut runs a command similar to the following:</p> <pre>C:\siebel\8.1.1.14.0\sweapp\config\config.bat -mode swse</pre> <pre>C:\siebel\8.2.2.14.0\sweapp\config\config.bat -mode swse</pre>

## Siebel Configuration Wizard Syntax Elements

This topic describes the command-line syntax for starting the Siebel Configuration Wizards. This topic is part of [“More Information About Using the Siebel Configuration Wizards” on page 91](#). The command-line syntax for starting the Configuration Wizard includes the following elements:

- **-mode *mode\_name***. Specifies the Siebel Configuration Wizard that you are running. The command must be executed within an installed instance of the applicable Siebel module. For all of the supported modes, you can optionally save a response file for later unattended configuration. The supported modes are as follows:
  - **enterprise**. Starts the Siebel Enterprise Configuration Wizard (to configure Siebel Gateway Name Server, Siebel Enterprise, or SWSE logical profile). These configuration tasks are performed from the Siebel Gateway Name Server installation.

- **siebsrvr.** Starts the Siebel Server Configuration Wizard. This configuration task is performed from the Siebel Server installation.
- **dbsrvr.** Starts the Siebel Database Configuration Wizard. This configuration task is performed from the Siebel Server installation where you also installed Siebel Database Configuration Utilities.
- **swse.** Starts the Siebel Web Server Extension Configuration Wizard. This configuration task is performed from the Siebel Web Server Extension (SWSE) installation.
- **-responseFile *file\_name*.** Specifies the name of a response file that you are executing, for an unattended configuration. The response file would have been saved in a previous configuration session. In unattended mode, wizard screens that would normally display are not displayed, because the applicable data is already stored in the response file. Unattended configuration can be invoked from an unattended installation session.
- **-skipValidation.** Specifies that no validation should be performed of user input. You can use this flag when saving a response file for an unattended configuration, or when previewing wizard screens.
- **-verbose.** Specifies that more details should be included in configuration log files.

## Options for Configuring the Siebel Gateway Name Server, the Siebel Enterprise, and the SWSE Logical Profile

After you install Siebel Gateway Name Server (using the Siebel Enterprise Server installer), you run the Siebel Configuration Wizard (Siebel Enterprise Configuration). This wizard includes the following tasks. Perform the tasks under Create New Configuration in the order shown. This topic is part of [“More Information About Using the Siebel Configuration Wizards” on page 91](#).

### ■ Create New Configuration

- **Configure a New Gateway Name Server.** Configures the Siebel Gateway Name Server that you have installed. For more information about these settings, see [“Configuring the Siebel Gateway Name Server” on page 66](#).
- **Configure a New Enterprise in a Gateway Name Server.** Creates a new Siebel Enterprise configuration. The configuration is stored on the Siebel Gateway Name Server. For more information about these settings, see [“Configuring the Siebel Enterprise” on page 67](#).

**NOTE:** Before you perform this task, the Siebel Gateway Name Server must have already been installed and configured, and must be running, unless you run the wizard with the flag to skip validation.

- **Configure a New Siebel Web Server Extension Logical Profile.** Creates and saves an SWSE logical profile in a location that you designate. The logical profile stores settings that might apply to one or multiple SWSE installations. The logical profile also includes editable files that automatically create the Siebel application virtual directories on the Web server when you apply the SWSE logical profile.

When you configure an installed instance of SWSE, you apply an SWSE logical profile. This task updates the `eapps.cfg` file on the SWSE with settings from the SWSE logical profile and other settings specific to this SWSE instance. It also creates the virtual directories on the Web server. For more information about creating and applying the SWSE logical profile, see [“Process of Configuring the Siebel Web Server Extension” on page 82](#).

- **Modify Existing Configuration**

- **Modify an Existing Enterprise.** Modifies the configuration settings for a Siebel Enterprise that you previously configured. For more information about these settings, see [“Configuring the Siebel Enterprise” on page 67](#).

**NOTE:** Before you perform this task, the Siebel Gateway Name Server must have already been installed and configured, and must be running, unless you run the wizard with the flag to skip validation. The Siebel Enterprise configuration that you are modifying must already exist.

Alternatively, you can modify the configuration settings for an existing Siebel Enterprise by using Siebel Server Manager, as described in *Siebel System Administration Guide*.

## Options for Configuring the Siebel Server

Running the Siebel Server Configuration Wizard assumes that you have performed all of the prerequisite configuration tasks: configuring the Siebel Gateway Name Server, Siebel Enterprise, and SWSE logical profile; and installing the Siebel database. This topic is part of [“More Information About Using the Siebel Configuration Wizards” on page 91](#).

After you have installed Siebel Server and performed the prerequisite tasks, you run the Siebel Server Configuration Wizard to perform the Create New Configuration task as shown. This wizard includes the following tasks.

After you have already configured a Siebel Server, you can modify the Siebel Server configuration using Siebel Server Manager, as described in *Siebel System Administration Guide*.

- **Create New Configuration.** Creates a new Siebel Server configuration. The configuration information is stored on the Siebel Gateway Name Server. For more information about these settings, see [“Configuring the Siebel Server” on page 77](#).

**NOTE:** Before you perform this task, the Siebel Gateway Name Server must have already been installed and configured, and must be running, unless you run the wizard with the flag to skip validation.

- **Add Language Support for the Siebel Server.** Deploys any additional installed languages for a Siebel Server that you previously configured. This task applies only if *both* of the following are true:

- You have already initially configured the Siebel Server (Create New Configuration task).



- You have already installed on the Siebel Server the new languages that you want to add as deployed languages.

In the screen where you specify languages to deploy, specify only the new languages that you want to deploy. See also [“Configuring the Siebel Server” on page 77](#).

Perform this task in conjunction with related language deployment tasks, such as to install and deploy languages on the SWSE. For more information, see [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

**NOTE:** Before you perform this task, the Siebel Gateway Name Server must have already been installed and configured, and must be running, unless you run the wizard with the flag to skip validation. The Siebel Server configuration that you are modifying must already exist.

**NOTE:** If you add (install) languages before you have configured the Siebel Server, then do not perform this task. Instead, use the task Create New Configuration, and specify all of the applicable languages that you want to deploy on this Siebel Server.

## Options for Configuring the Siebel Web Server Extension

Running the SWSE Configuration Wizard is done on each Siebel Web Server Extension (SWSE) instance, after SWSE installation. This topic is part of [“More Information About Using the Siebel Configuration Wizards” on page 91](#).

Running this wizard assumes that you have performed all of the prerequisite configuration tasks: configuring the Siebel Gateway Name Server, Siebel Enterprise, SWSE logical profile, and Siebel Server. You would also have installed the Siebel database using the Database Configuration Wizard.

After you install SWSE, you run the SWSE Configuration Wizard to apply the SWSE logical profile that you previously created. For detailed information about creating and applying the SWSE logical profile, see [“Process of Configuring the Siebel Web Server Extension” on page 82](#).

The SWSE Configuration Wizard includes the following tasks:

- **Apply an SWSE Logical Profile.** Specifies the location of an SWSE logical profile that you previously created using the Siebel Configuration Wizard and applies the settings to this installed instance of SWSE, along with other settings that you specify using this task. This task updates the SWSE configuration files, `eapps.cfg` file and `eapps_sia.cfg`.

The `eapps.cfg` and `eapps_sia.cfg` files are located in `SWSE_ROOT\bin`. In this path, `SWSE_ROOT` is the SWSE installation directory.

Applying an SWSE logical profile also creates (or re-creates) on the Web server the virtual directories required for Siebel Business Applications.

On Microsoft Windows (with Microsoft IIS Web server), batch files create the virtual directories for Siebel Business Applications. These batch files are located in the SWSE logical profile directory. Before configuring the SWSE, you can edit these batch files to remove entries for virtual directories that you do not need.

If you are using Siebel native load balancing, then generate the configuration file `lbconfig.txt` and place it in the SWSE logical profile location before you apply the logical profile. Perform these tasks as a second phase of SWSE configuration: after the initial SWSE configuration to get the system up and running and after installing and configuring all of the Siebel Servers that will participate in load balancing. For more information about configuring load balancing, see [“Process of Configuring Load Balancing for Siebel Business Applications” on page 120](#).

- **Add Language Support for the SWSE Configuration.** Deploys any additional installed languages for an SWSE that you previously configured. This task applies only if *both* of the following are true:
  - You have already initially configured the SWSE (Apply an SWSE Logical Profile task).
  - You have already installed on the SWSE the new languages that you want to add as deployed languages.

In the screen where you specify languages to deploy, specify only the new languages that you want to deploy. See also [“Applying the SWSE Logical Profile” on page 88](#).

Perform this task in conjunction with related language deployment tasks, such as to install and deploy languages on the Siebel Server. For more information, see [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

**NOTE:** If you add (install) languages before you have configured the SWSE, then do not perform this task. Instead, use the task Apply an SWSE Logical Profile, and specify all of the applicable languages that you want to deploy on this SWSE.

## About Configuring the Siebel Web Server Extension

As described in [“Process of Configuring the Siebel Web Server Extension” on page 82](#), you configure the Siebel Web Server Extension (SWSE) in two phases: creating the SWSE logical profile on the Siebel Gateway Name Server computer and configuring the installed instance of SWSE on the Web server computer. This topic is part of [“More Information About Using the Siebel Configuration Wizards” on page 91](#).

You can use the same SWSE logical profile with multiple SWSE instances. You can also create multiple SWSE logical profiles for use with sets of SWSE instances with different configuration requirements. It is strongly suggested that you retain all of the SWSE logical profiles and note the SWSE instances to which you applied each profile.

To change a setting that was specified in the SWSE logical profile, perform the SWSE logical profile configuration task again, specifying the same or a different name. If you configure an SWSE logical profile and specify the location of an existing logical profile, then the existing profile is replaced with the new one. You must reapply the logical profile to each applicable SWSE.

### About SWSE Configuration and the `eapps.cfg` File

It is possible to manually edit settings in the `eapps.cfg` file. However, doing so might cause this file to become out of sync with the SWSE logical profile. If the SWSE logical profile is re-created or reapplied, then your manual changes to the `eapps.cfg` file might be lost.

## About SWSE Configuration and Encryption Type

If you create the SWSE logical profile directly after configuring the Siebel Enterprise, then the profile derives the encryption type from temporary data defined during the previous task, unless you skip validation in the Siebel Configuration Wizard.

If you create the SWSE logical profile without validating the user input in the Configuration Wizard, then the encryption type is set to None in the ConnectString parameters in the eapps.cfg and eapps\_sia.cfg files. The connect string value *None* is compatible with Siebel Enterprise configuration encryption type choices of SISNAPI Without Encryption, SISNAPI Using TLS 1.2, SISNAPI Using SSL 3.0, or SISNAPI Using Enhanced SSL 3.0. For more information about validation in the Configuration Wizard, see ["Starting a Siebel Configuration Wizard" on page 62](#).

**NOTE:** If you configured the Siebel Enterprise with the encryption type set to either SISNAPI Using RSA Encryption Algorithm or SISNAPI Using Microsoft Crypto Enhanced API Encryption, then it is strongly recommended not to create the SWSE logical profile with validation skipped, so that the encryption settings are compatible between the Siebel Servers and the SWSE (as is required).

For more information about encryption type and Transport Layer Security (TLS) or Secure Sockets Layer (SSL) settings, see *Siebel Security Guide*.

**CAUTION:** It is strongly recommended to use TLS for best security, where possible. Using SSL is not recommended for secure environments. For more information, see *Siebel Security Guide*. See also 1944467.1 on My Oracle Support.

### Related Topics

["Process of Configuring the Siebel Web Server Extension" on page 82](#)



# 5

## Installing the Siebel Database on the RDBMS

This chapter describes running the Database Configuration Wizard to install the Siebel database and related tasks. This chapter is written for administrators who run the Database Configuration Wizard and for database administrators (DBAs) who perform related tasks on the relational database management system (RDBMS). It includes the following topics:

- [About Installing the Siebel Database on page 101](#)
- [Creating Table Owner and Administrator Accounts on page 104](#)
- [Installing the Stored Procedures and User-Defined Functions on IBM DB2 on page 107](#)
- [Installing the Siebel Database on page 108](#)
- [Setting Up Your Environment to Support Global Time Zone on page 113](#)
- [Populating the Siebel File System on page 113](#)
- [Importing a Siebel Repository Manually into the Siebel Database on page 114](#)

**NOTE:** If your database is IBM DB2 for z/OS, then see *Implementing Siebel Business Applications on DB2 for z/OS* instead of this chapter. See also the relevant information in “Planning RDBMS Installation and Configuration” on page 280.

### About Installing the Siebel Database

**CAUTION:** In an upgrade environment, or in another environment where you have an existing Siebel database, you generally *do not perform any of the tasks mentioned in this chapter*. For more information, see “About Installing in Upgrade Environments” on page 274 and “Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case (Existing Database)” on page 36.

The *Siebel database* on the RDBMS stores the data used by Siebel Business Applications. Siebel Server components (particularly Application Object Managers supporting Siebel Web Clients), Siebel Tools, and Siebel Developer Web Clients connect directly to the Siebel database and make changes in real time.

Siebel Mobile Web Clients download a subset of the server data to use locally. The mobile user periodically synchronizes the local database with the Siebel database through the Siebel Remote components on the Siebel Server. The synchronization process updates both the local database and the Siebel database.

The *Siebel Database Configuration Utilities* (sometimes called the *Siebel Database Server*) refers to a set of files that you install on a Siebel Server computer, using the Siebel Enterprise Server installer. These files are accessed when you run the Database Configuration Wizard and the Siebel Upgrade Wizard in order to install and configure the Siebel database on the RDBMS.

**NOTE:** In the Database Configuration Wizard, the main task that you perform is called *installing* the Siebel database. Additional tasks described in this chapter are sometimes referred to by using the general phrase *configuring* the Siebel database.

For instructions on installing Database Configuration Utilities, Siebel Server, and other Siebel Enterprise Server components for the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14, see [Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension.”](#)

**NOTE:** This chapter assumes that you have already created the database instance. It also assumes that you have already installed the Database Configuration Utilities on the same computer as a Siebel Server, and in the same top-level installation directory. You install the Database Configuration Utilities only once, on a single Siebel Server computer. It is recommended that you install the Siebel Server and the Database Configuration Utilities at the same time.

For a new deployment, you must install a Siebel Server and the Database Configuration Utilities on the same computer as the Siebel Gateway Name Server. For more information, see [“Requirements for Siebel Gateway Name Server Authentication” on page 299](#). For information about the tasks that you must perform in the RDBMS before you install the Database Configuration Utilities, see [Chapter 13, “Configuring the RDBMS.”](#)

The Database Configuration Utilities installed software has no run-time role in managing database operations for users running Siebel Business Applications. Some of the tasks that you can perform with the Database Configuration Wizard are for upgrades only, and are described in *Siebel Database Upgrade Guide*. For more information about the wizards provided for configuring Siebel Business Applications software, see [Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension.”](#)

**NOTE:** After performing a new installation, you must run the Configuration Wizards as described in this book.

This topic includes the following information:

- [“About Installing a Database” on page 102](#)
- [“About Adding a Language to an Existing Database” on page 103](#)
- [“About Database Updates for the Current Release” on page 103](#)

### Related Topics

[“Installation-Related Changes for Siebel Innovation Pack 2014” on page 25](#)

[“Installation-Related Changes for Siebel Innovation Pack 2013” on page 28](#)

[Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)

[Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)

[Chapter 13, “Configuring the RDBMS”](#)

## About Installing a Database

When you choose Install Database from the Siebel Database Operation screen in the Database Configuration Wizard, the utility performs several tasks within the database instance that you have already created.

The Database Configuration Wizard is available on the computer on which you installed the Siebel Server and the Database Configuration Utilities.

Before installing the Siebel database, review all of the applicable requirements. The Install Database operation does the following:

- 1 Creates the Siebel schema. Tables and indexes are created in their respective specified tablespaces.
- 2 Inserts Siebel seed data specific to your database. Seed data is inserted for the primary language only. This task also installs views, packages, and procedures for your database.
- 3 Imports the Siebel Repository. The Repository is imported for the primary language only.
- 4 Sets system preferences.

This topic is part of [“About Installing the Siebel Database” on page 101](#).

## About Adding a Language to an Existing Database

Adding a language to an existing Siebel database installs seed data to support that language. After the database is initially installed with the primary language, each additional language must be installed separately using an add-language operation.

To add a new language to previously installed Siebel Business Applications, you must have installed its Siebel language pack on the installed Siebel Server, using the Siebel Enterprise Server installer. See also [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

After adding a language, you must import the Siebel Repository for this language. For more information, see [“Importing a Siebel Repository Manually into the Siebel Database” on page 114](#).

After you have added a language to the Siebel database, your seed data is multilingual. You must enable the multilingual list of values (MLOV) capability for Siebel Business Applications, and you must enable individual LOVs associated with the language. For more information, see:

- *Configuring Siebel Business Applications*
- *Siebel Global Deployment Guide*
- For Siebel language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) for Siebel CRM version 8.1.1.x or 1524342.1 (Article ID) for Siebel CRM version 8.2.2.x on My Oracle Support.

This topic is part of [“About Installing the Siebel Database” on page 101](#).

## About Database Updates for the Current Release

If you have installed the current release as a new installation, then you use the Database Configuration Wizard task to install a new Siebel database. This database contains schema changes, Siebel Repository changes, and seed data for Siebel CRM functionality through the current release.

If you install the current release as a migration installation, then you must use the Incremental Repository Merge feature to update your existing Siebel database to the current release level. For information about setting up and using Incremental Repository Merge, see *Siebel Database Upgrade Guide*.

This topic is part of [“About Installing the Siebel Database”](#) on page 101.

#### Related Topics

[“Installing and Using the Siebel Sample Database”](#) on page 174

## Creating Table Owner and Administrator Accounts

Create the table owner and administrator accounts according to the guidelines provided for each database platform identified in this topic. These accounts are created by updating and running the grantusr.sql script. Record all of the relevant data, such as the table owner name and password, in the worksheets provided in [Appendix A, “Siebel Deployment Planning Worksheet.”](#)

**NOTE:** For each applicable database platform, if you are planning to use Siebel Marketing, then also grant DROP TABLE, DROP INDEX, CREATE TABLE, and CREATE INDEX rights at the database level within the OLTP schema to the table owner or the database user ID used for Siebel Marketing. For more information, see *Siebel Marketing Installation and Administration Guide*.

**CAUTION:** It is strongly recommended not to change the name of the Siebel administrator account, SADMIN. This account must be created so that you can log in to Siebel Business Applications as the Siebel administrator. For information about changing the password for this account, see *Siebel Security Guide*.

**NOTE:** Before you execute grantusr.sql, confirm that this script will create all of the users that must be created before you install the Siebel database. Optionally, you can also modify the script to define the anonymous users that you will specify when configuring the Siebel Web Server Extension. For more information, see [“Requirements for Configuring Anonymous Users for the Siebel Web Server Extension”](#) on page 310.

This topic contains the following information:

- [“Running the grantusr.sql Script on an Oracle Database”](#) on page 104
- [“Running the grantusr.sql Script on IBM DB2”](#) on page 105
- [“Running the grantusr.sql Script on Microsoft SQL Server”](#) on page 107

## Running the grantusr.sql Script on an Oracle Database

Before you install the Siebel database, your DBA must review, modify, and execute the grantusr.sql script.

The administrator executes grantusr.sql against the database instance to create the Siebel table owner account, the Siebel administrator account (default: SADMIN), the LDAPUSER account, and the role SSE\_ROLE and to grant them appropriate privileges. The script also creates the default tablespace. The grantusr.sql script is located in the *DBSRVR\_ROOT\ORACLE* subdirectory.



After executing `grantusr.sql`, the DBA must manually create all of the additional tablespaces (for data or indexes) that you require in your Siebel database. To do this, use commands similar to the existing `ALTER USER` command defined in `grantusr.sql` for creating the default tablespace. Use commands similar to the following:

```
ALTER USER TABLE_OWNER quota unlimited on tablespace_name;
```

where:

- `TABLE_OWNER` is the name of the Siebel table owner account.
- `tablespace_name` is the name that you are using for each particular tablespace. If it is necessary, then the quota value can be adjusted to an appropriate value for each tablespace.

The `grantusr.sql` script performs the following functions:

- Creates the role `SSE_ROLE` and grants `CREATE SESSION` privilege to this role.
- Creates the Siebel table owner account and grants other appropriate privileges to this account.
- Creates the accounts `SADMIN` (the Siebel administrator) and `LDAPUSER` and grants the role `SSE_ROLE` to them.
- Creates the default tablespace.

Passwords are prompted for by the script, rather than defined within the script.

The length and allowable characters for the user name and password depend on the rules of your underlying RDBMS platform. For more information, see Oracle Database documentation.

This topic is part of [“Creating Table Owner and Administrator Accounts” on page 104](#).

### **To run the `grantusr.sql` script on an Oracle Database**

- 1 Execute the `grantusr.sql` script from SQL\*Plus, using an account with DBA privileges, and using the following command:

```
@c: \SIEBEL_ROOT\dsrvr\oracle\grantusr.sql
```

**NOTE:** You must specify the full path to the `grantusr.sql` file.

- 2 Enter the tablespace name listed in [Appendix A, “Siebel Deployment Planning Worksheet.”](#)

## **Running the `grantusr.sql` Script on IBM DB2**

Before you install the Siebel database, your DBA must manually create the Siebel table owner account, the Siebel administrator account (default: `SADMIN`), and the `SSE_ROLE` group. The DBA must then add the Siebel administrator account to the `SSE_ROLE` group at the operating system level.

Before you install the Siebel database, execute the `grantusr.sql` script against your database server to grant the appropriate privileges to these users. The `grantusr.sql` script is located in the `DBSRVR_ROOT\DB2UDB` subdirectory.

Your DBA must review and execute this script, which performs the following functions:

- Grants DBA administration (DBADM) privileges to the table owner account.
- Grants CONNECT privileges to the SSE\_ROLE group.

You cannot create the LDAPUSER account by running `grantusr.sql`. This account must belong to the SSE\_ROLE group and be created by the DBA or the Windows network administrator, as appropriate. For more information about authentication using the LDAP security adapter, see *Siebel Security Guide*.

This topic is part of [“Creating Table Owner and Administrator Accounts”](#) on page 104.

### **To run the `grantusr.sql` script on IBM DB2**

- 1 Execute the `grantusr.sql` script from a DB2 Command Window, using an account with DBA privileges.

The usual DB2 System Administration account is called `db2admin` for this procedure.

**CAUTION:** Use the DB2 Command Window, not the DB2 command line processor (CLP), to enter these commands, because the DB2 command line processor window uses different syntax. The commands in this procedure work only if you issue them in a DB2 Command Window.

- 2 Enter the following commands:

```
db2 connect to DB2database_alias user instance_owner_username using password  
db2 -vf SIEBEL_ROOT\DBSRVR\DB2UDB\grantusr.sql
```

where:

- *DB2database\_alias* is the DB2 alias that you use
- *instance\_owner\_username* is the login ID of the database instance owner
- *password* is the password for the database instance owner
- *SIEBEL\_ROOT* is the full path to the Siebel root directory

The script prompts you for the default tablespace in which your Siebel objects are to be created.

- 3 Enter the tablespace name that you recorded in the copy that you made of [Appendix A, “Siebel Deployment Planning Worksheet,”](#) and exit the script.

The length and allowable characters of the account names and passwords depend on the rules of your underlying RDBMS platform. For more information, see IBM DB2 documentation.

Before you install the Siebel database, see [“Installing the Stored Procedures and User-Defined Functions on IBM DB2”](#) on page 107.

## Running the grantusr.sql Script on Microsoft SQL Server

Before you install the Siebel database, your DBA must review, modify, and execute the grantusr.sql script.

The administrator executes grantusr.sql against the database to set up minimum security. The grantusr.sql script is located in the *DBSRVR\_ROOT\MSSQL* subdirectory.

The grantusr.sql script performs the following functions:

- Creates database accounts (logins) for the SADMIN (Siebel administrator) account, the table owner account, and the LDAPUSER account.
- Creates users for each of these accounts, except the table owner account, which will be turned into a dbo by the stored procedure sp\_changedbowner.
- Grants SSE\_ROLE to each account, except dbo.

To change the account name or the database name, edit grantusr.sql. The length and allowable characters of the account names and passwords depend on the rules of your underlying RDBMS platform. For more information, see Microsoft SQL Server documentation.

This topic is part of [“Creating Table Owner and Administrator Accounts”](#) on page 104.

### *To run the grantusr.sql script on Microsoft SQL Server*

- 1 Open grantusr.sql in Microsoft Query Analyzer.
- 2 Execute the script.

## Installing the Stored Procedures and User-Defined Functions on IBM DB2

On IBM DB2, after installing the Database Configuration Utilities, you must copy stored procedures and user-defined functions (UDFs) from the Database Configuration Utilities installation to the DB2 database server.

Any method that transfers the necessary files to the correct location on the database server is acceptable. To copy the stored procedure code, complete the procedure that follows. Use the steps appropriate to the operating systems for the Database Configuration Utilities and the RDBMS. For information about how to perform basic IBM DB2 tasks, see the *Quick Beginnings* guide from IBM.

### *To copy and install the stored procedures and user-defined functions*

- 1 Log on to the Siebel Server computer on which you installed the Database Configuration Utilities.
- 2 Navigate to the following subdirectory in the Database Configuration Utilities installation directory:

*DBSRVR\_ROOT\DB2UDB\SI EBPROC\DBSRVR\_OS*

where:

- *DBSRVR\_ROOT* is the Database Configuration Utilities component subdirectory of your Siebel Business Applications installation directory (*SIEBEL\_ROOT\dbsrvr*)
  - *DBSRVR\_OS* is the string corresponding to the operating system your database server (RDBMS) runs on, such as WIN32
- 3 Copy the file *siebproc.dll* to the *FUNCTION* subdirectory within the *DB2* instance directory on the RDBMS computer where *DB2* is installed.

For example, on Windows, this location might be *C:\SQLLIB\FUNCTION* or *C:\Program Files\SQLLIB\FUNCTION*.

For a 64-bit *DB2* database, do one of the following instead:

- For a 64-bit *DB2* database running on Itanium architecture, copy the file *siebproc64.dll* to the *SQLLIB\FUNCTION* directory, and rename it to *siebproc.dll*.
  - For a 64-bit *DB2* database running on X64 architecture, copy the file *siebprocEMT64.dll* to the *SQLLIB\FUNCTION* directory, and rename it to *siebproc.dll*.
- 4 Proceed to ["Installing the Siebel Database" on page 108](#).

# Installing the Siebel Database

This topic describes how to install the Siebel database on the RDBMS. This task is a step in ["Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment" on page 33](#). (Also perform all of the other applicable tasks in this chapter.)

## To install Siebel database components

- 1 Review ["About Installing the Siebel Database" on page 101](#).

See also the referenced information such as the relevant information about the Siebel Configuration Wizards in [Chapter 4, "Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension."](#)

- 2 Start the Database Configuration Wizard, as described in ["Starting a Siebel Configuration Wizard" on page 62](#). Choose Start, All Programs, Siebel Enterprise Server 8.1.1.14.0 or 8.2.2.14.0, and then Database Server Configuration.

- 3 Specify the following, and click Next:

**Siebel Server Directory.** Accept the default path, or click Browse to select a different Siebel Server installation location. The location that you specify is the *SIEBSRVR\_ROOT* installation directory. For example, for Siebel CRM version 8.1.1.14, this directory might be *C:\siebel\8.1.1.14.0\ses\siebsrvr*.

**Siebel Database Server Directory.** Accept the default path, or click Browse to select a different location. The location that you specify is the Siebel Database Configuration Utilities installation directory (the *DBSRVR\_ROOT* directory). For example, for Siebel CRM version 8.1.1.14, this directory might be *C:\siebel\8.1.1.14.0\ses\dbsrvr*.

- 4 On the RDBMS Platform screen, select one of the following platforms, and click Next:

- IBM DB2 UDB for Linux UNIX Windows
- IBM DB2 UDB for z/OS
- Microsoft SQL Server
- Oracle Database Enterprise Edition

- 5 On the Siebel Database Operation screen, select Install Database from the list, and click Next.
- 6 On the Select Installation Operation screen, select Install Siebel Database to install a new Siebel database, or select Add a Language to an Existing Siebel Database, and then click Next.

The Install Siebel Database option creates the Siebel schema and inserts seed data and Siebel Repository data for the primary language at the end of the Configuration Wizard session.

If you instead selected Add a Language to an Existing Siebel Database, then go to [Step 10 on page 109](#). You must have included the language when you installed the Siebel Server and Database Configuration Utilities. For more information, see [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

- 7 On the next screen, confirm that you want to install a new Siebel database, or indicate that you already have a Siebel database.
- 8 On the Siebel User/Role Creation screen, confirm that you (or a database administrator) have already run the grantusr.sql script to set up table owner and administrator accounts.

**NOTE:** The table owner and administrator accounts must be in place or you will not be able to complete the installation of the tables, indexes, and seed data in the Siebel database. For more information, see [“Creating Table Owner and Administrator Accounts” on page 104](#).

- If you already ran grantusr.sql, then select the corresponding option, and click Next.
- If you did not already run grantusr.sql, then exit the Database Configuration Wizard, and run the script now. When the script has finished executing, restart the Database Configuration Wizard.

- 9 On the Database Encoding screen, identify the appropriate database encoding method, and click Next:

- UNICODE Database
- Non-UNICODE Database

**CAUTION:** Choose the correct option for your database to prevent installing the wrong data types. The database cannot create Unicode data types on a non-Unicode page setting, so check this setting carefully before choosing this option.

**NOTE:** Before you select languages in the next two steps, review the information about code pages in [“Planning RDBMS Installation and Configuration” on page 280](#).

- 10 On the Base Language screen, specify which language serves as the primary language (base language) for the Siebel database.

**NOTE:** If you installed a single Siebel language pack on the Siebel Server where you also installed Database Configuration Utilities, then that language is assumed for a new database installation. Neither the Base Language nor the Language Selection screen appears. Go to [Step 12 on page 110](#).

The languages listed in this screen are those for which you previously installed Siebel language packs on the Siebel Server where you also installed Database Configuration Utilities. Do one of the following, and click Next:

- If you are installing a new Siebel database, then specify the language that will be the primary language. Seed data and Siebel Repository data will be installed for this language. Go to [Step 12 on page 110](#). (The Language Selection screen does not appear in this case.)
- If you are adding a language to an existing Siebel database, then specify the language that you already installed as the primary language. Go to the next step to specify the additional language to install, from the Language Selection screen.

- 11** (Add Language case only) On the Language Selection screen, select the language that you want to install in the Siebel database, for an Add Language operation.

**NOTE:** This screen does not appear for a new database install case. Go to the next step.

The languages listed in this screen are those for which you previously installed Siebel language packs on the Siebel Server where you also installed Database Configuration Utilities.

Select the language that you want to add. Seed data will be installed for this language. You must import the Siebel Repository for this language separately (using the Add Language to an Existing Repository task), as described in ["Importing a Siebel Repository Manually into the Siebel Database" on page 114](#).

Some of the remaining screens do not apply for an add-language operation. Go to the next applicable step.

- 12** On the ODBC Data Source Name screen, indicate the name for the ODBC data source, such as si eb81\_DSN or si eb82\_DSN, and click Next.

For more information about the ODBC data source, see ["Planning RDBMS Installation and Configuration" on page 280](#).

- 13** Specify the following, and click Next:

**Database User Name.** Type the user name of the Siebel administrator; for example, sadmi n.

**Database Password.** Type the password for the Siebel administrator.

**Database Password (confirm).** Retype the password to confirm it.

- 14** Specify the following, and click Next:

**Database Table Owner.** Type the name of the Siebel database table owner or the account that will own the Siebel objects.

**Database Table Owner Password.** Type the password for the Siebel database table owner.

**Database Table Owner Password (confirm).** Retype the password to confirm it.

15 (IBM DB2 only) Specify the following, and click Next:

**Index Table Space Name.** Type the name for your index tablespace; for example, SBL\_INDX. (Tablespace names must not contain spaces; underscores are allowed.)

**4K Table Space Name.** Type the name for your 4-KB tablespace; for example, TBS\_4K. (Tablespace names must not contain spaces; underscores are allowed.)

**16K Table Space Name.** Type the name for your 16-KB tablespace; for example, TBS\_16K. (Tablespace names must not contain spaces; underscores are allowed.)

**32K Table Space Name.** Type the name for your 32-KB tablespace; for example, TBS\_32K. (Tablespace names must not contain spaces; underscores are allowed.)

16 (Oracle Database only) Specify the following, and click Next:

**Index Table Space Name.** Type the name for your index tablespace; for example, INDEX01. (Tablespace names must not contain spaces; underscores are allowed.)

**Table Space Name.** Type the name for your tablespace; for example, DATA01. (Tablespace names must not contain spaces; underscores are allowed.)

17 (Microsoft SQL Server only) On the Repository Selection screen, specify if you are using binary sort order or case-sensitive sort order for the Siebel Repository, and click Next.

18 (Oracle Database and Microsoft SQL Server only) On the Siebel License Key Option screen, specify that you will provide the license key data later, and click Next.

In the current release, the license keys for Siebel CRM base applications do not need to be entered manually. The license keys are provided in the seed data that is imported into a new Siebel database. The license keys are also part of the seed data that is imported into an existing database as part of Incremental Repository Merge or database upgrade operations. For more information about performing these operations, see *Siebel Database Upgrade Guide*.

19 (Oracle Database only) On the Oracle Parallel Index screen, specify the statement describing your database environment, and click Next:

- Does not use the Oracle Parallel Indexing option
- Uses the Oracle Parallel Indexing option

If you have a single-CPU environment, then choose the first option. If you have a multiple-CPU environment, then choose the first or second option, depending on whether you are running your Oracle Database with parallel indexing on.

20 Specify the following, and click Next:

**Security Group ID / Grantee.** Type the name for your security group; for example, SSE\_ROLE.

21 On the Log Output Directory screen, accept the default log directory or enter a new directory name, and click Next.

By default, logging occurs in the *SIEB SRV R ROOT \log \operation \output* directory. In this path, *operation* corresponds to the operation that you are performing, such as *install* for an Install Database operation or *install\_lang* for an Add Language operation.

Click Help to view the following message, which asks if you are ready to apply configuration changes to the Siebel database now, using the Siebel Upgrade Wizard, or will do so later:

Configuration is complete: your output will be saved under \$Siebel Root/siebsrvr/bin/master\_<process>.ucf. Would you like to deploy the process you configured to the database now or later?

**NOTE:** Check the *Siebel Release Notes* on My Oracle Support for the current release. If this document describes any tasks that you must perform to modify the generated SQL files, then modify the generated SQL files as necessary before you execute the SQL in the Siebel Upgrade Wizard.

**22** Choose one of the following, and click Next:

- **Yes apply configuration changes now.** Choose this option if you want the generated SQL files to be executed in the Siebel Upgrade Wizard.
- **No I will apply configuration changes later.** Choose this option if you do *not* want the generated SQL files to be executed in the Siebel Upgrade Wizard. In this case, you must run the Upgrade Wizard manually at a later time in order to execute the generated SQL files.

If you choose to apply configuration changes later, then the command line to apply the configuration later is:

```
SIEBEL_ROOT\siebsrvr\bin\siebug.exe /m master_operation.ucf
```

For the purposes of this procedure, *operation* is either *install* or *install\_lang*.

**23** Review the values that you entered on the previous screens in the Database Configuration Wizard:

- If you have to change any values, then click Back and Next to access the screens on which to change entries, and then to return to this screen.
- Alternatively, you can click Cancel to cancel the Database Configuration Wizard session, then restart the wizard and enter different values.
- When you have verified your input, click Next. Doing so generates SQL files that you will then apply to the database. When all of the SQL files have been generated, a message appears, stating The configuration changes were applied successfully. Click OK.

If you chose No in [Step 22 on page 112](#), then the Siebel Upgrade Wizard does not appear. You must run it manually, after reviewing the generated SQL files.

If you chose Yes in [Step 22 on page 112](#), then the Siebel Upgrade Wizard appears.

**NOTE:** When you run the Siebel Upgrade Wizard, if a program or system error occurs, then you can rerun the wizard, starting at the point at which the wizard failed. For more information, see *Siebel Database Upgrade Guide*.

When the Siebel Upgrade Wizard finishes running, the Siebel Upgrade Wizard Complete screen appears. You have now finished installing the Siebel database components.

**24** After the Siebel Upgrade Wizard has finished running, click Exit to exit the Database Configuration Wizard.



### Related Topics

[“About Installing the Siebel Database” on page 101](#)

[“Verifying Installation for the Siebel Database” on page 196](#)

[“Troubleshooting Installation for the Siebel Database” on page 218](#)

## Setting Up Your Environment to Support Global Time Zone

Global deployments typically span multiple time zones, making it difficult to manage time-sensitive information that must be exchanged among customers and employees working around the world. You can use the Global Time Zone feature to monitor the transfer of tasks between sites in different time zones.

The Global Time Zone feature converts and stores date and time data, using the Universal Time Coordinated (UTC) standard. UTC is equivalent to Greenwich Mean Time, but without daylight savings time.

**CAUTION:** The Global Time Zone feature is documented primarily in *Siebel Global Deployment Guide*. Whether or not you plan to enable Global Time Zone, you must review the documentation on this feature before you deploy your Siebel Business Applications and create any user date-time data in the Siebel database.

Make sure that the time is synchronized on all of your computers.

If you intend to operate your deployment with the Global Time Zone feature enabled, then you can optionally set the operating system of your database servers to UTC time, or its equivalent.

For restrictions on using the Global Time Zone feature on IBM DB2 for z/OS, see *Implementing Siebel Business Applications on DB2 for z/OS*.

**NOTE:** The Global Time Zone parameter (Universal Time Coordinated system preference) is enabled (set to TRUE) by default. If you do not want to enable the Global Time Zone feature, then you must reset this system preference to FALSE by navigating to the Administration - Application screen, and then the System Preferences view.

## Populating the Siebel File System

After you complete installing Database Configuration Utilities and installing the Siebel database, you must populate the Siebel File System. Specific files needed to use the Siebel File System, such as correspondence templates and Siebel Marketing files, are provided with the Database Configuration Utilities software. A subdirectory called `files` is created when you install the Database Configuration Utilities.

The Siebel administrator must populate the `att` directory in the File System with these files after installing the Database Configuration Utilities, and before running the Siebel Web Client.

For detailed information about creating the Siebel File System, including setting the necessary permissions, see [“Creating the Siebel File System” on page 289](#).

### *To populate the Siebel File System directory*

- 1 Copy the appropriate files from the `files` subdirectory of the Database Configuration Utilities software to the `att` subdirectory of the Siebel File System.
- 2 Verify that the files are in the correct location.

## Importing a Siebel Repository Manually into the Siebel Database

Installing the Siebel database as described in [“Installing the Siebel Database” on page 108](#) automatically imports the Siebel Repository for the primary language (only). For each nonprimary language in a multilingual deployment, a separate step to manually import the Siebel Repository is needed.

The content in this topic is provided for customers with multilingual deployments or who have some reason to manually import a Siebel Repository.

You can import the Siebel Repository using the Database Configuration Wizard. This task populates the Siebel Repository tables in the Siebel database with new object definitions. You import the Siebel Repository separately for each nonprimary language in a multilingual deployment. This task does not apply to the Siebel Repository for the primary language.

Regardless of how many Siebel Business Applications that you are using (for example, Siebel Call Center, Siebel Sales, Siebel Service, and Siebel Marketing), you load the Siebel Repository tables only once for each language.

**NOTE:** When you import data into the Siebel Repository tables, a commit is performed once for each table into which Siebel Repository data is imported. Alternatively, the commit frequency can be set to a specified number of rows by including the command-line option `/h num_rows_per_commit` when the `repimexp.exe` utility is invoked.

Some steps in the procedure in this topic pertain to the task of adding a language to an existing Siebel Repository, also using the Database Configuration Wizard. By adding a new language to a Siebel Repository, you populate rows of localized user interface strings for Siebel Repository objects, which allows Siebel Business Applications to display the UI in the new language.

In order to add a new language to an existing Siebel Repository, you must have installed its Siebel language pack on the Siebel Server using the Siebel Enterprise Server installer. Also, you must have added the language to the Siebel database. For more information, see [“Installing the Siebel Database” on page 108](#) and [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

### *To import the Siebel Repository*

- 1 Start the Database Configuration Wizard, as described in [“Installing the Siebel Database” on page 108](#). Respond to the wizard prompts in the same way that you did for that procedure, up to the Siebel Database Operation screen.
- 2 On the Siebel Database Operation screen, select Import/Export Repository, and click Next.

- 3 On the Select Repository Operation screen, choose one of the following options:

**Import Repository.** This option imports the Siebel Repository for the first time with a primary (base) language. Click Next and go to the next step. *This task does not apply if you are importing Siebel Repository data into an existing Siebel Repository for any nonprimary language.*

**Add Language to an Existing Repository.** This option adds a new language to your existing Siebel Repository (imports Siebel Repository data for that language). Click Next and go to [Step 6 on page 115](#).

**Export Repository.** This option exports the Siebel Repository data into a platform-independent file that can be sent to Oracle Global Customer Support for analysis, if needed. *This task is not described in this book.* For more information, see *Using Siebel Tools* and other documentation.

- 4 On the Import Selection screen, specify that you want to import the standard Siebel 8.x Repository, and click Next.
- 5 On the Language Selection screen, specify the language. For an import Siebel Repository operation, this is the primary language (base language), the first language installed in [“Installing the Siebel Database” on page 108](#). For an Add Language operation, this is the language that you want to add to the Siebel Repository.

The languages listed in this screen are those for which you previously installed Siebel language packs on the Siebel Server.

- 6 On the ODBC Data Source Name screen, indicate the name for the ODBC data source, such as si eb81\_DSN or si eb82\_DSN, and click Next.

For more information about the ODBC data source, see [“Planning RDBMS Installation and Configuration” on page 280](#).

- 7 On the Database User Name screen, indicate the following about your database, and click Next:

**Database User Name.** Type the user name of the Siebel administrator, for example, sadmi n for Oracle Database and IBM DB2, or SADMI N for Microsoft SQL Server.

**Database Password.** Type the password for the Siebel administrator.

**Database Password (confirm).** Retype the password to confirm it.

- 8 On the Database Table Owner screen, indicate the following about your database, and click Next:

**Database Table Owner.** The Siebel database table owner, or the account that will own the Siebel objects.

**Database Table Owner Password.** Type the Siebel database table owner password.

**Database Table Owner Password (confirm).** Retype the password to confirm it.

- 9 On the Import Repository Name screen, type the following values, and click Next:

**Import Repository Name.** Accept the default name (Siebel Repository) or type another valid name.

**Repository File Name/Localized Repository File Name.** If you are importing your Siebel Repository for the first time, then this field is named *Repository File Name*. If you are adding a language to an existing Siebel Repository, then this field is named *Localized Repository File Name*. Accept the default installation path and file name for this Siebel Repository, or type another valid installation path.

For Oracle Database, go to the next step. For IBM DB2 or Microsoft SQL Server, go to [Step 11 on page 116](#).

- 10 (Oracle Database only) In the Oracle Parallel Index screen, specify the appropriate environment for your installation, and click Next:

- I am not running with Parallel Indexing On
- I am running with Parallel Indexing On

If you have a single-CPU environment, then choose the first option. If you have a multiple-CPU environment, then choose the first or second option, depending on whether you are running your Oracle Database with parallel indexing on.

- 11 In the Log Output Directory screen, accept the default log directory, or enter a new directory name, and click OK.

By default, logging occurs in the *SIEBSRVR\_ROOT\log\operation\output* directory. In this path, *operation* corresponds to the operation that you are performing, such as *imprep* for Import Repository or *imprep\_lang* for Add Language to an Existing Repository.

The Configuration Parameter Review screen appears.

- 12 Review the configuration values that you entered on the previous Configuration Wizard screens:

- If you want to change any values, then click Previous or Next to access the screens on which to change entries, and then to return to this screen.
- When you have verified the configuration values, click Finish. A message box appears with the prompt:

To apply the configuration now, press OK.

To apply the configuration later, press Cancel.

The command line to apply the configuration later is

```
SIEBEL_ROOT\si ebsrvr\bin\si ebug. exe /m master_operation. ucf
```

For the purposes of this procedure, *operation* is either *imprep* or *imprep\_lang*.

The Siebel Upgrade Wizard appears, displaying the items to be executed or imported.

**NOTE:** If a program or system error occurs and you have to rerun the Siebel Upgrade Wizard, then you can do so starting at the point at which the wizard failed. For more information, see *Siebel Database Upgrade Guide*.

**13** To begin, click OK.

A window appears, displaying information about Siebel Upgrade Wizard activities to import the Siebel Repository. The Upgrade Wizard displays a message when the operation is complete.

#### **Related Topics**

["About Installing the Siebel Database" on page 101](#)

["Verifying Installation for the Siebel Database" on page 196](#)

["Troubleshooting Installation for the Siebel Database" on page 218](#)

#### **Related Books**

*Using Siebel Tools*

*Siebel Database Upgrade Guide*



# 6

## Additional Postinstallation and Configuration Tasks

This chapter describes some additional tasks that you might have to perform to complete configuring your Siebel Business Applications. It includes the following topics:

- [Starting the Siebel Gateway Name Server on page 119](#)
- [Starting the Siebel Server Service on page 120](#)
- [Process of Configuring Load Balancing for Siebel Business Applications on page 120](#)
- [Preparing to Run Siebel Server Components on page 125](#)
- [Installing and Deploying Siebel Business Applications with Multiple Languages on page 133](#)
- [Additional Tasks for the Siebel Web Server Extension and the Web Server on page 146](#)

### Starting the Siebel Gateway Name Server

If, during configuration of the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.4, you selected manual start for the Siebel Gateway Name Server, then you must make sure that the Siebel Gateway Name Server is started when you do any of the following:

- Create and configure the Siebel Enterprise
- Configure a new Siebel Server
- Operate any of the Siebel applications
- Remove the configuration of a Siebel Server (such as when you are uninstalling) or the Siebel Enterprise

**NOTE:** It is recommended that you review the Siebel Gateway Name Server log files, which are found in the `SIEBEL_GATEWAY_ROOT\LOG` directory.

#### Related Topics

- [“Installing Siebel Enterprise Server” on page 42](#)
- [“Starting the Siebel Server Service” on page 120](#)
- [“Verifying Installation for the Siebel Enterprise Server” on page 191](#)
- [“Verifying That the Siebel Gateway Name Server Has Started” on page 214](#)

#### *To start the Siebel Gateway Name Server manually on Windows*

- 1 Navigate to Control Panel, Administrative Tools, and then Services.
- 2 If the Siebel Gateway Name Server is not started, then click Action, and then Start.

## Starting the Siebel Server Service

In order to run the Siebel Server, you must start the Siebel Server service. This topic describes how to start this service manually. You perform this task after you configure the Siebel Server. You also perform this task anytime the server computer has been rebooted if you did not select automatic Siebel Server startup when you configured the Siebel Server.

If you are clustering a particular server, then you must start and stop it using the Cluster Administrator, rather than by using the following procedure.

### Related Topics

[“Installing Siebel Enterprise Server” on page 42](#)

[“Starting the Siebel Gateway Name Server” on page 119](#)

[“Verifying Installation for the Siebel Enterprise Server” on page 191](#)

### To manually start the Siebel Server service

- 1 Navigate to Control Panel, Administrative Tools, and then Services.
- 2 On the Services dialog box, scroll to the Siebel Server service. The name of the service has the following format:

```
Siebel Server si ebel enterpri se_si ebel server
```

where:

- *siebelenterprise* is the name of your Siebel Enterprise
  - *siebelserver* is the name of the Siebel Server that you have just installed and configured
- 3 To start the service, select Action, then Start.

**NOTE:** If the Siebel Server service does not start, then look in the log files for error messages. The installation log file is called SVRsetup.log and is located in the Siebel Server root directory. You can also check `Log\sw_cfg_util.log`.

## Process of Configuring Load Balancing for Siebel Business Applications

This topic describes configuring load balancing for Siebel Business Applications. Both Siebel native load balancing and third-party load balancing are supported. You perform this task before configuring the Siebel Web Server Extension (SWSE).

**NOTE:** This topic describes the initial configuration of load balancing. For more information about planning and managing load balancing for your deployment, see [“Planning Siebel Server Load Balancing” on page 278](#), *Siebel Deployment Planning Guide*, and *Siebel System Administration Guide*. For information about implementing third-party load balancing, see 477835.1 (Article ID) on My Oracle Support. This document was previously published as Siebel Technical Note 540.



To configure load balancing, perform the following tasks:

- 1 [“Generating the Load Balancing Configuration File \(lbconfig.txt\)” on page 121](#)
- 2 [“Setting Up a Third-Party HTTP Load Balancer” on page 122](#)
- 3 [“Setting the Load Balancer Connection Timeout Interval” on page 124](#)
- 4 [“Monitoring Servers with Siebel Native Load Balancer or Third-Party HTTP Load Balancers” on page 124](#)

### Related Topics

- [“Planning Siebel Server Load Balancing” on page 278](#)
- [“Process of Configuring the Siebel Web Server Extension” on page 82](#)
- [“Preparing to Run Siebel Server Components” on page 125](#)

## Generating the Load Balancing Configuration File (lbconfig.txt)

The load balancing configuration file provides virtual server definitions for Siebel load balancing. It also provides URLs for writing connection rules for third-party HTTP load balancers.

You must generate a load balancing configuration file (lbconfig.txt) in the following situations:

- Before configuring the Siebel Web Server Extension (SWSE), when you are using Siebel native load balancing. Configuring the SWSE means applying the SWSE logical profile that you created as part of Siebel Enterprise configuration.
- When you require URLs for routing rules as part of configuring a third-party HTTP load balancer.
- When you add or remove a Siebel Server and you are using either Siebel native load balancing or a third-party load balancer.

This task is a step in [“Process of Configuring Load Balancing for Siebel Business Applications” on page 120](#).

### Generating and Using the lbconfig.txt File

Follow the procedure that follows to generate the lbconfig.txt file and to use it with your Siebel Web Server Extension.

**NOTE:** If you have modified or optimized the existing lbconfig.txt file, such as by creating multiple virtual server definitions, then you lose these changes when you generate the file. To prevent this result, save your modified file under a new name, regenerate the lbconfig.txt file, then copy your changes from your modified file to the newly generated file.

### *To generate the lbconfig.txt file*

- 1 On a Siebel Server, start the Server Manager at the Siebel Enterprise level (do not use the /s option), and enter the following command:

```
generate lbconfig
```

This step generates the lbconfig.txt file. The file is created in the admin subdirectory of the Siebel Server installation directory.

- 2 Review the generated lbconfig.txt file to verify that virtual server definitions do not include any Siebel Servers that will not participate in load balancing.
- 3 Manually edit the lbconfig.txt file. Remove any Application Object Managers that were disabled, or add comment characters to disable the applicable entries.
- 4 Configure the SWSE logical profile to be used with Web servers that will participate in Siebel native load balancing.

For more information about creating and applying the SWSE logical profile, see [“Process of Configuring the Siebel Web Server Extension” on page 82](#).

- 5 Copy the lbconfig.txt file into the SWSE logical profile directory.
- 6 Configure the installed SWSE by applying the SWSE logical profile.

The SWSE Configuration Wizard retrieves the lbconfig.txt file from the logical profile directory.

- 7 Restart the Web server.

## **Types of Connection Rules Provided by the lbconfig.txt File**

The lbconfig.txt file provides three types of connection rules: component rules, server rules, and round-robin rules. These rule types are mandatory: you must include all three types when you configure the load balancer.

Most load balancers allow you to associate a virtual IP address and virtual port number with a group of load balancing rules. They also allow you to define servers as resources and to create groups for them. The procedure in [“Setting Up a Third-Party HTTP Load Balancer” on page 122](#) outlines general steps for setting up load balancers for Siebel Servers.

## **Consequences of Incomplete Configuration of Connection Rules**

Incomplete configuration of the connection rules has the following consequences:

- Not configuring round-robin rules can cause login failures.
- Not configuring server rules can cause unexpected session termination.

## **Setting Up a Third-Party HTTP Load Balancer**

A third-party load balancer receives SISNAPI messages from the Web server. The load balancer routes each message based on the URL that it contains. To configure an HTTP load balancer, you must write connection rules that route these messages to the correct Siebel Servers.

Use the `generate lbconfig` command to generate a file containing definitions for such connection rules. For more information, see [“Generating the Load Balancing Configuration File \(lbconfig.txt\)” on page 121](#).

The `generate lbconfig` command reviews the configuration of the Siebel Servers, then generates a file that pairs connection strings included in SISNAPI messages with paths to the correct Siebel Servers. The rules are stored in the load balancing configuration file (`lbconfig.txt`). Use this file to help configure the third-party load balancer. Use the following procedure to set up a third-party HTTP load balancer.

This task is a step in [“Process of Configuring Load Balancing for Siebel Business Applications” on page 120](#).

### ***To set up a third-party HTTP load balancer***

- 1** Install and complete the initial configuration of the third-party HTTP load balancer.  
See the vendor documentation for more information.
- 2** Verify that the load balancer can work with the computers that host the Siebel Servers.  
See the vendor documentation for the networking requirements.
- 3** Open the `lbconfig.txt` file that you generated as a reference for configuring the third-party load balancer.
- 4** Add Siebel Servers to the load balancer as pools of resources.  
Typically, each resource is defined as a combination of host name or IP address, and TCP Port. Use the host name or IP address of the Siebel Server, and the port number for the SCBroker component (by default, this is port 2321).
- 5** Create load balancing rules or content rules in the load balancer.  
Load balancing rules are mappings between URLs and pools of resources. For each line in the `lbconfig.txt` file, create one such mapping or rule in the load balancer.  
For configuration guidelines for load balancers, see 477835.1 (Article ID) on My Oracle Support. This document was previously published as Siebel Technical Note 540.  
**NOTE:** You must configure the HTTP load balancer to handle all three types of rules: component, server, and round-robin.
- 6** For each group of load balancing rules, define the desired load balancing scheme.  
For component rules, use any preferred load balancing scheme.  
For server and round-robin rules, a round-robin load balancing scheme is recommended.
- 7** Define a virtual IP address and virtual port number for all of the load balancing rules.  
The virtual IP address and virtual port number must match what is defined in the Application Object Manager connect strings of the SWSE configuration file (`eapps.cfg`). This file is located in `SWSE_ROOT\bin`. `SWSE_ROOT` is the SWSE installation directory.

- 8 If the load balancer has a configurable TCP connection timeout interval, then adjust this setting so that it is greater than the value of the parameter SISNAPI Connection Maximum Idle Time (alias ConnIdleTime). Doing so prevents the load balancer from disconnecting active SISNAPI sessions.

For more information about setting ConnIdleTime, see [“Setting the Load Balancer Connection Timeout Interval” on page 124](#). See also *Siebel System Administration Guide*.

## Setting the Load Balancer Connection Timeout Interval

Many third-party HTTP load balancers allow you to set a connection timeout interval. When the timeout occurs, the load balancer’s SISNAPI connection to the Application Object Manager on the Siebel Server is terminated. In addition, Application Object Managers have a configurable timeout parameter, SISNAPI Connection Maximum Idle Time (alias ConnIdleTime). When a session is idle for the specified time, the Application Object Manager closes the session.

This task is a step in [“Process of Configuring Load Balancing for Siebel Business Applications” on page 120](#).

### *To set the load balancer connection timeout interval*

- Set the load balancer connection timeout interval to be slightly longer than the ConnIdleTime setting of the Application Object Managers for which it will provide load balancing.

For example, if ConnIdleTime is 600 seconds, then set the load balancer connection timeout interval to 601 seconds or higher.

**NOTE:** Avoid setting ConnIdleTime to be greater than the load balancer connection timeout interval. Doing so can cause login screen delays and problems with communications performance.

## Monitoring Servers with Siebel Native Load Balancer or Third-Party HTTP Load Balancers

The Siebel native load balancer and most third-party HTTP load balancers support server health monitoring. To set up server health monitoring, you configure the load balancer to send an HTTP GET request to the server URL.

This task confirms that the Siebel Server is running on the specified server computer and that SCBroker is listening at the specified port. This health check does not verify that specific Application Object Managers or other server components are running on the computer.

**CAUTION:** Do not use TCP Health Check. It might connect to SCBroker and remain connected until the SCBroker component parameter ConnRequestTimeout expires. During this period, SCBroker cannot handle new user-session requests.

This task is a step in [“Process of Configuring Load Balancing for Siebel Business Applications” on page 120](#).

### To set up monitoring for a Siebel Server

- Configure the load balancer to send an HTTP GET request to the server URL.

Here are example URLs:

```
//SiebSrvr1: 2321/sieb81/SCBroker
```

```
//SiebSrvr1: 2321/sieb82/SCBroker
```

where:

- *SiebSrvr1* is the Siebel Server host name or IP address.
- *2321* is the port number for the Siebel Connection Broker (SCBroker). This port number is the default.
- *sieb81* or *sieb82* is the Siebel Enterprise Server name.
- *SCBroker* is the Siebel Connection Broker server component.

If the Siebel Server and Siebel Connection Broker are running, then Siebel Connection Broker returns the string: SCBroker OK.

## Guidelines for Setting Up Server Monitoring

Use the following guidelines when you set up server monitoring:

- **On the Siebel Servers that you want to monitor, set the Default Tasks and Maximum Tasks parameters for SCBroker to 2.** These settings provide two instances of SCBroker, which helps prevent monitoring requests from delaying handling of user requests.
- **Use HTTP 1.0 to do health checks.** It terminates connections to SCBroker quickly.

# Preparing to Run Siebel Server Components

This topic summarizes some of the tasks that you might have to do after installing and configuring Siebel Server and before you run Siebel Server components. It includes the following information:

- [“Enabling and Disabling Server Component Groups” on page 126](#)
- [“Enabling and Disabling Language-Specific Application Object Managers and Adding Languages” on page 127](#)
- [“Synchronizing Batch Components” on page 127](#)
- [“Saving Component Job Definitions During an Upgrade” on page 128](#)
- [“Migrating Siebel Enterprise Server and Siebel Server Parameter Settings” on page 128](#)
- [“Performing Additional Tasks to Configure Siebel Servers” on page 128](#)
- [“Enabling Siebel Open UI” on page 129](#)
- [“Updating the CRC Parameter” on page 132](#)

- [“About Installing Additional Siebel Servers for an Existing Siebel Enterprise” on page 133](#)

You might have to perform some of these tasks on multiple Siebel Servers in order to configure them similarly for use in a load-balanced environment. For more information, see [“Planning Siebel Server Load Balancing” on page 278](#) and [“Process of Configuring Load Balancing for Siebel Business Applications” on page 120](#).

**NOTE:** For detailed information about enabling and disabling server component groups, synchronizing batch components, creating server component job definitions, using Server Manager, and related tasks, see *Siebel System Administration Guide*.

## Enabling and Disabling Server Component Groups

When you initially configured your Siebel Server, you specified which server component groups to enable. Before you deploy your Siebel Server, verify that the server component groups that you require are enabled. It is also recommended that you disable any server component groups that you do not require.

Because you explicitly enabled server component groups when you configured the Siebel Server, you might or might not have to disable component groups after installation and configuration.

**NOTE:** As is common for a new release, for the current release, Siebel Innovation Pack 2014, some new server components are provided. Also, some existing server components have moved from existing component groups into a new component group. Such changes introduce changed requirements for enabling server components. Requirements apply differently for new installations than they do for migration installations and depend on the products that you are using. For example, for a new installation, enable any component groups using the Siebel Server Configuration Wizard. For a migration installation, if you do not reconfigure the Siebel Server and you have to enable any additional component groups, then you can do so manually after installation.

For example, a new component group, Disconnected Mobile Synchronization (alias MobileSync), has been created for the current release. Customers using Siebel Mobile disconnected applications, Siebel Handheld applications, or Siebel Remote or Replication Manager must enable the MobileSync component group, as well as meet other existing requirements. Before performing a migration installation, also review parameter settings for affected server components, in case you need to reapply custom settings to the components that have moved into the MobileSync component group.

This topic is part of [“Preparing to Run Siebel Server Components” on page 125](#).

### Related Topics

[“Enabling and Disabling Language-Specific Application Object Managers and Adding Languages” on page 127](#)

### Related Books

*Siebel System Administration Guide*

*Siebel Mobile Guide: Disconnected*

*Siebel Remote and Replication Manager Administration Guide*

## Enabling and Disabling Language-Specific Application Object Managers and Adding Languages

When you installed and configured Siebel Business Applications software, you would have included one or more languages, as described in [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#). That topic also describes optional approaches to installing and deploying languages in a phased approach.

If you install the Siebel Server with multiple languages and specify these languages as deployed languages when you configure the Siebel Server, then language-specific Application Object Manager components are created for each deployed language. If you decide that you do not require Application Object Managers for one or more of these deployed languages, then you can use Server Manager to disable such components prior to deployment.

If you install multiple languages, then it is recommended that you deploy all of the installed languages when you run the Siebel Server Configuration Wizard. As stated, you can disable any language-specific components that you do not require.

You must coordinate the language deployment tasks between your installations of Siebel Server and Siebel Web Server Extension.

For more information about performing tasks in the Siebel Server Configuration Wizard, see [“Options for Configuring the Siebel Gateway Name Server, the Siebel Enterprise, and the SWSE Logical Profile” on page 95](#).

This topic is part of [“Preparing to Run Siebel Server Components” on page 125](#).

### Related Topics

[“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#)

[“Options for Configuring the Siebel Gateway Name Server, the Siebel Enterprise, and the SWSE Logical Profile” on page 95](#)

### Related Books

*Siebel System Administration Guide*

*Siebel Global Deployment Guide*

## Synchronizing Batch Components

After installing and configuring the Siebel Server, you must synchronize any batch components before you can operate them. Do this after upgrading the Siebel database, where applicable. For more information about synchronizing batch components, see *Siebel System Administration Guide*.

This topic is part of [“Preparing to Run Siebel Server Components” on page 125](#).

## Saving Component Job Definitions During an Upgrade

In an upgrade, after you install and configure Siebel Servers and after you upgrade the Siebel database, the S\_SRM\_ACTION and S\_SRM\_ACT\_PARAM tables are truncated, with the result that component job definitions are deleted. To help you re-create these definitions, it is recommended that you save component job definitions before you upgrade.

For example, you can export data from the S\_SRM\_ACTION table using Siebel EIM, then import this data into the same table after upgrading the database and synchronizing batch components.

This topic is part of [“Preparing to Run Siebel Server Components” on page 125](#).

### Related Books

*Siebel Database Upgrade Guide*

*Siebel Enterprise Integration Manager Administration Guide*

## Migrating Siebel Enterprise Server and Siebel Server Parameter Settings

Some Siebel Enterprise Server and Siebel Server parameter settings can be migrated from one Siebel application environment to another by using the configuration migration utility (cfgmerge). Other customized application data can be migrated by using Siebel Application Deployment Manager (Siebel ADM).

This topic is part of [“Preparing to Run Siebel Server Components” on page 125](#).

### Related Books

*Siebel System Administration Guide*

*Siebel Application Deployment Manager Guide*

## Performing Additional Tasks to Configure Siebel Servers

After installing and configuring a Siebel Server as described in this guide, you might have to perform some additional configuration tasks, such as setting parameters for the Siebel Enterprise, Siebel Server, or server components, such as Application Object Managers.

An example configuration task is setting the server component parameters needed to enable or disable Siebel Open UI, as described in [“Enabling Siebel Open UI” on page 129](#).

You perform these types of configuration tasks with Server Manager, whether by using views in the Administration - Server Configuration screen or by using commands at the srvrmgr command line. For more information about using Server Manager, see *Siebel System Administration Guide*.

This topic is part of [“Preparing to Run Siebel Server Components” on page 125](#).



## Related Books

*Siebel System Administration Guide*

## Enabling Siebel Open UI

This topic describes how to enable Siebel Open UI for Siebel Business Applications, where applicable.

The Siebel Open UI client is an alternative to the high interactivity client or the standard interactivity client. Siebel Open UI provides a rich user interface experience, like high interactivity, yet presents many advantages over both high interactivity and standard interactivity. Recent browser versions are strongly recommended, for optimal functionality.

For new installations, you can specify the preferred client user interface, Siebel Open UI or high interactivity, for Siebel CRM applications, using the Siebel Server Configuration Wizard. A similar option is presented in the Siebel Web Client installer, for the Siebel Mobile Web Client or Developer Web Client. For more information, see [“Configuring the Siebel Server” on page 77](#) and [“Installing the Siebel Web Client” on page 157](#).

After a new installation and initial configuration, you can change the setting for any of the applications that support both Siebel Open UI and high interactivity, as appropriate for your deployment requirements. In particular, you can do the following:

- If the application uses Siebel Open UI, then you can revert to high interactivity.
- If the application uses high interactivity, then you can enable Siebel Open UI.

For existing installations (migration installation case), applications use their existing client user interface, which depends on your prior deployment choices. For migrated installations with high interactivity applications, before you enable Siebel Open UI, it is recommended that you first create corresponding Application Object Manager components that you will deploy using Siebel Open UI. For example, create the components on the same Siebel Server as existing Application Object Manager components that are enabled for high interactivity, and base the new components on the existing ones. For more information about creating server components, see *Siebel System Administration Guide*. For more information about deploying Siebel Business Applications using Siebel Open UI, see *Deploying Siebel Open UI*. See also *Configuring Siebel Open UI*.

Check all applicable configuration settings to make sure that they meet the requirements for Siebel Open UI. For example, Siebel Open UI requires the use of session cookies and does not support cookieless mode. You might need to update the `eapps.cfg` file settings on the Siebel Web Server Extension so that all applications deployed using Siebel Open UI use cookie-based mode. Checking these settings is recommended in all cases, but particularly if you are enabling Siebel Open UI for existing applications, such as after performing a migration installation. For more information, see *Siebel Security Guide*.

**NOTE:** For migrated installations, you must also use the Incremental Repository Merge feature before you can run any Siebel CRM applications. For more information, see [“About Database Updates for the Current Release” on page 103](#).

For applications that use standard interactivity by default, you can also deploy these applications using Siebel Open UI. However, significant configuration is required to do this.

**NOTE:** User interface references in this guide assume that you are using Siebel Open UI. The Siebel application procedures in this guide assume that you do not use left-hand navigation. However, you can set up left-hand navigation. For more information about left-hand navigation and about implementing it, see *Siebel Fundamentals for Siebel Open UI*.

This topic is part of “Preparing to Run Siebel Server Components” on page 125.

### Related Books

*Deploying Siebel Open UI*

*Configuring Siebel Open UI*

*Siebel System Administration Guide*

*Siebel Security Guide*

*Siebel Fundamentals for Siebel Open UI*

## Parameters for Enabling Siebel Open UI

To use Siebel Open UI with the Siebel Web Client, the Application Object Manager component must have the parameters `EnableOpenUI` and `HighInteractivity` set to `True`. To use Siebel Open UI with the Siebel Mobile Web Client or Developer Web Client, the application configuration file must have these parameters set to `True`. For applications that currently use high interactivity, `HighInteractivity` is already set to `True`.

## Enabling Siebel Open UI for an Application Object Manager Component

Use the following procedure to enable Siebel Open UI for an Application Object Manager component, where applicable.

### *To enable Siebel Open UI for an Application Object Manager component*

- 1 Log in to the Siebel client with administrator privileges.
- 2 Navigate to the Administration - Server Configuration screen, and then the Servers view.
- 3 Select the Siebel Server for which you want to configure an Application Object Manager.
- 4 (Optional) Create a new Application Object Manager component that you will deploy using Siebel Open UI.
- 5 In the Components list, query the Component field for the Application Object Manager component for which you are enabling Siebel Open UI. For example, locate the component *Call Center Object Manager (JPN)* for Japanese.
- 6 Click the Parameters view tab.
- 7 In the Component Parameters list, query the Parameter field for *EnableOpenUI*.

- 8 If the EnableOpenUI parameter is set to False, then change the Value on Restart field to True.  
**NOTE:** The HighInteractivity parameter also must be set to True for Siebel Open UI. For applications that are currently enabled for high interactivity, this parameter is already set to True.
- 9 Log out of the client and close the browser.
- 10 Restart the Siebel Server for which you configured the Application Object Manager for Siebel Open UI.
- 11 Using a suitable browser, log in to the application that you configured and verify that it opens the Siebel Open UI client.

## Enabling Siebel Open UI for a Siebel Mobile Web Client Application

Use the following procedure to enable Siebel Open UI for a Siebel Mobile Web Client or Developer Web Client application, where applicable.

### *To enable Siebel Open UI for a Siebel Mobile Web Client application*

- 1 On the client computer, use a text editor to open the application configuration file, such as uagent.cfg for Siebel Call Center. This file is located in `SIEBEL_CLIENT_ROOT\bin\lang`, where *lang* is a deployment language, such as *ita* for Italian.
- 2 In the [InfraUIFramework] section of the configuration file, set the parameter EnableOpenUI to True.  
**NOTE:** The HighInteractivity parameter also must be set to True for Siebel Open UI. For applications that are currently enabled for high interactivity, this parameter is already set to True.
- 3 Save and close the application configuration file.
- 4 Using a suitable browser, log in to the application that you configured and verify that it opens the Siebel Open UI client.

## Additional Configuration Tasks for Siebel Open UI

Siebel Innovation Pack 2014 uses a rendering framework called Responsive Web Design that unifies Siebel Open UI rendering across Siebel CRM products. Note that the jQuery Mobile renderers for the Siebel Mobile applications are no longer used. As a result of these changes, after performing a migration installation, such as from Siebel Innovation Pack 2013 to Siebel Innovation Pack 2014, you must perform some configuration tasks if you want to retain any applicable customizations that you had made in the earlier release. For more information, see *Configuring Siebel Open UI*.

If you retain and update CSS stylesheets from an earlier release, then it is strongly recommended that you remove the Side Menu as a navigation choice for your users, because it is not supported by the earlier stylesheets. For more information, see *Siebel Fundamentals for Siebel Open UI*.

## About Reverting to High Interactivity

Where Siebel Open UI is enabled for a Siebel application, to revert to high interactivity (where applicable), you must set the parameter `EnableOpenUI` back to `False`. If you do this reversion, then the browser requirements for high interactivity apply again. The browser requirements are described in the Certifications tab on My Oracle Support and in *Siebel System Administration Guide*.

## Related Books

For more information about configuring and deploying Siebel Business Applications with Siebel Open UI, see the following related books:

- For information about deploying Siebel Business Applications using Siebel Open UI, see *Deploying Siebel Open UI*.
- For information about configuring Siebel Business Applications that use Siebel Open UI, see *Configuring Siebel Open UI*.
- For information about creating and configuring Application Object Manager components, see the *Siebel System Administration Guide*.
- For information about the Siebel Mobile applications, see *Siebel Mobile Guide: Connected* and *Siebel Mobile Guide: Disconnected*.
- For information about using Siebel Business Applications that are deployed with Siebel Open UI, see *Siebel Fundamentals for Siebel Open UI*.
- For more information about the functionality that is available for Siebel Open UI, see *Siebel Open UI Deployment Guide* on My Oracle Support. To access this article, from within My Oracle Support, navigate to the Knowledge tab and search for Article ID 1499842.1.
- For the minimum browser standards and other support information for Siebel Open UI, see the Certifications tab on My Oracle Support. See also *Deploying Siebel Open UI* on *Siebel Bookshelf* and 1499842.1 (Article ID) on My Oracle Support.

## Updating the CRC Parameter

If you are using a security adapter, then you might have to update the value of the CRC parameter after installing the current release as a migration installation. The value must reflect the checksum value applicable to the security adapter library file, such as a DLL file on Microsoft Windows.

This task might be necessary if you previously determined to use checksum validation for your security adapter deployment, and set the value of the CRC parameter. If a Siebel CRM release that you installed later as a migration installation included an updated security adapter library file, then checksum validation fails and Siebel Web Clients might not start. To prevent this result, you must update the value of the CRC parameter. For more information about this task, see the topic about configuring checksum validation in *Siebel Security Guide*.

This topic is part of [“Preparing to Run Siebel Server Components” on page 125](#).

## Related Books

*Siebel Security Guide*

## About Installing Additional Siebel Servers for an Existing Siebel Enterprise

You can install and configure multiple Siebel Servers for a Siebel Enterprise.

Typically, before installing and configuring additional Siebel Servers for an existing Siebel Enterprise, you complete installation and configuration for the Siebel Web Server Extension (SWSE).

Run the Siebel Enterprise Server installer to install each additional Siebel Server on another server computer, and run the Siebel Server Configuration Wizard to configure this Siebel Server.

You can also deploy a new Siebel Server based on an existing configured Siebel Server, using the Siebel cloning utility.

**NOTE:** Alternatively, you can use the Siebel Server Configuration Wizard to configure an additional Siebel Server on a single computer where the Siebel Server is already installed and configured. Creating multiple Siebel Server configurations for a single installed Siebel Server instance is typically done *for test or development purposes only*. In your production environment, it is strongly recommended that you configure only one Siebel Server for each server computer. Where Siebel Remote is to be deployed, do not create multiple Siebel Server configurations for a single installed Siebel Server instance.

After configuring a new Siebel Server, you must perform corresponding SWSE configuration tasks to make the applications on this Siebel Server available on the Siebel Web server. You might have to re-create the SWSE logical profile and then reapply the logical profile on the SWSE. In some cases, you might choose to manually edit the eapps.cfg file and manually create new virtual directories on the Web server. As part of this overall process, you might also regenerate the lbconfig.txt file, which is used for load balancing.

This topic is part of [“Preparing to Run Siebel Server Components”](#) on page 125.

### Related Topics

[Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)

[Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)

[Chapter 9, “Cloning a Siebel Installation”](#)

[“Process of Configuring Load Balancing for Siebel Business Applications”](#) on page 120

[“Additional Tasks for the Siebel Web Server Extension and the Web Server”](#) on page 146

## Installing and Deploying Siebel Business Applications with Multiple Languages

Multiple Siebel language packs can be installed and deployed as part of Siebel Business Applications installation and configuration, for the current release. Review this topic and related topics when planning multilingual deployments. Language installation is part of the installation procedure for each installable Siebel module. The task of adding and deploying new languages is described for Siebel Server, Siebel Web Server Extension (SWSE), Siebel Web Client, and Siebel Tools.

Scenarios for deploying Siebel Business Applications with more than one language pack are described in [“Scenarios for Installing and Deploying Multiple Languages” on page 138](#).

See also [“General Requirements for Installing and Configuring Siebel Enterprise Server Components” on page 297](#) and other relevant topics.

For a list of the languages supported by Siebel Business Applications, see 1513102.1 (Article ID) for Siebel CRM version 8.1.1.x or 1524342.1 (Article ID) for Siebel CRM version 8.2.2.x on My Oracle Support. See also *Siebel Global Deployment Guide*, *Siebel System Administration Guide*, and other applicable documentation.

Note the following recommendations:

- It is strongly recommended that you install and deploy, or at least install, all of the languages that you expect to require, on each physical server.
- It is strongly recommended that you install the same set of language files on each physical server. Doing so helps ensure maximum compatibility between physical servers, so that the system can be reconfigured to meet ongoing requirements. Oracle only tests configurations in which the same set of language files are installed on each physical server that is used in a single Siebel Enterprise.

You can add languages to an existing installation of the same version of Siebel Enterprise Server, SWSE, Siebel Web Client, or Siebel Tools by using unattended mode (silent mode) only. After adding languages in this case, you must run the Configuration Wizards for the Siebel Server and the SWSE and perform the tasks to add new languages. See the limitations described in this topic for adding languages.

If you include multiple languages with a Siebel Enterprise Server installation, then you designate one language as the primary language to be used for server messages and logging. Typically, the same primary language is also used for the Siebel database, which cannot be changed after database installation.

If you install and deploy a new language in an existing installation, then you must add the language to the Siebel database and perform additional tasks using the Database Configuration Wizard, as described in [“About Language Deployment Tasks Using the Database Configuration Wizard” on page 137](#).

This topic contains the following information:

- [“About Language Deployment and the Siebel Network Image” on page 135](#)
- [“About Language Deployment and Migration Installations” on page 135](#)
- [“About Language Deployment on Siebel Server and Siebel Web Server Extension” on page 136](#)
- [“About Language Deployment Tasks Using the Database Configuration Wizard” on page 137](#)
- [“About Language Deployment for Unshipped Languages” on page 137](#)
- [“Limitations for Installing Additional Languages” on page 137](#)
- [“Scenarios for Installing and Deploying Multiple Languages” on page 138](#)
- [“Installing and Deploying All Required Languages Once” on page 139](#)
- [“Installing All Required Languages but Deploying Some Languages Later” on page 140](#)

- [“Installing and Deploying Additional Languages” on page 142](#)
- [“Importing Locale-Specific Data into the Siebel Repository” on page 145](#)

## About Language Deployment and the Siebel Network Image

This topic is part of [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

In order to include any languages in a new installation or to add languages that were not previously installed, the languages must be present in the Siebel network image for the applicable release of Siebel Business Applications. This requirement applies to the current release and to applicable Siebel Patchset releases, where available.

Where a language was not previously included in the network image, you can add languages to each applicable network image (for all applicable releases) using the Siebel Image Creator utility. For details, see [Chapter 14, “Creating the Siebel Installation Image on the Network.”](#)

## About Language Deployment and Migration Installations

This topic is part of [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

For Siebel Enterprise Server, Siebel Web Server Extension (SWSE), Siebel Web Client, or Siebel Tools, when you perform a migration installation of the current release, files for all of the installed languages are automatically included. First, however, you must include all of these languages when you create the network image for the current release. For more information about the types of Siebel releases, see [“About Siebel CRM Releases” on page 272](#).

If you plan to perform a migration installation of the current release, and you also want to add languages to your existing deployment, then you have two options for how to do this, subject to limitations:

- **Add languages after installing the current release.** The Siebel Enterprise Server and SWSE installers for the current release support adding languages to an existing installation of the same version, using an unattended installation method. You would perform this task after performing the migration installation tasks for these modules. Some limitations might apply to adding languages to your existing installed Siebel client software. For more information, see [“Limitations for Installing Additional Languages” on page 137](#) and [“Installing and Deploying Additional Languages” on page 142](#).
- **Add languages before installing the current release.** Subject to limitations for your existing installed Siebel server and client software, it might be possible or desirable for you to install new languages before you install the current release. To determine if this option is possible for the currently installed software in your Siebel deployment and, if so, to determine what steps are required, see the documentation that applies to your currently installed Siebel software version for information about this version.

For example, for Siebel CRM version 8.1.1.10 on Microsoft Windows, see *Siebel Maintenance Release Guide, Version 8.1.1.10*, and see *Siebel Installation Guide for Microsoft Windows, version 8.1, Rev. D*. For versions of *Siebel Maintenance Release Guide* for prior releases, see 880452.1 (Article ID) on My Oracle Support for version 8.1.1.x or see 1441523.1 (Article ID) for version 8.2.2.x. For versions of the *Siebel Installation Guide* for prior releases, see 1461732.1 (Article ID) on My Oracle Support.

For a list of the languages supported by Siebel Business Applications, see 1513102.1 (Article ID) for Siebel CRM version 8.1.1.x or 1524342.1 (Article ID) for Siebel CRM version 8.2.2.x on My Oracle Support.

**NOTE:** Specific installation tasks and requirements might apply for any language pack that is newly supported and thus requires a minimum Siebel release of Siebel CRM version 8.1.1.x or version 8.2.2.x. For more information, see [“Importing Locale-Specific Data into the Siebel Repository” on page 145](#).

#### Related Topics

[“Limitations for Installing Additional Languages” on page 137](#)

[“Installing and Deploying Additional Languages” on page 142](#)

[“Importing Locale-Specific Data into the Siebel Repository” on page 145](#)

[“About Siebel CRM Releases” on page 272](#)

## About Language Deployment on Siebel Server and Siebel Web Server Extension

This topic is part of [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

When you configure each installed instance of Siebel Server and Siebel Web Server Extension (SWSE), you specify which languages to deploy, from among the installed languages. It is possible to deploy a subset of the installed languages. Which languages you deploy on a given server depends on the uses to which you will put that server.

Note the following points about language deployment on Siebel Server and SWSE:

- On each Siebel Server, the set of deployed languages determines which language-specific components such as Application Object Managers are created on that server. It is recommended that you deploy all of the languages that are installed in the enterprise and optionally disable Application Object Managers for particular languages where they are not required.
- On each instance of SWSE, you must deploy the superset of all of the languages that are required by all of the Application Object Managers that connect to it. It is recommended that you deploy all of the languages that are installed in the enterprise.

#### Related Topics

[Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)

[“Scenarios for Installing and Deploying Multiple Languages” on page 138](#)



## About Language Deployment Tasks Using the Database Configuration Wizard

This topic is part of [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

In addition to software installation and configuration tasks, for installed languages other than the primary language for the Siebel database, you must perform the following operations, using the Database Configuration Wizard. You perform these tasks after installing the Siebel database.

- Adding the language (including seed data) to the Siebel database. Perform this task once for each nonprimary language that you install.
- Importing the Siebel Repository into the Siebel database. Perform this task once for each nonprimary language that you install.
- Running the MLOV (multilingual LOV) conversion utility. Perform this task once after installing multiple languages initially and again after adding one or more languages.

### Related Topics

[Chapter 5, “Installing the Siebel Database on the RDBMS”](#)

[“Installing the Siebel Database” on page 108](#)

[“Importing a Siebel Repository Manually into the Siebel Database” on page 114](#)

## About Language Deployment for Unshipped Languages

This topic is part of [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

If you are localizing Siebel Business Applications to use a language for which a Siebel language pack is not provided, then see also the topics about localizing an unshipped language in *Siebel Global Deployment Guide*.

## Limitations for Installing Additional Languages

This topic is part of [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

Although it is strongly recommended to install all of the languages that you might require (whether or not you initially deploy them all), you can also add languages to an existing installation by using the installer for the current release. However, several limitations apply.

**NOTE:** If you plan to perform a migration installation of the current release, and you also want to add languages to your existing deployment, then you might be able to install the languages before you install the current release. For more information, see [“About Language Deployment and Migration Installations” on page 135](#).

For Siebel Enterprise Server, SWSE, Siebel Web Client, and Siebel Tools, the limitations for installing additional languages for the current release are as follows:

- You can install additional languages for existing installations by using the installers of the same version only. For example, for the current release, you can install the software as a new installation or as a migration installation, then later use the same installers to add languages.
- You can add languages to the current release by running the installer in unattended mode (silent mode) only, using response files that you have prepared for this purpose. You cannot add languages by running the installer in GUI mode.
- You cannot generate response files for an operation to add languages. You must use an edited copy of one of the response files that are provided for Siebel Enterprise Server, SWSE, Siebel Web Client, or Siebel Tools. For the location of these response files, see [“Installing and Deploying Additional Languages” on page 142](#).
- You cannot add languages as part of performing a migration installation of the current release. However, you can add languages after the migration installation.
- You cannot add languages to an earlier version of the installed software by using the installers for the current release. Conversely, you cannot use the installers for any earlier release to add languages to an installation of the current release.
- Before you install additional languages, you must uninstall any Siebel Patchset release that you have installed onto the current release. Reinstall the Siebel Patchset onto the current release after completing the steps to add the languages.

### Related Topics

[“About Language Deployment and Migration Installations” on page 135](#)

[“Installing and Deploying Additional Languages” on page 142](#)

[Chapter 11, “Uninstalling Siebel Business Applications”](#)

## Scenarios for Installing and Deploying Multiple Languages

This topic is part of [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

Consider the following scenarios for installing and deploying multiple Siebel language packs:

- **Install and deploy all of the languages that you require once.** For customers who are installing and deploying languages shipped with the Siebel CRM base release, and who *do not* plan to deploy other languages at a later date. This option is easiest but might not be suitable for phased language deployments.
- **Install all of the languages that you will require, but deploy some languages later.** For customers who are installing and deploying languages shipped with the Siebel CRM base release, but who plan to deploy some of the installed languages at a later date. This option is recommended for phased language deployments.

- **Install and deploy additional languages in an existing deployment.** For customers who are installing and deploying languages shipped with the Siebel CRM base release, and who plan to install and deploy additional languages at a later date. This option might be suitable for some phased language deployments. You can install languages at any time to meet changing business needs. However, deploying languages is easier if you include them when you first install and configure the Siebel CRM software.

#### Related Topics

[“Installing and Deploying All Required Languages Once” on page 139](#)

[“Installing All Required Languages but Deploying Some Languages Later” on page 140](#)

[“Installing and Deploying Additional Languages” on page 142](#)

## Installing and Deploying All Required Languages Once

This topic is part of [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

This scenario is intended for customers who are deploying language packs that shipped with the current release and who are installing all of the language packs that their enterprise will require during initial installation and configuration.

Include all of the required languages with your initial installation and deploy them when you configure the installed Siebel software.

**NOTE:** You perform the tasks in this topic in conjunction with topics such as [“Installing Siebel Enterprise Server” on page 42](#) and [“Installing the Siebel Web Server Extension” on page 49](#). Perform all applicable steps that are documented in more detail in these and other topics.

### *To deploy multiple languages shipped with the current release*

- 1 Install Siebel Enterprise Server software on all of the applicable servers, with all of the languages that you will require for the enterprise.
- 2 Configure the Siebel Gateway Name Server and configure the Siebel Enterprise. Also configure the SWSE logical profile.
- 3 Install the Siebel database. This task installs seed data for the primary language into the Siebel database.

**NOTE:** For information about Siebel Gateway Name Server authentication and associated requirements for the installation and configuration sequence, see [“Requirements for Siebel Gateway Name Server Authentication” on page 299](#).

- 4 Configure each Siebel Server, using the Siebel Server Configuration Wizard. During Siebel Server configuration, specify to deploy all of the installed languages.
- 5 Install SWSE software on all of the applicable Web servers, with all of the languages that you will require for the enterprise.

- 6 Configure each SWSE, using the SWSE Configuration Wizard. During SWSE configuration, specify to deploy all of the installed languages.
- 7 For each additional installed (nonprimary) language that you are deploying for the first time: add the language to the Siebel database and import the Siebel Repository. Also run the MLOV conversion utility (once).
- 8 If you have not already done so, install the latest Siebel Patchset release on all of the components in your Siebel CRM deployment. (It is recommended that you install a Siebel Patchset release after you install Siebel CRM software and before you configure it.)

## Installing All Required Languages but Deploying Some Languages Later

This topic is part of [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

This scenario is intended for customers who are deploying language packs included in the current release but who plan to deploy some language packs at a later date on particular instances of Siebel Server or SWSE.

Include all of the required languages with your initial installation.

There are two variations of this scenario that can achieve the desired result. Review each option and decide which one works best for your situation. See also [“Installing and Deploying All Required Languages Once” on page 139](#) for details for some tasks.

**NOTE:** You perform the tasks in this topic in conjunction with topics such as [“Installing Siebel Enterprise Server” on page 42](#) and [“Installing the Siebel Web Server Extension” on page 49](#). Perform all applicable steps that are documented in more detail in these and other topics.

### Deploying Multiple Languages Now and Later (Option 1)

Use the following procedure to deploy multiple languages now and at a later date. This procedure represents Option 1. See also Option 2.

#### *To deploy multiple languages now and at a later date (Option 1: preferred)*

- 1 Perform tasks similar to those described in [“Installing and Deploying All Required Languages Once” on page 139](#).
  - Install Siebel Business Applications software with all of the languages that you will deploy now and at a later date.
  - When you configure each Siebel Server and SWSE, specify that you want to deploy all of the installed languages.
- 2 For each Siebel Server, disable any language-specific Application Object Manager components that you do not yet require.

- 3 When you are ready to deploy additional installed languages, re-enable any language-specific Application Object Managers that you previously disabled.
- 4 For each additional installed (nonprimary) language that you are deploying for the first time: add the language to the Siebel database and import the Siebel Repository. Also run the MLOV conversion utility (once).
- 5 If you have not already done so, install the latest Siebel Patchset release on all of the components in your Siebel CRM deployment. (It is recommended that you install a Siebel Patchset release after you install Siebel CRM software and before you configure it.)

## Deploying Multiple Languages Now and Later (Option 2)

Use the following procedure to deploy multiple languages now and at a later date. This procedure represents Option 2. See also Option 1.

### *To deploy multiple languages now and at a later date (Option 2)*

- 1 Perform tasks similar to those described in [“Installing and Deploying All Required Languages Once” on page 139](#). In this case, it is assumed that you did not deploy all of the installed languages.
  - Install Siebel Business Applications software with all of the languages that you will deploy now and at a later date.
  - When you configure each Siebel Server or SWSE, optionally specify to deploy only a subset of the installed languages.
- 2 When you are ready to deploy additional installed languages, perform the following for each Siebel Server:
  - a Start the Siebel Server Configuration Wizard.
  - b Perform the wizard task Add Language Support for the Siebel Server.
  - c In the Deployed Languages screen, specify the additional languages to deploy.
  - d Execute the configuration.
- 3 Perform the following for each SWSE:
  - a Start the SWSE Configuration Wizard.
  - b Perform the wizard task Add Language Support for the SWSE Configuration.
  - c In the Deployed Languages screen, specify the additional languages to deploy.
  - d Execute the configuration.
- 4 For each additional installed (nonprimary) language that you are deploying for the first time: add the language to the Siebel database and import the Siebel Repository. Also run the MLOV conversion utility (once).
- 5 If you have not already done so, install the latest Siebel Patchset release on all of the components in your Siebel CRM deployment. (It is recommended that you install a Siebel Patchset release after you install Siebel CRM software and before you configure it.)

## Installing and Deploying Additional Languages

This topic is part of [“Installing and Deploying Siebel Business Applications with Multiple Languages”](#) on page 133.

This scenario is intended for customers who did not install all of the Siebel language packs and who later determine that they require additional supported Siebel language packs that were not previously installed and deployed.

This topic describes adding new languages to your existing Siebel Business Applications deployment and existing physical resource allocation. As part of expanding language support, you might also install components on new servers that include new language packs.

For an existing installation of the current release of Siebel Enterprise Server, SWSE, Siebel Web Client, or Siebel Tools, you can run the same installer in unattended mode to add any available and supported language packs that you require that were not previously installed. You must perform this installation task using unattended mode (silent mode) only.

For detailed requirements and other information about running Siebel installers and Configuration Wizards, see [Chapter 12, “Requirements for Installing and Configuring Siebel Business Applications,”](#) and other applicable parts of this guide.

Perform the tasks in this topic in conjunction with the installation instructions for each installable module and the unattended installation instructions for these modules. Perform all applicable steps, including those that are documented in more detail in other topics.

For more information about performing unattended installations, see [“Installing Siebel Enterprise Server Components and Siebel Web Server Extension in Unattended Mode”](#) on page 56 and [“Installing Siebel Web Clients and Siebel Tools in Unattended Mode”](#) on page 170.

**NOTE:** Where you are adding languages to an existing installation, the primary language for the Siebel database will already have been determined when you installed the Siebel Enterprise Server software and the Siebel database. Any language that is to serve as the primary language for a new Siebel database must be included when you first install the Siebel Enterprise Server software.

### Oracle-Provided Installation Response Files

The Oracle-provided response files that you can use for adding languages using unattended mode are as follows, depending on your Siebel CRM version. Use the file whose name best reflects the version, product, and operating system for each installation you are performing.

- 811x\_ses\_addlang\_win.rsp
- 811x\_swse\_addlang\_win.rsp
- 822x\_ses\_addlang\_win.rsp
- 822x\_swse\_addlang\_win.rsp
- seaw\_mobile\_webclient\_addlang.rsp
- seaw\_dedicated\_webclient\_addlang.rsp
- seatools\_addlang.rsp

### Response File Parameters

The response files that you use when you install additional languages in unattended mode include parameters that specify information about your existing installation, the network image, the new languages you are installing, and so on. Review the parameters in each response file to determine the parameters for which you must provide values. All values must be enclosed in double-quotes.

For any operation to install new languages, you must do the following:

- Specify values for the ORACLE\_HOME and ORACLE\_HOME\_NAME parameters, which correspond to values that you specified when you performed the original installation. These settings identify the installation to which you are adding languages.
- Specify a value for the s\_shiphomeLocation parameter, representing the location of the Disk1 directory in the network image for the Siebel module that you are installing.
- Specify a value for the FROM\_LOCATION parameter, representing the location of the products.xml file within the Disk1\stage directory in the network image for the Siebel module that you are installing.
- Specify a value for the selectedLangs parameter, representing the new language or languages that you are installing.

For Siebel Enterprise Server only, you must set the following parameters to *true* for each installed component:

- b\_isGatewayInstalled (if Siebel Gateway Name Server is installed)
- b\_isSiebsrvrInstalled (if Siebel Server is installed)
- b\_isDBInstalled (if Siebel Database Configuration Utilities is installed)
- b\_isEAIInstalled (if EAI Connectors is installed)

### ***To install and deploy additional languages on existing installations***

- 1 Perform tasks similar to those described in [“Installing and Deploying All Required Languages Once” on page 139](#) or [“Installing All Required Languages but Deploying Some Languages Later” on page 140](#). In this case, it is assumed that you did not install and deploy all of the languages.
- 2 Review [“Limitations for Installing Additional Languages” on page 137](#).
- 3 Uninstall any Siebel Patchset release that you have installed on top of the current release, for each applicable installed Siebel module.
- 4 Verify that the additional new languages that you require and plan to install are included in the Siebel network image.
- 5 Navigate to the location of an existing response file for the Siebel module for which you are adding languages.

For example, for Siebel Enterprise Server on Microsoft Windows, navigate to *Siebel\_Image\Windows\Server\Siebel\_Enterprise\_Server\Disk1\stage\Response*.

In this path, *Siebel\_Image* is the directory for your version-specific Siebel network image, such as C:\Siebel\_Install\_Image\8.1.14 or C:\Siebel\_Install\_Image\8.2.2.14.

- 6 Edit the response file, as appropriate for the Siebel module for which you are adding languages. For example, for Siebel Enterprise Server, for Siebel CRM version 8.1.1.14, edit the response file 811x\_ses\_addlang\_win.rsp.

See the information about response file parameters, before this procedure.

**NOTE:** Always back up any existing response file before editing it or replacing it with an edited version of the file.

- 7 Copy the edited file to a suitable location. For example, you might place a file into a subdirectory of the existing location for the response files, or into a temporary location such as C: .
- 8 Navigate to the location of the installer for the Siebel module for which you are installing additional languages.

For example, for Siebel Enterprise Server on Microsoft Windows, navigate to *Siebel\_Image\Windows\Server\Siebel\_Enterprise\_Server\Disk1\install*.

- 9 When you are ready to install additional languages as indicated by the settings in each of your edited response files, run each installer program in unattended mode (silent mode) on each computer where the current release is already installed.

For example, for Siebel Enterprise Server, for Siebel CRM version 8.1.1.14, run a command like the following:

```
setup.bat -silent -responseFile C:\811x_ses_addlang_win.rsp
```

For example, for Siebel Tools, for Siebel CRM version 8.1.1.14, run a command like the following:

```
setup.bat -silent -responseFile C:\811x_tools_addlang_win.rsp
```

- 10 When you are ready to deploy the newly installed languages, and any other languages that were not previously deployed, perform the following for each applicable Siebel Server:
  - a Start the Siebel Server Configuration Wizard.
  - b Choose the wizard task Add Language Support for the Siebel Server.
  - c In the Deployed Languages screen, specify the additional languages to deploy.
  - d Execute the configuration.
- 11 When you are ready to deploy the newly installed languages, and any other languages that were not previously deployed, perform the following for each applicable SWSE:
  - a Start the SWSE Configuration Wizard.
  - b Choose the wizard task Add Language Support for the SWSE Configuration.
  - c In the Deployed Languages screen, specify the additional languages to deploy.
  - d Execute the configuration.
- 12 For each additional installed (nonprimary) language that you are deploying for the first time: add the language to the Siebel database and import the Siebel Repository. Also run the MLOV conversion utility (once).
- 13 Validate the installation after it has completed.



- 14 Repeat the previous steps, where applicable, to install and deploy the new languages for each applicable installed Siebel module.

**NOTE:** In general, it is recommended that you add the languages for all of the applicable server installations before you add the languages for Siebel Web Client and Siebel Tools, where needed.

- 15 Reinstall any previously installed Siebel Patchset release that you uninstalled in [Step 3 on page 143](#). Then validate the installation again.

### Related Topics

[“Installing Siebel Enterprise Server” on page 42](#)

[“Installing the Siebel Web Server Extension” on page 49](#)

[“Installing Siebel Enterprise Server Components and Siebel Web Server Extension in Unattended Mode” on page 56](#)

[“Limitations for Installing Additional Languages” on page 137](#)

[“Installing and Deploying All Required Languages Once” on page 139](#)

[“Installing All Required Languages but Deploying Some Languages Later” on page 140](#)

[“Installing the Siebel Web Client” on page 157](#)

[“Installing Siebel Tools” on page 164](#)

[“Installing Siebel Web Clients and Siebel Tools in Unattended Mode” on page 170](#)

[Chapter 8, “Verifying and Troubleshooting Your Installation”](#)

[Chapter 12, “Requirements for Installing and Configuring Siebel Business Applications”](#)

[“About Siebel CRM Releases” on page 272](#)

## Importing Locale-Specific Data into the Siebel Repository

This topic is part of [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

Sometimes it is necessary to update the text strings held in the repository for a particular language or for multiple languages. These text strings are held in the Symbolic String Model (SSM) table, and appear on-screen as labels for tabs, fields, and so on, across all of the Siebel applications.

Updates might be needed either because a string has been incorrectly translated for a particular language or because installing a patch release has caused a new string or message to appear for all of the languages for which Oracle ships language packs for Siebel Business Applications.

**NOTE:** These instructions are provided for use with any releases to which they might apply. They might not apply for any particular Siebel CRM version 8.1.1.x or version 8.2.2.x release or language.

The following procedure uses the Locale Management Utility (LMU), which is part of Siebel Tools, to import an LMU file. An LMU file might contain strings in just one language or in multiple languages. When running the Locale Management Utility, you can choose to import only the strings for the languages that you are using in your installation. In the procedure, when you are prompted for the file to import, specify the name of the LMU file provided for the applicable language.

**NOTE:** Install the current release before you run the Locale Management Utility.

For more information about using the Locale Management Utility, see *Using Siebel Tools* and *Siebel Global Deployment Guide*.

### ***To import strings and other locale-specific attributes into the repository***

- 1 In Siebel Tools, choose Tools, then Utilities, and then Locale Management.

The Locale Management Utility appears.

- 2 Select a source language and a target language.

The source language is the language of the locale-specific data in the LMU file that you are importing. The target language is the Siebel language into which the strings will be imported.

- 3 Click the Import tab.

- 4 Enter the name of the LMU file from which you want to import locale-specific attributes.

You can also click Browse to find and select the file.

- 5 Specify whether you want to mark records in the repository with the Redo flag that have changed since the export occurred.

When the import occurs, the LMU compares the source language records in the repository with the source language records in the import file. If the records in the repository have changed since the export occurred, then they are marked with the Redo flag. This flag helps you identify records that might have to be retranslated.

- 6 Click Import.

- 7 After completing the import process, recompile the SRF file and restart the Application Object Manager component on the Siebel Server to see the results.

#### **Related Books**

*Using Siebel Tools*

*Siebel Global Deployment Guide*

## **Additional Tasks for the Siebel Web Server Extension and the Web Server**

Perform the following additional tasks for the Siebel Web Server Extension and the Web server, as required by your deployment:

- [“Verifying the Siebel Virtual Directories on the Web Server” on page 147](#)
- [“Creating Custom Virtual Directories” on page 147](#)
- [“Supporting ASP Pages and Siebel Virtual Directories on the Same Instance of Microsoft IIS” on page 148](#)
- [“Setting SWSE and Virtual Directory Permissions” on page 148](#)

- [“Restarting the Web Server” on page 148](#)
- [“Enabling HTTP Compression for Siebel Business Applications” on page 149](#)
- [“Editing the SWSE Configuration File \(eapps.cfg\)” on page 151](#)
- [“Configuring the Default HTTP and HTTPS Ports for the Web Server” on page 151](#)
- [“About the Siebel Enterprise Security Token” on page 152](#)
- [“Updating Web Server Static Files Using the Siebel Enterprise Security Token” on page 153](#)

## Verifying the Siebel Virtual Directories on the Web Server

Review the Siebel virtual directories that were created during configuration of the Siebel Web Server Extension. The virtual directories are created on the Web server for the installed Siebel Business Applications. For example, the virtual directory `eservice_enu` is for Siebel eService using U.S. English (ENU).

The Siebel virtual directories are created in the virtual Web site that you specify when you configure the SWSE logical profile. For more information, see [“Configuring the SWSE Logical Profile” on page 82](#).

On Microsoft Windows with Microsoft IIS, before you apply the SWSE logical profile, you can precustomize which Siebel virtual directories to create on the Web server. For more information, see [“Creating Custom Virtual Directories” on page 147](#).

This topic is part of [“Additional Tasks for the Siebel Web Server Extension and the Web Server” on page 146](#).

### *To verify the virtual directories on Microsoft IIS*

- 1 On the Microsoft IIS computer, navigate to Control Panel, Administrative Tools, and then Internet Information Services.
- 2 Double-click `computer_name` (local computer) in the left panel.
- 3 Double-click Web Sites in the right panel.
- 4 Double-click in the right panel the name of the virtual Web site that you are using for the Siebel applications, such as *Siebel* or *Default Web Site*.

All of the Siebel virtual directories that were created on this computer for that virtual Web site are listed in the right panel.

## Creating Custom Virtual Directories

Virtual directories are created automatically for Siebel Business Applications when you apply the SWSE logical profile to an installed SWSE. However, in some cases you might want to create your own virtual directory and point to an existing Application Object Manager; for example, to be able to test features like Web Single Sign-On (Web SSO).

On Microsoft Windows with Microsoft IIS, before you apply the SWSE logical profile, you can precustomize which virtual directories to create on the Web server. For example, you can remove the entries for virtual directories that you do not need. To do this, you edit batch files that are located in the SWSE logical profile directory. Edit `eapps_virdirs.bat` and `eapps_virdirs_sia_latest.bat`.

Alternatively, before you create the SWSE logical profile on the Siebel Gateway Name Server computer, you can precustomize the Siebel virtual directories by editing the configuration files that correspond to these batch files. These files are located in the `SIEBEL_GATEWAY_ROOT\ADMIN` directory. For information about where the virtual directories are created on Microsoft IIS, see [“Verifying the Siebel Virtual Directories on the Web Server” on page 147](#). For information about creating and applying SWSE logical profiles, see [“Process of Configuring the Siebel Web Server Extension” on page 82](#).

This topic is part of [“Additional Tasks for the Siebel Web Server Extension and the Web Server” on page 146](#).

## Supporting ASP Pages and Siebel Virtual Directories on the Same Instance of Microsoft IIS

It is not recommended to host ASP pages and the virtual directories for Siebel Business Applications on the same instance of Microsoft Internet Information Services (IIS). If you want to deploy both ASP pages and Siebel Business Applications on the same Web server, then you must isolate the ASP pages from Siebel Business Applications, by using separate application pools. Doing this might affect performance of the Web server.

This topic is part of [“Additional Tasks for the Siebel Web Server Extension and the Web Server” on page 146](#).

## Setting SWSE and Virtual Directory Permissions

You must set permissions as outlined in [“Requirements for Installing and Configuring the Siebel Web Server Extension” on page 304](#). This topic is part of [“Additional Tasks for the Siebel Web Server Extension and the Web Server” on page 146](#).

## Restarting the Web Server

You must restart the Web server (or Web servers) after you have finished installing the current release as a migration installation on the computers where you installed Siebel Enterprise Server or Siebel Web Server Extension (SWSE). The restart is required because the Web server must be able to create a directory to contain static files required for the current version of the Siebel application (corresponding to the latest Siebel CRM release). This directory is created as `SWSE_ROOT\publi c\lang_code\build_number`, where:

- `SWSE_ROOT` is the location where the SWSE is installed
- `lang_code` is each installed language (such as ENU for U.S. English)
- `build_number` is the current build number of the installed Siebel software

The *build\_number* directory and other directories are created on the Web server when the first SWSE request is made after you install any Siebel Business Applications release. This directory is populated with static files copied from the Siebel Server directory *SIEBSRVROOT\WEBMASTER\siebel\_build*. The contents of these directories are updated on the Web server each time that the Web server restarts, or when an administrator enters a Web update command in the browser. After a build-specific directory is created on the SWSE, directories representing earlier builds are no longer used.

Failure to restart the Web server after installing the current release for Siebel Enterprise Server and for the SWSE means that the directories described above will not be created on the Web server, which causes the Siebel login screens to stop responding. For detailed information about how to stop and restart the Web server, see [“Requirements for Stopping and Starting the Web Server” on page 309](#).

This topic is part of [“Additional Tasks for the Siebel Web Server Extension and the Web Server” on page 146](#).

#### Related Topics

[“About the Siebel Enterprise Security Token” on page 152](#)

[“Updating Web Server Static Files Using the Siebel Enterprise Security Token” on page 153](#)

[“Requirements for Stopping and Starting the Web Server” on page 309](#)

#### Related Books

*Siebel Security Guide*

## Enabling HTTP Compression for Siebel Business Applications

You can specify whether, or when, the SWSE compresses HTTP traffic by setting the value of the DoCompression parameter in the eapps.cfg file. Compressing HTTP traffic, where it is feasible to do so, substantially reduces bandwidth consumption. This feature is supported on HTTP 1.1 and is not supported on HTTP 1.0.

For detailed information about setting the value for the DoCompression parameter, see *Siebel Security Guide*.

This topic is part of [“Additional Tasks for the Siebel Web Server Extension and the Web Server” on page 146](#).

## Compressing Static Content for Microsoft IIS

The Siebel compression filter compresses dynamic content only. If you plan to compress static Web content for any Microsoft IIS Web server used with Siebel Business Applications, then make sure that you set the Microsoft IIS properties as listed in the following example:

```
HcSendCacheHeaders          FALSE
hcNoCompressionForProxies  TRUE
```

```
HcNoCompressi onForHttp10    TRUE
```

For more information about enabling static compression and setting properties on Microsoft IIS, see your third-party vendor documentation.

The example that follows illustrates a script that you can run on your Microsoft IIS Web servers to enable static compression, after editing it to fit your site requirements:

```
rem -----  
rem run this on webserver si te  
rem make sure the di rectories c:\i netpub\Admi nScri pts\ are correct.  
rem -----  
c:  
cd \  
cd i netpub  
cd Admi nScri pts  
cscri pt.exe adsuti l.vbs set W3Svc/Fi l ters/Compressi on/GZI P/HcFi l eExtensi ons "htm"  
"html " "txt" "css" "js"  
cscri pt.exe adsuti l.vbs set W3Svc/Fi l ters/Compressi on/DEFLATE/HcFi l eExtensi ons  
"htm" "html " "txt" "css" "js"  
cscri pt.exe adsuti l.vbs set W3Svc/Fi l ters/Compressi on/Parameters/HcSendCacheHeaders  
"FALSE"  
cscri pt.exe adsuti l.vbs set W3Svc/Fi l ters/Compressi on/Parameters/  
HcNoCompressi onForProxi es "TRUE"  
cscri pt.exe adsuti l.vbs set W3Svc/Fi l ters/Compressi on/Parameters/  
HcNoCompressi onForHttp10 "TRUE"  
rem -----  
rem Veri fy the setti ngs  
rem -----  
cscri pt.exe adsuti l.vbs get W3Svc/Fi l ters/Compressi on/GZI P/HcFi l eExtensi ons  
cscri pt.exe adsuti l.vbs get W3Svc/Fi l ters/Compressi on/DEFLATE/HcFi l eExtensi ons
```

**CAUTION:** Setting these properties for static compression affects all of the applications that are served on that Web server. Therefore, carefully review your vendor documentation and your site requirements before making a decision to enable this type of compression. Review all of the available vendor information about static file compression for Microsoft IIS, including any applicable issues or fixes.

## Editing the SWSE Configuration File (eapps.cfg)

The SWSE configuration process updates the eapps.cfg and eapps\_sia.cfg files in *SWSE\_ROOT\bin*. The same files are used for all deployments.

These SWSE configuration files contain configuration information that you entered during the configuration of the SWSE, including identity and connectivity information for the Application Object Managers, and login and security settings.

You can modify the settings in the eapps.cfg and eapps\_sia.cfg files by re-creating and reapplying the SWSE logical profile, or in some cases just reapplying the SWSE logical profile. For more information, see [“Process of Configuring the Siebel Web Server Extension” on page 82](#).

Alternatively, you can manually add or modify selected optional parameters in these files to affect all of the Siebel applications or selected applications. For example, you might do this to tune the performance of Siebel Business Applications. (A manually edited file might then become out of sync with the SWSE logical profile.)

Other related files might also be used in your deployment. The file eapps\_sia.cfg is included by eapps.cfg and extends its functionality by specifying connectivity information for Application Object Managers for additional applications not specifically defined in eapps.cfg. In general, documented information about the eapps.cfg file also applies to eapps\_sia.cfg.

For detailed information about the structure and parameters of the eapps.cfg file, see *Siebel System Administration Guide*. For information about security and authentication parameters in the eapps.cfg file, see *Siebel Security Guide*. Most of the information also applies to eapps\_sia.cfg.

This topic is part of [“Additional Tasks for the Siebel Web Server Extension and the Web Server” on page 146](#).

### *To edit the eapps.cfg or eapps\_sia.cfg file*

- 1 Open eapps.cfg or eapps\_sia.cfg, which are located in *SWSE\_ROOT\bin*, using a text editor such as Notepad. (Do not use WordPad.)
- 2 Modify settings in the file. Save and close the file.
- 3 Stop and restart the Web server, as described in [“Requirements for Stopping and Starting the Web Server” on page 309](#).

## Configuring the Default HTTP and HTTPS Ports for the Web Server

The default HTTP and HTTPS ports for the Web server are port 80 and 443. When you deploy SWSE onto the Web server, and if you want to use nondefault port numbers, then use the following procedure to configure these ports.

The HTTP and HTTPS port numbers specified in the `eapps.cfg` file apply to the virtual Web site that you are using for Siebel Business Applications. For any custom virtual Web site name, the port numbers that you specify cannot be the same as the corresponding port numbers that are already in use for Default Web Site. For more information, see [“Configuring the SWSE Logical Profile” on page 82](#).

This topic is part of [“Additional Tasks for the Siebel Web Server Extension and the Web Server” on page 146](#).

### ***To configure the default ports for HTTP and HTTPS***

- 1 Open the `eapps.cfg` file.

For more information, see [“Editing the SWSE Configuration File \(eapps.cfg\)” on page 151](#).

- 2 Locate the [defaults] section.

- 3 Change the port number for HTTPPort and HTTPSPort to a desired port number. For example:

```
HTTPPort = 81
HTTPSPort = 444
```

**NOTE:** Alternatively, update these ports by re-creating and reapplying the SWSE logical profile.

- 4 Configure the Web server:

- a On the Microsoft IIS computer, navigate to Control Panel, Administrative Tools, and then Internet Information Services.

- b In the right panel, double-click the local computer name.

- c In the right panel, double-click Web Sites.

- 5 Double-click in the right panel the name of the virtual Web site that you are using for the Siebel applications, such as *Siebel* or *Default Web Site*.

- 6 In the Web Site tab, change the values for the TCP Port and SSL Port to the same values that you set in [Step 3 on page 152](#).

## **About the Siebel Enterprise Security Token**

The Siebel Enterprise security token is the password that your Siebel administrator can use to update static files, such as application image files or cascading style sheet files, on your Web server. Your developers might have placed updated versions of these files on the Siebel Server (in the `WEBMASTER` subdirectory) after customizing the Siebel application with Siebel Tools.

Each time that the administrator restarts the Web server, the Web server contacts the Siebel Server and updates the static files. However, it is not necessary to restart the Web server every time the Web server static files in the SWSE directory must be updated. Instead, you can use the Siebel Enterprise security token that you specified when you configured the SWSE. You can update the static files by entering this token in a command line, particularly when deploying multiple Web servers.



You set the value of the Siebel Enterprise security token during configuration of the SWSE logical profile, as described in [“Configuring the SWSE Logical Profile” on page 82](#). This value is defined as the value for the SiebEntSecToken parameter in the eapps.cfg file for your SWSE installation. By default, this value is encrypted.

**NOTE:** If passwords are encrypted in eapps.cfg, then, to change the value, you must either reconfigure the SWSE and specify the new password in the SWSE Configuration Wizard or use the encryptstring utility to encrypt the password before you add it manually to the eapps.cfg file. Directly editing passwords in the eapps.cfg file is suitable only when encryption is not used.

The EncryptedPassword parameter specifies whether passwords are encrypted in the eapps.cfg file. For more information, see [“Configuring the SWSE Logical Profile” on page 82](#). See also *Siebel Security Guide*.

For each language-specific application, the directory on the SWSE where the static files are cached is determined by the setting of the WebPublicRootDir parameter in the eapps.cfg file.

This topic is part of [“Additional Tasks for the Siebel Web Server Extension and the Web Server” on page 146](#).

#### Related Topics

[“Configuring the SWSE Logical Profile” on page 82](#)

[“Restarting the Web Server” on page 148](#)

## Updating Web Server Static Files Using the Siebel Enterprise Security Token

Each time the administrator restarts the Web server, the Web server contacts the Siebel Server, and updates the static files. However, it is not necessary to restart the Web server every time the Web server static files in the SWSE directory must be updated. Instead, you can use the Siebel Enterprise security token that you specified when you configured the SWSE. You can update the static files by entering this token in a command line, particularly when deploying multiple Web servers. For more information about the Siebel Enterprise security token, see [“About the Siebel Enterprise Security Token” on page 152](#).

This topic is part of [“Additional Tasks for the Siebel Web Server Extension and the Web Server” on page 146](#).

#### *To update the static files on the Web server*

- 1 Start a Web browser session.
- 2 Type a URL like the following into the browser:

```
http://host:port/application/  
start.swe?SWECmd=UpdateWebImages&SWEPassword=EnterpriseSecurityToken
```

where:

- *host* is the name of the Web server computer.
- *port* is the Web server listening port number. This element is not required if you are using the default port, 80.
- *application* is any Siebel application hosted by this Web server (such as callcenter\_enu, sales\_deu, and so on).
- *EnterpriseSecurityToken* is the unencrypted version of the Siebel Enterprise security token, which is defined in the eapps.cfg file by the SiebEntSecToken parameter.

For example:

`http://siebel:81/sales_deu/start.swe?SWECmd=UpdateWebImages&SWEPassword=siebel`

### Related Topics

["About the Siebel Enterprise Security Token" on page 152](#)

# 7

## Installing Siebel Web Clients and Siebel Tools

This chapter describes the tasks that you must perform to install Siebel Mobile Web Clients, Siebel Tools, and the Siebel Sample Database, and to start Siebel Business Applications. Both new installations and migration installations are described. This chapter includes the following topics:

- [About Installing the Siebel Web Client or Siebel Tools on page 155](#)
- [Installing the Siebel Web Client on page 157](#)
- [Installing Siebel Tools on page 164](#)
- [Installing Siebel Web Clients and Siebel Tools in Unattended Mode on page 170](#)
- [Installing and Using the Siebel Sample Database on page 174](#)
- [Postinstallation Tasks for High Interactivity Clients on page 177](#)
- [Logging in to Your Siebel Application on page 179](#)
- [Siebel Web Client Shortcuts and Startup Options on page 181](#)
- [About Siebel QuickStart on page 185](#)
- [Enabling and Disabling Siebel QuickStart on page 187](#)

### About Installing the Siebel Web Client or Siebel Tools

This chapter describes how to install Siebel Web Clients, Siebel Tools, and the Siebel Sample Database, with specified Siebel language packs. In this chapter, the term *Siebel Web Client* refers to either the Mobile Web Client or the Developer Web Client.

The language that the installer displays is the one that corresponds to the current regional settings on the installation client computer.

The software that is installed on the user's computer for Siebel Mobile Web Client and Developer Web Client is identical. A single installer provides the software necessary to install and run either of these Siebel Web Client types. For general information about these client types, see *Siebel Deployment Planning Guide*. Information in this guide about installing the Siebel Web Client refers to these two client types. (Siebel Developer Web Client installation is covered with the Siebel Mobile Web Client.)

Each Siebel Web Client is designed to be used within a single Siebel Enterprise. To support multiple Siebel Enterprises on a single computer for testing purposes, install separate Siebel client instances in separate directories.

Before installing, review all documented requirements. The specific requirements for Siebel Mobile Web Client and Siebel Developer Web Client also depend on whether you are deploying Siebel CRM applications using Siebel Open UI or high interactivity. For high interactivity, see also the browser configuration information in *Siebel System Administration Guide*.

It is recommended to install the Siebel Developer Web Client with Siebel Tools. The Siebel Developer Web Client has specific requirements for connectivity to the enterprise database. For information about the relational database management systems (RDBMS) that may require installation on the Siebel client computers on which you run Siebel Developer Web Clients, see the Certifications tab on My Oracle Support. RDBMS products are not provided by Oracle; you must obtain them based on your database-connection requirements.

**NOTE:** The Siebel Developer Web Client is supported for administration, development, and troubleshooting usage scenarios only.

The migration installation tasks are a new type of patch installation provided for Siebel Web Client and Siebel Tools installers for Innovation Pack 2014 and later. You perform migration installations using the same installers (for the current release) that you use for new installations. A migration installation applies settings from your existing installation to a new installation. The existing Oracle home name, installation location, installation languages, configuration data, and other settings are used for the new installation. Before the new installation is performed, the existing installation is moved to a backup location and can no longer be used.

This topic includes the following information:

- [“Siebel Web Client Installer Workflow” on page 156](#)
- [“About ActiveX Controls for High Interactivity” on page 157](#)

#### **Related Topics**

- [“Installation-Related Changes for Siebel Innovation Pack 2014” on page 25](#)
- [“Installation-Related Changes for Siebel Innovation Pack 2013” on page 28](#)
- [“Installing the Siebel Web Client” on page 157](#)
- [“Installing Siebel Tools” on page 164](#)
- [“Installing and Using the Siebel Sample Database” on page 174](#)
- [“Requirements for Installing Siebel Web Clients” on page 315](#)
- [“Requirements for Installing Siebel Tools” on page 317](#)
- [“Enabling Siebel Open UI” on page 129](#)

#### **Related Books**

- Siebel Deployment Planning Guide*
- Deploying Siebel Open UI*
- Siebel System Administration Guide*

## **Siebel Web Client Installer Workflow**

The installer for Siebel Mobile Web Client and Developer Web Client does the following:

- 1** Checks the client computer to verify whether required components have already been installed.
- 2** Creates all of the required ODBC data sources.

- 3 Installs the Siebel Web Client software and specified Siebel language packs.
- 4 Creates Siebel application and utility shortcuts.
- 5 Writes data to installation log files.
- 6 Downloads the ActiveX controls that are used by the Siebel Web Client when it is deployed using high interactivity.

This topic is part of [“About Installing the Siebel Web Client or Siebel Tools”](#) on page 155.

## About ActiveX Controls for High Interactivity

After the Siebel Web Client installation completes, the file `predeploy.htm` is loaded in a browser window. This file downloads the ActiveX controls that are used by the Siebel Mobile Web Client when it is deployed using high interactivity. Downloading the ActiveX controls to the client computer so that they can be used by the Siebel Web Client is referred to as *predeploying* these controls. The `predeploy.htm` file is located in the directory `SIEBEL_CLIENT_ROOT\bin`. In this path, `SIEBEL_CLIENT_ROOT` is the directory where the Siebel Web Client is installed.

For more information about the ActiveX controls that are used by Siebel Web Clients that are deployed using high interactivity, about related browser settings, and about the `predeploy.htm` file, see the browser configuration chapter in *Siebel System Administration Guide*. Updated ActiveX controls are also predeployed when you install a Siebel CRM release, including the current release. For more information, see [“Postinstallation Tasks for High Interactivity Clients”](#) on page 177.

**NOTE:** You can deploy Siebel Business Applications using Siebel Open UI, which is an alternative to the high-interactivity client for employee applications, such as Siebel Call Center. For more information, see [“Enabling Siebel Open UI”](#) on page 129.

This topic is part of [“About Installing the Siebel Web Client or Siebel Tools”](#) on page 155.

## Installing the Siebel Web Client

This topic provides instructions for installing the Siebel Mobile Web Client or Developer Web Client and specified Siebel language packs.

**NOTE:** This topic includes instructions for installing the Siebel Web Client as a new installation or as a migration installation. For an existing installation, you perform a migration installation instead of a new installation.

The language that the installer displays is the one that corresponds to the current regional settings on the installation client computer.

This topic contains the following information:

- [“Installing the Siebel Web Client as a New Installation”](#) on page 158
- [“Installing the Siebel Web Client as a Migration Installation”](#) on page 162

### Related Topics

- [“About Installing the Siebel Web Client or Siebel Tools” on page 155](#)
- [“Installing Siebel Web Clients and Siebel Tools in Unattended Mode” on page 170](#)
- [“Verifying Installation for the Siebel Web Client” on page 201](#)
- [“Uninstalling Siebel Web Clients or Siebel Tools” on page 266](#)
- [“Requirements for Installing Siebel Web Clients” on page 315](#)

## Installing the Siebel Web Client as a New Installation

Use the following procedure to install the Siebel Web Client as a new installation for the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14. Some of the information applies to only the Siebel Mobile Web Client or only the Siebel Developer Web Client.

**NOTE:** Use this procedure only when Siebel Web Client is not already installed. Where an earlier version of Siebel Web Client is already installed, you perform a migration installation instead, as described in [“Installing the Siebel Web Client as a Migration Installation” on page 162](#).

This topic is part of [“Installing the Siebel Web Client” on page 157](#).

This task is a step in:

- [“Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment” on page 33](#)
- [“Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case \(Existing Database\)” on page 36](#)

### To install the Siebel Web Client as a new installation

- 1 Review [“About Installing the Siebel Web Client or Siebel Tools” on page 155](#).
- 2 In Windows Explorer, navigate to the Siebel image location for the current release. Then navigate to the directory where the installer is located. Navigate to `Siebel_Image\Windows\Client\Siebel_Web_Client\Disk1\install`.  
  
In this path, *Siebel\_Image* is the directory for your version-specific Siebel network image, such as `C:\Siebel_Install_Image\8.1.1.14` or `C:\Siebel_Install_Image\8.2.2.14`.
- 3 To start the Siebel Web Client installer, double-click `setup.bat`.  
The Siebel Web Client installer displays the Welcome screen.
- 4 Click Next.  
A screen appears that prompts for email contact information.
- 5 When prompted for the email address and password corresponding to your My Oracle Support account, click Next. (This information is not used in this context.)  
The Select Installation Task screen appears. The New Installation task is selected by default.

- 6 To perform a new installation of Siebel Web Client software where no existing installation of Siebel CRM version 8.1.1.x or version 8.2.2.x is present, click Next.

The New Installation Details screen appears.

- 7 Enter a name for your installation and specify the installation location, and then click Next. (Note the installation name and location for future reference.) Note the following:
  - The default installation name (Oracle Home Name) is CLIENT\_HOME. The value that you specify is used in the parent program folder name for the Siebel application client shortcuts. (A separate program folder is created for the Oracle Universal Installer software.) If you have an existing installation, then you must specify a new name for the new installation.
  - The default installation path (Oracle Home Location) for a new installation is C:\siebel\8.1.1.14.0\client or C:\siebel\8.2.2.14.0\client or a similar value. Accept the default path or specify a different location by typing it directly or by clicking Browse. If you have an existing installation, then you must specify a new path for the new installation.

For more information about Oracle home and installation path requirements, see [“File and Directory Naming Conventions” on page 287](#).

The Select Languages screen appears. All of the languages that were included in the Siebel network image for Siebel Web Client are available for selection.

- 8 Select the languages that you want to install, and click Next. You must select at least one language in order to proceed.

To select a language, you click the name of the language in the Available box and then use the arrow controls to move it into the Selected box.

You specify languages to install in order to run Siebel Business Applications using these languages. The files that are specific to the languages chosen in this step will be copied to your computer.

**NOTE:** You can add languages to an existing installation by running the installer in unattended mode (silent mode). For more information about installing and deploying languages, see [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

The Client Type screen appears.

- 9 Specify the type of Siebel Web Client that you are installing: either Siebel Mobile Web Client or Siebel Developer Web Client. Also specify the client user interface for the Siebel applications that will run on this Siebel client. Select one of the following options, and then click Next:
  - Open UI
  - High Interactivity

Your selection sets the parameter EnableOpenUI to True (for Siebel Open UI) or to False (for high interactivity) in the [InfraUIFramework] section of the configuration files for the applications that will run on this Siebel client. For more information, see [“Enabling Siebel Open UI” on page 129](#).

Do one of the following:

- For Siebel Mobile Web Client, go to the next step.
- For Siebel Developer Web Client, go to [Step 11 on page 160](#).

- 10** (Siebel Mobile Web Client only) In the Remote Server Information screen, specify the name of the Siebel Server on which you are running the Siebel Remote Server components. Then click Next. Go to [Step 18 on page 161](#).

The Siebel Remote Server components are required for initializing and synchronizing the local database on the Siebel Mobile Web Client computer.

- 11** (Siebel Developer Web Client only) In the Database Server screen, select the type of database server that you are using for Siebel Business Applications. Choose one of the following, and click Next:

- Oracle Database Server
- IBM DB2 UDB for Windows and UNIX
- Microsoft SQL Server
- IBM DB2 UDB for z/OS

**NOTE:** According to your selection, the Siebel Web Client installer validates that the correct database connectivity software has been installed. If it has not been installed, then you must exit the Siebel Web Client installer, install the required software, and then restart the Siebel Web Client installer.

- 12** (Siebel Developer Web Client only) In the Database Identification screen, enter the following information, and click Next. Specify information for the database that you specified in [Step 11 on page 160](#):

- For Oracle Database, specify the Database Alias and Table Owner.
- For IBM DB2, specify the Database Alias and Table Owner.
- For Microsoft SQL Server, specify the Database Server Host Name and Database Instance Name.
- For IBM DB2 for z/OS, specify the Database Alias (as defined in DB2 Connect) and Table Owner or Schema Qualifier.

Enter the data that you previously specified in the worksheet in [Appendix A, "Siebel Deployment Planning Worksheet."](#)

- 13** (Siebel Developer Web Client only) In the File System Server Information screen, specify the directory path for a network-based Siebel File System by typing it directly or by clicking Browse. Then click Next.

**NOTE:** For the Siebel File System path, you can use a UNC share name (for example, `\\SRV1\si ebfi le`) or a mapped drive (for example, `K: \si ebel FS`). For more information, see "File and Directory Naming Conventions" on page 287. See also "Creating the Siebel File System" on page 289.

- 14** (Siebel Developer Web Client only) In the Remote Server Information screen, click Next to accept the default. (This screen is primarily for Siebel Mobile Web Client.)



- 15** (Siebel Developer Web Client only) In the Enterprise Server Information screen, specify the address of the Siebel Gateway Name Server and the name of the Siebel Enterprise to which this Siebel Developer Web Client will connect for administration. Then click Next.

The Gateway Name Server Address is the network name or the IP address of the computer on which the Siebel Gateway Name Server is installed. To enter a specific port number, append the Gateway Name Server Address string with a colon and the desired port number.

The Enterprise Server name is the name of the Siebel Enterprise under which the Siebel Servers that support the server database were installed.

- 16** (Siebel Developer Web Client only) In the Server Request Broker Information screen, specify the Request Server Name, and click Next.

This value is the name of the Siebel Server on which the Server Request Broker component is operating. This component is used for dynamic assignment and other interactive operations.

- 17** (Siebel Developer Web Client only) In the Search Server Information screen, if you will use a search server, then enter the following for the server computer where the search server operates. Then click Next.

■ **Search Server Hostname.** The default value is localhost.

■ **Search Server Port Number.** The default value is 2048.

**NOTE:** For system requirements and other information about deploying a search server, see *Siebel Search Administration Guide*.

The Summary screen appears. This screen displays the location where the Siebel Web Client will be installed.

- 18** Review the information in the Summary screen. Before you proceed, confirm that you have met all of the installation requirements, such as for disk space. Then do one of the following:

■ To begin installing the Siebel Web Client software, click Install. You can also click Install after saving a response file.

■ To save a response file to use for an unattended installation later, click Save Response File. If you are not also installing at this time, then click Cancel after you save the response file. For information about performing unattended installations, see [“Installing Siebel Web Clients and Siebel Tools in Unattended Mode” on page 170](#).

The Installation Progress screen appears. The Siebel Web Client software is installed into the directory that you specified in [Step 7 on page 159](#).

- 19** When the browser is displayed and indicates that ActiveX controls have been deployed, close the browser window.

**NOTE:** The ActiveX controls are used only for applications deployed using high interactivity.

- 20** When the Next button becomes available, the installation is complete. Click Next.

The Finish Installation screen appears. This screen indicates whether the installation was successful and shows the location of the installer log file. You can access this file to review the installation results.

**21** To close the installer, click Close.

The Siebel Web Client installation is now finished. Siebel application shortcuts are created in the program folder that you specified in [Step 7 on page 159](#). For more information about these shortcuts, see [“Siebel Web Client Shortcuts” on page 181](#).

**22** After installing the Siebel Web Client software:

- Verify the Siebel Web Client installation, as described in [“Verifying Installation for the Siebel Web Client” on page 201](#).
- Install the latest Siebel Patchset release, where available. Then verify the installation again.
- Perform any additional postinstallation steps, as described in [Chapter 6, “Additional Postinstallation and Configuration Tasks.”](#)

**23** Repeat this procedure on each computer where you are installing Siebel Web Client.

## Installing the Siebel Web Client as a Migration Installation

Use the following procedure to install the Siebel Web Client as a migration installation for the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14. Migration installation is a type of patch installation. The information applies to both the Siebel Mobile Web Client and the Siebel Developer Web Client.

**NOTE:** Use this procedure only when an earlier version of the Siebel Web Client is already installed (Siebel CRM version 8.1.1.x or version 8.2.2.x). Otherwise, you must follow the steps in [“Installing the Siebel Web Client as a New Installation” on page 158](#) instead.

During a migration installation, the original Siebel Web Client installation directory is renamed from *Original Name* to *Original Name\_pre8.1.1.14.0* or *Original Name\_pre8.2.2.14.0*. For example, if the original installation directory name (*Original Name*) was *Client\_1*, then this directory is renamed to *Client\_1\_pre8.1.1.14.0* or *Client\_1\_pre8.2.2.14.0*. The new Siebel Web Client installation directory is named *Original Name*, such as *Client\_1*. Retain the original installation directory, in case you choose to perform a rollback uninstallation later. For more information, see [“Rolling Back the Siebel Web Client” on page 267](#).

This topic is part of [“Installing the Siebel Web Client” on page 157](#).

This task is a step in [“Roadmap for Installing Siebel Business Applications in a Migration Installation Case \(Existing Installation\)” on page 39](#).

### **To install the Siebel Web Client as a migration installation**

- 1** Review [“About Installing the Siebel Web Client or Siebel Tools” on page 155](#).
- 2** Exit any Siebel software on the client computer where you are installing the current release.

**NOTE:** For a Siebel Mobile Web Client using the Siebel QuickStart feature, you must also exit the QuickStart agent if it is running. To do this, right-click the QuickStart icon in the system tray, and then choose Exit. For more information, see [“About Siebel QuickStart” on page 185](#).

- 3 In Windows Explorer, navigate to the Siebel image location for the current release, and then to the directory where the installer is located. Navigate to *Siebel\_Image\Windows\Client\Siebel\_Web\_Client\Disk1\install*.

In this path, *Siebel\_Image* is the directory for your version-specific Siebel installation image, such as C:\Siebel\_Install\_Image\8.1.1.14 or C:\Siebel\_Install\_Image\8.2.2.14.

- 4 To start the Siebel Web Client installer, double-click setup.bat.

The Siebel Web Client installer displays the Welcome screen.

- 5 Click Next.

A screen appears that prompts for email contact information.

- 6 When prompted for the email address and password corresponding to your My Oracle Support account, click Next. (This information is not used in this context.)

The Select Installation Task screen appears.

- 7 To perform a migration installation of the Siebel Web Client software where an existing prior installation of version 8.1.1.x or version 8.2.2.x is present, choose Migration Installation, and click Next.

The Installation Migration Details screen appears.

- 8 Confirm or select the name and location of your existing installation, and then click Next. Do the following:

- Confirm the existing installation name, or select it from the drop-down list.
- Confirm the existing installation location, or select it from the drop-down list.

For more information about Oracle home and installation path requirements, see [“File and Directory Naming Conventions” on page 287](#).

The Summary screen appears. This screen displays the location where the Siebel Web Client will be installed.

- 9 Review the information in the Summary screen. Before you proceed, confirm that you have met all of the installation requirements, such as for disk space. Then do one of the following:

- To begin installing the Siebel Web Client software, click Install. You can also click Install after saving a response file.
- To save a response file to use for an unattended installation later, click Save Response File. If you are not also installing at this time, then click Cancel after you save the response file. For information about performing unattended installations, see [“Installing Siebel Web Clients and Siebel Tools in Unattended Mode” on page 170](#).

The Installation Progress screen appears. The Siebel Web Client software is installed into the directory that you specified in [Step 8 on page 163](#).

- 10 When the browser is displayed and indicates that ActiveX controls have been deployed, close the browser window.

**NOTE:** The ActiveX controls are used only for applications deployed using high interactivity.

- 11** When the Next button becomes available, the installation is complete. Click Next.

The Finish Installation screen appears. This screen indicates whether the installation was successful and shows the location of the installer log file. You can access this file to review the installation results. This screen also shows the new location of the original installation, which the installer moved before it performed the new installation.

- 12** Review the report that is generated about any conflicts between your customized files and the files that are delivered by the Siebel Web Client installer. As needed, copy any of your customized files from the original installation to the new migrated installation.

Conflicts are identified in the file `overwrittenfiles_timestamp.log`, which is created in the `SIEBEL_CLIENT_ROOT\cfgtool\logs\oui` directory (in the new Siebel Web Client installation).

- 13** To close the installer, click Close.

The Siebel Web Client installation is now finished. Siebel application shortcuts are created in the program folder that you specified in [Step 8 on page 163](#). For more information about these shortcuts, see [“Siebel Web Client Shortcuts” on page 181](#).

- 14** After installing the Siebel Web Client software:

- Verify the Siebel Web Client installation, as described in [“Verifying Installation for the Siebel Web Client” on page 201](#).
- Install the latest Siebel Patchset release, where available. Then verify the installation again.
- Perform any additional postinstallation steps, as described in [Chapter 6, “Additional Postinstallation and Configuration Tasks.”](#)

- 15** Repeat this procedure on each computer with a Siebel Web Client installation to be migrated.

## Installing Siebel Tools

This topic provides instructions for installing the Siebel Tools Client and specified Siebel language packs. Siebel Tools is an integrated environment used by developers for configuring Siebel Business Applications.

**NOTE:** This topic includes instructions for installing Siebel Tools as a new installation or as a migration installation. For an existing installation, you perform a migration installation instead of a new installation.

The language that the installer displays is the one that corresponds to the current regional settings on the installation client computer.

This topic contains the following information:

- [“Installing Siebel Tools as a New Installation” on page 165](#)
- [“Installing Siebel Tools as a Migration Installation” on page 168](#)

### Related Topics

[“About Installing the Siebel Web Client or Siebel Tools” on page 155](#)

[“Installing Siebel Web Clients and Siebel Tools in Unattended Mode” on page 170](#)

[“Verifying Installation for Siebel Tools” on page 204](#)

[“Uninstalling Siebel Web Clients or Siebel Tools” on page 266](#)

[“Requirements for Installing Siebel Tools” on page 317](#)

### Related Books

*Using Siebel Tools*

*Configuring Siebel Business Applications*

*Configuring Siebel Open UI*

*Siebel Developer’s Reference*

## Installing Siebel Tools as a New Installation

Use the following procedure to install Siebel Tools as a new installation for Siebel CRM version 8.1.1 or version 8.2.2.

**NOTE:** Use this procedure only when Siebel Tools is not already installed. Where an earlier version of Siebel Tools is already installed, you perform a migration installation instead, as described in [“Installing Siebel Tools as a Migration Installation” on page 168](#).

This topic is part of [“Installing Siebel Tools” on page 164](#).

This task is a step in:

- [“Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment” on page 33](#)
- [“Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case \(Existing Database\)” on page 36](#)

### *To install Siebel Tools as a new installation*

- 1 Review [“About Installing the Siebel Web Client or Siebel Tools” on page 155](#).
- 2 In Windows Explorer, navigate to the Siebel image location for Siebel CRM version 8.1.1.14 or version 8.2.2.14. Then navigate to the directory where the installer is located. Navigate to *Siebel\_Image\Windows\Client\Siebel\_Tools\Disk1\install*.  
  
In this path, *Siebel\_Image* is the directory for your version-specific Siebel network image, such as *C:\Siebel\_Install\_Image\8.1.1.14* or *C:\Siebel\_Install\_Image\8.2.2.14*.
- 3 To start the Siebel Tools installer, double-click *setup.bat*.  
  
The Siebel Tools installer displays the Welcome screen.
- 4 Click Next.  
  
A screen appears that prompts for email contact information.

- 5 When prompted for the email address and password corresponding to your My Oracle Support account, click Next. (This information is not used in this context.)

The Select Installation Task screen appears. The New Installation task is selected by default.

- 6 To perform a new installation of Siebel Tools software where no existing installation of Siebel CRM version 8.1.1.x or version 8.2.2.x is present, click Next.

The New Installation Details screen appears.

- 7 Enter a name for your installation and specify the installation location, and then click Next. (Note the installation name and location for future reference.) Note the following:
  - The default installation name (Oracle Home Name) is TOOLS\_HOME. The value that you specify is used in the parent program folder name for the Siebel Tools client shortcut. (A separate program folder is created for the Oracle Universal Installer software.) If you have an existing installation, then you must specify a new name for the new installation.
  - The default installation path (Oracle Home Location) for a new installation is C:\siebel\8.1.1.14.0\Tools or C:\siebel\8.2.2.14.0\Tools or a similar value. Accept the default path or specify a different location by typing it directly or by clicking Browse. If you have an existing installation, then you must specify a new path for the new installation.

For more information about Oracle home and installation path requirements, see [“File and Directory Naming Conventions” on page 287](#).

The Select Languages screen appears. All of the languages that were included in the Siebel network image for Siebel Tools are available for selection.

- 8 Select the languages that you want to install, and click Next. You must select at least one language in order to proceed.

To select a language, you click the name of the language in the Available box and then use the arrow controls to move it into the Selected box.

You specify languages to install in order to run applications using these languages. The files that are specific to the languages chosen in this step will be copied to your computer.

**NOTE:** You must install Siebel Tools with the U.S. English (ENU) language pack. You can also install other Siebel language packs.

**NOTE:** You can add languages to an existing installation by running the installer in unattended mode (silent mode). For more information about installing and deploying languages, see [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).

- 9 In the Database Server screen, select the type of database server that you are using for Siebel Business Applications. Choose one of the following, and click Next:
  - Oracle Database Server
  - IBM DB2 UDB for Windows and UNIX
  - Microsoft SQL Server
  - IBM DB2 UDB for z/OS

**10** In the Database Identification screen, enter the following information, and click Next. Specify information for the database that you specified in [Step 9 on page 166](#):

- For Oracle Database, specify the Database Alias and Table Owner.
- For IBM DB2, specify the Database Alias and Table Owner.
- For Microsoft SQL Server, specify the Database Server Host Name and Database Instance Name.
- For IBM DB2 for z/OS, specify the Database Alias (as defined in DB2 Connect) and Table Owner or Schema Qualifier.

Enter data that you previously specified in the worksheet in [Appendix A, "Siebel Deployment Planning Worksheet."](#)

**11** In the File System Server Information screen, specify the directory path for a network-based Siebel File System by typing it directly or by clicking Browse. Then click Next.

**NOTE:** For the Siebel File System path, you can use a UNC share name (for example, \\SRV1\si ebfi le) or a mapped drive (for example, K: \si ebel FS). For more information, see "File and Directory Naming Conventions" on page 287. See also "Creating the Siebel File System" on page 289.

**12** In the Remote Server Information screen, specify the name of the Siebel Server on which you are running the Siebel Remote Server components. Then click Next.

The Siebel Remote Server components are required for initializing and synchronizing the local database on the Siebel Tools computer.

**13** In the Enterprise Server Information screen, specify the address of the Siebel Gateway Name Server and the name of the Siebel Enterprise to which Siebel Tools will connect for administration. Then click Next.

The Gateway Name Server Address is the network name or the IP address of the computer on which the Siebel Gateway Name Server is installed. To enter a specific port number, append the Gateway Name Server Address string with a colon and the desired port number.

The Enterprise Server is the name of the Siebel Enterprise under which the Siebel Servers that support the server database were installed.

The Summary screen appears. This screen displays the location where Siebel Tools will be installed.

**14** Review the information in the Summary screen. Before you proceed, confirm that you have met all of the installation requirements, such as for disk space. Then do one of the following:

- To begin installing the Siebel Tools software, click Install. You can also click Install after saving a response file.
- To save a response file to use for an unattended installation later, click Save Response File. If you are not also installing at this time, then click Cancel after you save the response file. For information about performing unattended installations, see "Installing Siebel Web Clients and Siebel Tools in Unattended Mode" on page 170.

The Installation Progress screen appears. The Siebel Tools software is installed into the directory that you specified in [Step 7 on page 166](#).

**15** When the Next button becomes available, the installation is complete. Click Next.

The Finish Installation screen appears. This screen indicates whether the installation was successful and shows the location of the installer log file. You can access this file to review the installation results.

**16** To close the installer, click Close.

Siebel Tools installation is now finished. The Siebel Tools shortcut was created in the program folder that you specified in [Step 7 on page 166](#).

**17** After installing the Siebel Tools software:

- Verify the Siebel Tools installation, as described in [“Verifying Installation for Siebel Tools” on page 204](#).
- Install the latest Siebel Patchset release, where available. Then verify the installation again.
- Perform any additional postinstallation steps, as described in [Chapter 6, “Additional Postinstallation and Configuration Tasks.”](#)

**18** Repeat this procedure on each computer where you are installing Siebel Tools.

## Installing Siebel Tools as a Migration Installation

Use the following procedure to install Siebel Tools as a migration installation for the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14. Migration installation is a type of patch installation.

**NOTE:** Use this procedure only when an earlier version of Siebel Tools is already installed (Siebel CRM version 8.1.1.x or version 8.2.2.x). Otherwise, you must follow the steps in [“Installing Siebel Tools as a New Installation” on page 165](#) instead.

During a migration installation, the original Siebel Tools installation directory is renamed from *Original Name* to *Original Name\_pre8.1.1.14.0* or *Original Name\_pre8.2.2.14.0*. For example, if the original installation directory name (*Original Name*) was Tool s\_1, then this directory is renamed to Tool s\_1\_pre8.1.1.14.0 or Tool s\_1\_pre8.2.2.14.0. The new Siebel Tools installation directory is named *Original Name*, such as Tool s\_1. Retain the original installation directory, in case you choose to perform a rollback uninstallation later. For more information, see [“Rolling Back Siebel Tools” on page 268](#).

This topic is part of [“Installing Siebel Tools” on page 164](#).

This task is a step in [“Roadmap for Installing Siebel Business Applications in a Migration Installation Case \(Existing Installation\)” on page 39](#).

### *To install Siebel Tools as a migration installation*

- 1** Review [“About Installing the Siebel Web Client or Siebel Tools” on page 155](#).
- 2** Exit any Siebel software on the Siebel Tools Client computer where you are installing the current release.



- 3 In Windows Explorer, navigate to the Siebel image location for the current release, and then to the directory where the installer is located. Navigate to *Siebel\_Image\Windows\Client\Siebel\_Tools\Disk1\install*.

In this path, *Siebel\_Image* is the directory for your version-specific Siebel installation image, such as C:\Siebel\_Install\_Image\8.1.1.14 or C:\Siebel\_Install\_Image\8.2.2.14.

- 4 To start the Siebel Tools installer, double-click *setup.bat*.

The Siebel Tools installer displays the Welcome screen.

- 5 Click Next.

A screen appears that prompts for email contact information.

- 6 When prompted for the email address and password corresponding to your My Oracle Support account, click Next. (This information is not used in this context.)

The Select Installation Task screen appears.

- 7 To perform a migration installation of the Siebel Tools software where an existing prior installation of version 8.1.1.x or version 8.2.2.x is present, choose Migration Installation, and click Next.

The Installation Migration Details screen appears.

- 8 Confirm or select the name and location of your existing installation, and then click Next. Do the following:

- Confirm the existing installation name, or select it from the drop-down list.
- Confirm the existing installation location, or select it from the drop-down list.

For more information about Oracle home and installation path requirements, see [“File and Directory Naming Conventions” on page 287](#).

The Summary screen appears. This screen displays the location where Siebel Tools will be installed.

- 9 Review the information in the Summary screen. Before you proceed, confirm that you have met all of the installation requirements, such as for disk space. Then do one of the following:

- To begin installing the Siebel Tools software, click Install. You can also click Install after saving a response file.
- To save a response file to use for an unattended installation later, click Save Response File. If you are not also installing at this time, then click Cancel after you save the response file. For information about performing unattended installations, see [“Installing Siebel Web Clients and Siebel Tools in Unattended Mode” on page 170](#).

The Installation Progress screen appears. The Siebel Tools software is installed into the directory that you specified in [Step 8 on page 169](#).

- 10 When the Next button becomes available, the installation is complete. Click Next.

The Finish Installation screen appears. This screen indicates whether the installation was successful and shows the location of the installer log file. You can access this file to review the installation results. This screen also shows the location of the original installation, which the installer moved before it performed the new installation.

- 11 Review the report that is generated about any conflicts between your customized files and the files that are delivered by the Siebel Tools installer. As needed, copy any of your customized files from the original installation to the new migrated installation.

Conflicts are identified in the file `overwrittenfiles_timestamp.log`, which is created in the `SIEBEL_TOOLS_ROOT\cfgtool\logs\oui` directory (in the new Siebel Tools installation).

- 12 To close the installer, click Close.

The Siebel Tools installation is now finished. The Siebel Tools shortcut was created in the program folder that you specified in [Step 8 on page 169](#).

- 13 After installing the Siebel Tools software:

- Verify the Siebel Tools installation, as described in [“Verifying Installation for Siebel Tools” on page 204](#).
- Install the latest Siebel Patchset release, where available. Then verify the installation again.
- Perform any additional postinstallation steps, as described in [Chapter 6, “Additional Postinstallation and Configuration Tasks.”](#)

- 14 Repeat this procedure on each computer with a Siebel Tools installation to be migrated.

## Installing Siebel Web Clients and Siebel Tools in Unattended Mode

The installer programs for Siebel Mobile or Developer Web Client and Siebel Tools support an optional *unattended installation*, which is an installation that has been preconfigured to require no user input when the installation program runs. You can save a response file in a regular installer session. Then you can run the installer at the command line with certain flags appended to the installer command to execute the response file. Together, these tasks constitute installing in unattended mode.

You can perform unattended installations for better performance when installing software on multiple client computers. Or, you might perform unattended installations if user input during an installation is not allowed in your environment, as might be the case in some secure environments. An unattended installation prepackages all of the required parameters so that you only have to execute a command to perform the installation.

You can use unattended mode to perform a new installation or migration installation of the current release, or to add languages to an existing installation of the current release. To add languages, you must use this method.

**CAUTION:** Unattended installations provide no direct feedback or error notification. Therefore, you must test your settings in a development environment before system-wide deployment in a production environment. It is strongly recommended that you become thoroughly familiar with GUI installation for any Siebel modules for which you intend to perform unattended installation.

This topic contains the following information:

- [“Guidelines for Installing Siebel Web Clients and Siebel Tools in Unattended Mode” on page 171](#)
- [“Saving an Installation Response File” on page 172](#)

- [“Editing an Oracle-Provided Installation Response File” on page 173](#)
- [“Performing an Installation in Unattended Mode” on page 173](#)

#### Related Topics

- [“Installing and Deploying Additional Languages” on page 142](#)
- [“Installing the Siebel Web Client” on page 157](#)
- [“Installing Siebel Tools” on page 164](#)
- [“Verifying Installation for the Siebel Web Client” on page 201](#)
- [“Verifying Installation for Siebel Tools” on page 204](#)
- [“Requirements for Installing Siebel Web Clients” on page 315](#)
- [“Requirements for Installing Siebel Tools” on page 317](#)

## Guidelines for Installing Siebel Web Clients and Siebel Tools in Unattended Mode

Review the following guidelines for installing Siebel Web Clients and Siebel Tools in unattended mode:

- **Keep track of the response file results.** Because the unattended installation session is controlled by the response file, you must keep careful track of the result that each response file will yield when you perform an unattended installation.
- **Create the response file on a computer similar to the target computer.** When you run the installer as described in [“Saving an Installation Response File” on page 172](#), validations are performed as if you were performing a real installation. It is strongly recommended that you run the installer on a computer that has similar resources and configuration settings as the target computer on which the installation will be performed, as described in [“Performing an Installation in Unattended Mode” on page 173](#). Unattended installations must meet all of the documented requirements, including those described in [“Requirements for Installing Siebel Web Clients” on page 315](#) and [“Requirements for Installing Siebel Tools” on page 317](#).
- **Validate the installation.** Validate each installation after it has completed, as described in [“Verifying Installation for the Siebel Web Client” on page 201](#) and [“Verifying Installation for Siebel Tools” on page 204](#).

To install Siebel Web Client or Siebel Tools and the specified Siebel language packs using unattended mode, perform the following tasks:

- [“Saving an Installation Response File” on page 172](#)
- [“Editing an Oracle-Provided Installation Response File” on page 173](#)
- [“Performing an Installation in Unattended Mode” on page 173](#)

## Saving an Installation Response File

Perform the following steps to save an installation response file to be used in an unattended installation of Siebel Web Client or Siebel Tools.

**NOTE:** If you are adding languages to an existing installation of the current release, then do not use this procedure. Instead, follow the procedure in [“Editing an Oracle-Provided Installation Response File” on page 173](#).

### *To save an installation response file*

- 1 Navigate to the Siebel image location where the installer is located.
- 2 Start the installer for Siebel Web Client or Siebel Tools.  
For information about starting these installers, see [“Installing the Siebel Web Client” on page 157](#) and [“Installing Siebel Tools” on page 164](#).
- 3 Provide input to the installer wizard, as in a normal GUI installation.
- 4 In the Summary screen, click Save Response File.
- 5 Specify the location of the response file, for example, C: \temp\cl i enti nstal l . rsp, and save the file.

A response file is generated that includes data that is derived from the input that you made during the installer session.

- 6 After the response file is saved, click Cancel.

The installer session ends.

In addition to saving the response file at the location that you specified at the command line, the installer creates the Siebel installation directory at the location that you specified in the installer session (for example, C: \temp\cl i enti nstal l . rsp). Although the Siebel module is not installed (because you clicked Cancel), this directory contains a subdirectory called i nventory, which includes information about the product inventory.

See [“Performing an Installation in Unattended Mode” on page 173](#) for information about performing a Siebel Web Client or Siebel Tools installation in unattended mode, using the response file that you just generated.

## Editing an Oracle-Provided Installation Response File

If you are adding languages to an existing Siebel Web Client or Siebel Tools installation, then you must edit an Oracle-provided installation response file instead of saving a response file from the installer. For detailed information about the task of adding languages, see [“Installing and Deploying Additional Languages” on page 142](#).

## Performing an Installation in Unattended Mode

Perform the following steps to perform an unattended installation of Siebel Web Client or Siebel Tools.

First, you must save an installation response file as described in [“Saving an Installation Response File” on page 172](#) or prepare an installation response file for adding languages as described in [“Editing an Oracle-Provided Installation Response File” on page 173](#). Then you run the installer command as shown in the following procedure. For detailed information about the task of adding languages, see [“Installing and Deploying Additional Languages” on page 142](#).

### *To perform an installation in unattended mode*

- 1 (For add language operations only) Uninstall any Siebel Patchset release that you have installed on top of Siebel CRM version 8.1.1.14 or version 8.2.2.14, for each installed Siebel module for which you are adding languages.
- 2 Navigate to the Siebel image location where the installer is located.
- 3 Place the response file that you previously generated or edited into the correct Siebel image directory for the Siebel module (where the installer program is located), so that the file can be read when you run the installer.

**NOTE:** Always back up any existing valid response file before replacing it with a new file.

- 4 Open a DOS command window.
- 5 Run a command like the following to start the Siebel Web Client or Siebel Tools installer:

```
setup.bat -silent -responseFile path_to_installation_response_file
```

In this command, *path\_to\_installation\_response\_file* is the full path and name of a response file to be executed (for example, C:\temp\client\install.rsp).

This command runs the installer in unattended mode and specifies the location of the response file to be executed. No installer screens are displayed, and no further user input is prompted for after the installer starts. The installation result depends on the content of the specified response file.

- 6 Validate the installation after it has completed.  
For more information, see [“Verifying Installation for the Siebel Web Client” on page 201](#) and [“Verifying Installation for Siebel Tools” on page 204](#).
- 7 (For add language operations only) Reinstall any previously installed Siebel Patchset release that you uninstalled in [Step 1 on page 173](#). Then validate the installation again.

# Installing and Using the Siebel Sample Database

The Siebel Sample Database contains example data of various kinds to help you understand how Siebel Business Applications work. You install the Sample Database for the Siebel Mobile Web Client (or the Siebel Developer Web Client). This database, like the local database used with the Siebel Mobile Web Client, is based on SQL Anywhere.

**NOTE:** Installation of the Siebel Sample Database is optional and applies to the Siebel Mobile Web Client. Before you can install the Sample Database, you must install the Siebel Mobile Web Client, as described in [“Installing the Siebel Web Client” on page 157](#).

For platform requirements for installing and using Siebel Web Clients and the Siebel Sample Database, see the Certifications tab on My Oracle Support. For information about installation path requirements, see [“File and Directory Naming Conventions” on page 287](#).

After you have installed the Siebel Sample Database, you can run Siebel demo applications, such as those described in [“Siebel Web Client Shortcuts and Startup Options” on page 181](#). You can also customize shortcuts, as described in the same topic.

**NOTE:** Before you install the current release as a new installation of Siebel Sample Database, you must uninstall the existing installed Siebel Sample Database, if present.

This topic contains the following information:

- [“Procedure for Installing the Siebel Sample Database” on page 175](#)
- [“About the Siebel Sample Database ConnectString Parameter” on page 177](#)
- [“Using the Siebel Sample Database with Siebel Tools” on page 177](#)

## Related Topics

[“Installing the Siebel Web Client” on page 157](#)

[“Installing Siebel Tools” on page 164](#)

[“Siebel Web Client Shortcuts and Startup Options” on page 181](#)

[“File and Directory Naming Conventions” on page 287](#)

## Procedure for Installing the Siebel Sample Database

Use the following procedure to install the Siebel Sample Database. Install this database after installing the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14, for the Siebel Mobile Web Client.

The Siebel Sample Database contains schema changes, repository changes, and seed data for Siebel CRM functionality through the current release.

**NOTE:** The following procedure is for installing a new instance of the Siebel Sample Database for the current release. For existing deployments for which you have installed the current release as a migration installation for the Siebel Mobile Web Client, use this installer to install a new instance of the Siebel Sample Database. The installer does not patch an existing instance of the Siebel Sample Database.

This topic is part of [“Installing and Using the Siebel Sample Database” on page 174.](#)

### To install the Siebel Sample Database

- 1 Uninstall your existing Siebel Sample Database from a previous version.

You might have installed the existing database using a Siebel CRM version 8.1.1 or version 8.2.2 installer, or you might have replaced that database with an updated one, such as for Siebel CRM version 8.1.1.11 or version 8.2.2.4.

- 2 In Windows Explorer, navigate to the Siebel image location for the current software version. Then navigate to the directory where the installer is located. Navigate to *Siebel\_Image\Windows\Client\Siebel\_Sample\_Database*.

In this path, *Siebel\_Image* is the directory for your version-specific Siebel network image, such as C:\Siebel\_Install\Image\8.1.1.14 or C:\Siebel\_Install\Image\8.2.2.14.

**CAUTION:** You must run this installation program from a network drive mapped to a drive letter. If you attempt to install from an unmapped network drive, then the installer might be unable to locate the files that it requires to proceed and might fail.

- 3 Double-click *install.exe* to start the Siebel Sample Database installer.

The Siebel Sample Database installer displays a Welcome screen.

- 4 In the Choose Setup Language screen, choose the language in which to conduct the installation, and click OK.

The default installation language is the one that corresponds to the current regional settings on the installation computer.

- 5 If you have an existing Sample Database installation of the same version, then you can choose to add Siebel language packs to this installation.

- If you are installing a new instance of the Siebel Sample Database (into a Siebel Web Client installation that does not already have the Sample Database), then click Next. Go to the next step.

- If you are adding languages to an existing Siebel Sample Database installation, then do the following:
  - Select the check box next to the line identifying the existing Sample Database installation to which you are adding languages, and click Next.
  - Select the check box next to each language that you are installing, and click Next. Go to [Step 9 on page 176](#).

**6** In the Welcome screen that appears, click Next.

**7** In the Setup Type screen, specify an installation directory for the Siebel Sample Database that is the same as where you installed the Siebel Mobile Web Client. The default installation location for the Siebel Mobile Web Client is C:\siebel\8.1.14.0\client or C:\siebel\8.2.14.0\client or a similar location.

**CAUTION:** You must install the Siebel Sample Database in the same location where you installed the Siebel Mobile Web Client.

Click Browse to select the installation directory for Siebel Mobile Web Client.

**8** While still in the Setup Type screen, select Typical. Click Next and go to the next step.

**NOTE:** The Setup Type options currently install the same components.

**9** In the Choose Languages screen, select the languages (that is, Siebel language packs) that you want to install.

If you are installing Siebel language packs for an existing installation, then go to [Step 11 on page 176](#).

Verify that your destination computer has sufficient disk space for the installation, and click Next.

**10** In the Select Program Folder screen, enter the name of the program folder that will contain your Siebel demo application shortcuts, and click Next.

Optionally, you can specify the same location in which shortcuts were created earlier for the Siebel Mobile or Developer Web Client installation. By default, this folder location is similar to Siebel8\_home1\Siebel Web Client 8.1 or Siebel8\_home1\Siebel Web Client 8.2.

Siebel demo application shortcuts (for example, Siebel Call Center Demo - ENU) are created in the program folder that you specify in this step.

Clicking Next in this step initiates file transfer. The setup program copies files to the local hard disk. A status bar in the Setup Status dialog box indicates the progress of the installation.

The setup program copies files to the local hard disk for each specified language, in addition to those that were installed for the base Sample Database installation.

If you have installed all of the specified Siebel language packs, then go to the next step. Alternatively, if you have installed language packs for an existing Siebel Sample Database installation, then the installer exits. Skip the rest of this procedure.

**11** Review the information presented in the Event Log screen, and click Next.

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



12 Click Finish in the Setup Complete screen.

The Siebel Sample Database installation is now finished.

## About the Siebel Sample Database ConnectString Parameter

The value of the ConnectString parameter in the [Sample] section of the application configuration files, such as uagent.cfg for Siebel Call Center (located in *SIEBEL\_CLIENT\_ROOT*\bin\enu for U.S. English), resembles the following example (all on one line). This example, for Siebel CRM version 8.1.1.14, assumes that the Siebel Sample Database was installed in the Siebel Mobile Web Client installation directory:

```
ConnectString = C:\siebel\8.1.1.14.0\client\sampl e\UTF8\sse_samp.dbf -q -m -x NONE  
-gp 4096 -c40m -ch60m
```

**NOTE:** You can use the same Siebel Sample Database with Siebel Tools if you edit the ConnectString parameter in the tools.cfg file so it uses the same value. See also [“Using the Siebel Sample Database with Siebel Tools”](#) on page 177.

This topic is part of [“Installing and Using the Siebel Sample Database”](#) on page 174.

## Using the Siebel Sample Database with Siebel Tools

A Siebel Sample Database that is installed with the Siebel Mobile Web Client can also be used with Siebel Tools. To configure this, copy the value of the ConnectString parameter from the [Sample] section of the application configuration file, and paste this value for the equivalent parameter in the tools.cfg file (located in *SIEBEL\_TOOLS\_ROOT*\bin\enu). For more information about the ConnectString parameter for the Siebel Sample Database, see [“About the Siebel Sample Database ConnectString Parameter”](#) on page 177.

Alternatively, you can install the Sample Database into the Siebel Tools directory instead of the Siebel Mobile Web Client directory. For information about installing Siebel Tools, see [“Installing Siebel Tools”](#) on page 164.

This topic is part of [“Installing and Using the Siebel Sample Database”](#) on page 174.

## Postinstallation Tasks for High Interactivity Clients

Siebel Business Applications running in high interactivity use both ActiveX controls and Java controls, which must be downloaded or predeployed to each client computer. This topic describes tasks that you might have to perform after installing Siebel Business Applications so that users of these applications can access the necessary controls.

After you install a new Siebel CRM release, including a Siebel Fix Pack or Siebel Innovation Pack release, the applicable ActiveX controls for high interactivity applications are downloaded onto your users' client computers when they run the Siebel application in the Internet Explorer browser and access the features that use these controls. Updated versions of the ActiveX controls are provided in each Siebel Fix Pack or Siebel Innovation Pack release. This behavior applies to high interactivity applications running in the Siebel Web Client, Mobile Web Client, and Developer Web Client.

As an alternative to allowing users of Siebel Mobile Web Clients and Developer Web Clients to download the ActiveX controls when they run the Siebel applications, administrators can predeploy the ActiveX controls to the client computers by loading the file `predeploy.htm` in the Internet Explorer browser. This operation is called predeploying, because it is done before the user logs into the application for the first time. For more information about downloading or predeploying ActiveX controls for high interactivity, see the browser configuration chapter in *Siebel System Administration Guide*. See also ["About ActiveX Controls for High Interactivity" on page 157](#).

When you install the Siebel Web Client as a migration installation, an updated `predeploy.htm` file is copied to the directory `SIEBEL_CLIENT_ROOT\publi c\lang`. In this path, `SIEBEL_CLIENT_ROOT` is the Siebel Mobile Web Client installation directory and `lang` represents each installed Siebel language. In order to predeploy any updated ActiveX controls, the administrator must load each language-specific version of this file in the browser.

After a new Siebel software version is installed, Java controls for high interactivity are also downloaded. If caching is enabled, then cached versions of these controls might have to be cleared on the client computer. To clear this data, choose Start, then Settings, then Control Panel, and then Java Plug-In. Click the Cache tab, and then click Reset.

After a new Siebel software version is installed, it is also recommended that users clear their browser cache. To do this in Internet Explorer, choose Tools, then Internet Options, and then choose Delete Files from the General tab.

For the minimum supported version of the Java Runtime Environment (JRE), see the Certifications tab on My Oracle Support. The JRE can be downloaded automatically to client computers, as described in *Siebel System Administration Guide*.

**NOTE:** You can deploy Siebel Business Applications using Siebel Open UI, which is an alternative to the high interactivity client for employee applications, such as Siebel Call Center. Siebel Open UI is enabled by default for new installations. For more information, see ["Before Logging in to Your Siebel Application" on page 179](#) and ["Enabling Siebel Open UI" on page 129](#).

### Related Topics

["About ActiveX Controls for High Interactivity" on page 157](#)

["Enabling Siebel Open UI" on page 129](#)

### Related Books

*Siebel System Administration Guide*

# Logging in to Your Siebel Application

This topic provides basic instructions for logging in to your Siebel application using one of the Siebel Web Client types. It contains the following information:

- [“Before Logging in to Your Siebel Application” on page 179](#)
- [“Logging in Using the Siebel Developer Web Client” on page 180](#)
- [“Logging in Using the Siebel Mobile Web Client” on page 180](#)
- [“Logging in Using the Siebel Web Client” on page 181](#)

## Before Logging in to Your Siebel Application

This topic contains information that you must know before you log in to your Siebel application.

This topic is part of [“Logging in to Your Siebel Application” on page 179](#).

Review the following issues:

- User rights to read and write in Siebel Web Client installation directories are required for running the Siebel Mobile Web Client or Developer Web Client. For information about setting user rights, consult the operating system manuals for the version of Microsoft Windows on which the application is installed.
- After the Siebel database has been installed, as described in [Chapter 5, “Installing the Siebel Database on the RDBMS,”](#) and the server modules have been configured, users can access the Siebel CRM applications.

In the current release, the license keys for Siebel CRM base applications do not need to be entered manually. The license keys are provided in the seed data that is imported into a new Siebel database. The license keys are also part of the seed data that is imported into an existing database as part of Incremental Repository Merge or database upgrade operations. For more information about performing these operations, see *Siebel Database Upgrade Guide*.

- The user name and password used to log in to Siebel Business Applications must be those of an employee with a valid position and division defined in the Siebel database.

You must log in to Siebel Business Applications (using the Server database option in the login screen) as the Siebel administrator before anyone else can log in. Log in using the SADMIN user name or using other credentials as defined by your database administrator. Then you or other administrators can set up more users as employees with defined positions and responsibilities and other settings suitable for your access control policies. For more information about setting up employees, see *Siebel Security Guide*.

- Depending on your Siebel Web Client deployment choices, you might need to enable or disable Siebel Open UI. For more information, see [“Enabling Siebel Open UI” on page 129](#).
- For the Siebel Developer Web Client, you must edit the application configuration file, such as uagent.cfg for Siebel Call Center, as follows:
  - In the [Siebel] section of the file, add the parameter ServerDbODBCDataSource, and set it to the ODBC data source that you are using for the server database.

- In the [ServerDataSrc] section of the file, set the parameter `ConnectionString` to the necessary value. For an Oracle database, set it to the alias defined in the `tnsnames.ora` file.
- For applications deployed using high interactivity, the Web browser must be correctly configured to run the Siebel application. High-interactivity applications can use the client health check feature to verify that requirements have been met. For more information about configuring the browser for high interactivity, see *Siebel System Administration Guide*. See also the Certifications tab on My Oracle Support. See also [“Postinstallation Tasks for High Interactivity Clients” on page 177](#).
- Tabbed browsing is supported with Siebel applications for one active session. Multiple Web pages can be opened using tabbed browsing, but only one tab can have a live connection to a Siebel application at a given time.

## Logging in Using the Siebel Developer Web Client

You can use the Siebel Developer Web Client to log in to the Siebel application.

This topic is part of [“Logging in to Your Siebel Application” on page 179](#).

### *To log in to your Siebel application using the Siebel Developer Web Client*

- 1 Double-click one of the Siebel shortcuts in the program folder, such as Siebel Call Center.
- 2 Log in using a valid user ID and password.
- 3 Specify the Server database, and click OK.

## Logging in Using the Siebel Mobile Web Client

You can use the Siebel Mobile Web Client to log in to the Siebel application.

This topic is part of [“Logging in to Your Siebel Application” on page 179](#).

### *To log in to your Siebel application using the Siebel Mobile Web Client*

- 1 Double-click one of the Siebel shortcuts in the program folder, such as Siebel Call Center.
- 2 Log in using a valid user ID and password.
- 3 Specify the Local database, and click OK.

**NOTE:** When logging in to a local database for the first time, users are automatically prompted to connect to the Siebel Server and download the local database. Users must attempt this only after a local database has been extracted for them by the system administrator.

For more information about Siebel Remote and extracting local databases, see *Siebel Remote and Replication Manager Administration Guide*.

## Logging in Using the Siebel Web Client

You can use the Siebel Web Client to log in to the Siebel application. (In this context, *Siebel Web Client* refers to the client type that is not installed locally, except for the browser itself.)

This topic is part of [“Logging in to Your Siebel Application” on page 179](#).

### *To log in to your Siebel application using the Siebel Web Client*

- 1 Open your Web browser.
- 2 Go to the URL for your Siebel application.
- 3 Log in using a valid user ID and password.

The Siebel application that you are connecting to is already configured to work with a specific database. When using this client type, you do not specify a database to connect to.

## Siebel Web Client Shortcuts and Startup Options

This topic provides information about the shortcuts installed in the Siebel program folder when you install the Siebel Web Client, and about command-line options used in these shortcuts.

Shortcuts are also created when you install the Siebel Sample Database. It also provides information about creating custom shortcuts to access Siebel Business Applications using demo users other than those specified in the predefined shortcuts installed with the Siebel Sample Database. For the demo users provided with the Siebel Sample Database, by Siebel application, see *Siebel Demo Users Reference*.

This topic contains the following information:

- [“Siebel Web Client Shortcuts” on page 181](#)
- [“Siebel Web Client Startup Options” on page 183](#)
- [“Creating Custom Siebel Application Shortcuts” on page 184](#)

## Siebel Web Client Shortcuts

The Siebel Web Client and Sample Database installers create shortcuts in the Siebel program folder for the modules that you have installed. For Siebel Business Applications, separate shortcuts are installed for each installed language. Which shortcuts are installed depends on your installation choices and is also subject to the settings in the siebel.ini file at the time of installation. Most of the shortcuts are installed in the program group (program folder); some are installed in the startup group.

For information about customizing the shortcuts or creating new ones, see [“Siebel Web Client Startup Options” on page 183](#) and [“Creating Custom Siebel Application Shortcuts” on page 184](#).

Siebel application shortcuts are created by the Siebel Web Client installer. When you run a shortcut to start a Siebel application, you can connect to the Siebel database (for LAN-connected users of the Siebel Developer Web Client) or to an initialized local database on the local computer (for Mobile Web Client). Each application shortcut loads the Siebel configuration file for that application; for example, Siebel Call Center uses the file `uagent.cfg`.

Where the Siebel Sample Database has been installed on the local computer, the demo application shortcuts connect to the Sample Database, using predefined demonstration users.

This topic is part of [“Siebel Web Client Shortcuts and Startup Options” on page 181](#).

### Siebel Application Shortcuts

Several Siebel application shortcuts are created in the Siebel Web Client program folder for Siebel Business Applications. All demo applications use the Siebel Sample Database.

You can create shortcuts for any valid Siebel application for which no shortcut is created by the installer.

### Demo Application Shortcuts

The Siebel Sample Database, which is accessed by using one of the demo (demonstration) application shortcuts described in [“Siebel Web Client Shortcuts” on page 181](#), contains many predefined demo users. For example, CCHENG is the demo user for the Siebel Call Center Demo shortcut. Many other demo users are available in the Sample Database that are not represented in the existing demo application shortcuts. Each demo user is intended to illustrate a particular Siebel application as it would appear for a user with certain predefined responsibilities.

#### Related Books

*Siebel Demo Users Reference*

*Siebel Security Guide*

### Utility and Synchronization Program Shortcuts

The following are some of the additional shortcuts created in the Siebel Web Client program folder for Siebel Business Applications. These shortcuts run utilities or synchronization programs.

- **Siebel Remote.** Starts the Siebel Remote stand-alone synchronization program (`siebsync.exe`).
- **Siebel TrickleSync.** Starts the Siebel TrickleSync program (`autosync.exe`). This shortcut is created in both the program group and the startup group.

Additional shortcuts are created for the synchronization program for specific Siebel Handheld applications.

#### Related Books

*Siebel Remote and Replication Manager Administration Guide*

## Siebel Web Client Startup Options

The application shortcuts described in [“Siebel Web Client Shortcuts” on page 181](#) run an executable program called `siebel.exe`, followed by various startup options. For example, the shortcut for Siebel Call Center - ENU might be defined as shown in the following example (depending on your installation location). For this example for Siebel CRM version 8.1.1.14, the only option used is `/c`, to specify the configuration file.

```
"C:\siebel\8.1.1.14.0\client\BIN\siebel.exe" /c CFG_FILE_PATH\uagent.cfg
```

The demo application shortcuts also specify the Siebel Sample Database and user and password information. For this example for Siebel CRM version 8.1.1.14, the shortcut for Siebel Call Center Demo - ENU might be defined as shown in the following:

```
"C:\siebel\8.1.1.14.0\client\BIN\siebel.exe" /c CFG_FILE_PATH\uagent.cfg /d sample /u CCHENG /p CCHENG
```

In the preceding examples, `CFG_FILE_PATH` represents the full path to the configuration file. This file is located in `BIN\LANGUAGE` in the `SIEBEL_CLIENT_ROOT` directory. In this path, `LANGUAGE` is a language code, such as ENU for U.S. English.

For example, the target definition for the Siebel Call Center - ENU shortcut might resemble the following example for Siebel CRM version 8.2.2.14:

```
"C:\siebel\8.2.2.14.0\client\BIN\siebel.exe" /c
"C:\siebel\8.2.2.14.0\client\bin\ENU\uagent.cfg"
```

The `siebel.exe` program can also be run from an MS-DOS window. In this case, the startup options would be entered directly on the command line. For information about creating custom shortcuts, see [“Creating Custom Siebel Application Shortcuts” on page 184](#).

This topic is part of [“Siebel Web Client Shortcuts and Startup Options” on page 181](#).

The available startup options are described in [Table 11 on page 183](#).

Table 11. Siebel Web Client Startup Options

Startup Option	Description
<code>/c config_file</code>	Required. Specifies the path and file name for the configuration file to use, such as <code>siebel.cfg</code> for Siebel Sales or <code>uagent.cfg</code> for Siebel Call Center.
<code>/d data_source</code>	Specifies the data source to connect to, as defined in the configuration file. The demo application shortcuts specify <code>/d sample</code> to access the Siebel Sample Database: <ul style="list-style-type: none"> <li>■ If you do not use <code>/u</code> and <code>/p</code> to specify a valid Siebel user and do not use <code>/d</code> to specify a valid data source, then you can specify the data source from the login screen.</li> <li>■ If you use <code>/u</code> and <code>/p</code> but do not use <code>/d</code>, then the local database is assumed.</li> </ul>

Table 11. Siebel Web Client Startup Options

Startup Option	Description
<i>/l language</i>	<p>Specifies the three-letter code for the language to use for this Siebel Web Client session, such as ENU for U.S. English. The applicable Siebel language pack must have been installed for the Siebel Web Client.</p> <p>If you do not use <i>/l</i> to specify a valid language, then the language is obtained from the configuration file.</p>
<i>/u username</i>	<p>Specifies the user name. The demo application shortcuts specify predefined demo users using <i>/u</i> and <i>/p</i> options.</p> <p>If you do not use <i>/u</i> and <i>/p</i> to specify a valid Siebel user, then you must log in from a login screen.</p> <p>For lists of demo users provided with the Siebel Sample Database, by Siebel application, see <i>Siebel Demo Users Reference</i>.</p> <p><b>CAUTION:</b> Consider the security issues when using <i>/u</i> and <i>/p</i> options (in particular <i>/p</i>) to access a live, production system. These values are not encrypted.</p>
<i>/p password</i>	<p>Specifies the password for the user specified using <i>/u</i>.</p>
<i>/b browser_exe</i>	<p>Specifies the path and file name for the browser executable program to use for the Siebel Web Client session.</p> <p>The <i>/b</i> option is needed only if a browser that is not supported for the Siebel application is currently the default browser. For example, to run Siebel Call Center when it is deployed using high interactivity, then you must use a supported version of Microsoft Internet Explorer. If this browser is not the default browser, then use <i>/b</i> to specify the browser explicitly.</p> <p>For more information about the supported browsers for Siebel Business Applications using high interactivity, see the Certifications tab on My Oracle Support.</p>
<i>/s spool_file</i>	<p>Specifies spooling SQL to a specified output file. This option can be useful for troubleshooting purposes. For more information, see <i>Siebel Performance Tuning Guide</i>.</p>

## Creating Custom Siebel Application Shortcuts

If you want to customize Siebel Business Applications shortcuts described in [“Siebel Web Client Shortcuts” on page 181](#), then you can do so by modifying shortcut properties and changing the value for the Target field. Generally, rather than modifying existing shortcuts or creating them from scratch, it is recommended that you copy existing ones and rename and modify the copies.



Observe the following requirements for creating or modifying shortcuts:

- Do not modify the location displayed in the shortcut property labeled *Start in*.
- When defining the Target value for a shortcut, follow the guidelines for using the options described in [“Siebel Web Client Startup Options” on page 183](#).

This topic is part of [“Siebel Web Client Shortcuts and Startup Options” on page 181](#).

### *To create custom Siebel application shortcuts*

- 1 Copy existing Siebel application shortcuts.
- 2 Modify the copies, for example, by changing the value for the Target field.

## About Siebel QuickStart

Siebel QuickStart is an application feature for the Siebel Mobile Web Client that, when enabled, preloads the Siebel application on a mobile user's computer at startup time, reducing the time required to start the Siebel Web Client. Siebel QuickStart is enabled and loaded for the first time from the Siebel application login screen. If it is enabled, then it affects subsequent sessions for the same application. For information about enabling and disabling Siebel QuickStart, see [“Enabling and Disabling Siebel QuickStart” on page 187](#).

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

### Siebel QuickStart Components

Siebel QuickStart has two main components:

- **Siebel QuickStart agent.** The agent represents the Siebel application that is preloaded when the user logs in to Windows, or that remains loaded after logging out of the application.
- **Siebel QuickStart Service.** This Windows service starts the Siebel QuickStart agent when the user logs in to Windows. This service runs automatically by default. If the user selected Enable Siebel QuickStart in the login screen in a previous Siebel application session (in the same or in a previous Windows session), then the service starts the Siebel QuickStart agent to preload the Siebel application.

### What Does Siebel QuickStart Do?

Siebel QuickStart applies to subsequent instances of the same type of Siebel application session: running the same application as the same user and with the same startup options. Before enabling Siebel QuickStart for a different type of Siebel application session, users must disable Siebel QuickStart for an existing application session.

The speed increase provided by Siebel QuickStart does not take effect on the initial Siebel login. Subsequent logins of the same type of Siebel application session benefit from Siebel QuickStart, until the user disables Siebel QuickStart.

The Windows service Siebel QuickStart Service shuts down during the application session, to conserve resources. The service restarts the next time Windows is restarted. The Siebel QuickStart agent remains running during the Windows session, unless the user has disabled Siebel QuickStart, as described in this topic. The Siebel QuickStart agent runs under the Local System account and stays running even if the user logs out of Windows and logs back in again, unless the user has logged out of the Siebel application and disabled Siebel QuickStart from the Siebel icon in the system tray.

If the Siebel QuickStart agent is enabled but the Windows service Siebel QuickStart Service is disabled, then the Siebel application remains loaded after the user exits the application, providing quick access when the user restarts the application. However, if the user logs out of Windows, then the Siebel application does not preload when the user logs back in to Windows.

Siebel QuickStart stores the encrypted Siebel user name and password in the file `mwc_storage.cfg`, located in `SIEBEL_CLIENT_ROOT\bin`. Do not modify this file. For more information about the encryption used in this file, see *Siebel Remote and Replication Manager Administration Guide*.

### When Does Siebel QuickStart Remain Running?

The Siebel QuickStart agent runs and remains running at least for the rest of the user's Windows session, in the following Siebel Mobile Web Client usage cases:

- After the user has started the Siebel application for the first time and initialized the local database.
- After the user has started the Siebel application by supplying login credentials from the command line.
- After the user has started the Siebel application and checked Enable QuickStart in the login screen.
- After the user has logged in to Windows when Enable QuickStart was specified in a previous Siebel application session (and in a previous Windows session).

**NOTE:** The listed cases apply only when Siebel QuickStart Service is set to either Automatic or Manual, unless the user has disabled Siebel QuickStart or logged out of the Siebel application.

### Options for the Siebel Icon in the System Tray

When the Siebel application is running or the Siebel QuickStart agent is loaded, an icon appears in the system tray. Right-clicking this icon displays several choices:

- **Exit.** Exits the Siebel QuickStart agent for the current Windows session. This option is available only when the Siebel QuickStart agent is loaded and the Siebel application is *not* running. If Siebel QuickStart is enabled, then the agent loads again the next time the user starts the Siebel application the same way or starts Windows.
- **Disable On Startup.** Disables Siebel QuickStart the next time the user starts the Siebel application or starts Windows. Also exits the Siebel QuickStart agent, in the manner described in the previous topic. This option is available only when the Siebel QuickStart agent is loaded and the Siebel application is not running or was not started using Siebel QuickStart Service. This option also disables Siebel QuickStart Service.

- **About.** Displays information about Siebel Business Applications. This option is available when the Siebel application or the Siebel QuickStart agent are running, or both.
- **Help.** Displays *Siebel Online Help*. This option is available when the Siebel application or the Siebel QuickStart agent are running, or both.

## Using View Precaching with Siebel QuickStart

When the Siebel QuickStart agent is loaded, views specified using the parameters in the [Preload] section of the configuration file, such as `siebel.cfg`, are preloaded (precached) during startup of the Siebel application. In subsequent application sessions, navigating to a precached view is faster.

In the [Preload] section, specify the names of the views to be precached as the values for configuration parameters named `View1`, `View2`, and so on.

For more information about specifying configuration file parameters, see *Siebel System Administration Guide*.

## Siebel QuickStart and AutoStopDB Configuration Parameter

When you are using Siebel QuickStart, you can also decide to set the configuration parameter `AutoStopDB` to `FALSE` for the local database.

If the parameter is `True`, then the SQL Anywhere database engine exits when the user logs out. If it is `FALSE` (the default), then the database engine continues to run after the user logs out of Siebel Business Applications.

The `AutoStopDB` parameter is specified in the [Local] section of the application configuration file, such as `uagent.cfg` for Siebel Call Center.

Both the Siebel QuickStart feature and the ability to keep the SQL Anywhere database engine running have a similar performance benefit when the Siebel application is started and exited multiple times within the same Windows session.

### Related Books

*Siebel System Administration Guide*

*Siebel Performance Tuning Guide*

## Enabling and Disabling Siebel QuickStart

Instructions are provided in the following procedures for enabling and disabling Siebel QuickStart agent and the Windows service Siebel QuickStart Service. For more information about Siebel QuickStart, see [“About Siebel QuickStart” on page 185](#).

## Enabling Siebel QuickStart

You enable Siebel QuickStart in the Siebel Mobile Web Client.

### *To enable Siebel QuickStart*

- 1 Start a Siebel application with the Siebel Mobile Web Client and the local database. For example, double-click the shortcut for Siebel Call Center for your applicable language.
- 2 In the Siebel login screen, check the Enable Siebel QuickStart check box, and log in.

The Siebel QuickStart agent is loaded into memory for the rest of the Windows session, and it is loaded again when the user logs in to Windows subsequently, unless the user disables it. If you disable the service named *Siebel QuickStart Service*, then the agent stays loaded in memory for the rest of the Windows session only.

## Disabling Siebel QuickStart from the Login Screen

You can disable Siebel QuickStart from the login screen.

### *To disable Siebel QuickStart from the login screen*

- 1 Start a Siebel application with the Siebel Mobile Web Client. For example, double-click the shortcut for Siebel Call Center for your applicable language.
- 2 In the Siebel login screen, clear the Enable Siebel QuickStart check box (if it is checked), and log in.

The Siebel QuickStart agent is not loaded for this Siebel application session, and does not load subsequently, unless it is explicitly specified. You might also choose to disable the service Siebel QuickStart Service.

## Disabling Siebel QuickStart from the System Tray

You can disable Siebel QuickStart from the system tray.

### *To disable Siebel QuickStart from the system tray*

- Right-click the Siebel icon in the system tray, and select Disable On Startup.

This option is available only if the Siebel application is not running, or was not started using Siebel QuickStart.

The Siebel QuickStart agent exits. The agent does not load subsequently, unless it is explicitly specified. You might also choose to disable the service Siebel QuickStart Service.

## Disabling Siebel QuickStart from the Siebel QuickStart Service

You can disable Siebel QuickStart from the Siebel QuickStart Service.

### *To disable Siebel QuickStart from the Siebel QuickStart Service*

- 1 Navigate to Control Panel, Administrative Tools, and then Services.
- 2 Select Siebel QuickStart Service, click Action, and then Properties.
- 3 Change the startup type for this service from Automatic to Disabled.

The service Siebel QuickStart Service will no longer run automatically when you log in. If you want to reenable it, then change the startup type back to Automatic.



# 8

## Verifying and Troubleshooting Your Installation

This chapter provides information about verifying and troubleshooting your installation of Siebel Business Applications. It includes the following topics:

- [Verifying Installation for the Siebel Enterprise Server on page 191](#)
- [Verifying Installation for the Siebel Database on page 196](#)
- [Verifying Installation for the Siebel Web Server Extension on page 199](#)
- [Verifying Installation for the Siebel Web Client on page 201](#)
- [Verifying Installation for Siebel Tools on page 204](#)
- [Verifying the ODBC Data Source on page 208](#)
- [Verifying Network Connectivity for the Siebel Server Computer on page 211](#)
- [Verifying Network Connectivity for Mobile Users on page 213](#)
- [Verifying That the Siebel Gateway Name Server Has Started on page 214](#)
- [Troubleshooting Installation and Configuration for Siebel Enterprise Server on page 214](#)
- [Troubleshooting Installation for the Siebel Database on page 218](#)
- [Troubleshooting Installation for the Siebel Web Server Extension on page 219](#)
- [Configuring the Siebel Mobile Web Client When Neither Siebel VB nor Siebel eScript Is Licensed on page 222](#)
- [About the Environment Verification Tool on page 222](#)
- [Using the Environment Verification Tool on page 225](#)

### Verifying Installation for the Siebel Enterprise Server

After installing the Siebel Enterprise Server software as a new installation or as a migration installation, review the installation log files, verify the version number of your installed software, and review the Siebel Enterprise Server directories and files that now exist under the *SIEBEL\_ROOT* directory that you specified during the installation.

**NOTE:** Additional top-level directories are created, which are parallel to the directories for the Siebel Gateway Name Server, Siebel Server, and so on. These directories include *ccr* for Oracle Configuration Manager files, *confi g* for Siebel Configuration Wizard files, *cfgtool l ogs* for installation log files, *opatch* for files related to the *opatch* utility, *oui* for files related to Oracle Universal Installer, and so on.

This topic contains the following information:

- [“Reviewing the Installation Log Files for Siebel Enterprise Server” on page 192](#)
- [“Verifying the Installation Version Number for Siebel Enterprise Server” on page 192](#)
- [“Reviewing the Installation Directories for Siebel Gateway Name Server” on page 193](#)
- [“Reviewing the Installation Directories for Siebel Server” on page 193](#)
- [“Reviewing the Installation Directories for Siebel Database Configuration Utilities” on page 195](#)

#### Related Topic

[“Installing Siebel Enterprise Server” on page 42](#)

## Reviewing the Installation Log Files for Siebel Enterprise Server

After installing the Siebel Enterprise Server components, review the installation log files to verify that all of the components installed successfully, particularly if you experienced any difficulties with the installation. The log files are created in the following directory:

```
SIEBEL_ROOT\cfgtool\logs\oui
```

The relevant log files for an installation session are named `installActionsdate_time.log` file. In the file name, `date_time` represents the date and time when the file was created; for example, `installActions2014-07-02_10-28-04PM.log`. For each set of files created, the oldest and largest log file generally represents the Siebel module being installed.

## Verifying the Installation Version Number for Siebel Enterprise Server

After installing the Siebel Enterprise Server components, verify the version number of installed software.

### *To verify the installation version number for Siebel Enterprise Server*

- 1 Open a DOS window.
- 2 Set the value of the `ORACLE_HOME` environment variable to correspond to your top-level installation location, such as `C:\siebel\8.1.1.14.0\ses` or `C:\siebel\8.2.2.14.0\ses` for an installation of Siebel Enterprise Server software. For example, enter a command like this for Siebel CRM version 8.1.1.14:

```
set ORACLE_HOME=C:\siebel\8.1.1.14.0\ses
```

- 3 Navigate to the `opatch` directory within your installation. For example, enter a command like this for Siebel CRM version 8.1.1.14:

```
cd C:\siebel\8.1.1.14.0\ses\opatch
```

- 4 Enter the following command:

```
opatch lsi nventory
```



The installed components within the specified Oracle home are displayed, with the version number as managed by Oracle Universal Installer. For example, the version number shown for your installed software might be 8.1.1.14.0 or 8.2.2.14.0.

## Reviewing the Installation Directories for Siebel Gateway Name Server

After installing the Siebel Gateway Name Server, review the directory structure created by the installer.

The Siebel Gateway Name Server is installed in the *SIEBEL\_GATEWAY\_ROOT* directory within the Siebel root directory that you specified during the installation. The default installation location is C:\siebel\8.1.1.14.0\ses\gtwysrvr or C:\siebel\8.2.2.14.0\ses\gtwysrvr. Verify that the following Siebel Gateway Name Server directories and files now exist in the installation directory. In the list, *lang* represents each language that you have installed, such as ENU for U.S. English.

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

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

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

**LOCALE.** Language-specific files and scripts. These are not configurable.

*lang.* Language-specific files and scripts. These are not configurable.

**LOG.** Siebel Gateway Name Server log files.

## Reviewing the Installation Directories for Siebel Server

After installing the Siebel Server, review the directory structure created by the installer.

The Siebel Server is installed in the *SIEBSRVR\_ROOT* directory within the Siebel root directory that you specified during the installation. The default installation location is C:\siebel\8.1.1.14.0\ses\siebsrvr or C:\siebel\8.2.2.14.0\ses\siebsrvr. Verify that the following Siebel Server directories and files now exist in the installation directory. In the list, *lang* represents each language that you have installed, such as ENU for U.S. English.

**NOTE:** The OBJECTS directory contains the SRF file. Monitoring of any SRF files by virus scanning software might significantly degrade Siebel Server performance. If you have virus scanning software installed on your computers, then configure it to skip SRF files. Because these files are binary data files, the risk of virus infection is low, and so excluding these files from scanning is usually acceptable. Alternatively, you can scan SRF files less frequently than other files.

**siebsrvr.** Top-level directory for Siebel Server.

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

**BIN.** Binary file directory, containing executable programs, scripts, and language subdirectories related to language-specific server components. Also contains files used by Oracle Global Customer Support for installation workarounds.

**BSCRIPTS.** Web server-related files.

## CLASSES.

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

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

**HELP.** Contains help files.

**INPUT.** Contains files related to Siebel Remote.

**ISSTEMPL.** Contains templates for Customer Order Management CDA application and engine files for newly created projects. Do not modify any files in the directories `ISSTEMPL\lang\EngineSourceFiles` or `ISSTEMPL\lang\NewProjectDefault`, unless you are directed to do so by Oracle Global Customer Support.

**LEX.** Language-related files.

**LOCALE.** Contains language-specific files. These files are not configurable.

*lang.* Language-specific files and scripts. These are not configurable.

**LOG.** Contains client and utility log files.

**LOGARCHIVE.** Archive of client and utility log files.

**MSGTEMPL.** Stores language-specific files for mail merge.

**NLP.** Contains natural-language processing files.

**OBJECTS.** Contains language-specific Siebel Repository files.

**OUTPUT.** Contains files related to Siebel Remote.

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

**SDQConnector.** Contains the DLLs, configuration files, and other files necessary to connect the Siebel Data Quality Universal Connector to one or more external data quality products. An external data quality product is validated through Oracle's partner initiative.

**SEARCH.** Contains the indexes and scripts used to administer and execute searches.

**SQLTEMPL.** Contains SQL statements used by Siebel Server components. Do not modify these files.

**TEMP.** Stores temporary files for use by the Siebel Server.

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

**upgrade.log.** File that contains information logged during an upgrade.

**WEBMASTER.** Contains files (including CSS files, IMG files, JS files, and others) that are updated to the Web server when the Web server is restarted, or when an administrator uses the SWE command `UpdateWebImages` to manually update the files on the Web server.

For more information, see ["About the Siebel Enterprise Security Token" on page 152](#) and ["Updating Web Server Static Files Using the Siebel Enterprise Security Token" on page 153](#). See also the topic about adding a password for updating Web server static files in *Siebel Security Guide*.

**WEBTEMPL.** Contains Siebel Web templates and HTML files that support the applets and views required for any type of Siebel Web Client for Siebel Business Applications. If you are using Siebel Open UI (in native mode), then do not store your own custom Web template files or HTML files in this directory. For more information, see *Configuring Siebel Open UI*.

**XML.** Web server-related files.

## Reviewing the Installation Directories for Siebel Database Configuration Utilities

After installing the Siebel Database Configuration Utilities, review the directory structure created by the installer.

The Siebel Database Configuration Utilities software is installed in the *DBSRVR\_ROOT* directory within the Siebel root directory that you specified during the installation. The default installation location is C:\siebel\8.1.14.0\ses\dbsrvr or C:\siebel\8.2.2.14.0\ses\dbsrvr. Verify that the following Siebel Database Configuration Utilities directories and files now exist in the installation directory. In the list, *lang* represents each language that you have installed, such as ENU for U.S. English.

**dbsrvr.** Top-level directory for Siebel Database Configuration Utilities.

**BIN.** Contains files for internal use.

**COMMON.** Contains database platform-independent files.

**DB\_SERVER (ORACLE, DB2UDB, DB2390, or MSSQL).** Contains scripts specific to your database, including upgrade scripts for previous versions of Siebel Business Applications.

**DBOUTPUT (IBM DB2 for z/OS only).** Contains subdirectories in which DDL is deposited by the installer for later transfer to the DB2 host when the Siebel Schema installation option Generate DDL Into Files is chosen.

**SIEBPROC (IBM DB2 only).** Contains User Defined Functions (UDFs) and stored procedures for IBM DB2, by operating system. See also ["Installing the Stored Procedures and User-Defined Functions on IBM DB2" on page 107](#).

**AIX.** UDFs and stored procedures for IBM DB2 on AIX.

**HPUX.** UDFs and stored procedures for IBM DB2 on HP-UX.

**LINUX.** UDFs and stored procedures for IBM DB2 on Linux.

**SOLARIS.** UDFs and stored procedures for IBM DB2 on Oracle Solaris.

**WIN32.** UDFs and stored procedures for IBM DB2 on Windows.

**SQLPROC (IBM DB2 only).** Contains subdirectories that contain the binary files that are required to install stored procedures. These stored procedures perform data migration as part of an upgrade.

**AIX.** Stored procedures for IBM DB2 on AIX.

**HPUX.** Stored procedures for IBM DB2 on HP-UX.

**LINUX.** Stored procedures for IBM DB2 on Linux.

**SOLARIS.** Stored procedures for IBM DB2 on Oracle Solaris.

**WIN32.** Stored procedures for IBM DB2 on Windows.

**STORPROC (IBM DB2 for z/OS only).** Contains stored procedures for DB2 for z/OS.

**UPGRADE.** Directories containing files to enable upgrading from specific versions of Siebel Business Applications that are supported for upgrade to the current release.

**LANG.** Contains language-specific and database-specific files for the ancestor Siebel Repository and supporting files. For example, ENU contains language-specific files for U.S. English, and DEU contains language-specific files for German.

**FILES.** This directory contains sample file attachments. You must copy these files to the appropriate subdirectory of the Siebel File System. See ["Populating the Siebel File System" on page 113](#).

**LOCALE.** Contains translation files (for Oracle use only).

## Verifying Installation for the Siebel Database

After installing the Siebel database on the RDBMS using the Siebel Database Configuration Wizard, review the installation log files and the system preferences for the database code page. This topic has the following information:

- ["Reviewing the Installation Log Files for the Siebel Database" on page 196](#)
- ["Verifying System Preferences and Settings for the Database Code Page" on page 197](#)

### Related Topic

["Installing the Siebel Database" on page 108](#)

## Reviewing the Installation Log Files for the Siebel Database

Installing Siebel database components on the RDBMS creates several log files within the `SIEBEL_ROOT\l`og subdirectory. You must review the files in this subdirectory for any errors.

For example, log files created might be named `upgwiz.log` (the most recently created), `upgwiz_01.log`, `upgwiz_02.log`, and so.

**NOTE:** For information about reviewing log files using the `Logparse` utility, see *Siebel Database Upgrade Guide*. This utility is located in `SIEBSVR_ROOT\bin`.

Some other files generated, by supported RDBMS, are listed as follows.

**Oracle Database.** For Oracle Database, the following log files are also generated when you create tables, indexes, and seed data:

```
ddl_ctl.log
dataimp_prim.log
dataimp_prim_lang.log
ddlseq.log
ddlora.log
ddlview.log
ddlview_sia.log
seedssa.log
seedver.log
pkgseq.log
pkgldel.log
```

seedora.log  
pkgvis.log  
trgreset.log  
ifstrg.log  
ifindxstrg.log  
set\_utc\_on.log  
month\_fn.log

**IBM DB2.** For IBM DB2, the following log files are also generated when you create tables, indexes, and seed data:

ddl\_ctl.log  
dataimp\_prim.log  
dataimp\_prim\_lang.log  
db2ddl.log  
siebproc.log  
seeddb2.log  
seedver.log  
seedssa.log  
ddlview.log  
ddlview\_sia.log  
grantstat.log  
updatestats.log  
loadstats.log  
set\_utc\_on.log

**Microsoft SQL Server.** For Microsoft SQL Server, the following log files are also generated when you create tables, indexes, and seed data:

helpsort.log  
ddl\_ctl.log  
dataimp\_prim.log  
dataimp\_prim\_lang.log  
pkgseq.log  
seedmss.log  
ddlms.log  
trgreset.log  
seedver.log  
seedssa.log  
ddlview.log  
ddlview\_sia.log  
set\_utc\_on.log

## Verifying System Preferences and Settings for the Database Code Page

After you complete installing Database Configuration Utilities and installing the Siebel database, you must verify system preferences and other settings for the Siebel application that indicate whether you are using Unicode, and indicate the code page that you are using.

For more information about code pages, see [“Planning RDBMS Installation and Configuration” on page 280](#). For Siebel language support, Unicode support, and legacy code page support, see article ID 1513102.1 (for Siebel CRM version 8.1.1.x) or article ID 1524342.1 (for Siebel CRM version 8.2.2.x) on My Oracle Support.

The following procedure assumes that you have already installed Siebel Tools.

- For information about installing Siebel Tools, see [“Installing Siebel Tools” on page 164](#).
- For information about starting Siebel Tools, see [“Verifying Successful Installation of Siebel Tools” on page 206](#).

**To verify system preferences and settings for the database code page**

- 1 Start Siebel Tools and connect to the Siebel database.
- 2 Navigate to Screens, System Administration, and then System Preferences.
- 3 Look for System Preference Name = Enterprise DB Server Code Page. Verify that the value has been set correctly, based on the value that you selected during the installation of the Siebel database components (see [“Installing the Siebel Database” on page 108](#)).

**NOTE:** The value of Enterprise DB Server Code Page must be in lowercase, for example, utf-8 or utf-16. An Oracle Database character set might have a different value, although the system preference value must be utf-8. The utf-16 code page is also known as UCS-2, although the system preference value must be utf-16.

Possible values for the system preference are listed in the following table:

Language	Database	Value
All	Oracle	utf-8 (for Unicode)
All	IBM DB2, Microsoft SQL Server	utf-16 (for Unicode)
Japanese	Oracle, IBM DB2	cp932 (or equivalent)
Western European	All	cp1252 (or equivalent)

- 4 Verify that the column UNICD\_DATATYPS\_FLG in the table S\_APP\_VER is set correctly. The flag value must be in uppercase.

Possible values for UNICD\_DATATYPS\_FLG are listed in the following table:

Code Page	Database	Value
Non-Unicode code page	All	N
Unicode	Oracle	8
Unicode	IBM DB2	Y
Unicode	Microsoft SQL Server	Y

# Verifying Installation for the Siebel Web Server Extension

After installing the Siebel Web Server Extension (SWSE) software as a new installation or as a migration installation, review the installation log files, verify the version number of your installed software, and review the Siebel Web Server Extension (SWSE) directories and files that now exist under the *SWSE\_ROOT* directory that you specified during the installation.

This topic contains the following information:

- [“Reviewing the Installation Log Files for the SWSE” on page 199](#)
- [“Verifying the Installation Version Number for the SWSE” on page 199](#)
- [“Reviewing the Installation Directories for the SWSE” on page 200](#)
- [“Reviewing the Log Files for the SWSE” on page 201](#)

## Related Topic

[“Installing the Siebel Web Server Extension” on page 49](#)

## Reviewing the Installation Log Files for the SWSE

After installing the SWSE, review the installation log files to verify that all of the components installed successfully, particularly if you experienced any difficulties with the installation. The log files are created in the following directory:

```
SIEBEL_ROOT\cfgtool\logs\oui
```

The relevant log files for an installation session are named `installActionsdate_time.log` file. In the file name, *date\_time* represents the date and time when the file was created; for example, `installActions2014-07-02_10-28-04PM.log`. For each set of files created, the oldest and largest log file generally represents the Siebel module being installed.

## Verifying the Installation Version Number for the SWSE

After installing the SWSE, verify the version number of the installed Siebel software.

### *To verify the installation version number for the SWSE*

- 1 Open a DOS window.
- 2 Set the value of the `ORACLE_HOME` environment variable to correspond to your top-level installation location, such as `C:\siebel\8.1.1.14.0\sweapp` or `C:\siebel\8.2.2.14.0\sweapp` for an installation of Siebel Web Server Extension software. For example, enter a command like this for Siebel CRM version 8.1.1.14:

```
set ORACLE_HOME=C:\siebel\8.1.1.14.0\sweapp
```

- 3 Navigate to the `opatch` directory within your installation. For example, enter a command like this for Siebel CRM version 8.1.1.14:

```
cd C:\siebel\8.1.1.14.0\sweapp\opatch
```

- 4 Enter the following command:

```
opatch lsi nventory
```

The installed components within the specified Oracle home are displayed, with the version number as managed by Oracle Universal Installer. For example, the version number shown for your installed software might be 8.1.1.14.0 or 8.2.2.14.0.

## Reviewing the Installation Directories for the SWSE

Review the physical directories created during the installation of the Siebel Web Server Extension (SWSE) on the Web server host to familiarize yourself with the locations of files such as the `eapps.cfg` and `eapps_sia.cfg` configuration files.

**NOTE:** Additional top-level directories are created, which are parallel to the `sweapp` directory for the Siebel Web Server Extension. These directories include `ccr` for Oracle Configuration Manager files, `config` for SWSE Configuration Wizard files, `cfgtoollogs` for installation log files, `opatch` for files related to the `opatch` utility, `oui` for files related to Oracle Universal Installer, and others.

The following list shows some of the physical directories and files created after you install the SWSE on the Web server. Some of these directories are not created until the first login. In the list, *lang* represents each language that you have installed, such as ENU for U.S. English.

**sweapp.** Top-level directory for SWSE.

**ADMIN.** Contains model files used during configuration of the SWSE.

**BIN.** Contains the SWSE configuration files (`eapps.cfg` and `eapps_sia.cfg`) and the library files needed for the SWSE functionality, such as `sweis.dll`.

**lang.** Language-specific files and scripts. These are not configurable.

**ISSRUN.** Contains the files for Customer Order Management CDA run time. CDA run time is used most commonly for Siebel Advisor and sometimes for catalogs or product configuration.

**LOCALE.** Contains resource files with information about any run-time errors. These language-specific files and scripts are not configurable.

**lang.** Language-specific files and scripts. These are not configurable.

**LOG.** Reports communication errors between the SWSE and the Application Object Managers in the Siebel Servers.

**PUBLIC.** Each language-specific subdirectory contains the default HTML file (`default.htm`) used to redirect the browser to the SWSE and subdirectories of the Siebel Server. The files are updated from the `WEBMASTER` directory on the Siebel Server when the Web server is restarted, or when an administrator uses the `SWE` command `UpdateWebImages` to manually update the files on the Web server.

For more information, see [“About the Siebel Enterprise Security Token” on page 152](#) and [“Updating Web Server Static Files Using the Siebel Enterprise Security Token” on page 153](#). See also the topic about adding a password for updating Web server static files in *Siebel Security Guide*.



**lang.** Language-specific files. If you are using Siebel Open UI (in native mode), then do not store your own custom files in subdirectories such as CSS, files, images, or scripts. For more information, see *Configuring Siebel Open UI*.

## Reviewing the Log Files for the SWSE

SWSE generates one or more log files as a result of connection attempts with the Siebel Server. These log files reside in `SWSE_ROOT\log`.

Depending on the logging level that you choose, these files record errors, warnings, and general information. Events such as Web server failures or invalid configuration of the SWSE are captured in these log files. Analyzing the log files can provide clues for troubleshooting SWSE problems. For more information about reviewing log files and monitoring Web servers and SWSE, see *Siebel System Monitoring and Diagnostics Guide*.

# Verifying Installation for the Siebel Web Client

After installing the Siebel Web Client software as a new installation or as a migration installation, review the installation log files, verify the version number of your installed software, and review the Siebel Web Client directories and files that now exist under the `SIEBEL_CLIENT_ROOT` directory that you specified during the installation.

This topic contains the following information:

- [“Reviewing the Installation Log Files for the Siebel Web Client” on page 201](#)
- [“Verifying the Installation Version Number for the Siebel Web Client” on page 202](#)
- [“Reviewing the Installation Directories for the Siebel Web Client” on page 202](#)
- [“Verifying ODBC Data Sources for the Siebel Developer Web Client” on page 203](#)

### Related Topic

[“Installing the Siebel Web Client” on page 157](#)

## Reviewing the Installation Log Files for the Siebel Web Client

After installing the Siebel Web Client software, review installation log files to verify that all of the components installed successfully, particularly if you experienced any difficulties with the installation. The log files are created in the following directory:

```
SIEBEL_CLIENT_ROOT\cfgtool\logs\oui
```

The relevant log files for an installation session are named `installActionsdate_time.log` file. In the file name, `date_time` represents the date and time when the file was created; for example, `installActions2014-07-02_10-28-04PM.log`. For each set of files created, the oldest and largest log file generally represents the Siebel module being installed.

This topic applies to the Siebel Web Client installation, but not to the Siebel Sample Database installation.

## Verifying the Installation Version Number for the Siebel Web Client

After installing the Siebel Web Client software, verify the version number of the installed Siebel software.

This topic applies to the Siebel Web Client installation, but not to the Siebel Sample Database installation.

### *To verify the installation version number for the Siebel Web Client*

- 1 Open a DOS window.
- 2 Set the value of the ORACLE\_HOME environment variable to correspond to your installation location, such as C:\siebel\8.1.1.14.0\client or C:\siebel\8.2.2.14.0\client. For example, enter a command like this for Siebel CRM version 8.1.1.14:

```
set ORACLE_HOME=C:\siebel\8.1.1.14.0\client
```

- 3 Navigate to the opatch directory within your installation. For example, enter a command like this for Siebel CRM version 8.1.1.14:

```
cd C:\siebel\8.1.1.14.0\client\opatch
```

- 4 Enter the following command:

```
opatch lsiinventory
```

Installed components within the specified Oracle home are displayed, with the version number as managed by the Oracle Universal Installer software. For example, the version number of an installation of Siebel CRM version 8.1.1.14 or version 8.2.2.14 is shown as 8.1.1.14.0 or 8.2.2.14.0.

## Reviewing the Installation Directories for the Siebel Web Client

The following minimum directories are created for a Siebel Web Client installation. These directories, the files and subdirectories they contain, and various other files are created in the directory that you specified during the installation, such as C:\siebel\8.1.1.14.0\client or C:\siebel\8.2.2.14.0\client. Use Windows Explorer to verify the directory structure on your computer.

**NOTE:** The objects directory contains the SRF file. The monitoring of any SRF file by virus scanning software might significantly degrade Siebel Web Client performance. If you have virus scanning software installed on your computers, then configure it to skip SRF files. Because these files are binary data files, the risk of virus infection is low, and so excluding these files from scanning is usually acceptable. Alternatively, you can scan SRF files less frequently than other files.

**SIEBEL\_CLIENT\_ROOT.** The directory for the Siebel Web Client installation, such as C:\siebel\8.1.1.14.0\client or C:\siebel\8.2.2.14.0\client (or similar locations). This installation directory contains the subdirectories identified here. You can change the name during the installation process. For more information, see [“Requirements for Installing Siebel Web Clients” on page 315](#).

**bin.** Contains all of the binary files (\*.exe, \*.dll, and so on), configuration files (\*.cfg), user preference files, and language-specific files.

**cfgtoollogs.** Contains installation log files.

**charts.** Contains files for generating charts.

**fonts.** Contains font files.

**isstempl.** Contains templates for the Customer Order Management CDA application and engine files for newly created projects.

**lex.** Contains dictionary files used by the spelling checker.

**local.** Where the local database is stored.

**locale.** Stores language-specific files.

**log.** Stores the log files from Siebel Web Client operations, such as synchronization.

**msgtempl.** Stores message files used by the Siebel Web Client.

**objects.** Contains compiled Siebel Repository (SRF) files and language-specific files.

**opatch.** Files used by the opatch utility for installing Siebel Patchset releases.

**public.** Contains HTML, ActiveX, Java, and JavaScript files, and image files used by the Siebel Web Client.

**sample.** Contains the Siebel Sample Database.

**sqltempl.** Contains SQL scripts. Do not modify these files.

**temp.** Contains working report files.

**upgrade.** Contains Siebel Anywhere upgrade files that have been retrieved by the user.

**webtempl.** Contains Siebel application Web templates.

## Verifying ODBC Data Sources for the Siebel Developer Web Client

Verification of ODBC data sources for the Siebel Developer Web Client is similar to that for Siebel Tools. For information, see [“Verifying the ODBC Data Sources for Siebel Tools” on page 207](#).

## Verifying Installation for Siebel Tools

After installing Siebel Tools, as a new installation or as a migration installation, review the installation log files, verify the version number of your installed software, and review the Siebel Tools directories and files that now exist under the *SIEBEL\_TOOLS\_ROOT* directory that you specified during the installation.

This topic contains the following information:

- [“Reviewing the Installation Log Files for Siebel Tools” on page 204](#)
- [“Verifying the Installation Version Number for Siebel Tools” on page 204](#)
- [“Reviewing the Installation Directories for Siebel Tools” on page 205](#)
- [“Verifying Successful Installation of Siebel Tools” on page 206](#)
- [“Verifying Directory Permissions for Siebel Tools” on page 207](#)
- [“Verifying the ODBC Data Sources for Siebel Tools” on page 207](#)

### Related Topic

[“Installing Siebel Tools” on page 164](#)

### Reviewing the Installation Log Files for Siebel Tools

After installing Siebel Tools, review the installation log files to verify that all of the components installed successfully, particularly if you experienced any difficulties with the installation. The log files are created in the following directory:

```
SIEBEL_TOOLS_ROOT\cfgtool\logs\oui
```

The relevant log files for an installation session are named `installActionsdate_time.log` file. In the file name, *date\_time* represents the date and time when the file was created; for example, `installActions2014-07-02_10-28-04PM.log`. For each set of files created, the oldest and largest log file generally represents the Siebel module being installed.

### Verifying the Installation Version Number for Siebel Tools

After installing Siebel Tools, verify the version number of the installed software.

#### *To verify the installation version number for Siebel Tools*

- 1 Open a DOS window.
- 2 Set the value of the `ORACLE_HOME` environment variable to correspond to your installation location, such as `C:\siebel\8.1.1.14.0\Tools` or `C:\siebel\8.2.2.14.0\Tools`. For example, enter a command like this for Siebel CRM version 8.1.1.14:

```
set ORACLE_HOME=C:\siebel\8.1.1.14.0\Tools
```

- 3 Navigate to the `opatch` directory within your installation. For example, enter a command like this for Siebel CRM version 8.1.1.14:

```
cd C:\siebel\8.1.1.14.0\Tools\opatch
```

- 4 Enter the following command:

```
opatch lsi nventory
```

Installed components within the specified Oracle home are displayed, with the version number as managed by the Oracle Universal Installer software. For example, the version number of an installation of Siebel CRM version 8.1.1.14 or version 8.2.2.14 is shown as 8.1.1.14.0 or 8.2.2.14.0.

## Reviewing the Installation Directories for Siebel Tools

The following minimum directories are created for a Siebel Tools installation. These directories, the files and subdirectories they contain, and various other files are created in the directory that you specified during the installation, such as `C:\siebel\8.1.1.14.0\Tools` or `C:\siebel\8.2.2.14.0\Tools`. Use Windows Explorer to verify the directory structure on your computer. In the list, *lang* represents each language that you have installed, such as ENU for U.S. English.

**NOTE:** The `objects` directory contains the SRF file. Monitoring of any SRF file by virus scanning software might significantly degrade Siebel Tools performance. If you have virus scanning software installed on your computers, then configure it to skip SRF files. Because these files are binary data files, the risk of virus infection is low, and so excluding these files from scanning is usually acceptable. Alternatively, you can scan SRF files less frequently than other files.

<b>adm</b>	Stores SIF files created in Siebel Tools that are used by Siebel ADM.
<b>admpkgr</b>	The ADM packager utility.
<b>bin</b>	All binary files (.exe, .dll, .cfg, .dsn, .enu, .bat), configuration files, and user preference files.
	<i>lang</i> Language-specific DLL files.
	dll Siebel Tools program library files.
	bin Siebel Tools binary files.
	exe Siebel Tools executable files.
<b>cfgtoollogs</b>	Contains installation log files.
<b>classes</b>	Java code files.
	examples
	examples\src
	examples\src\com
	examples\src\com\siebel
	examples\src\com\extra
	examples\src\com\integration
	examples\src\com\integration\mq Examples of Java code files.
	examples\src\com\integration\servlet Examples of Java code files.

<b>ddktempl</b>	Dynamic Developer Kit (DDK) files. For more information, see <i>Siebel Web UI Dynamic Developer Kit Guide</i> .	
<b>help</b>	Siebel Tools help files.	
	<i>lang</i>	Help files for the language that you installed.
<b>local</b>	The local, extracted database.	
	files	Local file attachments.
	inbox	Not used for Siebel Tools.
	outbox	Not used for Siebel Tools.
<b>locale</b>	Text files for installed languages containing version information.	
<b>log</b>	Log files from Siebel Tools operations.	
<b>msgtempl</b>	Message files.	
<b>objects</b>	Location of the compiled Siebel Repository file used by Siebel Tools (siebel_sia.srf). Also the default location for SRF files created using the Siebel Tools object compiler.	
<b>opatch</b>	Files used by the opatch utility for installing Siebel Patchset releases.	
<b>public</b>	HTML files, graphics files, and cascading style sheet files.	
<b>reppatch</b>	Location of the XML files used by the maintenance update wizard. All log files generated by this wizard are also created under reppatch\log.	
<b>sample</b>	Location where the Sample Database (sse_samp.dbf) is installed, if you installed it with Siebel Tools.	
	files	Where the sample file attachments are installed.
	inbox	Not used for Siebel Tools.
	outbox	Not used for Siebel Tools.
<b>scripts</b>	Location of Java scripts.	
<b>sqltempl</b>	SQL statement fragments used by certain Siebel Tools operations.	
<b>temp</b>	Temporary working area.	
<b>upgrade</b>	Not used for Siebel Tools.	
<b>webtempl</b>	Location of Siebel Web Template (.swt) files.	

## Verifying Successful Installation of Siebel Tools

After installing Siebel Tools, verify that installation was successful by starting Siebel Tools and connecting to the Siebel database.

### To verify that the Siebel Tools installation completed successfully

- Start Siebel Tools and log in to the Siebel database.

In the current release, the license keys for Siebel CRM base applications do not need to be entered manually. The license keys are provided in the seed data that is imported into a new Siebel database. The license keys are also part of the seed data that is imported into an existing database as part of Incremental Repository Merge or database upgrade operations. For more information about performing these operations, see *Siebel Database Upgrade Guide*.

## Verifying Directory Permissions for Siebel Tools

After installing Siebel Tools, verify that the Siebel Tools user has sufficient permissions to read and write data to the Siebel Tools installation directory.

### *To verify directory permissions for Siebel Tools*

- 1 Select the Siebel Tools root directory and right-click on it.
- 2 Choose Properties and go to the Sharing tab.
- 3 Make sure that the Siebel Tools user has read and write access.

In addition, in user account properties, the Siebel Tools user must not be defined as a restricted user in the group membership section.

## Verifying the ODBC Data Sources for Siebel Tools

The Siebel Tools installer creates the ODBC data sources described in [Table 12](#). By default, these are created as system data sources, which are visible to all of the user accounts on the computer where Siebel Tools is installed.

Table 12. Siebel Tools ODBC Data Sources

Data Source	Use
SSD Local Db default instance	Connects to the local SQL Anywhere database.
SSD	Connects to the DB2 database.
SSD default instance	Connects to the Microsoft SQL Server or Oracle Database.

For Oracle Database, verify that the following registry keys are set as shown. These values are required in order for the ODBC driver to behave correctly.

```

PacketSize = 0
EnableScrollableCursors = 0
ColumnsAsChar = 1
ColumnSizeAsCharacter = 1
    
```

For more information about how to run the Microsoft ODBC Administrator to verify ODBC data sources, see [“Verifying the ODBC Data Source” on page 208](#). See also [“Requirements for Installing Siebel Tools” on page 317](#).

## Verifying the ODBC Data Source

This topic provides information about verifying the ODBC data source for your database platform. It includes the following information:

- [“Verifying the ODBC Data Source for Oracle Database” on page 208](#)
- [“Verifying the ODBC Data Source for IBM DB2” on page 209](#)
- [“Verifying the ODBC Data Source for Microsoft SQL Server” on page 210](#)

### Verifying the ODBC Data Source for Oracle Database

Configuring the Siebel Enterprise automatically creates an ODBC system data source name (DSN) that the Siebel Server uses to connect to the Siebel database on the RDBMS.

Make sure that the appropriate version of the Oracle Database Client has been installed and that the Siebel Server service is started prior to verifying the ODBC data source. This topic applies also to virtual ODBC data sources in a clustered environment.

**NOTE:** For information about installing the Oracle Database Client for the current release, see *Siebel Security Guide*. This client is part of a new LDAP integration for Siebel CRM, for any RDBMS.

**CAUTION:** In general, do not change the default settings that are created automatically with the ODBC data source. However, if you have upgraded from earlier Oracle Database versions to Oracle Database 11g (which uses CBO), or if you manually created your ODBC, then you must check your ODBC settings, as shown in the following procedure.

For more information about the ODBC data source, see [“Planning RDBMS Installation and Configuration” on page 280](#).

#### *To verify the ODBC data source for Oracle Database (on Windows)*

- 1 Start the Microsoft ODBC Administrator.

Run the 32-bit version of the Microsoft ODBC Administrator, which is located here:  
C:\Windows\SysWOW64\odbcad32.exe.

**NOTE:** You need the 32-bit version of the Microsoft ODBC Administrator because Siebel Business Applications use 32-bit ODBC drivers and database clients only.

- 2 On the ODBC Data Source Administrator dialog box, select the System DSN tab.
- 3 Review the data source name; its default name is *SiebelEnterpriseName\_DSN*.

In the data source name, *SiebelEnterpriseName* is the name that you gave the Siebel Enterprise during its configuration.

- 4 Record the name of the ODBC data source in [Appendix A, “Siebel Deployment Planning Worksheet,”](#) if you have not already done so.
- 5 Select the data source *SiebelEnterpriseName\_DSN*, and click Configure.  
The ODBC Oracle Driver Setup screen appears.



- 6 To test the connection, click Test Connect.

If the connection is valid, then you see a message box confirming the connection.

If the connection could not be made, then see [“Verifying Network Connectivity for the Siebel Server Computer” on page 211](#) and [“Troubleshooting the ODBC Data Source Connection” on page 217](#).

- 7 In the Windows registry, locate the following registry entry:

[HKEY\_LOCAL\_MACHINE\SOFTWARE\ODBC\ODBC.INI\Siebel EnterpriseName\_DSN]

- 8 Verify that the following registry keys are set as shown. These values are required in order for the ODBC driver to behave correctly.

PacketSize = 0  
 EnableScrollableCursors = 0  
 ColumnsAsChar = 1  
 ColumnSizeAsCharacter = 1

## Verifying the ODBC Data Source for IBM DB2

Configuring the Siebel Enterprise automatically creates an ODBC system data source name (DSN) that the Siebel Server uses to connect to the Siebel database on the RDBMS.

Make sure that the appropriate database client has been installed and that the Siebel Server service is started prior to verifying the ODBC data source. This topic applies also to virtual ODBC data sources in a clustered environment.

**CAUTION:** Do not change the default settings that are created automatically with the ODBC data source.

For more information about the ODBC data source, see [“Planning RDBMS Installation and Configuration” on page 280](#).

**NOTE:** For information about verifying the ODBC data source for IBM DB2 for z/OS, see [Implementing Siebel Business Applications on DB2 for z/OS](#).

### To verify the ODBC data source for IBM DB2 (on Windows)

- 1 Start the Microsoft ODBC Administrator.

Run the 32-bit version of the Microsoft ODBC Administrator, which is located here:  
 C:\Windows\SysWOW64\odbcad32.exe.

**NOTE:** You need the 32-bit version of the Microsoft ODBC Administrator because Siebel Business Applications use 32-bit ODBC drivers and database clients only.

- 2 On the ODBC Data Source Administrator dialog box, select the System DSN tab.

- 3 Review the data source name; its default name is *EnterpriseName\_DSN*.

In the data source name, *EnterpriseName* is the name that you gave the Siebel Enterprise during its configuration.

- 4 Record the name of the ODBC data source in [Appendix A, “Siebel Deployment Planning Worksheet,”](#) if you have not already done so.

- 5 Select the data source *EnterpriseName\_DSN*, and click Configure.

A DB2 Message box appears to let you know your connection status.

If you are not connected, then you are prompted whether you want to connect now to the data source.

- 6 Click Yes.

The Connect to DB2 Database screen appears.

- 7 Type your user ID and passwords into the applicable fields, and click OK.

If the connection is valid, then you see a message box confirming the connection.

If the connection could not be made, then see [“Verifying Network Connectivity for the Siebel Server Computer” on page 211](#) and [“Troubleshooting the ODBC Data Source Connection” on page 217](#).

- 8 From the Windows command prompt, navigate to *SIEBEL\_ROOT\si\_ebsrvr\BIN*, and execute the following command:

```
odbcsql /s ODBC_DSN /u database_account_name /p password
```

where:

- *ODBC\_DSN* is the ODBC data source name, in the form *SiebelEnterpriseName\_DSN*. In the data source name, *SiebelEnterpriseName* is the name of your Siebel Enterprise.
- *database\_account\_name* is a valid database account name.
- *password* is the corresponding database account password.

When you connect, a confirmation message appears.

### Verifying the ODBC Data Source for Microsoft SQL Server

Configuring the Siebel Enterprise automatically creates an ODBC system data source name (DSN) that the Siebel Server uses to connect to the Siebel database on the RDBMS.

Make sure that the appropriate database client has been installed and that the Siebel Server service is started prior to verifying the ODBC data source. This topic applies also to virtual ODBC data sources in a clustered environment.

**CAUTION:** Do not change the default settings that are created automatically with the ODBC data source.

For more information about the ODBC data source, see [“Planning RDBMS Installation and Configuration” on page 280](#).

### To verify the ODBC data source for Microsoft SQL Server

- 1 Start the Microsoft ODBC Administrator.

Run the 32-bit version of the Microsoft ODBC Administrator, which is located here:  
C: \Windows\SysWOW64\odbcad32.exe.

**NOTE:** You need the 32-bit version of the Microsoft ODBC Administrator because Siebel Business Applications use 32-bit ODBC drivers and database clients only.

- 2 On the ODBC Data Source Administrator dialog box, select the System DSN tab.

- 3 Review the data source name; its default name is *SiebelEnterpriseName\_DSN*.

In the data source name, *SiebelEnterpriseName* is the name that you gave the Siebel Enterprise during its configuration.

- 4 Record the name of the ODBC data source in [Appendix A, "Siebel Deployment Planning Worksheet,"](#) if you have not already done so.

- 5 Select the data source *SiebelEnterpriseName\_DSN*, and click Configure.

The Microsoft SQL Server DSN Configuration screen appears.

- 6 Click Next, and click Client Configuration.

The Edit Network Library Configuration screen appears.

- 7 Verify that the port number for the database is correct.

- 8 If the port number is incorrect, then edit it, and then click OK.

To edit the port number, you might have to first select and then deselect the check box Dynamically Determine Port.

The Microsoft SQL Server DSN Configuration screen appears.

- 9 Select verification with SQL Server using a valid database login ID and password that you enter in the Login ID and Password fields. Then click Next.

The program tests the connection:

- If the connection is valid, then you see a message box confirming the connection.
- If the connection could not be made, then see ["Verifying Network Connectivity for the Siebel Server Computer" on page 211](#) and ["Troubleshooting the ODBC Data Source Connection" on page 217](#).

## Verifying Network Connectivity for the Siebel Server Computer

The Siebel Server must have network access to other Siebel Enterprise components, such as the Siebel Gateway Name Server, the Siebel database on the RDBMS, and the Siebel File System. Use the following procedure to verify that the Siebel Server computer can access other Siebel Enterprise components.

The Siebel Server Configuration Wizard sets the TCP/IP registry values as follows:

```
HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Tcpip\Parameters
```

```
TcpTimedWaitDelay = 30
```

```
MaxUserPort = 65534
```

```
MaxFreeTcbs = 10000
```

```
MaxHashTableSize = 2048
```

The Configuration Wizard saves the original registry values in the registry file *SIEBEL\_ROOT\si\_ebsrvr\admin\tcp\_bak.reg*. If you want to reset the applicable keys to the values prior to the Siebel installation, then you can import them from this registry file.

**NOTE:** For information about verifying network connectivity for IBM DB2 for z/OS, see *Implementing Siebel Business Applications on DB2 for z/OS*.

### **To verify network connectivity for the Siebel Server computer**

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

For TCP/IP networks, use the ping utility to verify network connectivity. Or test the connection through Control Panel, Administrative Tools, Data Sources (ODBC), and then System DSN.

- 2 For Oracle Database, verify connectivity to the Siebel database, then go to [Step 5 on page 213](#).

Use the tnsping utility and Oracle Database connectivity alias, as appropriate to your database, from a command prompt window to make sure that you can connect to the database using the network connect string that you defined.

- 3 For IBM DB2, verify connectivity to the Siebel database, then go to [Step 5 on page 213](#).

- a Open a DB2 Command Window to make sure that you can connect to your database.

**CAUTION:** Use the DB2 Command Window, not the DB2 command line processor, to enter these commands, because the DB2 command line processor window uses different syntax. The commands in this procedure work only if you issue them in a DB2 Command Window.

- b Choose Start, All Programs, IBM DB2, Command Line Tools, and then Command Window. Enter:

```
db2 connect to database_alias user user_ID using password
```

where:

- *database\_alias* is your database alias
- *user\_ID* is a valid user name on DB2
- *password* is the password for that *user\_ID*

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

Database Connection Information

```
Database Server      = DB2/NT x. x. x
SQL authorization ID = SADMIN
Database alias      = DB_Alias
```

- c** If your connection is not valid, then verify your configuration.
- d** To close the connection, type `db2 terminate`. You can also use the DB2 Command Center GUI tool to terminate the connection.
- 4** For Microsoft SQL Server, verify connectivity to the Siebel database, then go to the next step. Navigate to Control Panel, Administrative Tools, and then Data Sources (ODBC). Under System DSN, select the data source, and click Configure. This wizard provides a button for testing the connection.
- 5** Provide network connections from the Siebel Server to all of the applicable Siebel File System directories.  
  
Do not use a mapped network drive as this network connection. Instead, use a UNC share. The sharename syntax must be in this form: `\\Siebel_Server_Name\Sharename`.  
  
For more information, see ["Creating the Siebel File System" on page 289](#).
- 6** Verify that the Siebel File System directories are visible and that the Siebel service owner account has the necessary permissions on these directories.

If you are clustering the Siebel File System, then use the Network IP resource or Network Hostname Resource assigned to that cluster file share.

## Verifying Network Connectivity for Mobile Users

Siebel Mobile Web Client users must be able to connect to the Siebel Remote Server, using TCP/IP, to synchronize with the master Siebel database. Make sure that you have the correct network software and hardware installed to support this connectivity and that your remote users are able to establish a TCP/IP connection to the server. To check connectivity, use the `ping` utility.

### Related Book

*Siebel Remote and Replication Manager Administration Guide*

## Verifying That the Siebel Gateway Name Server Has Started

If, during configuration, you selected manual start for the Siebel Gateway Name Server, then you must make sure that the Siebel Gateway Name Server is started when you do any of the following:

- Create and configure the Siebel Enterprise
- Configure a new Siebel Server
- Operate any of the Siebel applications
- Remove the configuration of a Siebel Server (such as when uninstalling) or the Siebel Enterprise

**NOTE:** It is recommended that you review the Siebel Gateway Name Server log files, which are found in the `SIEBEL_GATEWAY_ROOT\LOG` directory.

### *To start the Siebel Gateway Name Server manually on Windows*

- 1 Navigate to Control Panel, Administrative Tools, and then Services.
- 2 If the Siebel Gateway Name Server is not started, then click Action, and then Start.

#### Related Topics

[“Starting the Siebel Gateway Name Server” on page 119](#)

[“Verifying Installation for the Siebel Enterprise Server” on page 191](#)

[“Troubleshooting Installation and Configuration for Siebel Enterprise Server” on page 214](#)

## Troubleshooting Installation and Configuration for Siebel Enterprise Server

This topic presents troubleshooting information related to installation and configuration of Siebel Enterprise Server components.

#### Related Topics

[“Starting the Siebel Gateway Name Server” on page 119](#)

[“Starting the Siebel Server Service” on page 120](#)

[“Verifying Installation for the Siebel Enterprise Server” on page 191](#)

[“Verifying That the Siebel Gateway Name Server Has Started” on page 214](#)

## Troubleshooting Installation and Configuration for the Siebel Gateway Name Server

This topic describes potential errors that can result from a faulty installation or configuration of Siebel Gateway Name Server. Such problems can have any of several causes, the most common of which are listed in [Table 13 on page 215](#).

**NOTE:** If you cannot start the Siebel Gateway Name Server, then you will not be able to configure a Siebel Enterprise or configure and start a Siebel Server.

Table 13. Troubleshooting Siebel Gateway Name Server Installation and Configuration

Problem	Cause	Solution
The Siebel Gateway Name Server does not start.	You might not have privileges as the Siebel service owner.	Review the instructions in <a href="#">“Creating the Siebel Service Owner Account” on page 293</a> .
You cannot start the Siebel Gateway Name Server service on \\COMPUTER_NAME.  Error XXX: The service did not start due to Logon failure.	Login failure	<ol style="list-style-type: none"> <li>1 Navigate to Control Panel, Administrative Tools, and then Services.</li> <li>2 Select the Siebel Gateway Name Server.</li> <li>3 Right-click, then choose Properties.</li> <li>4 In the Log On tab, specify the user name and password to use for this service.</li> </ol>
You receive an error at system startup that a driver is missing.	This problem can occur if you uninstall earlier Siebel Business Applications versions without first stopping the Siebel Server.	<p>Stop the Siebel Server before uninstalling Siebel Business Applications.</p> <p>If the services are no longer visible within the Services menu, then contact Oracle Global Customer Support for instructions.</p>

## Troubleshooting Installation and Configuration for the Siebel Server

This topic describes potential errors that can result from a faulty installation or configuration of Siebel Server. Such problems can have any of several causes, the most common of which are listed in [Table 14](#).

Table 14. Troubleshooting Siebel Server Installation and Configuration

Problem	Cause	Solution
The Siebel Server cannot be installed.	Insufficient user privileges	For information about setting up appropriate administrative user privileges to install, see <a href="#">“Creating the Siebel Service Owner Account”</a> on page 293.
	Trying to install or configure the Siebel Server out of sequence	For the required installation and configuration sequence, see <a href="#">Chapter 2, “Overview of Installing Siebel Business Applications.”</a>
	Failure to install the required hardware or software	Installation errors related to software requirements are logged in the Siebel Enterprise Server installer log file. For requirements, see the Certifications tab on My Oracle Support.
<p>The following error messages occur for a Siebel Enterprise supported by a Microsoft SQL Server database:</p> <ul style="list-style-type: none"> <li>■ In the SVRsetup.log file: 5000: Bad key name., , exi ti ng. . .</li> <li>■ In Microsoft SQL Server DSN configuration (server field): completed wi th error(s): 2000046</li> </ul>	You used brackets in the name that you gave to one or more of your Siebel Servers or to your Siebel Enterprise Server.	Remove the applicable configurations and re-create them with new names. For more information, see <a href="#">“Process of Removing Configuration Data”</a> on page 256.



Table 14. Troubleshooting Siebel Server Installation and Configuration

Problem	Cause	Solution
The Siebel Server does not start after configuration.	Siebel Gateway Name Server not started	Verify that the Siebel Gateway Name Server was started. Start it if it was stopped.
	Invalid input values during configuration	Verify that the input values during configuration were valid.
	Insufficient system privileges	Verify that you have sufficient system privileges to start the service. For more information, see <a href="#">“Creating the Siebel Service Owner Account”</a> on page 293.

## Troubleshooting the ODBC Data Source Connection

This topic describes troubleshooting steps for your ODBC data source connection.

**NOTE:** If your database is IBM DB2 for z/OS, then see *Implementing Siebel Business Applications on DB2 for z/OS*.

### Troubleshooting Connection Problems on Oracle Database

Complete the following instructions to troubleshoot Oracle Database connection problems on Windows. See also [“Configuring Siebel Server Connectivity to the Siebel Database”](#) on page 347.

#### To troubleshoot a failed ODBC connection for Oracle Database

- 1 Verify that the ODBC driver was correctly installed by reviewing the file structure under `SI EBSRVR_ROOT\BIN`.
- 2 If the files have been correctly copied to the BIN subdirectory, then verify that the Oracle connect string that you entered during the Siebel Enterprise configuration was valid.

### Troubleshooting Connection Problems on IBM DB2

Complete the following instructions to troubleshoot IBM DB2 connection problems. See also [“Configuring Siebel Server Connectivity to the Siebel Database”](#) on page 347.

#### To troubleshoot a failed ODBC connection for IBM DB2

- Verify that the data source name (`SiebelEnterpriseName_DSN`) that you entered during the Siebel Server configuration was valid. Also verify that the required IBM DB2 client version is available on the machine and verify that the IBM DB2 catalog step has been completed correctly.

### Troubleshooting Connection Problems on Microsoft SQL Server

Complete the following instructions to troubleshoot Microsoft SQL Server connection problems on Windows. See also [“Configuring Siebel Server Connectivity to the Siebel Database” on page 347](#).

#### *To troubleshoot a failed ODBC connection for Microsoft SQL Server*

- Verify that the data source name (*SiebelEnterpriseName\_DSN*) that you entered during the Siebel Server configuration was valid. Also verify that the SQL Server database is up and running, and validate the ODBC connectivity.

## Troubleshooting Installation for the Siebel Database

These topics provide suggestions for troubleshooting problems that you might encounter when installing and configuring the Siebel database.

### Troubleshooting Installation for the Siebel Database

Typically, problems during database installation result from insufficient storage space having been allocated, or from the installer having improper user privileges.

### Acceptable Errors for Installation of the Siebel Database

The log files might include errors that are expected and benign. Compare any error messages found in the log files to the sample error messages in the errors.rtf file, which is located in the installation subdirectory for your database, for example, ORACLE or MSSQL. If a log file is not listed in the errors.rtf file, then there are no acceptable error messages for that log file. No further action is required if the log files contain errors listed in the errors.rtf file.

**NOTE:** Only one of each type of error occurring in a particular log file appears in the errors.rtf file.

If you find errors that are not listed in the errors.rtf file, then correct the condition that caused the errors, and rerun the Upgrade Wizard. The wizard restarts from the point where it left off.

Do not review only the error numbers because these might have changed following installation of a new driver version. Instead, compare the error descriptions to find out which are acceptable errors for this database.

**CAUTION:** Although other errors are rarely encountered, this review is critical. Certain errors, such as a failure to create indexes, might result in performance problems or anomalous behavior in Siebel Business Applications.

You can view a log summary generated using the logparse utility. For more information, see *Siebel Database Upgrade Guide*.

## Troubleshooting Siebel Repository Import for the Siebel Database

Typical problems that can occur at this stage are shown in [Table 15](#). These errors might appear in the log files produced by the Siebel Repository import process.

Table 15. Troubleshooting Siebel Repository Import for the Siebel Database

Problem	Cause	Solution
Cannot import a Siebel Repository	Importing a Siebel Repository with the same name as an existing Siebel Repository	Choose a unique name for the new Siebel Repository.
Database runs out of tablespace pages and cannot allocate new data pages	Insufficient tablespace size	Increase the tablespace sizes.
(IBM DB2 only) Errors regarding the settings for DB2 configuration parameters, such as APP_CTL_HEAP_SZ	Values too low	Reset the DB2 configuration parameters to higher values. Guidelines for Siebel Business Applications suggest using only minimum values.

## Troubleshooting Installation for the Siebel Web Server Extension

This topic provides suggestions for troubleshooting problems that you might encounter when installing and configuring the Siebel Web Server Extension (SWSE). Typical problems are shown in [Table 16](#).

Table 16. Troubleshooting Siebel Web Server Extension Installation

Problem	Cause	Solution
After installation, when the Siebel Web Client is started, a message appears, stating:  Page Cannot be displayed	The Web server instance is not running.	Make sure that the Web server instance is running.  Refresh the connection between your browser and the Web site.
	The Web server port is incorrectly specified in the eapps.cfg file.	Verify that the Web server port information in the eapps.cfg file is correct.
	Virtual directories were not installed or configured properly.	Make sure that the Local Path for the virtual directories is correct and resembles the following:  <i>SWSE_ROOT\PUBLIC\language</i>  If you use a custom virtual directory, then make sure that you add the sweiis.dll parameter to your virtual directory to allow communication with the Siebel Server. For information, see <a href="#">"Creating Custom Virtual Directories" on page 147</a> .
	Anonymous users have incorrect responsibilities.	Make sure that anonymous users specified in the eapps.cfg file (AnonUserName and AnonPassword parameters) are also defined in the Siebel database with the correct responsibilities. Otherwise, end users cannot access the home page.
	The connect string for the Siebel application is incorrect.	Make sure that the connect string for the Siebel application is correct. The value resembles the following example (where load balancing is not deployed):  ConnectString = siebel.TCPIP.none.none:// <i>Siebel ServerHost: 2321/ EnterpriseServerName/ ProductNameObjMgr_language</i>
	Siebel Server components or component groups might not be enabled.	Make sure that the necessary Siebel Server components and component groups are enabled.

Table 16. Troubleshooting Siebel Web Server Extension Installation

Problem	Cause	Solution
Your Siebel application stops responding, displays a blank page or page not found, or times out.	Appropriate parameters are not available within the [defaults] section of the eapps.cfg file for Siebel Business Applications.	Make sure that the [defaults] section of the eapps.cfg file contains valid AnonUserName, AnonPassword, HTTPPort, and HTTPSPort values.  Also make sure that SessionTimeout and GuestSessionTimeout have appropriate values. For information about configuring these and other parameters, see <a href="#">“Configuring the SWSE Logical Profile” on page 82.</a>
After stopping the IIS Administration service, an error message appears:  The service did not respond to the start or control request in a timely fashion	Stopping the IIS Administration service from Control Panel, Administrative Tools, then Services creates an error.	Open a DOS command window, and enter the following command to release all of the resources that are used by this service, such as inetinfo.exe and dllhost.exe:  IISRESET /START  If, after doing this, you still cannot start Siebel Business Applications, then you must restart the computer.
Inability to access the Siebel Web Client. The browser status bar might display errors such as:  SWESubmitOnEnter is undefined  Also, the login page might stop responding.  Or, the Siebel Web Client login page does not display properly; for example, images might be missing.	The IUSR user account does not have proper permissions to the <i>SWSE_ROOT\publi c\lang</i> directory.	Stop the Web server. Make sure that the permissions meet the requirements described in <a href="#">“Requirements for Installing and Configuring the Siebel Web Server Extension” on page 304.</a> Restart the Web server.

## Configuring the Siebel Mobile Web Client When Neither Siebel VB nor Siebel eScript Is Licensed

By default, the Siebel Mobile Web Client has Siebel VB or Siebel eScript enabled. The parameter `EnableScripting` is set to `True` in the application configuration files. If this parameter is `True`, but neither Siebel VB nor Siebel eScript is licensed, then the Siebel Mobile Web Client does not start. An error message is returned, indicating that you must turn off Siebel VB or Siebel eScript before running the Siebel Mobile Web Client.

### *To configure the Siebel Mobile Web Client when neither Siebel VB nor Siebel eScript is licensed*

- Set `EnableScripting` to `FALSE` in the configuration file used by your Siebel Mobile Web Client, such as `uagent.cfg` for Siebel Call Center. This configuration file is located in the directory `SIEBEL_CLIENT_ROOT\bin\LANGUAGE`.

where:

- `SIEBEL_CLIENT_ROOT` is the directory where you installed the Siebel Mobile Web Client.
- `LANGUAGE` is the three-letter code for the language in which you are running the Siebel Mobile Web Client.

## About the Environment Verification Tool

The Environment Verification Tool (EVT) is a tool intended to help system administrators verify the configuration of the Siebel CRM environment. System administrators can use the EVT utility to identify errors and potential problems in the Siebel Enterprise after installation in a development or test environment, or following rollout or upgrades.

It is recommended that you use EVT to verify your Siebel Business Applications environment. EVT is included with the installed software for Siebel Server, Siebel Gateway Name Server, and Siebel Web Server Extension (SWSE). It is provided for each supported Siebel Enterprise Server operating system.

### Siebel Modules or Third-Party Products That EVT Can Check

You can run EVT against Siebel Business Applications modules and some third-party products.

- Siebel Gateway Name Server
- Siebel Server
- Siebel Web Server Extension
- Web server (Oracle HTTP Server, Microsoft IIS, IBM HTTP Server, HP Apache Web Server, or Oracle iPlanet Web Server)
- Database

## EVT Check Groups

The EVT engine is driven by a configuration file (evt.ini). This file is specific for each version of Siebel Business Applications, and cannot be used to run the utility against an earlier or a later version of the software. This file identifies the default checks that must be run, and it also provides the dependency logic, such as operating system-specific checks or database-specific checks, between different checks. The evt.ini file can be customized to check for other issues as well.

If you want to create customized checks, then create a copy of the original evt.ini file for this purpose, so that you do not accidentally affect EVT functionality.

You can use EVT to validate configuration settings in the following check groups:

- Environment checks (ENV)
- Siebel Server checks (SVR)
- Database client checks (DBC)
- Web server checks (WEB)
- Database server (RDBMS) checks (DBS)
- Internal checks (INT)
- Network settings checks (NET)
- Operating system checks (OS)
- Other checks (OTH)

## About the EVT Configuration File

EVT uses a configuration file (evt.ini) to determine what checks to perform and, for each check, what settings it will check for. Each Siebel CRM release has a corresponding configuration file specific for that release. This file resides under the bin subdirectory of the *SIEBSRVR\_ROOT* directory on the Siebel Server, or of the *SWSE\_ROOT* directory on the SWSE.

In the evt.ini file, the [CheckX] sections contain check definitions for different check groups. Refer to the evt.ini file for descriptions of the parameters used for each check section. A check definition can have the parameters shown in Table 17. Not shown in the table are check-dependent parameters, such as PARAMNAME and PARAMVALUE.

Table 17. EVT Check Definition Format

Parameter	Description
CHECKID	Unique identifier for each check definition.
CHECKGROUP	The area of the application environment that is verified by this check.
CHECKNAME	Name of the check to run.

Table 17. EVT Check Definition Format

Parameter	Description
SERVERTYPE	<p>The server type on which the check can be run: either Siebel Server, Siebel Gateway Name Server, Web server with SWSE, or Database Server (RDBMS). For values, see <a href="#">“Optional EVT Command-Line Flags” on page 226</a>.</p> <p>SERVERTYPE can have multiple delimited values separated by commas, for example, SERVERTYPE=DBSERVER,SIEBSRVR,SWSE.</p>
OSTYPE	<p>The operating system applicable to this check. OSTYPE can have multiple delimited values separated by commas, for example, OSTYPE=AIX,HPUX,LINUX,SOL,W32.</p> <p>For a list of supported operating systems for the current release, see the Certifications tab on My Oracle Support.</p>
DEPENDENCY	<p>This feature is used to implement conditional logic in the .ini file, for example, checking for the right Oracle client version if Oracle Database is in use.</p> <p>DEPENDENCY can have multiple delimited values separated by commas, for example, DEPENDENCY=Check1,Check231.</p>
PRIMARY	<p>Determines whether this check must be printed as part of the output. Dependent checks that prevent the next check from succeeding are not printed in the output.</p>
RESULTMODE	<p>The value of RESULTMODE specifies how the check is evaluated. Use one of the following values:</p> <ul style="list-style-type: none"> <li>■ <b>evaluate</b>. Performs a text comparison and returns TRUE if the values are the same.</li> <li>■ <b>inverted</b>. The opposite of evaluate. Returns FALSE where evaluate would return TRUE.</li> <li>■ <b>versioncheck</b>. Evaluates version strings, including dotted version strings.</li> <li>■ <b>invertedversioncheck</b>. The opposite of versioncheck. Returns FALSE where versioncheck would return TRUE.</li> </ul>
ERRORLEVEL	<p>This parameter uses two values, WARN and FAIL, to determine whether the failure of a particular check constitutes a critical failure or just a warning.</p> <p>Critical failures are misconfigurations that would result in the failure of Siebel Business Applications software in one form or another. Warnings apply to misconfigurations that might result in reduced performance but not necessarily in a software failure.</p>

Parameters in the .ini file must be set to the alias and not to the value; for example, PARAMNAME=Lang and PARAMVALUE=ENU.



You can use # (pound sign) as a comment character in the evt.ini file, to disable particular entries.

You can also add new checks to the .ini file based on your business requirements, using the parameters described in [Table 17 on page 223](#). If you decide to do so, then make a copy of the file, and make your modifications in the new file. Then run EVT using the -f option, as described in [“Optional EVT Command-Line Flags” on page 226](#), to direct EVT to use the new configuration file.

## Using the Environment Verification Tool

EVT uses various operating systems utilities and Siebel command-line utilities to query information about installation and configuration settings for Siebel components. EVT verifies that the computers running Siebel Business Applications software are configured correctly and according to the Certifications tab on My Oracle Support and other documented requirements.

This topic has the following information:

- [“Starting the EVT Utility” on page 225](#)
- [“Running EVT in Query Mode” on page 226](#)
- [“Optional EVT Command-Line Flags” on page 226](#)
- [“Available EVT Output Formats” on page 228](#)
- [“Changing EVT Output Text” on page 229](#)

### Starting the EVT Utility

The EVT executable program is installed under the bin subdirectory of *SIEBSRVR\_ROOT*. The command name is evt.exe for Windows or evt for UNIX operating systems.

You can run this executable program with different options, depending on what part of your environment that you want to check.

On Windows, in order to be able to run EVT, *SIEBSRVR\_ROOT\BIN* must be included in the environment path.

**NOTE:** For more information about using EVT, see 477105.1 (Article ID) on My Oracle Support. This document was previously published as Siebel Technical Note 467.

Review the following topics to determine how to edit the evt.ini file and how to use command-line options:

- [“About the EVT Configuration File” on page 223](#)
- [“Optional EVT Command-Line Flags” on page 226](#) (includes command examples)
- [“Available EVT Output Formats” on page 228](#)
- [“Changing EVT Output Text” on page 229](#)

The evt.ini file contains all of the approved checks. If you have to add any checks or modify any of the existing checks, then make a copy of the file, and make your modification in the new file. Then run EVT using the -f option to direct EVT to use the new configuration file.

### To start EVT

- 1 Open a DOS command window.
- 2 Navigate to the `SIEBSRV_ROOT\BIN` directory, and run `evt.exe` with any valid flags.  
You can include any of the flags described in [“Optional EVT Command-Line Flags” on page 226](#).

## Running EVT in Query Mode

EVT can also be run in query mode. This mode is intended to work with other utilities that query the installation for information.

To run EVT in query mode, you use the `-q` flag. The `-q` flag must be accompanied by a properly formatted query string.

**NOTE:** In query mode, EVT ignores all of the other options (except `-h`).

The query string consists of `name=value` pairs delimited by the plus sign (+).

The output of EVT in this mode is either `pass[]` or `fail []`, with the current value of the parameter in brackets, where applicable. The following are examples for UNIX.

### Example

```
% evt -q "Checkname=VAR+ParamName=SIEBEL_ASSERT_MODE+ParamValue=0"
fail []
```

This command returns `fail []` because `SIEBEL_ASSERT_MODE` is not set to 0 and its current value is `[NULL]`.

### Example

```
% evt -q "Checkname=UNDEFVAR+ParamName=SIEBEL_ASSERT_MODE"
pass[]
```

This command returns `pass[]`. Because `SIEBEL_ASSERT_MODE` is not defined, `UNDEFVAR` checks whether the variable is defined. As expected, this check passes, and the current value is still `[NULL]`.

## Optional EVT Command-Line Flags

You can run the EVT utility with various options as described in [Table 18 on page 227](#).

**NOTE:** If you do not provide `-e`, `-g`, `-s`, `-u`, and `-p` options, then EVT tries to query information from the configuration files under the `ENU` directory. On Windows, `-r` is a required flag; all of the other flags are optional.

Table 18. Command-Line Flags Used with EVT

Flag	Description
-h	Prints a help message with a list of all of the flags that you can use with the EVT utility.
-g	The name of the Siebel Gateway Name Server. If it is not provided, then EVT picks up the name of the Siebel Gateway Name Server from the Siebel Server configuration file; for example, <code>enu\si ebel . cfg</code> .
-s	The name of the Siebel Server. If it is not provided, then EVT tries to determine the name of the server from the <code>siebenv.bat</code> file.
-e	The name of the Siebel Enterprise. If it is not provided, then EVT determines the name of the Siebel Enterprise from the Siebel Server configuration file; for example, <code>enu\si ebel . cfg</code> .
-u	The user name to use to log in to Server Manager. The default user name is <code>sadmi n</code> .
-p	The password to log in to Server Manager.  <b>NOTE:</b> If any <code>svrmgr</code> parameters are provided incorrectly, then EVT will not be able to check Siebel Server parameters. To print the details of root cause, use the <code>-d SHOWERRORS</code> flag.
-r	Required. Specifies the path to the <code>SIEBEL_ROOT</code> directory.
-o	The output format. EVT can generate output in several formats: TEXT (default), TEXTFILE, HTML, and HTMLFILE. For more information, see <a href="#">“Available EVT Output Formats” on page 228</a> .
-d	Runs the script in debug mode. Supported debug levels are shown in order of verbosity, starting with the least verbose level (see examples of this flag as follows):  <b>DEFAULT.</b> (Default) Prints only check for pass, fail, or not executed.  <b>EXPLAIN.</b> Prints a description of what has been checked and why. If a check cannot run, then no explanation is given. If a check executes and finds an error, then it reports the corrective actions to be taken.  <b>SHOWERRORS.</b> Prints the same information as EXPLAIN, but, in addition, prints any errors encountered that prevented a check from executing. For example, if the check tried to verify that a particular file was executed, but the file does not exist, then SHOWERRORS provides the error that prevented the execution.  <b>SHOWCOMMENTS.</b> Prints the same output as SHOWERRORS, but, in addition, prints more detailed information about how the check was implemented. The output represents debug information, for example: <code>Got value A from file X</code> .  <b>EVTLOG.</b> Prints the same output as SHOWCOMMENTS, but, in addition, prints the execution log for EVT. This output is primarily useful to EVT developers.
-l	The output directory to which reports are written.

Table 18. Command-Line Flags Used with EVT

Flag	Description
-t	<p>The type of server to check:</p> <ul style="list-style-type: none"> <li>■ Siebel Server [SIEBSRVR]</li> <li>■ Siebel Gateway Name Server [GTWYNS]</li> <li>■ Database Server (RDBMS) [DBSERVER]</li> <li>■ Siebel Web Server Extension [SWSE]</li> </ul> <p>For example, if -t SWSE is specified, then EVT runs Web server-related checks (along with those checks that can be run on any type of server, such as for JRE).</p>
-f	The location of the evt.ini file. When EVT is started, it verifies the existence of this file. By default, the evt.ini file is located in the same directory as the EVT executable program. If the evt.ini file is located in a different directory, or has a different name, then you must use this flag to specify the location of the evt.ini file.
-q	Runs EVT in query mode. See <a href="#">“Running EVT in Query Mode” on page 226</a> .
-w	The location of the Web server installation.

### Example 1

Starting EVT using a custom .ini file and generating HTML output:

```
evt.exe -f evt_cust.ini -o HTML -r SIEBEL_ROOT > output.htm
```

### Example 2

Starting EVT using a custom .ini file and generating HTML output with details on what commands were run, what files were opened, and so on:

```
evt.exe -f evt_cust.ini -o HTML -d SHOWCOMMENTS -r SIEBEL_ROOT > output_debug.htm
```

## Available EVT Output Formats

EVT supports the following output formats:

- **TEXT.** Prints all of the output directly to the console, terminal, or DOS window. This format is the only mode of operation when EVT is executed in query mode by giving the -q option. For an explanation of flags that can be used with EVT, see [“Optional EVT Command-Line Flags” on page 226](#).
- **TEXTFILE.** Prints all of the output to a log file. The file name format is `evt.hostname.timestamp.log`. The log is created in the current directory. To create the log in a specified directory, use the option `-l log_dir`. In this option, `log_dir` is the path to the directory that you want.
- **HTML.** Prints HTML output to the console, terminal, or DOS window. This format is mainly for redirecting the output to another program or utility that can consume the output or redirect it to a file.

- **HTMLFILE.** HTMLFILE output format creates an HTML file in the current directory. The file name takes the form `evt. hostname. timestamp. htm`, where:
  - *hostname* is the computer name where you are running EVT.
  - *timestamp* is the number of epoch seconds (starting from January 1, 1970). This value is used solely to maintain the uniqueness of file names.

It is recommended that you delete previously generated output files on a regular basis.

## Changing EVT Output Text

EVT supports user-specified strings in output reports. By default, EVT output reports are generated using a message template. However, the user can specify any other string to be used as part of the report. The following user-defined output tags are supported:

- **USERPASSEDSTRING.** Overrides the internal message template and allows you to specify your own message, in case this check passes.
- **USERFAILEDSTRING.** Overrides the internal message template and allows you to specify your own message, in case this check fails.
- **USERNOTEXESTRING.** Overrides the internal message template and allows you to specify your own message, in case this check is not executed.

The user-defined message can contain some placeholders that are defined by EVT. Such placeholders are specified by using two underscores on each side. During execution of the checks, these placeholders are substituted. When the check runs, the following placeholders are defined:

- **CURRENTVALUE.** The current value of the parameter being checked.
- **PASSEDSTRING.** The system-defined *check passed* message.
- **FAILEDSTRING.** The system-defined failure or error message.
- **NOTEXESTRING.** The system-defined *check is not executed* message.
- **CHECKID.** The ID number of the currently executing check.

For example, assume a user-defined check like the following:

```
[Check241]
CHECKNAME=OSVERSION
OSTYPE=AI X
PARAMVALUE=5200-02
```

```
USERFAILEDSTRING=[__CHECKID__] Version __CURRENTVALUE__ is not supported anymore.
Please contact Mr. John Smith (j.smith@yourcompanyhere.com) to get your system
upgraded to __PARAMVALUE__.
```

In this example, when the placeholders are filled by values when the check executes, the error defined for the USERFAILEDSTRING tag appears in the output report as follows:

```
[Check241] Version 5100-02 is not supported anymore. Please contact Mr. John Smith
(j.smith@yourcompanyhere.com) to get your system upgraded to 5200-02.
```



# 9

## Cloning a Siebel Installation

This chapter explains how to clone an installation of Siebel Enterprise Server or Siebel Web Server Extension on one computer and deploy it on another computer. This chapter includes the following topics:

- [About Cloning a Siebel Installation on page 231](#)
- [Requirements When Cloning an Installation on page 233](#)
- [Limitations When Cloning an Installation on page 235](#)
- [Process of Cloning a Siebel Installation on page 236](#)
- [Properties Files Used in Cloning Operations on page 238](#)
- [Properties File Settings for Cloning an Installation on page 239](#)

### About Cloning a Siebel Installation

You can copy or clone an existing installed instance of Siebel Enterprise Server or Siebel Web Server Extension on a source computer and then deploy the clone as a new instance on a target computer.

For a cloning operation, the existing installed Siebel software instance from which you create a clone is called the *source instance*, and the computer where the software instance is installed is called the *source computer*. The new Siebel software instance that you deploy is called the *target instance*, and the computer where you deploy it is called the *target computer*.

Using the cloning feature requires the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14. You can clone any source instance that is at the current release level.

#### About Cloning a Siebel Enterprise Server Installation

The primary intended usage case for Siebel Enterprise Server cloning is to clone an installed and configured instance of Siebel Server.

When you deploy a Siebel Server clone, you can optionally create a new Siebel Gateway Name Server on the target computer. Alternatively, you can specify that the target instance of Siebel Server should use an existing installed instance of Siebel Gateway Name Server on another computer.

When you create the clone for the Siebel Server source instance, you can include certain configuration data sets, such as the Siebel Server configuration or the Siebel Enterprise configuration. Typically, you export the Siebel Server configuration as part of the clone. If you will create a new Siebel Gateway Name Server on the target instance, then you also export the Siebel Enterprise configuration. When you deploy the clone, you can import this configuration data into the new or existing Siebel Gateway Name Server for the new target instance of Siebel Server.

To specify these (and other) variations in how you create and deploy a clone, you use different settings in the cloning properties files, which are described in [“Properties File Settings for Cloning an Installation” on page 239](#).

The files for the Siebel Database Configuration Utilities and Siebel EAI are also included if you create and deploy a clone for a Siebel Server instance for which these modules were also installed. However, do not use the Database Configuration Wizard on the target instance, because you already have it on the source instance.

### Where to Obtain the Siebel Cloning Utility

The files that make up the Siebel cloning utility are provided in the file clone.zip. You can find clone.zip with the JAR files after you unpack the media zip files for the current release. For more information about obtaining the Siebel CRM media, see [“About Siebel CRM Releases” on page 272](#) and [“Obtaining Siebel Installation Media Files” on page 350](#).

You must save or copy the file clone.zip to any computer that will be used as a source or target computer for a cloning operation. On each source or target computer, you use a standard unpacking tool, such as WinZip or unzip, to extract files into a directory named clone.

### Files Provided with the Siebel Cloning Utility

The Siebel cloning utility includes the following files:

- The Siebel cloning utility executable program for the operating system on which you run the utility: clone.bat (on Microsoft Windows) or clone.sh (on UNIX and Linux). These files are created in the clone directory that is created when you unpack the clone.zip file.
- The files cloneconfig.jar and orainstaller.jar are created in a subdirectory called lib.
- Several example properties files, which are text files that contain settings for use in different operations of the Siebel cloning utility. These files are created in a subdirectory called templates. For more information, see [“Properties Files Used in Cloning Operations” on page 238](#).

When you run the Siebel cloning utility at the command line, you specify the name of a properties file that you have updated to include all of the settings necessary for the operation that you are performing. For example, the properties file must include a pointer to the snapshot file that you are creating or deploying, the host name of the source or target computer, and so on. For more information, see [“Properties File Settings for Cloning an Installation” on page 239](#).

### About Running the Siebel Cloning Utility

Cloning an existing source instance includes separate tasks to create the clone on a source computer and to deploy the clone on a target computer. Both of these tasks involve running the Siebel cloning utility. These tasks are outlined in [“Process of Cloning a Siebel Installation” on page 236](#).

- **Creating the clone.** The operation to create a clone creates a file called the *snapshot file*, which is a ZIP file representing the installed software that you are cloning, in compressed form. This task is referred to as *creating a clone*. The term *clone*, when it is used as a noun, refers to the snapshot file. What is included in the snapshot file depends on the settings that you specify for the operation to create the clone.



- **Deploying the clone.** The operation to deploy a clone uses the snapshot file to deploy the clone on the target computer. This task is referred to as *deploying a clone*. What is included in the deployed clone depends on the contents of the snapshot file and on the settings that you specify for the operation to deploy the clone.

### About Creating and Deploying a Full Clone or a Delta Clone

A clone that you create and deploy can be either a full clone or a delta clone, as follows:

- **Full clone.** Creating and deploying a *full clone* copies a complete installation on the source computer and deploys it on the target computer, assuming that no existing installation is present on the target computer. For a source instance that has not been cloned before, you always create a full clone. To deploy a new target instance, you always deploy a full clone.
- **Delta clone.** Creating and deploying a *delta clone* (also called a *partial clone*) identifies differences in a source instance, relative to a snapshot file, and deploys new or updated files on an existing target instance that had been created using this same snapshot file. Creating a delta clone generates a *delta snapshot file*, which represents the differences between the source instance in its current state and the original full snapshot file. Deploying a delta clone updates the target instance to include these differences.

### Excluding Files or File Types

You can specify files or file types that you want to exclude from a cloning operation. You do this by specifying a value for the Exclude File List parameter in the properties file. It is strongly recommended that you do not exclude any files from the cloning operation unless you are certain that the target instance does not require those files. Log files are never cloned and do not have to be specified for exclusion.

### Related Topics

["Requirements When Cloning an Installation" on page 233](#)

["Limitations When Cloning an Installation" on page 235](#)

["Process of Cloning a Siebel Installation" on page 236](#)

["Properties Files Used in Cloning Operations" on page 238](#)

["Properties File Settings for Cloning an Installation" on page 239](#)

## Requirements When Cloning an Installation

The following are requirements for using the cloning feature for Siebel Business Applications installations and configurations:

- **Using the cloning feature requires the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14.** You can clone any source instance that is at the current release level.

- **The source and target computer environments must be consistent.** The source computer and the target computer must use the same supported server operating system, including the same operating system version and patch updates. The target computer must meet all of the documented requirements for installing the Siebel software that you are cloning, including those documented in this guide and those documented in the Certifications tab on My Oracle Support.
- **Java Runtime Environment (JRE) must be installed.** JRE must be installed on any computer where you will run the Siebel cloning utility, that is, on the source computer and on the target computer. Also, the JAVA\_HOME environment variable must be set to point to the JRE installation location at the time that you run the Siebel cloning utility (for example, C:\Program Files\Java\jre6 on Windows). On the source computer, JRE was already installed with the Oracle Universal Installer software, under the JDK directory, so you can set JAVA\_HOME to this installation location. For supported version information, see the Certifications tab on My Oracle Support.
- **For Siebel Enterprise Server, the database client and data source must be present on the target computer.** For Siebel Enterprise Server, the database client software must be installed and configured on the target computer, and the data source must be created (using the same name as on the source computer) before you deploy the clone. The database client on the target computer must be able to connect to the correct database. For an Oracle Database, you must also add entries to tnsnames.ora, as needed. For more information, see [Chapter 13, "Configuring the RDBMS."](#)
- **The installation directory on the source instance and the target instance must be the same.** For example, these directories might be C:\siebel\8.1.1.14.0\ses or C:\siebel\8.2.2.14.0\ses for Siebel Enterprise Server, or C:\siebel\8.1.1.14.0\sweapp or C:\siebel\8.2.2.14.0\sweapp for SWSE.

When you edit the properties file for deploying a clone on the target instance, specify the directory into which you installed the Siebel CRM software on the source instance, such as C:\siebel\8.1.1.14.0 or C:\siebel\8.2.2.14.0.

**NOTE:** The installation directories on the source computer might not match these examples. In particular, the installation paths differ where the Siebel CRM software was initially installed using the original Siebel CRM version 8.1.1 installers, which use InstallShield technology instead of Oracle Universal Installer.

- **The properties file for any cloning operation must contain a valid user name (such as SADMIN) and password.** For security reasons, it is strongly recommended that you include a password in any properties file only when you are using the properties file.
- **You must specify all of the applicable data in the properties file that are necessary for the cloning operation that you are performing.**
- **You must start all of the necessary Siebel modules or create all of the necessary configurations that are required for the cloning operation that you are performing.** For example:
  - Before you create a clone of an installed and configured instance of Siebel Enterprise Server software on a source computer, the applicable Siebel Gateway Name Server must be running. Depending on your cloning case, the Siebel Gateway Name Server might be running on the source computer as part of the source instance, or it might be running on another computer.

- Before you deploy a clone of an installed and configured instance of Siebel Enterprise Server software (Siebel Server only, in this case) on a target computer, where the Siebel Gateway Name Server is running on a different computer, the Siebel Enterprise for the target environment must already have been configured on that Siebel Gateway Name Server. The clone must have been created using the same settings as the Siebel Enterprise that applied to the source environment.
- **The Oracle Configuration Manager service cannot be running during a cloning operation.** If the Oracle Configuration Manager service is running on either the source computer or the target computer, then you must stop this service before you initiate any cloning operation. Otherwise, errors occur and the operation cannot complete successfully.

The name of the Oracle Configuration Manager service is `OracleOracleHomeNameConfigurationManager`, where *OracleHomeName* is the Oracle Home name for the Siebel CRM installation on this computer.

### Related Topics

[“About Cloning a Siebel Installation” on page 231](#)

[“Limitations When Cloning an Installation” on page 235](#)

[“Process of Cloning a Siebel Installation” on page 236](#)

[“Properties Files Used in Cloning Operations” on page 238](#)

[“Properties File Settings for Cloning an Installation” on page 239](#)

## Limitations When Cloning an Installation

The following are limitations for using the cloning feature for Siebel Business Applications installations and configurations:

- **Support for the cloning feature is currently limited to Siebel Enterprise Server and Siebel Web Server Extension (SWSE).**
- **For Siebel Enterprise Server, the cloning feature is primarily intended to be used to clone a single, configured, source instance of Siebel Server to a target computer.**
  - The cloning feature is not intended to be used as an alternative to installation of the Siebel Enterprise Server software.
  - A Siebel Server that you clone can optionally include the Siebel Gateway Name Server. It is possible to clone a Siebel Gateway Name Server installation that does not also include a Siebel Server, but this is not the primary usage case.
- **For Siebel Web Server Extension, the cloning feature currently supports cloning an installation only.** SWSE configurations are not included in the operations to create or deploy the clone. Although parts of the `eapps.cfg` file are updated when you deploy the SWSE target instance, you must configure this SWSE instance in the standard way (by applying the SWSE logical profile) after you deploy the clone.

- **Shortcuts for Siebel Configuration Wizards are not cloned.** When you deploy a clone on a target computer, the shortcuts for running the Siebel Configuration Wizards are not created on the target computer. You must either run the wizards from the command line or else re-create the shortcuts yourself on the target computer.

### Related Topics

- [“About Cloning a Siebel Installation” on page 231](#)
- [“Requirements When Cloning an Installation” on page 233](#)
- [“Process of Cloning a Siebel Installation” on page 236](#)

## Process of Cloning a Siebel Installation

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

- 1 [“Creating a Clone on a Source Computer” on page 236.](#)
- 2 [“Deploying a Clone on a Target Computer” on page 237.](#)

### Related Topics

- [“About Cloning a Siebel Installation” on page 231](#)
- [“Requirements When Cloning an Installation” on page 233](#)
- [“Limitations When Cloning an Installation” on page 235](#)
- [“Properties Files Used in Cloning Operations” on page 238](#)
- [“Properties File Settings for Cloning an Installation” on page 239](#)

## Creating a Clone on a Source Computer

Use the following procedure to create a clone on a source computer. After you create a clone, you deploy the clone on a target computer. This task is part of [“Process of Cloning a Siebel Installation” on page 236.](#)

### *To create a clone on a source computer*

- 1 Determine your goals for the cloning operation that you are performing.
- 2 Log on to the server computer on which you will create the clone.
- 3 Open a DOS command window.
- 4 Copy the Siebel cloning utility and all of the relevant files to the target computer.
- 5 Copy one of the existing properties files, and edit the copy appropriately for your operation to create a clone. Use a properties file that is similar to one of the following:
  - For a cloning operation for Siebel Server, use a file that is similar to `windowssource_ses.properties`.

- For a cloning operation for Siebel Web Server Extension, use a file that is similar to `windowssource_swse.properties`.

For example, the properties file must specify the location of the snapshot file that you are creating. Several other settings are required for creating a clone on a source computer.

- 6 Enter a command like the following to run the Siebel cloning utility:

```
clone.bat -p properties_file
```

In this command, *properties\_file* is the name of the properties file that you prepared for this operation.

- 7 When the operation is complete, validate the creation of the snapshot file in the specified location. Also review the command output to confirm that the operation completed successfully without any errors.

## Deploying a Clone on a Target Computer

Use the following procedure to deploy a clone on a target computer. Before you can deploy a clone on a target computer, you must create it on a source computer. This task is part of [“Process of Cloning a Siebel Installation” on page 236](#).

### *To deploy a clone on a target computer*

- 1 Determine your goals for the cloning operation that you are performing.
- 2 Verify that the clone was created on the source computer correctly for your purposes.
- 3 Log on to the server computer on which you will deploy the clone.
- 4 Install and configure the database client software on the target computer. Also create the data source using the same name as on the source computer.
- 5 Open a DOS command window.
- 6 Create an installation directory on the target computer that corresponds to the installation location on the source computer.  
For example, you might create a directory like `C:\siebel\8.1.14.0` or `C:\siebel\8.2.2.14.0`.
- 7 Copy the Siebel cloning utility and all of the relevant files to the target computer.
- 8 Copy one of the existing properties files, and edit the copy appropriately for your operation to deploy a clone. Use a properties file that is similar to one of the following:
  - For an operation to deploy a clone for the Siebel Server, use a file that is similar to `windowstarget_ses.properties`.
  - For an operation to deploy a clone for the Siebel Web Server Extension, use a file that is similar to `windowstarget_swse.properties`.

For example, the properties file must specify the location of the snapshot file that you are deploying. Several other settings are required for deploying a clone to a target computer.

- 9 Validate that the snapshot file is located in a suitable location for the deployment operation that you are performing. Copy the file to another location, if necessary.

**NOTE:** You might have created the snapshot file in a network location that is accessible to both the source computer and the target computer. Or, you might have to copy the snapshot file to another location, such as on the target computer, before you run the Siebel cloning utility to deploy the clone.

- 10 Enter a command like the following to run the Siebel cloning utility:

```
clone.bat -p properties_file
```

In this command, *properties\_file* is the name of the properties file that you prepared for this operation.

- 11 When the operation is complete, validate the creation of a valid installation as a result of deploying the clone. Also review the command output to confirm that the operation completed successfully without any errors.
- 12 Perform any additional tasks that are necessary to set up the deployed clone to function as a valid installation.

For example, if you cloned an installation of Siebel Web Server Extension, then you must run the SWSE Configuration Wizard to complete the configuration of the target instance.

## Properties Files Used in Cloning Operations

Table 19 on page 238 lists several properties files that are provided for use with the Siebel cloning utility. Before you perform a cloning operation, copy an existing properties file, such as one of the following files, and edit the copy appropriately for your operation to create or deploy a clone.

**TIP:** Retain the original properties files, and do not modify them. Edit only copies of the properties files for use in your cloning operations. You can also save multiple versions of any file with some of the settings that you typically use, to serve as templates for future use.

Table 19. Siebel Cloning Utility Properties Files

File Name	Operating System	Cloning Operation	Installable Module
windowssource_ses.properties	Windows	Clone	Siebel Enterprise Server
windowstarget_ses.properties	Windows	Deploy	Siebel Enterprise Server
windowssource_swse.properties	Windows	Clone	Siebel Web Server Extension
windowstarget_swse.properties	Windows	Deploy	Siebel Web Server Extension

**Related Topics**

[“Properties File Settings for Cloning an Installation” on page 239](#)

## Properties File Settings for Cloning an Installation

Table 20 on page 239 describes the possible settings in the properties files for different cloning operations and provides some usage information. The properties files themselves also provide basic usage information. Different settings apply depending on the particulars of your cloning operation, such as whether you are creating or deploying a clone, cloning the Siebel Server or the Siebel Web Server Extension, using Microsoft Windows or UNIX, creating or deploying a full clone or a delta clone, and so on.

Table 20. Settings in the Siebel Cloning Utility Properties File

Setting	Cloning Operation	Description
Product	Creating a clone Deploying a clone	<p>The possible values are:</p> <ul style="list-style-type: none"> <li>■ <b>ses</b>. Creates or deploys a clone of the Siebel Enterprise Server.</li> <li>■ <b>swse</b>. Creates or deploys a clone of the Siebel Web Server Extension.</li> </ul> <p>This setting cannot be null. It is predefined in the properties files provided with the Siebel cloning utility.</p> <p>The properties files for cloning the Siebel Enterprise Server include <i>ses</i> in the file name. The properties files for cloning the SWSE include <i>swse</i> in the file name.</p>
Mode	Creating a clone (which uses the value <i>clone</i> ) Deploying a clone (which uses the value <i>deploy</i> )	<p>The possible values are:</p> <ul style="list-style-type: none"> <li>■ <b>clone</b>. Creates a clone (that is, a snapshot file) on a source computer.</li> <li>■ <b>deploy</b>. Deploys a clone on a target computer, using a previously created snapshot file.</li> </ul> <p>This setting cannot be null. It is predefined in the properties files provided with the Siebel cloning utility.</p> <p>The properties files for creating a clone include <i>source</i> in the file name. The properties files for deploying a clone include <i>target</i> in the file name.</p>

Table 20. Settings in the Siebel Cloning Utility Properties File

Setting	Cloning Operation	Description
Type	Creating a clone Deploying a clone	<p>The possible values are:</p> <ul style="list-style-type: none"> <li>■ <b>full</b>. Creates or deploys a full clone, using a complete snapshot file.</li> <li>■ <b>delta</b>. Creates or deploys a partial (delta) clone, using a delta snapshot file.</li> </ul> <p>This setting cannot be null. It is predefined as <i>full</i> in the properties files provided with the Siebel cloning utility.</p>
Source Location	Creating a clone	The location of the source instance for which you are creating a clone. This setting cannot be null.
Target Location	Deploying a clone	The location of the target instance where you are deploying a clone. This setting cannot be null. The value must be the same as the location of the source instance.
Snapshot Location	Creating a clone Deploying a clone	The location of the snapshot file that you are creating or deploying. This setting cannot be null.
Zip FileName	Creating a clone Deploying a clone	<p>The name of the snapshot file, including the file extension, that will be created in the snapshot location or that will be deployed from the snapshot location. This setting cannot be null.</p> <p>For Siebel Enterprise Server, an example file name is <i>sesssnapshot.zip</i>. For SWSE, an example file name is <i>swsesnapshot.zip</i>.</p>
Delta Zip FileName	Creating a clone (creating a delta clone only) Deploying a clone (deploying a delta clone only)	The name of the delta snapshot file, including the file extension, that will be created in the snapshot location or that will be deployed from the snapshot location. This setting cannot be null for an operation to create or deploy a delta clone (that is, an operation of type <i>delta</i> ).
Exclude File List	Creating a clone	A comma-separated list of files in the source instance that will be excluded when you create a clone. You can use wildcards. For each file that you specify, you must include the full path.



Table 20. Settings in the Siebel Cloning Utility Properties File

Setting	Cloning Operation	Description
Source Host Name	Creating a clone (for Siebel Enterprise Server only)	The host name of the source computer for which you are creating a clone. This setting cannot be null.
Target Host Name	Deploying a clone	The host name of the target computer on which you are deploying a clone. This setting cannot be null.
Target Gateway Server Host Name	Deploying a clone (for Siebel Enterprise Server only)	The host name of the computer hosting the Siebel Gateway Name Server for the target instance.
Gateway Port	Creating a clone (for Siebel Enterprise Server only) Deploying a clone (for Siebel Enterprise Server only)	The port number of the Siebel Gateway Name Server for the source instance or target instance.
Language	Creating a clone (for Siebel Enterprise Server only) Deploying a clone (for Siebel Enterprise Server only)	The language code (such as RUS for Russian) for the primary language for the source instance or target instance. You must use the same setting for creating and for deploying a clone. This setting cannot be null.
UserName	Creating a clone (for Siebel Enterprise Server only) Deploying a clone (for Siebel Enterprise Server only)	The name of the Siebel Administrator user who will access the source instance or target instance, such as SADMIN. This setting cannot be null.
Password	Creating a clone (for Siebel Enterprise Server only) Deploying a clone (for Siebel Enterprise Server only)	The password for the Siebel Administrator user. This setting cannot be null.

Table 20. Settings in the Siebel Cloning Utility Properties File

Setting	Cloning Operation	Description
Source Enterprise Name	Creating a clone (for Siebel Enterprise Server only)	<p>The name of the Siebel Enterprise for the source instance.</p> <p>Specify the Siebel Enterprise name if you are exporting the Siebel Enterprise configuration when you create the clone. Do this if deploying the clone will also create a new Siebel Gateway Name Server on the target computer. To export the Siebel Enterprise configuration, you also must specify Export Enterprise = Y.</p> <p>If no value is provided, then no Siebel Enterprise configuration is exported when you create the clone.</p>
Source Siebel Server Name	Creating a clone (for Siebel Enterprise Server only)	<p>The name of the Siebel Server for the source instance.</p> <p>Specify the Siebel Server name if you are exporting the Siebel Server configuration when you create the clone. This is the expected usage case for cloning a Siebel Server. To export the Siebel Server configuration, you must specify Export Siebel Server = Y.</p> <p>If no value is provided, then no Siebel Server configuration is exported when you create the clone.</p>
Export Enterprise	Creating a clone (for Siebel Enterprise Server only)	<p>The possible values are:</p> <ul style="list-style-type: none"> <li>■ <b>Y.</b> Exports the Siebel Enterprise configuration when you create a clone. This setting assumes that the Siebel Enterprise has been defined for the source instance and is specified using Source Enterprise Name. The Siebel Gateway Name Server must be running when you create the clone.</li> <li>■ <b>N.</b> Does not export the Siebel Enterprise configuration when you create a clone.</li> </ul> <p>This setting cannot be null.</p>

Table 20. Settings in the Siebel Cloning Utility Properties File

Setting	Cloning Operation	Description
Export Siebel Server	Creating a clone (for Siebel Enterprise Server only)	<p>The possible values are:</p> <ul style="list-style-type: none"> <li>■ <b>Y.</b> Exports the Siebel Server configuration when you create a clone. This setting assumes that the Siebel Server is running on the source instance and is specified using Source Siebel Server Name. The Siebel Gateway Name Server must be running when you create the clone.</li> <li>■ <b>N.</b> Does not export the Siebel Server configuration when you create a clone.</li> </ul> <p>This setting cannot be null.</p>
Target Enterprise Name	Deploying a clone (for Siebel Enterprise Server only)	<p>The name of the Siebel Enterprise for the target instance. This setting cannot be null.</p> <p>If you exported the Siebel Enterprise configuration when you created the clone, then set Target Enterprise Name to match the setting you used for Source Enterprise Name. In this case, you are creating a new Siebel Gateway Name Server on the target computer. To import the Siebel Enterprise configuration, you must specify Import Enterprise = Y and set Create Gateway = Y.</p> <p>If an existing Siebel Gateway Name Server runs on a computer that is different from the target computer, then specify the name of an existing Siebel Enterprise and point to an existing Siebel Gateway Name Server, which must be running. In this case, you are not creating the Siebel Gateway Name Server on the target computer. You must set Import Enterprise = N and Create Gateway = N.</p>
Target Siebel Server Name	Deploying a clone (for Siebel Enterprise Server only)	<p>The name of the Siebel Server for the target instance. This setting cannot be null.</p> <p>To import the Siebel Server configuration, you also specify Import Siebel Server = Y.</p>

Table 20. Settings in the Siebel Cloning Utility Properties File

Setting	Cloning Operation	Description
Import Enterprise	Deploying a clone (for Siebel Enterprise Server only)	<p>The possible values are:</p> <ul style="list-style-type: none"> <li>■ <b>Y.</b> Imports the Siebel Enterprise configuration when you deploy a clone. This setting assumes that the Siebel Enterprise configuration was exported when you created the clone. The Siebel Gateway Name Server must be running when you deploy the clone.</li> <li>■ <b>N.</b> Does not import the Siebel Enterprise configuration when you deploy a clone.</li> </ul> <p>This setting cannot be null.</p>
Import Siebel Server	Deploying a clone (for Siebel Enterprise Server only)	<p>The possible values are:</p> <ul style="list-style-type: none"> <li>■ <b>Y.</b> Imports the Siebel Server configuration when you deploy a clone. This setting assumes that the Siebel Server configuration was exported when you created the clone. The Siebel Gateway Name Server must be running when you deploy the clone.</li> <li>■ <b>N.</b> Does not import the Siebel Server configuration when you deploy a clone.</li> </ul> <p>This setting cannot be null.</p>
Create Gateway	Deploying a clone (for Siebel Enterprise Server only)	<p>The possible values are:</p> <ul style="list-style-type: none"> <li>■ <b>Y.</b> Creates the Siebel Gateway Name Server when you deploy a clone. The Siebel Gateway Name Server is created using the settings for Target Host Name, Gateway Port, Username, and Password.</li> <li>■ <b>N.</b> Does not create the Siebel Gateway Name Server when you deploy a clone.</li> </ul> <p>This setting cannot be null.</p>
Gateway.VersionString	Deploying a clone (for Siebel Enterprise Server only)	<p>Specifies the version string for the Siebel Gateway Name Server. Use this setting if you are creating a new instance of Siebel Gateway Name Server on the target computer.</p>

Table 20. Settings in the Siebel Cloning Utility Properties File

Setting	Cloning Operation	Description
Gateway.UseDefault	Deploying a clone (for Siebel Enterprise Server only)	Use this setting if you are creating a new instance of the Siebel Gateway Name Server on the target computer.
Gateway.CreateDefault	Deploying a clone (for Siebel Enterprise Server only)	Use this setting if you are creating a new instance of the Siebel Gateway Name Server on the target computer.
Update SWSE	Deploying a clone (for SWSE only)	Updates the Siebel Web Server Extension configuration files (eapps.cfg and eapps_sia.cfg) to include the target host name. This setting must be Y.

**Related Topics**

["Requirements When Cloning an Installation" on page 233](#)

["Limitations When Cloning an Installation" on page 235](#)

["Properties Files Used in Cloning Operations" on page 238](#)



# 10 Installing Siebel Charts

This chapter describes how to install and configure Siebel Charts for use with Siebel Business Applications. It includes the following topics:

- [About Installing Siebel Charts on page 247](#)
- [Installing Siebel Charts on page 248](#)
- [Configuring Siebel Charts on page 248](#)
- [Changing the Siebel Charts Server Used by Siebel Web Clients on page 249](#)

## About Installing Siebel Charts

Siebel Charts, which uses the third-party product NetCharts Server from Visual Mining, provides functionality for generating and displaying charts in Siebel Business Applications. Siebel Charts configuration is part of installation. You specify configuration-related information in the installer before files are copied to the target computer.

For general requirements, see [Chapter 12, "Requirements for Installing and Configuring Siebel Business Applications."](#) See also the *NetCharts Server Installation Guide* by Visual Mining, Inc., on the *Siebel Business Applications Third-Party Bookshelf* in the product media pack on Oracle Software Delivery Cloud.

You can install Siebel Charts on any server computer that your Siebel Servers can connect to through HTTP. Typically, it is installed on a Siebel Server computer. If Siebel Charts is not installed on a Siebel Server computer, then install it on the same subnet as the Siebel Servers. No additional license key is required for Siebel Charts.

**NOTE:** This topic supplements the installation instructions provided by Visual Mining, Inc., which are provided in the *Siebel Business Applications Third-Party Bookshelf* in the product media pack on Oracle Software Delivery Cloud. It is not intended to replace them.

### Default Ports Used by Siebel Charts

The Siebel Charts server requires that certain ports be available. If these ports are used by any other application, then the Charts server will not start correctly. Siebel Charts uses the following ports by default:

- **8001.** This port is used by Web browsers connecting to the Siebel Charts server. This port is specified during the installation and can be changed.
- **8002.** This port is used for shutdown requests. The port that is used is the port number specified during the installation plus one; by default, this is 8001 plus 1 (8002).
- **1099.** This port is used for administration console access (using Java RMI).

## Installing Siebel Charts

Siebel Charts software is installed with the Siebel Mobile Web Client and Developer Web Client. The associated Windows service starts automatically when a chart is accessed within the Siebel Web Client.

This task is a step in:

- [“Roadmap for Installing and Configuring Siebel Business Applications for a New Deployment” on page 33](#)
- [“Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case \(Existing Database\)” on page 36](#)

### To install Siebel Charts

- 1 Review the information in [“About Installing Siebel Charts” on page 247](#).
- 2 In Windows Explorer, navigate to the Siebel image location for the current software version. Then navigate to the directory where the installer is located. Navigate to `Siebel_Image\Windows\Server_Architecture\Visual_Minimizing_Netcharts_Server\lang\windows`, where:
  - *Siebel\_Image* is the directory for your version-specific Siebel network image, such as `C:\Siebel_Install_Image\8.1.1.0` or `C:\Siebel_Install_Image\8.2.2.0`.
  - *lang* is the three-letter code for the language of your Siebel Business Applications; for example, `enu` for U.S. English.
- 3 To start the NetCharts Server installer, double-click `NetChartsServer4.6SiebelEdition.exe`.
- 4 As you proceed from screen to screen using the installer, accept all of the applicable defaults, and accept all of the license agreements.
- 5 Restart your computer.

## Configuring Siebel Charts

When you configure the Siebel Enterprise, you are prompted to set certain parameters related to communications with the Siebel Charts server (NetCharts).

For instructions on installing and configuring the Siebel Enterprise, see [Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension,”](#) and [Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension.”](#)

After installing Siebel Charts software, you must configure the Siebel Charts server.

### To configure Siebel Charts

- 1 In Windows Explorer, navigate to your installation directory for Siebel Charts; for example:  
`C:\Program Files\Visual_Minimizing_NetCharts_Server_4.6_Siebel_Edition\Server\root\projects`



- 2 Create a new subdirectory called Siebel.chart.
- 3 In the Siebel.chart subdirectory, create a new file, using Windows Notepad, and type the following three characters in uppercase but without a carriage return:  
CDL
- 4 Save the file as Siebel.cdx.
- 5 Specify a default font to be used by NetCharts if no font is defined for a chart or if the font defined for the chart is not available on the server computer.

Make sure that the DefaultChartFont parameter in your configuration file and the Application Default Chart Font parameter for your Application Object Manager component are set to a font that is available on your computer. For some example font names, see *Siebel Global Deployment Guide*.

**NOTE:** The NetCharts Server console provides tools that you can use to validate specific fonts on your system, including any extension fonts that you might have loaded. From the Examples link in the console, you can choose either Font Selection or I18N. Under Font Selection, you can select your custom fonts, and specify any font to populate the text areas of your charts. Similarly, under I18N, you can display the full map of characters available to the server. For each character that is unavailable in a given font, a square box is displayed instead of the character.

- 6 If you are deploying Siebel Charts for use with languages other than U.S. English, then, in order to display translated messages and to display chart text correctly (such as in the X and Y axis), you must make the following change in the server.xml file provided with the NetCharts Server:
  - a Navigate to the following subdirectory in your NetCharts Server installation directory; for example:  
C:\Program Files\Visual Mining\NetCharts Server 4.6\Siebel Edition\Server\conf
  - b Open the file server.xml using a suitable editor.
  - c In the section of the file with the tag <Parameter Name="Encoding">, change the Value parameter from "" (null) to "UTF-8", so the section resembles the following:  

```
<Parameter Name="Encoding" Value="UTF-8" Description="Sets the encoding used for String to byte[] conversions. Unless you require a specific encoding other than the platform default, leave this property disabled." Disabled="true"/>
```
  - d Save the file.

## Changing the Siebel Charts Server Used by Siebel Web Clients

The installation script prompts for the Siebel Charts server location and provides the default value of the localhost. You can change the Siebel Charts server specified for a Siebel Enterprise by using the server administration user interface after you install Siebel Business Applications.

**NOTE:** Some Siebel Enterprise settings related to using charts can be set initially or modified using the Siebel Configuration Wizard. For more information, see ["Configuring the Siebel Enterprise" on page 67](#).

### *To specify the Siebel Charts server for Siebel Web Clients (optional)*

- 1 Log in as the Siebel administrator.
- 2 Navigate to the Administration - Server Configuration screen, then the Enterprises view.
- 3 Click the Profile Configuration view tab.
- 4 Select the named subsystem Server Datasource (ServerDataSrc).
- 5 In the Profile Parameters list at the bottom of the screen, set the value of the parameter DSChartServer to indicate the host name of the computer where you are running the Siebel Charts server and the port number.

This parameter specifies the Siebel Charts server connect string. Use the following format for the parameter value:

*Charts\_server\_hostname:port\_number*

You initially specify the Siebel Charts server connect string when you configure the Siebel Server, as described in [Chapter 4, "Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension."](#)

- 6 (Optional) Set the value of the parameter DSChartImageFormat to png (the default), jpg, or gif. The value must be in lower case. You initially specify the chart image format when you configure the Siebel Server, as described in [Chapter 4, "Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension."](#)

**NOTE:** For a Siebel Mobile Web Client, set the equivalent parameter, ChartImageFormat, in the configuration file for the Siebel application, such as uagent.cfg for Siebel Call Center.

# 11 Uninstalling Siebel Business Applications

This chapter provides instructions for uninstalling Siebel Business Applications. It includes the following topics:

- [About Uninstalling Siebel Business Applications on page 251](#)
- [Process of Removing Configuration Data on page 256](#)
- [Uninstalling Siebel Enterprise Server or Siebel Web Server Extension on page 260](#)
- [Uninstalling Siebel Web Clients or Siebel Tools on page 266](#)
- [Uninstalling Siebel Charts on page 269](#)
- [About Uninstalling Earlier Versions of Siebel Business Applications on page 269](#)

## About Uninstalling Siebel Business Applications

The topics in this chapter describe how to uninstall the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14. Separate instructions are provided for server and client software modules. This chapter describes both full uninstallation and rollback uninstallation:

- *Full uninstallation* removes the installed Siebel software module.
- *Rollback uninstallation* (also referred to as *rollback* or *rolling back*) uninstalls a Siebel CRM release that you had installed as a patch release and reverts to the previously installed software release, where applicable. With a rollback uninstallation, the release that you can revert to depends on how you originally installed the Siebel CRM software module.

**NOTE:** Siebel Management Server is no longer provided, as of Siebel Innovation Pack 2014. For more information about uninstalling any software for a prior Siebel CRM version, see [“About Uninstalling Earlier Versions of Siebel Business Applications” on page 269](#).

This topic includes the following information:

- [“Uninstallation Options for Siebel Modules” on page 252](#)
- [“Requirements for Uninstalling Siebel Business Applications” on page 252](#)
- [“Limitations for Uninstalling Siebel Business Applications” on page 255](#)

### Related Books

*Siebel Deployment Planning Guide*  
*Siebel System Administration Guide*  
*Siebel Global Deployment Guide*

## Uninstallation Options for Siebel Modules

This topic summarizes the uninstallation options for the Siebel modules described in this guide.

This topic is part of [“About Uninstalling Siebel Business Applications” on page 251](#).

The following uninstallation options apply:

- If you installed the current release as a new installation, then you can perform a full uninstallation. Performing a rollback uninstallation is not an option in this case. This option applies to Siebel Enterprise Server, Siebel Web Server Extension (SWSE), Siebel Web Client, Siebel Tools, and Siebel Sample Database.
- If you installed the current release as a migration installation, then you can perform a rollback uninstallation to revert to your previously installed software version (such as Siebel CRM version 8.1.1 or 8.1.1.11, or Siebel CRM version 8.2.2 or 8.2.2.4). You can also perform a full uninstallation. This option applies to Siebel Enterprise Server, SWSE, Siebel Web Client, and Siebel Tools.  
**CAUTION:** Different rollback installation methods are provided for different situations. Make sure to use the correct method for your situation.
- If you installed a Siebel Patchset release on top of an installation of the current release, then you can uninstall the Siebel Patchset. This guide does not describe uninstallation for Siebel Patchset releases. For the readme documents for individual Siebel Patchset releases, see *Siebel Patchset Installation Guide for Siebel CRM*, 1614310.1 (Article ID) on My Oracle Support.

### Related Topics

[“Requirements for Uninstalling Siebel Business Applications” on page 252](#)

[“Limitations for Uninstalling Siebel Business Applications” on page 255](#)

## Requirements for Uninstalling Siebel Business Applications

Uninstallation of Siebel Business Applications software is subject to various requirements.

This topic is part of [“About Uninstalling Siebel Business Applications” on page 251](#).

The following requirements apply to uninstalling Siebel Business Applications software:

- **Use documented methods.** To successfully uninstall, you must use the supported methods documented in this chapter and observe all of the requirements and limitations that apply for uninstalling each module. Review this entire chapter before you uninstall any software.
- **Before a full uninstallation, you must remove configuration data.** For Siebel Enterprise Server components and Siebel Web Server Extension (SWSE) that were previously configured using Siebel Configuration Wizards, you must perform wizard tasks to remove the configuration data before you uninstall the Siebel software. For detailed information, see [“Process of Removing Configuration Data” on page 256](#).

- **You must have the required access.** When you uninstall an instance of Siebel Enterprise Server or Siebel Web Server Extension, you must either be the same user or be a user in the same group as the user who performed the installation. This requirement applies to both full uninstallation and rollback uninstallation.
- **Do not delete installation directories until you have performed a full uninstallation.** Do not delete the installation directories for any Siebel module until after you have performed a full uninstallation of the module. After a full uninstallation has completed successfully, you might have to restart your computer. Afterwards, you can safely delete the remaining directories. (Do not delete any installation directories after you perform a rollback uninstallation.)
- **Siebel modules must use the same version after a rollback uninstallation.** If you roll back to the previously installed version for Siebel Enterprise Server and SWSE, then you must also perform a similar rollback uninstallation for all of the other Siebel modules sharing the same Siebel Enterprise and Siebel database. After performing a rollback, see the documentation that applies to your currently installed Siebel software version for information about this version.
- **To perform a rollback uninstallation, you must have retained the previous installation.** When you installed the current release as a migration installation, the existing installation directory was renamed. You must retain this installation directory in order to be able to roll back to the version that it represents.

During a migration installation, the original installation directory is renamed from *Original Name* to *Original Name\_pre8.1.1.14.0* or *Original Name\_pre8.2.2.14.0*. The new installation directory is named *Original Name*. Examples follow:

- If the original installation directory name for Siebel Enterprise Server was *ses*, then this directory is renamed to *ses\_pre8.1.1.14.0* or *ses\_pre8.2.2.14.0*. The new installation directory is named *ses*.
- If the original installation directory name for SWSE was *sweapp*, then this directory is renamed to *sweapp\_pre8.1.1.14.0* or *sweapp\_pre8.2.2.14.0*. The new installation directory is named *sweapp*.
- If the original installation directory name for Siebel Web Client was *Client\_1*, then this directory is renamed to *Client\_1\_pre8.1.1.14.0* or *Client\_1\_pre8.2.2.14.0*. The new installation directory is named *Client\_1*.
- If the original installation directory name for Siebel Tools was *Tools\_1*, then this directory is renamed to *Tools\_1\_pre8.1.1.14.0* or *Tools\_1\_pre8.2.2.14.0*. The new installation directory is named *Tools\_1*.
- **For Siebel Enterprise Server and SWSE, you must use the correct rollback uninstallation method for your situation.** Different rollback installation methods are provided for different situations. You must use the correct method for your situation, as follows:
  - If you originally installed Siebel CRM version 8.1.1 (using the InstallShield installer) and are now rolling back to Siebel CRM version 8.1.1 through version 8.1.1.7, then you must use the Oracle Universal Installer uninstallation option to roll back the current version. (You must use this method because it removes the defined Oracle home, which no longer applies after the rollback in this case.)

- If you are rolling back to Siebel CRM version 8.1.1.8 or later or Siebel CRM version 8.2.2 or later, then you must use the manual steps to roll back the current version. (You must use this method because it does not remove the defined Oracle home, which still applies after the rollback in this case. If the Oracle home is removed, then the rollback process is incomplete and your original installation cannot be used in its current state.)
- **After a rollback uninstallation, you must restore the Siebel Repository.** New functionality and bug fixes associated with the current release are no longer available after a rollback uninstallation. After you roll back the current release, you must remove any configuration changes and restore the Siebel Repository and the SRF files to the state when you first installed the current release.

**NOTE:** After you installed the current release as a migration installation, you would have used the Incremental Repository Merge feature to update the Siebel Repository and to make other Siebel database changes. For more information about Incremental Repository Merge, see *Siebel Database Upgrade Guide*.
- **After a rollback uninstallation, you must re-enable the applicable services.** After a rollback uninstallation, the Siebel Server service and the Siebel Gateway Name Server service are disabled and must be re-enabled. For example, you might edit the service properties and specify that "startup-type" is automatic.
- **After a rollback uninstallation, refer to earlier versions of the documentation.** After you roll back the current release, you must refer to the documentation that applies to the Siebel CRM version that you revert to. For example, if you revert to Siebel CRM version 8.1.1.7, then for information about the new effective version of your installed software you must refer to version 8.1, Rev. A of the *Siebel Installation Guide* for the operating system you are using. This version of the guide is available from 1461732.1 (Article ID) on My Oracle Support. For versions of *Siebel Maintenance Release Guide* for prior releases, see 880452.1 (Article ID) on My Oracle Support for version 8.1.1.x or see 1441523.1 (Article ID) for version 8.2.2.x.
- **After a rollback uninstallation, verify the software version.** After a rollback uninstallation, verify the version number of the installed software that you revert to. See the documentation that applies to your new effective version. See also "[Verifying Installation for the Siebel Enterprise Server](#)" on page 191 and related topics.
- **After a rollback uninstallation, configure Oracle Configuration Manager (if necessary).** If Oracle Configuration Manager was not configured before you performed a migration installation of Siebel Enterprise Server, then, after a rollback to the original installation, you must configure this instance of Oracle Configuration Manager manually in order for it to function properly. For more information about Oracle Configuration Manager, see "[About Oracle Configuration Manager](#)" on page 276.
- **Clustered nodes present special requirements.** Clustered nodes present special requirements that might change part of the installation and uninstallation process from what is described in this guide.

The following recommendations apply to performing a full uninstallation:

- **Uninstall Database Configuration Utilities only after backing up files.** Before you uninstall an instance of Siebel Enterprise Server that includes the Database Configuration Utilities and Siebel Server, it is strongly recommended that you back up relevant files, such as summary.html and summary.txt in the *DBSRVR\_ROOT* directory and the files in the *log* directory under *SIEBSRVR\_ROOT*.

- **Uninstall Database Configuration Utilities only after removing configuration data.** Before you uninstall an instance of Siebel Enterprise Server that includes the Database Configuration Utilities and Siebel Server, it is strongly recommended that you first remove the Siebel Enterprise configuration or the Siebel Gateway Name Server.

#### Related Topics

[“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#)

[“Uninstallation Options for Siebel Modules” on page 252](#)

[“Limitations for Uninstalling Siebel Business Applications” on page 255](#)

#### Related Books

*Siebel Database Upgrade Guide*

## Limitations for Uninstalling Siebel Business Applications

Uninstallation of Siebel Business Applications software is subject to various limitations.

This topic is part of [“About Uninstalling Siebel Business Applications” on page 251](#).

The following limitations apply to uninstalling Siebel Business Applications software:

- **You cannot selectively uninstall Siebel Enterprise Server components installed together on the same computer.** For example, if you have installed Siebel Gateway Name Server and Siebel Server in the same Siebel Enterprise Server instance, then you cannot uninstall Siebel Server by itself. If you do not want to use this Siebel Server, then you can remove configuration data for this Siebel Server or disable the Siebel Server so that it does not run on this server computer. For information about disabling Siebel Server components, see *Siebel System Administration Guide*. See also [“Preparing to Run Siebel Server Components” on page 125](#).
- **You cannot selectively uninstall Siebel language packs.** If you have installed a particular Siebel language pack but determine that it is not needed on that installation, then you can deploy your applications using only the languages that you require. You cannot uninstall the Siebel language pack.

If you have already deployed languages that you do not require, then you can remove and re-create a Siebel Server configuration with fewer deployed languages, or re-create an SWSE logical profile with fewer deployed languages and reapply it to each installed SWSE instance.

Alternatively, you can disable unneeded language-specific Application Object Managers or other components. For these tasks, you do not uninstall the Siebel software. For more information about multilingual deployments, see [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#) and *Siebel Global Deployment Guide*.

- **Limitations might apply for previous versions that you roll back to.** If you installed the current release as a migration installation and are rolling it back, then you can revert to the previously installed software version. After rolling back, however, you might not be able to roll back again to an earlier release. For more information, see [“About Uninstalling Earlier Versions of Siebel Business Applications” on page 269](#).

- **This guide describes uninstalling the current release only.** For information about uninstalling any version prior to the current release (for example, uninstalling Siebel CRM version 8.1.1 or 8.1.1.11, or Siebel CRM version 8.2.2 or 8.2.2.4), see [“About Uninstalling Earlier Versions of Siebel Business Applications” on page 269](#).
- **This guide describes GUI uninstallation only.** Topics in this chapter describe full uninstallation by running Oracle Universal Installer in GUI mode. It is also possible to perform a full uninstallation by using unattended mode, similar to the installation process described in [“Installing Siebel Enterprise Server Components and Siebel Web Server Extension in Unattended Mode” on page 56](#).
- **This guide does not describe uninstalling Siebel Patchset releases.** If you installed a Siebel Patchset release on top of an installation of the current release, then you can uninstall the Siebel Patchset. For information about uninstalling a Siebel Patchset release, see the readme document for the Siebel Patchset. This guide does not describe uninstallation for Siebel Patchset releases. For the readme documents for individual Siebel Patchset releases, see *Siebel Patchset Installation Guide for Siebel CRM*, 1614310.1 (Article ID) on My Oracle Support.

### Related Topics

[“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#)

[“Uninstallation Options for Siebel Modules” on page 252](#)

[“Requirements for Uninstalling Siebel Business Applications” on page 252](#)

[“About Uninstalling Earlier Versions of Siebel Business Applications” on page 269](#)

### Related Books

*Siebel System Administration Guide*

*Siebel Global Deployment Guide*

*Siebel Patchset Installation Guide for Siebel CRM*, 1614310.1 (Article ID) on My Oracle Support

## Process of Removing Configuration Data

This topic describes the tasks that you perform for removing the configuration data for the Siebel Enterprise Server components and the Siebel Web Server Extension (SWSE). You perform these tasks using the same Siebel Configuration Wizards that you used for configuration.

Removing configuration data is related to uninstalling the Siebel software, but it is distinct from it. Before you uninstall Siebel Enterprise Server or SWSE, you must remove configuration data that was previously created for these modules, using Configuration Wizard tasks for this purpose. Do not perform tasks to remove configuration data where a module was not previously configured. In some cases, you might choose to remove configuration data without uninstalling.

Perform the tasks for removing configuration data in the following order (the reverse of the order of configuration):

- 1 [“Removing the SWSE Configuration” on page 257](#)
- 2 [“Removing the Siebel Server Configuration” on page 258](#)



- 3 ["Removing the SWSE Logical Profile" on page 258](#)
- 4 ["Removing the Siebel Enterprise Configuration" on page 259](#)
- 5 ["Removing the Siebel Gateway Name Server Configuration" on page 260](#)

For general information and procedures for starting the Siebel Configuration Wizards, see [Chapter 4, "Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension."](#)

## Removing the SWSE Configuration

The SWSE Configuration Wizard removes the physical configuration from the SWSE. This task removes the eapps.cfg file and removes the Siebel application virtual directories that were created when you applied the SWSE logical profile. The virtual Web site containing the virtual directories is not deleted. This task automatically stops and restarts the Web server.

**NOTE:** Alternatively, if you created the virtual directories in a non-default virtual Web site, such as *Siebel*, then you can delete the virtual directories by removing that virtual site. This action does not remove the eapps.cfg file.

This task is a step in ["Process of Removing Configuration Data" on page 256](#).

### *To remove the SWSE configuration*

- 1 Start the SWSE Configuration Wizard, as described in ["Starting a Siebel Configuration Wizard" on page 62](#).
- 2 Choose the task Remove the SWSE Configuration, and click Next.
- 3 Specify the name of the virtual Web site in which the Siebel virtual directories were created.
- 4 Click the check box for Remove Selected Siebel Web Server Extension, and click Next.

**NOTE:** When the task to remove the SWSE configuration is complete, the Web server is stopped and restarted automatically.

### Related Topics

[Chapter 4, "Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension"](#)  
["About Uninstalling Siebel Business Applications" on page 251](#)  
["Uninstalling Siebel Enterprise Server or Siebel Web Server Extension" on page 260](#)

## Removing the Siebel Server Configuration

The Siebel Server Configuration Wizard removes Siebel Server configuration data from the Siebel Gateway Name Server and removes the Siebel Server service from the local server computer.

**NOTE:** When removing Siebel Server configuration data using this wizard task, observe all of the documented requirements. Perform this task only if you have uninstalled, or removed all of the applicable configuration data for, all of the installed instances of SWSE that depend on this Siebel Server. Before you uninstall a previously configured instance of Siebel Server, you must perform this task. This task can also be useful in cases that do not involve uninstallation. When you perform this task, the Siebel Gateway Name Server must be running and the Siebel Server service must be stopped.

If this Siebel Server was not configured, then this task is not necessary before uninstallation.

This task is a step in [“Process of Removing Configuration Data” on page 256](#).

### *To remove the Siebel Server configuration*

- 1 Make sure that the Siebel Gateway Name Server is running.
- 2 Make sure that the Siebel Server service is not running. Stop the service if necessary.
- 3 Start the Siebel Server Configuration Wizard, as described in [“Starting a Siebel Configuration Wizard” on page 62](#).
- 4 Choose Remove Existing Configuration.
- 5 Follow the wizard prompts.

### Related Topics

[Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)  
[“About Uninstalling Siebel Business Applications” on page 251](#)  
[“Uninstalling Siebel Enterprise Server or Siebel Web Server Extension” on page 260](#)

## Removing the SWSE Logical Profile

The Siebel Enterprise Configuration Wizard removes an SWSE logical profile that you previously created.

Removing an SWSE logical profile deletes all of the files in the directory that was created with the logical profile, including the files that are used in creating the Siebel application virtual directories on any SWSE instance to which you apply the logical profile.

The task to remove an SWSE logical profile directory can be useful to perform in certain situations (which might or might not involve uninstallation), for housekeeping purposes.

Configuration data saved in an SWSE logical profile is used only when the profile is applied to an installed SWSE instance.

**NOTE:** It is strongly recommended that you retain any SWSE logical profile that you have created and applied. Back up the files in this directory before you remove it, in case you might need any of the files later.

This task is a step in [“Process of Removing Configuration Data” on page 256](#).

### ***To remove the SWSE logical profile***

- 1 Start the Siebel Enterprise Configuration Wizard, as described in [“Starting a Siebel Configuration Wizard” on page 62](#).
- 2 Choose Remove Existing Configuration, then Remove a Siebel Web Server Extension Profile Directory.
- 3 Follow the wizard prompts.

### **Related Topics**

[Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)

[“About Uninstalling Siebel Business Applications” on page 251](#)

[“Uninstalling Siebel Enterprise Server or Siebel Web Server Extension” on page 260](#)

## **Removing the Siebel Enterprise Configuration**

The Siebel Enterprise Configuration Wizard removes a Siebel Enterprise that you have configured on the Siebel Gateway Name Server.

**NOTE:** When removing a Siebel Enterprise using this wizard task, observe all of the documented requirements. Perform this task only if you have uninstalled, or removed all of the applicable configuration data for, all of the installed instances of SWSE and Siebel Server that depend on this Siebel Enterprise. When you perform this task, the Siebel Gateway Name Server must be running. This task might be useful in cases that do not involve uninstallation.

This task is a step in [“Process of Removing Configuration Data” on page 256](#).

### ***To remove the Siebel Enterprise configuration***

- 1 Make sure that the Siebel Gateway Name Server is running.
- 2 Start the Siebel Enterprise Configuration Wizard, as described in [“Starting a Siebel Configuration Wizard” on page 62](#).
- 3 Choose Remove Existing Configuration, then Remove an Enterprise from the Gateway Name Server.
- 4 Follow the wizard prompts.

### **Related Topics**

[Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)

[“About Uninstalling Siebel Business Applications” on page 251](#)

[“Uninstalling Siebel Enterprise Server or Siebel Web Server Extension” on page 260](#)

## Removing the Siebel Gateway Name Server Configuration

The Siebel Enterprise Configuration Wizard removes the Siebel Gateway Name Server service from the server computer, for a Siebel Gateway Name Server that you have installed and configured.

**NOTE:** When removing a Siebel Gateway Name Server using this wizard task, observe all of the documented requirements. Perform this task only if you have uninstalled, or removed all of the applicable configuration data for, all of the installed instances of SWSE and Siebel Server that depend on this Siebel Gateway Name Server. Before you uninstall a previously configured instance of Siebel Gateway Name Server, you must perform this task. When you perform this task, the Siebel Gateway Name Server must be running.

If this Siebel Gateway Name Server was not configured, then this task is not necessary before uninstallation.

This task is a step in [“Process of Removing Configuration Data” on page 256](#).

### *To remove the Siebel Gateway Name Server configuration*

- 1 Make sure that the Siebel Gateway Name Server is running.
- 2 Start the Siebel Enterprise Configuration Wizard, as described in [“Starting a Siebel Configuration Wizard” on page 62](#).
- 3 Choose Remove Existing Configuration, then Remove a Physical Gateway Name Server.
- 4 Follow the wizard prompts.

### Related Topics

[Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)

[“About Uninstalling Siebel Business Applications” on page 251](#)

[“Uninstalling Siebel Enterprise Server or Siebel Web Server Extension” on page 260](#)

## Uninstalling Siebel Enterprise Server or Siebel Web Server Extension

This topic describes how to uninstall Siebel Enterprise Server and Siebel Web Server Extension software for the current release. Both full uninstallation and rollback uninstallation (a type of patch uninstallation) are described. With a rollback uninstallation for these modules, you roll back to the previously installed software version (such as Siebel CRM version 8.1.1 or 8.1.1.11, or Siebel CRM version 8.2.2 or 8.2.2.4).

In a full uninstallation, the installed Siebel Enterprise Server software components are uninstalled, which might include Siebel Gateway Name Server, Siebel Server, Database Configuration Utilities, and EAI Connector. Siebel Enterprise Server components might have been installed on a single computer, or different components might have been installed on multiple computers.

**CAUTION:** Before you proceed with any uninstallation task, review all of the information in [“About Uninstalling Siebel Business Applications”](#) on page 251, particularly the requirements and limitations.

This topic includes the following information:

- [“Uninstalling the Siebel Enterprise Server”](#) on page 261
- [“Rolling Back the Siebel Enterprise Server”](#) on page 262
- [“Uninstalling the Siebel Web Server Extension”](#) on page 264
- [“Rolling Back the Siebel Web Server Extension”](#) on page 265

## Uninstalling the Siebel Enterprise Server

Use the following procedure to perform a full uninstallation of Siebel Enterprise Server software on a single computer.

**NOTE:** If you use the method described in this topic to perform a rollback uninstallation rather than a full uninstallation, then you do not remove configuration data first. Use this method only when it is appropriate, so that you do not perform a full uninstallation by mistake. See also [“Rolling Back the Siebel Enterprise Server”](#) on page 262.

This topic is part of [“Uninstalling Siebel Enterprise Server or Siebel Web Server Extension”](#) on page 260.

### Related Topics

[Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)

[“About Uninstalling Siebel Business Applications”](#) on page 251

[“Process of Removing Configuration Data”](#) on page 256

### *To uninstall the Siebel Enterprise Server components*

- 1 Review all of the information in [“About Uninstalling Siebel Business Applications”](#) on page 251, particularly the requirements and limitations.
- 2 Verify that you have performed any required tasks to uninstall other modules or remove configuration data.

**NOTE:** For example, before you uninstall an instance of Siebel Enterprise Server, particularly one that includes Siebel Gateway Name Server, you must perform all of the applicable Configuration Wizard tasks to remove existing configuration data. For more information, see [“Process of Removing Configuration Data”](#) on page 256.

- 3 Choose Start, Products, Oracle - SES\_HOME (or a similar Oracle home identifier), Oracle Installation Products, and then Universal Installer.

This action starts the instance of Oracle Universal Installer that was installed with your Siebel Enterprise Server installation.

- 4 Click Installed Products.
- 5 In the Inventory dialog box, select the Oracle Home value (for example, SES\_HOME) representing the installed instance of Siebel Enterprise Server software that you want to uninstall.
- 6 Click Remove.
- 7 Click Yes to confirm that you want to uninstall this Siebel Enterprise Server and all of its dependent components on the same computer.

The Siebel Enterprise Server software is uninstalled from this computer.

- 8 In the Inventory dialog box, click Close.
- 9 In the Oracle Universal Installer window, click Cancel.
- 10 Restart your server.

## Rolling Back the Siebel Enterprise Server

Use the following procedure to roll back the current release of the Siebel Enterprise Server software on a single computer and revert to the previously installed software version. You can do this only when you have installed the current release as a migration installation for an existing installation of Siebel CRM version 8.1.1.x or version 8.2.2.x.

**NOTE:** To be able to roll back the current release and revert to a previous version, you must have retained the backup directory to which the previous installation was moved during the migration installation. During that installation, if the original Siebel Enterprise Server installation directory was named `ses`, then it was renamed from `ses` to `ses_pre8.1.1.14.0` or `ses_pre8.2.2.14.0`.

This topic is part of [“Uninstalling Siebel Enterprise Server or Siebel Web Server Extension”](#) on page 260.

### *To roll back the Siebel Enterprise Server*

- 1 Review all of the information in [“About Uninstalling Siebel Business Applications”](#) on page 251, particularly the requirements and limitations.
- 2 Verify that the renamed original installation directory, such as `ses_pre8.1.1.14.0` or `ses_pre8.2.2.14.0`, exists.
- 3 Stop the Siebel services for the Siebel CRM version 8.1.1.14 or version 8.2.2.14 installation.
- 4 Stop any active Oracle Configuration Manager services.

- 5 You must use the correct rollback uninstallation method for your situation, as follows. For more information, see [“Requirements for Uninstalling Siebel Business Applications” on page 252](#).
  - If you originally installed Siebel CRM version 8.1.1 (using the InstallShield installer) and are now rolling back to Siebel CRM version 8.1.1 through version 8.1.1.7, then use the Oracle Universal Installer uninstallation option to uninstall Siebel CRM version 8.1.1.14. Follow the procedure described in [“Uninstalling the Siebel Enterprise Server” on page 261](#), but do not remove configuration data. After performing this task, go to [Step 10 on page 263](#). (Step 6 through [Step 9](#) do not apply in this case.)
  - If you are rolling back to Siebel CRM version 8.1.1.8 or later or Siebel CRM version 8.2.2 or later, then use the manual steps that follow. Go to the next step. (Step 6 through [Step 9](#) apply in this case only.)
- 6 Delete the directory representing the current installation of Siebel Enterprise Server for the current release. For example, if the directory name is ses, then delete this directory.
- 7 Rename the backup directory representing the previously installed software to use the original installation directory name for Siebel Enterprise Server. Rename the original (renamed) directory, such as ses\_pre8. 1. 1. 14. 0 or ses\_pre8. 2. 2. 14. 0, to ses (depending on your original installation directory name).
- 8 Delete the program folder that was created for the current release, which contains the shortcuts for running the Siebel Configuration Wizards.

**NOTE:** After the rollback, in order to run the Siebel Configuration Wizards, you must use the wizard shortcuts for the version of the software that you rolled back to. Additional requirements apply to the post-rollback environment.
- 9 If you rolled back to Siebel CRM version 8.1.1.8 or later or Siebel CRM version 8.2.2 or later, then verify the version number by using the opatch command, as described in [“Verifying Installation for the Siebel Enterprise Server” on page 191](#).
- 10 Restart the Siebel services.
- 11 If Oracle Configuration Manager was not configured before you performed a migration installation of Siebel Enterprise Server, then, after a rollback to the original installation, you must configure this instance of Oracle Configuration Manager manually in order for it to function properly.

### Related Topics

[Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)  
[“Verifying Installation for the Siebel Enterprise Server” on page 191](#)  
[“About Uninstalling Siebel Business Applications” on page 251](#)  
[“Process of Removing Configuration Data” on page 256](#)

## Uninstalling the Siebel Web Server Extension

Use the following procedure to perform a full uninstallation of Siebel Web Server Extension (SWSE) software on a single computer. Uninstalling SWSE is similar to uninstalling the Siebel Enterprise Server.

**NOTE:** If you use the method described in this topic to perform a rollback uninstallation, then you do not remove configuration data first. Use this method only when it is appropriate, so that you do not perform a full uninstallation by mistake. See also [“Rolling Back the Siebel Web Server Extension” on page 265](#).

This topic is part of [“Uninstalling Siebel Enterprise Server or Siebel Web Server Extension” on page 260](#).

### Related Topics

[Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)

[“About Uninstalling Siebel Business Applications” on page 251](#)

[“Process of Removing Configuration Data” on page 256](#)

### *To uninstall the Siebel Web Server Extension*

- 1 Review all of the information in [“About Uninstalling Siebel Business Applications” on page 251](#), particularly the requirements and limitations.
- 2 Verify that you have performed any required tasks to uninstall other modules or remove configuration data.

**NOTE:** For example, before you uninstall an instance of Siebel Web Server Extension, you must perform the Configuration Wizard task to remove existing SWSE configuration data. For more information, see [“Process of Removing Configuration Data” on page 256](#).

- 3 Choose Start, Products, Oracle - EAPPWEB\_HOME (or a similar Oracle home identifier), Oracle Installation Products, and then Universal Installer.

This action starts the instance of Oracle Universal Installer that was installed with your Siebel Web Server Extension installation.

- 4 Click Installed Products.
- 5 In the Inventory dialog box, select the Oracle Home value (for example, EAPPWEB\_HOME) representing the installed instance of Siebel Web Server Extension software that you want to uninstall.
- 6 Click Remove.
- 7 Click Yes to confirm that you want to uninstall this Siebel Web Server Extension and all of its dependent components on the same computer.

The Siebel Web Server Extension software is uninstalled from this computer.

- 8 In the Inventory dialog box, click Close.
- 9 In the Oracle Universal Installer window, click Cancel.
- 10 Restart your server.



## Rolling Back the Siebel Web Server Extension

Use the following procedure to roll back the current release of the Siebel Web Extension (SWSE) software on a single computer and revert to the previously installed software version. You can do this only when you have installed the current release as a migration installation for an existing installation of Siebel CRM version 8.1.1.x or version 8.2.2.x.

**NOTE:** To be able to roll back the current release and revert to a previous version, you must have retained the backup directory to which the previous installation was moved during the migration installation. During that installation, if the original SWSE installation directory was named sweapp, then it was renamed from sweapp to sweapp\_pre8. 1. 1. 14. 0 or sweapp\_pre8. 2. 2. 14. 0.

This topic is part of “[Uninstalling Siebel Enterprise Server or Siebel Web Server Extension](#)” on page 260.

### *To roll back the Siebel Web Server Extension*

- 1 Review all of the information in “[About Uninstalling Siebel Business Applications](#)” on page 251, particularly the requirements and limitations.
- 2 Verify that the renamed original installation directory, such as sweapp\_pre8. 1. 1. 14. 0 or sweapp\_pre8. 2. 2. 14. 0, exists.
- 3 Stop the Web server.
- 4 Stop any active Oracle Configuration Manager services.
- 5 You must use the correct rollback uninstallation method for your situation, as follows. For more information, see “[Requirements for Uninstalling Siebel Business Applications](#)” on page 252.
  - If you originally installed Siebel CRM version 8.1.1 (using the InstallShield installer) and are now rolling back to Siebel CRM version 8.1.1 through version 8.1.1.7, then use the Oracle Universal Installer uninstallation option to uninstall Siebel CRM version 8.1.1.14. Follow the procedure described in “[Uninstalling the Siebel Web Server Extension](#)” on page 264, but do not remove configuration data. After performing this task, go to [Step 10 on page 266](#). ([Step 6](#) through [Step 9](#) do not apply in this case.)
  - If you are rolling back to Siebel CRM version 8.1.1.8 or later or Siebel CRM version 8.2.2 or later, then use the manual steps that follow. Go to the next step. ([Step 6](#) through [Step 9](#) apply in this case only.)
- 6 Delete the directory representing the current installation of SWSE for the current release. For example, if the directory name is sweapp, then delete this directory.
- 7 Rename the backup directory representing the previously installed software to use the original installation directory name for SWSE. Rename the original (renamed) directory, such as sweapp\_pre8. 1. 1. 14. 0 or sweapp\_pre8. 2. 2. 14. 0, to sweapp (depending on your original installation directory name).
- 8 Delete the program folder that was created for the current release, which contains the shortcut for running the SWSE Configuration Wizard.

**NOTE:** After the rollback, in order to run the SWSE Configuration Wizard, you must use the wizard shortcut for the version of the software that you rolled back to. Additional requirements apply to the post-rollback environment.

- 9 If you rolled back to Siebel CRM version 8.1.1.8 or later or Siebel CRM version 8.2.2 or later, then verify the version number by using the `opatch` command, as described in [“Verifying Installation for the Siebel Web Server Extension” on page 199](#).
- 10 Restart the Web server.
- 11 If Oracle Configuration Manager was not configured before you performed a migration installation of SWSE, then, after a rollback to the original installation, you must configure this instance of Oracle Configuration Manager manually in order for it to function properly.

### Related Topics

[Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)

[“Verifying Installation for the Siebel Web Server Extension” on page 199](#)

[“About Uninstalling Siebel Business Applications” on page 251](#)

[“Process of Removing Configuration Data” on page 256](#)

## Uninstalling Siebel Web Clients or Siebel Tools

This topic describes how to uninstall Siebel Web Clients (Mobile Web Client or Developer Web Client) or Siebel Tools. Both full uninstallation and rollback uninstallation (a type of patch uninstallation) are described. With a rollback uninstallation for these modules, you roll back to the previously installed software version (such as Siebel CRM version 8.1.1 or 8.1.1.11, or Siebel CRM version 8.2.2 or 8.2.2.4).

**CAUTION:** Before you proceed with any uninstallation task, review all of the information in [“About Uninstalling Siebel Business Applications” on page 251](#), particularly the requirements and limitations.

This topic includes the following information:

- [“Uninstalling the Siebel Web Client” on page 266](#)
- [“Rolling Back the Siebel Web Client” on page 267](#)
- [“Uninstalling Siebel Tools” on page 268](#)
- [“Rolling Back Siebel Tools” on page 268](#)

## Uninstalling the Siebel Web Client

Use the following procedure to uninstall the Siebel Mobile Web Client or Developer Web Client in a full uninstallation.

**NOTE:** If you installed the Siebel Sample Database, then uninstall it before you uninstall the Siebel Web Client. Otherwise, you might be unable to uninstall the Sample Database. To uninstall the Sample Database, run the Siebel Uninstallation Manager from Add or Remove Programs in the Control Panel.

### Related Topics

[“Installing the Siebel Web Client” on page 157](#)

[“About Uninstalling Siebel Business Applications” on page 251](#)

### *To uninstall the Siebel Web Client*

- 1 Choose Start, All Programs, Oracle - CLIENT\_HOME (or a similar Oracle home identifier), Oracle Installation Products, and then Universal Installer.
- 2 Click Deinstall Products.
- 3 Select the Oracle home (for example, CLIENT\_HOME) representing the installed instance of Siebel Mobile or Developer Web Client that you want to uninstall.
- 4 Click Remove.

## Rolling Back the Siebel Web Client

Use the following procedure to roll back the installed current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14, for the Siebel Mobile Web Client or Developer Web Client and revert to Siebel CRM version 8.1.1 or a prior version 8.1.1.x release, or revert to Siebel CRM version 8.2.2 or a prior version 8.2.2.x release.

**NOTE:** In the procedure below, the example installation paths are those that might apply for previous releases that you subsequently migrated to the current release.

### *To roll back the Siebel Web Client*

- 1 Review all of the information in [“About Uninstalling Siebel Business Applications” on page 251](#), particularly the requirements and limitations.
- 2 Exit the Siebel Web Client if it is running.
- 3 Verify that the renamed original installation directory, such as `Client_1_pre8.1.1.14.0` or `Client_1_pre8.2.2.14.0`, exists.
- 4 Delete the directory representing the current installation of Siebel Web Client for the current release. For example, if the directory name is `Client_1`, then delete this directory.
- 5 Rename the backup directory representing the previously installed software to use the original installation directory name for Siebel Web Client. Rename the original (renamed) directory, such as `Client_1_pre8.1.1.14.0` or `Client_1_pre8.2.2.14.0`, to `Client_1` (depending on your original installation directory name).
- 6 Verify the version number by using the `opatch` command, as described in [“Verifying Installation for the Siebel Web Client” on page 201](#).
- 7 When the rollback process is complete, restart the Siebel Web Client.

## Uninstalling Siebel Tools

Use the following procedure to uninstall Siebel Tools in a full uninstallation.

### Related Topics

[“Installing Siebel Tools” on page 164](#)

[“About Uninstalling Siebel Business Applications” on page 251](#)

### *To uninstall Siebel Tools*

- 1 Choose Start, All Programs, Oracle - TOOLS\_HOME (or a similar Oracle home identifier), Oracle Installation Products, and then Universal Installer.
- 2 Click Deinstall Products.
- 3 Select the Oracle home (for example, TOOLS\_HOME) representing the installed instance of Siebel Tools that you want to uninstall.
- 4 Click Remove.

## Rolling Back Siebel Tools

Use the following procedure to roll back the installed current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14, for Siebel Tools and revert to Siebel CRM version 8.1.1 or a prior version 8.1.1.x release, or revert to Siebel CRM version 8.2.2 or a prior version 8.2.2.x release.

**NOTE:** In the procedure below, the example installation paths are those that might apply for previous releases that you subsequently migrated to the current release.

### *To roll back Siebel Tools*

- 1 Review all of the information in [“About Uninstalling Siebel Business Applications” on page 251](#), particularly the requirements and limitations.
- 2 Exit Siebel Tools if it is running.
- 3 Verify that the renamed original installation directory, such as Tool s\_1\_pre8. 1. 1. 14. 0 or Tool s\_1\_pre8. 2. 2. 14. 0, exists.
- 4 Delete the directory representing the current installation of Siebel Tools for the current release. For example, if the directory name is Tool s\_1, then delete this directory.
- 5 Rename the backup directory representing the previously installed software to use the original installation directory name for Siebel Tools. Rename the original (renamed) directory, such as Tool s\_1\_pre8. 1. 1. 14. 0 or Tool s\_1\_pre8. 2. 2. 14. 0, to Client (depending on your original installation directory name).
- 6 Verify the version number by using the opatch command, as described in [“Verifying Installation for Siebel Tools” on page 204](#).
- 7 When the rollback process is complete, restart Siebel Tools.

# Uninstalling Siebel Charts

This topic describes how to uninstall Siebel Charts (Visual Mining NetCharts).

## Related Topics

[Chapter 10, “Installing Siebel Charts”](#)

### *To uninstall Siebel Charts*

- 1 Navigate to Control Panel, Add or Remove Programs, and then Visual Mining NetCharts Server 4.6 Siebel Edition.
- 2 Restart the computer.

## About Uninstalling Earlier Versions of Siebel Business Applications

To uninstall an earlier version of Siebel Business Applications software, you must use the documented uninstallation method for that version, as follows. For each version, always use the latest revision of the documentation that applies for the Siebel CRM version that you are uninstalling.

### **For Siebel CRM version 8.1.1.11**

- For the full uninstallation or rollback uninstallation instructions for Siebel CRM version 8.1.1.11, see the version of the *Siebel Installation Guide* for the operating system you are using, the guide that you used when you installed Siebel CRM version 8.1.1.11. The most recent applicable guides, including those for Siebel Innovation Pack 2013, are available on My Oracle Support, at 1461732.1 (Article ID).

### **For Siebel CRM version 8.1.1 and version 8.1.1.x (through version 8.1.1.10)**

- For the full uninstallation instructions for Siebel CRM version 8.1.1, which used the InstallShield versions of the Siebel Enterprise Server and Siebel Web Server Extension (SWSE) installers, see the version of the *Siebel Installation Guide* for the operating system you are using, the guide that you used when you initially installed. The most recent applicable guides that cover the InstallShield installers, version 8.1, Rev. A, are available on My Oracle Support, at 1461732.1 (Article ID).
- For the full uninstallation instructions for Siebel CRM version 8.1.1.8 through version 8.1.1.10 (when Siebel Enterprise Server and SWSE were installed as a new installation), see the version of the *Siebel Installation Guide* for the operating system you are using, the guide that you used when you initially installed. The most recent applicable guides, version 8.1, Rev. D, are available on My Oracle Support, at 1461732.1 (Article ID).

- For the Siebel Fix Pack uninstallation instructions for Siebel CRM version 8.1.1.x Fix Pack releases through Siebel CRM version 8.1.1.10 (when Siebel Enterprise Server and SWSE were installed as a patch installation), see the applicable *Siebel Maintenance Release Guide* on My Oracle Support, 880452.1 (Article ID). Different uninstallation options apply for different Siebel Fix Pack releases. In particular, uninstallation options are different for Siebel CRM versions 8.1.1.8 and later, compared to Siebel CRM versions 8.1.1.1 through 8.1.1.7.

### For Siebel CRM version 8.2.2.4

- For the full uninstallation or rollback uninstallation instructions for Siebel CRM version 8.1.1.4, see the version of the *Siebel Installation Guide* for the operating system you are using, the guide that you used when you installed Siebel CRM version 8.1.1.4. The most recent applicable guides, including those for Siebel Innovation Pack 2013, are available on My Oracle Support, at 1461732.1 (Article ID).

### For Siebel CRM version 8.2.2 and version 8.2.2.x (through version 8.2.2.3)

- For the full uninstallation instructions for Siebel CRM version 8.2.2, see the version of the *Siebel Installation Guide* for the operating system you are using, the guide that you used when you initially installed. The most recent applicable guides, version 8.2, Rev. C, are available on My Oracle Support, at 1461732.1 (Article ID).
- For the Siebel Fix Pack uninstallation instructions for Siebel CRM version 8.2.2.x Fix Pack releases through version 8.2.2.3, see the applicable *Siebel Maintenance Release Guide* on My Oracle Support, 1441523.1 (Article ID).

### For Siebel CRM versions 8.0, 7.8.x, or 7.7.x

- For the uninstallation instructions for Siebel CRM version 8.0, 7.8.x, or 7.7.x, see version 8.0, 7.8, or 7.7 of the *Siebel Installation Guide* for the operating system you are using.

### For Siebel CRM versions 7.5.x, 7.0.x, or 6.x.x

- For the uninstallation instructions for Siebel CRM versions 7.5.x, 7.0.x, or 6.x.x, see the applicable version of the *Siebel Server Installation Guide* for your operating system. See also *Siebel Web Client Administration Guide*, *Siebel Tools Reference*, or other applicable documents for these earlier versions.

### Related Topics

[“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#)

[“About Uninstalling Siebel Business Applications” on page 251](#)

### Related Books

Earlier versions of the *Siebel Installation Guides* on My Oracle Support, 1461732.1 (Article ID)

# 12 Requirements for Installing and Configuring Siebel Business Applications

This chapter documents requirements that apply to installing and configuring Siebel Business Applications software. It contains the following topics:

- [About Installing Siebel Business Applications on page 271](#)
- [Planning Your Siebel Deployment on page 276](#)
- [Requirements for Installing and Configuring Siebel Enterprise Server Components on page 296](#)
- [Requirements for Installing and Configuring the Siebel Web Server Extension on page 304](#)
- [Requirements for Installing and Configuring the Siebel Database on page 312](#)
- [Requirements for Installing Siebel Web Clients on page 315](#)
- [Requirements for Installing Siebel Tools on page 317](#)

## About Installing Siebel Business Applications

Each Siebel Business Applications software release from Oracle has a specific version level. The current release is Siebel Innovation Pack 2014, which refers to Siebel CRM version 8.1.1.14 or version 8.2.2.14.

You can install Siebel Enterprise Server, Siebel Web Server Extension (SWSE), Siebel Web Client, or Siebel Tools at one of these versions, whether it is a new installation or a migration installation.

This topic contains the following information:

- [“About Documented Requirements” on page 272](#)
- [“About Siebel CRM Releases” on page 272](#)
- [“About Installing in Upgrade Environments” on page 274](#)
- [“About Language Installation” on page 275](#)
- [“About Oracle Configuration Manager” on page 276](#)

### Related Topics

[Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)

[Chapter 7, “Installing Siebel Web Clients and Siebel Tools”](#)

[Chapter 11, “Uninstalling Siebel Business Applications”](#)

## About Documented Requirements

This topic is part of [“About Installing Siebel Business Applications” on page 271](#).

Before installing any Siebel release, observe all of the documented requirements and review documented installation tasks. See this guide or any updated version of it, the Certifications tab on My Oracle Support, and any other relevant documents on Oracle Technology Network or My Oracle Support. Documentation for each Siebel Patchset release is provided with the Siebel Patchset.

**NOTE:** All Siebel modules used within a given Siebel Enterprise must share the same release level (version number), such as Siebel CRM version 8.1.1.14 or version 8.2.2.14. Third-party products must use supported release levels as documented in the Certifications tab on My Oracle Support.

Examples of installation requirements follow:

- Before installing a Siebel Innovation Pack release for Siebel Enterprise Server (migration installation case), you must shut down services for Siebel Server or Siebel Gateway Name Server, and shut down any running instances of `svrvmgr`.
- Before installing a Siebel Innovation Pack release for Siebel Web Server Extension (migration installation case), you must stop the Web server.

Requirements differ for applications deployed in Siebel Open UI, high interactivity, or standard interactivity. For more information about deploying applications using Siebel Open UI, see [“Enabling Siebel Open UI” on page 129](#).

## About Siebel CRM Releases

This topic is part of [“About Installing Siebel Business Applications” on page 271](#).

Siebel CRM software releases and their various installation methods have evolved significantly. New types of releases are provided, and some of the traditional types of releases no longer apply. The current release is Siebel CRM version 8.1.1.14 or version 8.2.2.14. The term Siebel Innovation Pack 2014 represents both of these releases. This book describes the tasks and requirements that apply for the current release.

An *innovation pack* release is similar to a traditional Siebel Fix Pack release, but includes new application functionality. Innovation pack releases are sometimes also referred to as *patch releases*, because they can also be installed as a patch release (migration installation) for an existing installation. Siebel Fix Pack releases are no longer provided.

This guide, the *Siebel Installation Guide* for the operating system you are using, is for installing the current release. This guide is concerned only with installers that are relevant for the current release. Traditional Siebel Fix Pack installation instructions, which were formerly published in the *Siebel Maintenance Release Guide* on My Oracle Support, are no longer provided. Instead, the *Siebel Installation Guides* describe how to perform migration installations (a new type of patch installation), as well as new installations.



You install Siebel Enterprise Server, Siebel Web Server Extension, Siebel Web Client, or Siebel Tools as a new installation of the current version of the software. For existing installations, you perform a migration installation. For more information, see [“Installation-Related Changes for Siebel Innovation Pack 2014” on page 25](#) and [“Installation-Related Changes for Siebel Innovation Pack 2013” on page 28](#).

**NOTE:** For an existing installation, running Incremental Repository Merge is required after performing a migration installation for Siebel Innovation Pack 2014. For more information, see [“About Database Updates for the Current Release” on page 103](#).

Table 21 on page 273 lists the major Siebel CRM installable modules and shows which versions support which installation methods in order to install the current release as a new installation or as a migration installation for an existing installation. Both new installations and migration installations use the same installers and are one-step installations.

Table 21. Siebel CRM Installers and Applicable Versions

Siebel CRM Module	Installer Version	Installation Method for Current Release
Siebel Enterprise Server	8.1.1.14	New installation Migration installation
	8.2.2.14	New installation Migration installation
Siebel Web Server Extension	8.1.1.14	New installation Migration installation
	8.2.2.14	New installation Migration installation
Siebel Web Client	8.1.1.14	New installation Migration installation
	8.2.2.14	New installation Migration installation
Siebel Tools	8.1.1.14	New installation Migration installation
	8.2.2.14	New installation Migration installation
Siebel Sample Database	8.1.1.14	New installation only
	8.2.2.14	New installation only

For information about the features and fixes provided in Siebel Business Applications for prior Siebel Innovation Pack and Siebel Fix Pack releases, and about the configuration requirements for those features, see the applicable *Siebel Maintenance Release Guide* on My Oracle Support. For versions of *Siebel Maintenance Release Guide* for prior releases, see 880452.1 (Article ID) on My Oracle Support for version 8.1.1.x or see 1441523.1 (Article ID) for version 8.2.2.x. For information about setting up and using Incremental Repository Merge, see *Siebel Database Upgrade Guide*.

Typically, no additional Siebel Configuration Wizard tasks are associated with a migration installation. You would not run the Siebel Configuration Wizard to configure a module that was already configured. However, requirements might vary for a given release, or for using particular functionality. In some cases, you might have to perform a new installation instead of a migration installation.

Individual Siebel Quick Fix releases are no longer provided for the current release. Instead, monthly Siebel Patchset releases are provided, each of which provides several fixes. The fixes are provided on a cumulative basis in each Siebel Patchset release. In some cases, installing a particular Siebel Patchset release might be required or strongly recommended. For example, it is strongly recommended that customers installing Siebel Innovation Pack 2014 also install Siebel Patchset 1 or later, where available. This guide does not describe installing or uninstalling Siebel Patchset releases.

**NOTE:** You must verify the availability, characteristics, and requirements of any future releases, including any Siebel CRM version 8.1.1.x or version 8.2.2.x releases, that might also be covered by this guide (or updated versions of it) or by other documentation. The installation tasks and requirements for all future releases are subject to change.

### Related Books

For the readme documents for individual Siebel Patchset releases, see *Siebel Patchset Installation Guide for Siebel CRM*, 1614310.1 (Article ID) on My Oracle Support.

For more information about Siebel Patchset releases, see 1600520.1 (Article ID) on My Oracle Support.

## About Installing in Upgrade Environments

This topic is part of [“About Installing Siebel Business Applications” on page 271](#).

When you install Siebel Business Applications, you might be creating a new deployment or you might be installing updated software to be used in a deployment that is being upgraded from a previous release of Siebel Business Applications, such as an upgrade from version 8.0 to the current version. A deployment that is being upgraded is sometimes called an *upgrade environment*. You install your new Siebel Business Applications software *before* upgrading the Siebel database.

In some cases, you can upgrade the Siebel database directly to the current release. For detailed information about upgrading the Siebel database, and about tasks that you perform before the installation or upgrade, see *Siebel Database Upgrade Guide*. See also any relevant documents on Oracle Technology Network or My Oracle Support.

**NOTE:** Review all of the applicable documentation before you install or upgrade.

For IBM DB2 for z/OS, see relevant parts of [“Planning RDBMS Installation and Configuration” on page 280](#) and see *Siebel Database Upgrade Guide for DB2 for z/OS*.

**CAUTION:** As part of installing Siebel Business Applications software in an upgrade environment, in general, you do not perform any database-related tasks described in this guide.

In an upgrade environment:

- You *do install* the Siebel Enterprise Server component called *Database Configuration Utilities* on a Siebel Server, as described in [Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension.”](#)
- You *do not create* the database instance on the RDBMS, as described in [Chapter 13, “Configuring the RDBMS.”](#) (After the upgrade is complete, you might have to modify database parameters for your RDBMS platform to match settings described in that chapter.)
- You *do not perform* the tasks described in [Chapter 5, “Installing the Siebel Database on the RDBMS.”](#)
- Certain installation and configuration requirements associated with Siebel Gateway Name Server authentication that apply for new deployments do not apply in this case. For details, see [“Requirements for Siebel Gateway Name Server Authentication” on page 299.](#)

After installing and upgrading, you might have to perform additional tasks. For example, some tasks that might apply are described in *Siebel Application Deployment Manager Guide* and *Siebel System Administration Guide*. See also [“Preparing to Run Siebel Server Components” on page 125.](#)

When you install Siebel Business Applications in some upgrade scenarios, you might in some cases be able to install different versions of a Siebel module on the same computer, if this scenario is valid for particular modules and might be helpful to you. For more information, see [“Planning to Install Multiple Instances of Siebel Business Applications” on page 284.](#)

After you install the current release, you can install the latest Siebel Patchset release, where available. Install the Siebel Patchset release *before* you initiate the upgrade process. After upgrading, you can install additional patchset releases as they become available.

**CAUTION:** After you have started upgrading, do not install any Siebel CRM releases until the upgrade is complete.

For information about types of Siebel CRM releases, see [“About Siebel CRM Releases” on page 272.](#)

Instructions in this guide apply both for new installations and upgrades, except where noted.

## About Language Installation

This topic is part of [“About Installing Siebel Business Applications” on page 271.](#)

It is strongly recommended that you install and deploy, or at least install, all of the languages that you expect to require. For more information about installing and deploying languages, see [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133.](#)

## About Oracle Configuration Manager

This topic is part of [“About Installing Siebel Business Applications”](#) on page 271.

Oracle Configuration Manager is installed by the installers for Siebel Enterprise Server and Siebel Web Server Extension (SWSE). These installers, which use Oracle Universal Installer software, automatically invoke the installer for Oracle Configuration Manager before completing the Siebel installation.

During the installation session, as described in [Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension,”](#) the user is prompted for email contact information. Specify the credentials for a valid My Oracle Support account.

**NOTE:** After installation, update Oracle Configuration Manager online with the latest version in order to obtain fixes and enhancements.

Oracle Configuration Manager is configured automatically after installation. Oracle Configuration Manager collects system configuration data for Siebel installation computers and uploads it to the Oracle repository. Oracle Configuration Manager is intended to help Oracle Global Customer Support representatives resolve customer issues more effectively.

For more information about Oracle Configuration Manager and its installer, see the Oracle Configuration Manager documentation provided on Oracle Technology Network. In particular, see *Oracle Configuration Manager Installation and Administration Guide*.

For the version number of the Oracle Configuration Manager software provided with the current Siebel CRM release, see the Certifications tab on My Oracle Support.

An instance of Oracle Configuration Manager is installed for both new installations and migration installations of Siebel Enterprise Server or SWSE, for the current release. Before performing a migration installation or before rolling back an installation after a migration, you must stop any active Oracle Configuration Manager services.

**NOTE:** If Oracle Configuration Manager was not configured before you performed a migration installation of Siebel Enterprise Server or SWSE, then, after a rollback to the original installation, you must configure this instance of Oracle Configuration Manager manually in order for it to function properly.

The Oracle Configuration Manager service cannot be running during a cloning operation. For more information, see [“Requirements When Cloning an Installation”](#) on page 233.

If you uninstall a Siebel module for which Oracle Configuration Manager was installed, then this instance of Oracle Configuration Manager is also uninstalled. See also [Chapter 11, “Uninstalling Siebel Business Applications.”](#)

## Planning Your Siebel Deployment

You must plan where to install the various Siebel components on your servers. This topic contains the following information:

- [“Preparing the Hardware and Planning Topologies”](#) on page 277
- [“Planning Siebel Server Load Balancing”](#) on page 278

- [“Planning Disk Space and Configuration Requirements” on page 279](#)
- [“Planning RDBMS Installation and Configuration” on page 280](#)
- [“Managing Temporary Disk Space Required by Siebel Installers and Wizards” on page 282](#)
- [“About The Language in Which Siebel Installers and Wizards Run” on page 283](#)
- [“Planning to Install Multiple Instances of Siebel Business Applications” on page 284](#)
- [“Specifying the Locale for Siebel Business Applications” on page 285](#)
- [“Restrictions on Host Names for Siebel Gateway Name Server and Siebel Server” on page 286](#)
- [“Restrictions on Names for Siebel Enterprise and Siebel Server” on page 287](#)
- [“File and Directory Naming Conventions” on page 287](#)
- [“Creating the Siebel File System” on page 289](#)
- [“Creating the Siebel Service Owner Account” on page 293](#)
- [“Installation and Configuration Methods by Deployment Type” on page 294](#)

## Preparing the Hardware and Planning Topologies

This topic is part of [“Planning Your Siebel Deployment” on page 276](#).

Verify that the hardware that you have chosen meets all of the requirements for running your Siebel Business Applications as well as the required third-party software. Verify also that the hardware is able to support the RDBMS and the Siebel database, the Siebel File System, Siebel Gateway Name Server, Siebel Server, and other Siebel modules. Also plan to support Siebel Tools developer workstation computers and Siebel Mobile Web Client computers, where applicable.

Consider running specialized components on dedicated computers. Whether you do so depends on considerations that include available resources, overall load, performance, security, and so on.

In general, it is assumed that, for security purposes, your computer resources are not shared between Siebel CRM and other applications or systems that are not related to supporting your Siebel CRM deployment.

Record the computer names and installation directory names that you decide on in your copy of the worksheet in [Appendix A, “Siebel Deployment Planning Worksheet.”](#)

### Related Topics

- [“Planning to Install Multiple Instances of Siebel Business Applications” on page 284](#)
- [“Restrictions on Host Names for Siebel Gateway Name Server and Siebel Server” on page 286](#)
- [“Restrictions on Names for Siebel Enterprise and Siebel Server” on page 287](#)
- [“File and Directory Naming Conventions” on page 287](#)
- [“Creating the Siebel File System” on page 289](#)
- [“About the Siebel Web Server Extension” on page 305](#)
- [“Installing the Web Server” on page 306](#)

### Related Books

*Siebel Deployment Planning Guide*

*Siebel Performance Tuning Guide*

*Siebel Security Guide*

*Siebel Security Hardening Guide*

Certifications tab on My Oracle Support

## Planning Siebel Server Load Balancing

This topic is part of [“Planning Your Siebel Deployment”](#) on page 276.

Before you install your Siebel Enterprise Server components, determine your load balancing strategy for Siebel Servers. For more information, see [“Process of Configuring Load Balancing for Siebel Business Applications”](#) on page 120. See also *Siebel Deployment Planning Guide* and *Siebel System Administration Guide*.

### Requirements for Generating the Load Balancing Configuration File

Generating the load balancing configuration (lbconfig.txt) file has the following requirements:

- **Verify that all of the Siebel Servers for which you want to provide load balancing are running.**
- **On each Siebel Server, verify that the Application Object Managers that you want to load balance are enabled.** Disable any Application Object Managers that you will not use. Note the Application Object Managers that are to be load balanced, so that you can later remove or comment out any disabled Application Object Managers that appear in the lbconfig.txt file that you generate.

### Requirements for Setting Up a Third-Party HTTP Load Balancer

Observe the following requirements for setting up a third-party HTTP load balancer:

- **The third-party HTTP load balancer must be validated for use with Siebel Business Applications.** For more information, see 477835.1 (Article ID) on My Oracle Support. This document was previously published as Siebel Technical Note 540.
- **Your third-party load balancer must have the following characteristics:**
  - It must be an HTTP load balancer capable of level 7 HTTP routing. It must be able to parse URLs in HTTP headers.
  - It must allow end-points to manage TCP connections. Specifically, it must allow one-to-one mapping between client and server TCP sessions. Also, it must not do back-end connection pooling, such as reverse proxy server pooling.
- **Verify that all of the Siebel Servers for which you want to provide load balancing are running.** At least one Siebel Server must be running.

- **On each Siebel Server, verify that the Application Object Managers that you want to load balance are enabled.** Disable any Application Object Managers that you will not use.
- **Select an unallocated, static virtual IP address and virtual port number for the load balancer.**
- **Generate the load-balancing configuration file (lbconfig.txt),** as described in [“Generating the Load Balancing Configuration File \(lbconfig.txt\)”](#) on page 121.
- **Review the HTTP load balancer rule types.** Review the component rules, server rules, and round-robin rules.
- **Configure the SWSE.** The SWSE Configuration Wizard will ask you to choose Siebel load balancing or third-party load balancing. Choose third-party load balancing and enter the virtual IP address and virtual port number for the load balancer. For more information, see [“Process of Configuring the Siebel Web Server Extension”](#) on page 82.

## Planning Disk Space and Configuration Requirements

This topic is part of [“Planning Your Siebel Deployment”](#) on page 276.

Before you install, you must anticipate your disk space requirements for each installable Siebel module. Each Siebel installer displays the required disk space for the installed software before files are copied. Also anticipate the disk space required for Siebel image directories. For more information, see [Chapter 14, “Creating the Siebel Installation Image on the Network.”](#)

Siebel installers also have temporary disk space requirements, as described in [“Managing Temporary Disk Space Required by Siebel Installers and Wizards”](#) on page 282.

The Siebel Enterprise Server architecture is designed to scale across multiple application server computers to meet the needs of large, complex deployments. For assistance in capacity planning and sizing hardware platforms for Siebel Enterprise Server, contact your Oracle sales representative or Oracle Advanced Customer Services to request assistance from Oracle’s Application Expert Services.

The number of server computers, the CPU resources, and the memory resources required for operating Siebel Business Applications increases with the number and types of users and the deployed Siebel CRM modules.

In addition to the disk space required for installation, computers operating Siebel Remote components require 15 MB of usable disk space for each mobile user. Oracle recommends using high-performance and high-availability storage solutions, as appropriate, for deployments of Siebel Business Applications, particularly for high-capacity deployments. Oracle also recommends using high-performance disks or fault-tolerant disk arrays for all server computers, Siebel File System servers, and database servers.

Hardware or software high-availability disk configurations are critical for Siebel Remote servers, Siebel File System servers, and database servers. It is recommended that you configure other Siebel application servers, Siebel Web servers, and other Siebel Server components to use hardware or software RAID level 1 or comparable configurations.

High-availability solutions, such as clustering, are also recommended on critical components and can be used in conjunction with applicable high-availability storage solutions. Clustering is critical for high availability of the Siebel Gateway Name Server, Siebel Remote servers, and the database server. Clustering is also recommended for any application server computer that is not load-balanced. See also [“Planning Siebel Server Load Balancing” on page 278](#) and related topics.

Customers are responsible for making sure that clustering is supported on each server component and that the Siebel Server hardware operates with the supported server operating systems and clustering solutions. For supported operating systems and supported Web servers, see the Certifications tab on My Oracle Support. For more information, see 1492194.1 (Article ID) on My Oracle Support.

**NOTE:** Some of the information in this topic was formerly presented in *Siebel System Requirements and Supported Platforms* on Oracle Technology Network. Use the requirements described in this topic as a guideline. The requirements do not take into consideration various factors that affect scalability and performance.

For more information about some of these recommendations, see *Siebel Deployment Planning Guide*. See also *Siebel Performance Tuning Guide*.

## Planning RDBMS Installation and Configuration

This topic is part of [“Planning Your Siebel Deployment” on page 276](#).

Note the following guidelines for installing and configuring the Relational Database Management System (RDBMS) on which you will create the Siebel database.

For more information about configuring the RDBMS, see [Chapter 13, “Configuring the RDBMS.”](#) For more information about configuring the Siebel database after installing Siebel Enterprise Server, see [Chapter 5, “Installing the Siebel Database on the RDBMS.”](#)

- Make sure that this release of Siebel Business Applications supports the exact version of your chosen RDBMS, as specified in the Certifications tab on My Oracle Support, and that the RDBMS has been installed on its designated server. This server will hold the database tables containing your business data, such as sales (personnel, territories, opportunities, and activities), marketing, and customer service information.
- Verify that the network name of the server that will support the Siebel database is properly recorded in your copy of the worksheet in [Appendix A, “Siebel Deployment Planning Worksheet.”](#)
- When you configure the Siebel Enterprise, the Siebel Enterprise Configuration Wizard creates the ODBC data source name, using the name *EnterpriseName\_DSN*. For example, if your Siebel Enterprise name is sieb81, then the ODBC data source name will be sieb81\_DSN. Using this pattern, determine what your ODBC data source name will be and record it in your copy of the worksheet in [Appendix A, “Siebel Deployment Planning Worksheet.”](#)



**NOTE:** In most cases, do not change any of the default ODBC settings or parameters. Otherwise, you will encounter problems using the ODBC. For example, setting `OptimizeLongPerformance` to `enable` corrupts all of the scripts in the Siebel Repository during import or export processes. See also the topics for verifying the ODBC data source for your RDBMS platform, such as those in [“Verifying the ODBC Data Source”](#) on page 208.

Siebel Web Client and Siebel Tools installers also create ODBC data source names during the installation. The naming convention is different than ODBC data source names created by the Siebel Enterprise Configuration Wizard. For more information, see [Chapter 7, “Installing Siebel Web Clients and Siebel Tools.”](#)

## About Database Code Pages and Locale Support

In a database environment that is enabled for Unicode, you can install any of the available Siebel language packs. However, in a database environment that is not enabled for Unicode, you must consider the correlation of the language packs that you want to install and the characters supported by your database code page. For example, in a Western European code page database, you can only install Western European language packs, such as U.S. English, French, Spanish, or German language packs. In a Japanese code page database, you can only install Japanese or U.S. English language packs. The installed languages and the code page of the operating system on which your Siebel Server runs must match those of your Siebel database instance.

### Related Topics

[“Specifying the Locale for Siebel Business Applications”](#) on page 285

[Chapter 13, “Configuring the RDBMS”](#)

### Related Books

*Siebel Global Deployment Guide*

Certifications tab on My Oracle Support

For Siebel language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) for Siebel CRM version 8.1.1.x or 1524342.1 (Article ID) for Siebel CRM version 8.2.2.x on My Oracle Support.

## Planning Database Connectivity

Use the ODBC driver versions listed in the Certifications tab on My Oracle Support for your chosen RDBMS for Siebel Servers, Siebel Tools, and Siebel Developer Web Clients (if applicable). Make sure that ODBC connectivity uses TCP/IP as the transport layer protocol for your Siebel Servers, Siebel Tools, and Siebel Developer Web Clients.

## How to Use This Guide If Your Database Is IBM DB2 for z/OS

This guide describes installation of Siebel modules for each supported RDBMS, with the exception of IBM DB2 for z/OS. (This database product was formerly referred to in some *Siebel Bookshelf* documentation as *IBM DB2 UDB for z/OS and OS/390*.)

**NOTE:** The *Siebel Bookshelf* is available on Oracle Technology Network (OTN) and Oracle Software Delivery Cloud. It might also be installed locally on your intranet or on a network location.

Customers for IBM DB2 for z/OS require this guide (*Siebel Installation Guide* for the operating system you are using) and *Implementing Siebel Business Applications on DB2 for z/OS*. Both of these guides are available on the *Siebel Bookshelf*.

**NOTE:** In this guide, [Chapter 13, “Configuring the RDBMS,”](#) and [Chapter 5, “Installing the Siebel Database on the RDBMS,”](#) do not apply to customers using DB2 for z/OS. Instead, see *Implementing Siebel Business Applications on DB2 for z/OS* for database-related content. If you are upgrading on this platform, then see also *Siebel Database Upgrade Guide for DB2 for z/OS*. For information about relevant requirements related to authentication for the Siebel Gateway Name Server, see [“Requirements for Siebel Gateway Name Server Authentication” on page 299](#).

*Implementing Siebel Business Applications on DB2 for z/OS* includes, but is not limited to, topics such as special security issues for this RDBMS, installing the Siebel schema, performance guidelines for use of this RDBMS with Siebel Business Applications, and specific procedures for moving data from development to production. Also consult all of the other applicable *Siebel Bookshelf* documentation, such as *Siebel Security Guide*.

## Managing Temporary Disk Space Required by Siebel Installers and Wizards

This topic is part of [“Planning Your Siebel Deployment” on page 276](#).

Siebel installer programs, the Siebel Image Creator utility, and Siebel Configuration Wizards all require the use of temporary disk space while operating. Disk space required varies by operating system. The location of temporary directories is specified using the TEMP and TMP environment variables. Set these variables the same: to a valid existing directory that contains adequate space.

It is recommended that you periodically clear out the temporary directory that you are using. You might have to do this as part of resolving installer or wizard problems.

On Microsoft Windows, the temporary directory used by default is C:\Documents and Settings\*username*\Local Settings\Temp.

The minimum disk space figures provided in this topic are general guidelines only. The specific amount of temporary disk space needed by a particular installation operation varies. If there is insufficient disk space, then the installer will notify you that more disk space is needed.

**CAUTION:** A nondefault temporary directory name that you specify must not include spaces, in order to avoid problems associated with how Microsoft Windows handles long path names. Installers or wizards might fail if this problem is encountered.

The user running the installer or wizard must have privileges that include write permission for the temporary directory.

Table 22 shows the minimum disk space required by Siebel installers and wizards (by operating system), along with the default temporary directory locations.

Table 22. Temporary Disk Space Required by Siebel Installers and Wizards

Operating System	Minimum Required Space	Default Location
Windows	65 to 100 MB	System drive (usually C:)

### *To verify the name of your temporary directory*

- From a DOS command prompt, enter the commands `set temp` and `set tmp`.

## About The Language in Which Siebel Installers and Wizards Run

This topic is part of “[Planning Your Siebel Deployment](#)” on page 276.

When you start Siebel installer programs, the Siebel Image Creator utility, or Siebel Configuration Wizards, the language in which the program runs (the user interface text) is determined by the language for the locale of your operating system, where this language and locale are supported for the current version of Siebel Business Applications and for the installer or other type of wizard.

Installers for Siebel CRM server modules and client modules are based on Oracle Universal Installer and run in the current language corresponding to the regional and language options settings on the server or client computer, where the current language is one of the following: U.S. English, French, German, Italian, Brazilian Portuguese, Spanish, Japanese, Korean, Chinese Simplified, or Chinese Traditional. For any other current language setting, the installer runs in U.S. English.

Siebel Configuration Wizards and Siebel Image Creator also use the current language corresponding to the regional and language options setting. The programs can run in all of the languages corresponding to the available Siebel language packs, except Arabic, Hebrew, Polish, Russian, Thai, or Turkish. If the current language is one of these or any language not supported for Siebel Business Applications, then the program runs in U.S. English.

For all of the Siebel installers and Configuration Wizards, and Siebel Image Creator, in order to change the user interface language, you must change the current operating system language and locale. Make sure that the language setting under the regional option of your operating system is set to the desired choice of your language. The language that you select must be one of those supported for Siebel Business Applications, as described earlier.

For information about installing language packs for Siebel Business Applications, see the applicable installation task topic and see “[Installing and Deploying Siebel Business Applications with Multiple Languages](#)” on page 133.

## Planning to Install Multiple Instances of Siebel Business Applications

This topic is part of [“Planning Your Siebel Deployment”](#) on page 276.

This topic describes issues in installing multiple instances of similar or dissimilar versions of Siebel Business Applications on the same computer.

### Installing Multiple Instances of Similar Versions of Siebel Business Applications

By default, the Siebel installers automatically install Siebel Business Applications software in directories with unique names that will not conflict with other Siebel modules that you install on the same computer. To install another instance of the same version of a module on a single computer (where applicable), specify a custom installation path.

However, installing multiple instances of some modules might cause problems. For example:

- You cannot install multiple instances of the same version of Siebel Gateway Name Server on the same computer. The reason for this is that installing and configuring the Siebel Gateway Name Server creates a service which cannot coexist in multiple instances for different installations.
- Restrictions apply for installing multiple instances of SWSE. For details, see [“Requirements for Installing and Configuring the Siebel Web Server Extension”](#) on page 304.

For important related considerations, see also [“About Installing Siebel Business Applications”](#) on page 271 and [“Preparing the Hardware and Planning Topologies”](#) on page 277.

**NOTE:** In this context, *same version* refers to all of the releases sharing the same first two digits, such as Siebel CRM version 8.1.1.11 and 8.1.1.14, or version 8.2.2.4 and 8.2.2.14, and so on.

All Siebel Enterprise Server components that you install on the same computer are installed into the same root directory (such as C:\siebel\8.1.1.14.0\ses or C:\siebel\8.2.2.14.0\ses on Microsoft Windows or /siebel/8.1.1.14.0/ses or /siebel/8.2.2.14.0/ses on UNIX), except in the case described in the note that follows. These components include Siebel Gateway Name Server, Siebel Server, Database Configuration Utilities, and EAI Connector. See also [“File and Directory Naming Conventions”](#) on page 287.

**NOTE:** If you have already installed Siebel Enterprise Server for the current release, and you require additional Siebel Enterprise Server components (for example, Siebel Gateway Name Server is already installed and you want to install a Siebel Server), then you can install a new instance, with the modules you require, in a different directory or on a different computer. (Then install the latest Siebel Patchset release for all of the applicable installed instances.) For more information about options in this situation, see [“General Requirements for Installing and Configuring Siebel Enterprise Server Components”](#) on page 297.

### Installing Multiple Instances of Dissimilar Versions of Siebel Business Applications

Multiple versions of some Siebel components can be installed on the same computer. Sometimes you might have to do this as part of some upgrade scenarios.

Use naming conventions for your installation directories that reflect the component and the version being installed, such as 81 or 82 for the current version. The default installation directories already reference Siebel CRM version 8.1 or version 8.2 in this way.

- Each Siebel Gateway Name Server must be installed on a separate computer, regardless of the version.
- If you install multiple versions of the Siebel Server on the same computer, then you must install them in different directories (default installation directories are already different between versions).
- Restrictions apply for installing multiple instances of Siebel Web Server Extension.

### Related Topics

[Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)  
[“Requirements for Installing and Configuring the Siebel Web Server Extension” on page 304](#)

### Related Books

*Siebel Database Upgrade Guide*

## Specifying the Locale for Siebel Business Applications

This topic is part of [“Planning Your Siebel Deployment” on page 276](#).

When a Siebel application component (Siebel Server, Siebel Tools, or Siebel Developer Web Client) opens a connection to the Siebel database, the locale is automatically determined on a per-session basis for the connection. This setting overrides settings that might be defined elsewhere.

Do not explicitly set the NLS\_LANG (Oracle-specific) or SIEBEL\_CODEPAGE environment variables for Siebel Business Applications. Windows Registry settings for these variables might be defined, but these settings are not used for the database connection. These registry settings affect any software that runs on that computer (except for Siebel Business Applications).

For deployments using Oracle Database, the NLS\_LANG variable determines default behaviors that can be overridden using other variables, such as NLS\_SORT, that are *not* set automatically for Siebel Business Applications using an Oracle Database connection. Therefore, settings that you make for NLS\_SORT will affect any software that runs in the Siebel environment (*including* Siebel Business Applications).

**CAUTION:** For development environments, Siebel Business Applications support only binary sort order. Therefore, for Oracle Database, when you are setting the locale for your development environment, either do not set NLS\_SORT at all, or set it to BINARY. In production environments, this restriction does not apply. (In this guide, *sort order* and *collation sequence* are used interchangeably, even though these terms might not always mean the same thing.)

You can explicitly set the locale to be used by a Siebel Server or Application Object Manager component by setting the Locale Code parameter.

### Related Topics

[“Planning RDBMS Installation and Configuration” on page 280](#)

[Chapter 13, “Configuring the RDBMS”](#)

### Related Books

*Siebel Applications Administration Guide*

*Siebel Global Deployment Guide*

## Restrictions on Host Names for Siebel Gateway Name Server and Siebel Server

This topic is part of [“Planning Your Siebel Deployment” on page 276](#).

See also [“Restrictions on Names for Siebel Enterprise and Siebel Server” on page 287](#), which is about names for Siebel entities that you specify during configuration.

This topic describes restrictions for host names for server computers on which you will install Siebel Gateway Name Server or Siebel Server.

The Siebel Gateway Name Server name is defined automatically based on the host name of the server computer. However, problems might arise during configuration of Siebel modules unless the following requirements are observed:

- Host names for Siebel Gateway Name Server or Siebel Server must not include dashes (hyphens). It is recommended that you use an underscore if a separator character is required. For example, `host_sba81` is acceptable, but `host-sba81` is not.

**NOTE:** A dash might not cause problems in every scenario, but problems have been observed in many specific scenarios, as noted in 477993.1 (Article ID) on My Oracle Support. This document was previously published as Siebel Alert 1067. (Workarounds described in the alert, involving substitute .scm files, do not apply to the current software version.) In any case, similar restrictions for naming a Siebel Enterprise or Siebel Server are noted in [“Restrictions on Names for Siebel Enterprise and Siebel Server” on page 287](#).

- The host name for Siebel Gateway Name Server must be no longer than 15 characters.

The Siebel Configuration Wizard task for configuring the Siebel Gateway Name Server cannot execute successfully if the host name is longer than 15 characters.

(Configuration Wizard tasks for configuring the Siebel Enterprise and the Siebel Server also validate that the name of the Siebel Gateway Name Server, which would have been previously configured, is no longer than 15 characters.)

- In general, it is recommended not to define the host name for the Siebel Gateway Name Server computer to include domain information, as might be common in some UNIX environments. The entire host name is subject to the 15-character limit mentioned previously.

## Restrictions on Names for Siebel Enterprise and Siebel Server

This topic is part of [“Planning Your Siebel Deployment” on page 276](#).

This topic describes restrictions to observe when planning the names that you will give the Siebel Enterprise and Siebel Server instances during configuration of Siebel Business Applications software.

See also [“Restrictions on Host Names for Siebel Gateway Name Server and Siebel Server” on page 286](#).

Siebel Configuration Wizard tasks that specify or refer to the Siebel Enterprise name or the Siebel Server name validate for some of the following requirements, such as the 12-character limit. User input is validated in the wizard, unless you specify to skip validation, as described in [“Starting a Siebel Configuration Wizard” on page 62](#). Observe all of the documented restrictions regardless of validation behavior.

### Siebel Enterprise Naming Restrictions

The following restrictions apply to naming a Siebel Enterprise:

- The name must be no longer than 12 characters.
- The name cannot be *server* or *enterprise*. (A name such as *enterprise1* is acceptable.)

### Siebel Server Naming Restrictions

When planning the names of Siebel Server instances within a Siebel Enterprise, the following restrictions apply:

- Names must contain only alphabetic characters, numerals, underscores, or a combination thereof. For example, do not use dashes (hyphens) in naming Siebel Server instances.
- Names must lead with an alphabetic character.
- Names must be unique within the Siebel Enterprise.
- Names must be no longer than 12 characters.
- Names cannot be *server* or *enterprise*. (Names such as *server1* are acceptable.)

## File and Directory Naming Conventions

This topic is part of [“Planning Your Siebel Deployment” on page 276](#).

Use lowercase for all of the file names, directory names, path names, parameters, flags, and command-line commands, unless you are instructed otherwise.

Directory names or file names cannot contain special characters, including periods, apostrophes, accents, number (pound or hash) signs, or ampersands. Underscores are acceptable. Spaces are not allowed for server installs on Windows (though the operating system might otherwise allow it). Spaces are acceptable for Siebel Web Client or Siebel Tools installs (on Windows).

## How This Guide Refers to Your Installation Directories

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

**NOTE:** The default installation directories shown in this guide for Siebel Enterprise Server components, Siebel Web Server Extension, Siebel Web Clients, and Siebel Tools are those for new installations of the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14. Alternatively, your products might have been installed in different installation directories, such as if you originally installed them for a prior release.

**SIEBEL\_ROOT.** Generally, this refers to the main directory in which software for each Siebel Enterprise Server component has been installed. The installers for the Siebel Enterprise Server components install into the top-level directory, such as C:\siebel\8.1.1.14.0\ses by default, although the directory where you install might be different. Generally, this directory is what *SIEBEL\_ROOT* represents in this guide.

**ORACLE\_HOME.** This refers to the same directory as represented by *SIEBEL\_ROOT*.

**SIEBEL\_HOME.** The installation or root directory for Siebel Business Applications software in general (such as C:\siebel\8.1.1.14.0\ses or C:\siebel\8.2.2.14.0\ses), or of a specific module such as the Siebel Gateway Name Server or the Siebel Server (such as C:\siebel\8.1.1.14.0\ses\siebsrvr or C:\siebel\8.2.2.14.0\ses\siebsrvr for Siebel Server), depending on the context. Many scripts contain variables with this name; its meaning is most often derived from the context.

**SIEBSRV\_ROOT.** The installation or root directory for Siebel Server. By default, it is installed in C:\siebel\8.1.1.14.0\ses\siebsrvr or C:\siebel\8.2.2.14.0\ses\siebsrvr.

**SIEBEL\_GATEWAY\_ROOT.** The installation or root directory for Siebel Gateway Name Server. By default, it is installed in C:\siebel\8.1.1.14.0\ses\gtwysrvr or C:\siebel\8.2.2.14.0\ses\gtwysrvr.

**DBSRV\_ROOT.** The directory into which you install the Siebel Database Configuration Utilities (formerly referred to as the *Siebel Database Server*). By default, these utilities are installed in C:\siebel\8.1.1.14.0\ses\dbsrvr or C:\siebel\8.2.2.14.0\ses\dbsrvr (on a Siebel Server computer).

**SWSE\_ROOT.** The directory into which you install the Siebel Web Server Extension (SWSE). By default, it is installed in C:\siebel\8.1.1.14.0\sweapp or C:\siebel\8.2.2.14.0\sweapp.

**SIEBEL\_CLIENT\_ROOT.** The directory into which you install the Siebel Mobile Web Client or Siebel Developer Web Client. By default, it is installed in C:\siebel\8.1.1.14.0\client or C:\siebel\8.2.2.14.0\client or a similar location.

**SIEBEL\_TOOLS\_ROOT.** The directory into which you install Siebel Tools. By default, it is installed in C:\siebel\8.1.1.14.0\tools or C:\siebel\8.2.2.14.0\tools or a similar location.



## Creating the Siebel File System

This topic is part of “[Planning Your Siebel Deployment](#)” on page 276.

The *Siebel File System* is a shared directory, or set of directories, that is network-accessible to the Siebel Server and that can store files such as attachments for use by Siebel Business Applications. Siebel File System directories might optionally exist on multiple separate devices or partitions.

Each File System directory might be created on a server computer where you have installed a Siebel Server, or on another network server that can share the directory, so that it is available to the Siebel Server. Consult your third-party documentation for requirements for networked file systems.

Creating multiple Siebel File System directories in different locations can enable you to store larger volumes of data. As new file attachments are inserted, they are evenly distributed to these multiple File System directories. If you create multiple File System directories, then you must include all of the directory locations, delimited by commas, when you specify the Siebel File System location during configuration of your Siebel environment. Each File System directory location must be uniquely named within the network context where it will be accessed.

You can exclude certain types of files from being saved to the Siebel File System, as determined by their file extensions. For more information about setting system preferences to enable this feature and to specify the file extensions to be excluded, see *Siebel Security Hardening Guide*.

### Siebel File System Requirements

The following are requirements for the Siebel File System. Additional requirements are noted later in this topic.

- A primary Siebel File System directory must be created before you configure the Siebel Enterprise. You specify this location during configuration. The location must be specified using UNC format, such as `\\computer_name\Fs`. If this directory is located on the same computer where you are installing and configuring Siebel Business Applications software, then the directory must be created as a shared directory. The user running the Siebel Configuration Wizard must have write permission in this directory.
- It is strongly recommended that you disable short file-name generation on Windows servers hosting the Siebel File System, because this type of file-naming can cause severe performance issues when the file system grows to a large size.
- The underlying physical file system must use file locking. Valid locks must be returned that are appropriate to the action being undertaken. For example, when a file is created or written to, an exclusive lock is needed. File locking must ensure the integrity of the files accessed. If a write lock is acquired for a file, then no other process must be able to access the file. For more information and recommendations, see 759070.1 (Article ID) on My Oracle Support.
- If the operating systems of the computers hosting the Siebel Server and a File System directory are different (for example, one Windows and one UNIX), then you might have to deploy a third-party cross-platform networking tool, such as Samba, to allow both computers to share the directory. See your third-party vendor documentation for details.
- You must create a separate Siebel File System for each Siebel Enterprise. For example, if you have development and test databases, then you must have two separate Siebel Enterprises, and therefore two Siebel File Systems.

- The ability to use multiple directories and devices for the Siebel File System does not apply to the Siebel Mobile Web Client, for which the Siebel File System must use a single directory on the client computer.
- If you operate a File System directory as part of a cluster for failover purposes, then you must create the directory on a clustered disk drive with a clustered network share resource. For information about clustering your servers and about deployment options for the Siebel File System, see *Siebel Deployment Planning Guide*.

## Siebel File System and Siebel Server Components

Each Siebel Server accesses the Siebel File System (for the Siebel Enterprise) by means of a dedicated server component, called File System Manager (alias FSMSrvr). Individual Siebel Web Clients require no direct knowledge of the locations of the Siebel File System directories, because they connect to FSMSrvr through the Application Object Manager component on the Siebel Server to request file uploads or downloads. The Application Object Manager passes such requests to FSMSrvr, which processes the requests through interaction with the File System directories.

Because the Siebel Server is the sole access mechanism to the Siebel File System, the user with administrative privileges for the Siebel Server, and no other user, must have access privileges to the File System directories. This precaution protects the File System from direct physical access by all other users.

Some Siebel Server components might access the Siebel File System directly, without using File System Manager.

## Siebel File System Parameter

The Siebel File System parameter defines the particular directory or set of directories that you are using for the Siebel File System. Specify multiple File System directories delimited by commas.

The Siebel File System parameter can be defined at the Siebel Enterprise level, Siebel Server level, or server component level. For example, for a Siebel Server dedicated for use with Siebel EIM, you might choose to use a Siebel File System location that is not in general use in the Siebel Enterprise. Use Server Manager to individually modify the parameter at the Siebel Server or component level, if the File System that is to be used by a particular Siebel Server or applicable component has different directory locations than are defined for the Siebel Enterprise.

The value of the Siebel File System parameter cannot exceed 255 characters in length.

**NOTE:** Verify that the network names of servers that support the Siebel File System are properly recorded in your copy of the worksheet in [Appendix A, "Siebel Deployment Planning Worksheet."](#) Use the computer names, not the IP addresses, for the Siebel File System names. IP addresses are not supported.

## Siebel File System Utilities

Two utilities are available to help you manage your Siebel File System directories: `sfscleanup` and `sfspartition`. For information about using these utilities to partition an existing Siebel File System to use multiple File System directories or to clean up orphan files in the File System, see *Siebel System Administration Guide*.

## Naming a Siebel File System Directory

Each Siebel File System directory name must be alphanumeric, must begin with an alphabetic character, and cannot contain special characters or spaces. Underscores are permitted. For example, you might name a directory something like this:

```
\\server\si ebel
```

Such a directory might be referred to using the following notation:

```
\\Si ebel FS\si ebel 8x
```

where:

- *SiebelFS* is the host name of the computer (for example, where a dedicated computer is used for the Siebel File System).
- *siebel8x* is the name of the shared directory.

You have to specify all of the applicable UNC sharenames (delimited by commas) when configuring the Siebel Enterprise. These shared directories must be available to all of the Siebel Servers in the Siebel Enterprise.

As part of the Siebel Server installation, File System Manager automatically generates a set of subdirectories under each Siebel File System root directory, as described in [Table 23 on page 291](#).

Table 23. Siebel File System Subdirectories

Subdirectory	Purpose
att	Main subdirectory for file attachments
atttmp	Temporary directory for file attachments
cms	Files used for outbound communication requests
ei m	Siebel transaction files for Siebel EIM
Marketi ng	Main subdirectory for Siebel Marketing
red	Rule edit cache for Siebel Configurator
ssp	Session preferences
userpref	Siebel user preferences

**NOTE:** When you create a Siebel File System shared directory, only the associated Siebel Servers must be allowed to create subdirectories in that location. Do not manually create subdirectories in that location.

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

## Setting Up the Siebel File System

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

**NOTE:** In addition to using the following steps, you must install the third-party software required to view standard attachment types, such as Microsoft Word, Excel, or Lotus Notes, on client computers where users run Siebel Business Applications.

### *To set up the Siebel File System*

- 1 Create each directory on the applicable server and record all of the directory locations in the copy that you made of the worksheet in [Appendix A, "Siebel Deployment Planning Worksheet."](#)
- 2 Using Windows Explorer, select the directory, and then choose File, then Properties, and then Sharing. Select Share this folder.
- 3 Type a name for the Share name.

**NOTE:** When you want to add a client or new user to this share, you click Add under the Security tab to browse for the user or group name.

You might want to type the number of the Siebel release that you are installing in the Comments field for future identification. However, completion of the field is not required.

**NOTE:** When installing a new File System directory, do not change the default setting for Maximum Allowed.

- 4 To grant UNC access to the Siebel administrator, click Permissions and choose the appropriate user or group name. When you want to add a client or new user to this share, you click Add to browse for the user or group name.

**NOTE:** Only the system administrator for the Siebel Server, and no other user, must have access privileges to the Siebel File System directories.

- 5 From the Permissions list, make sure that Full Control is selected.
- 6 Click OK to finish.
- 7 Grant Windows access to each Siebel Server and client:
  - a On the Security tab, select the appropriate user or group name and make sure that Full Control is selected on the Permissions list.
  - b Click Advanced.
  - c On the Access Control Settings dialog box, make sure that you check the option to allow inheritable permissions from the parent to propagate to this object.
- 8 To close the Permissions and File Properties dialog boxes, click OK.

### Related Topics

["Populating the Siebel File System" on page 113](#)

### Related Books

*Siebel Deployment Planning Guide*

*Siebel System Administration Guide*

*Siebel Security Guide*

*Siebel Security Hardening Guide*

## Creating the Siebel Service Owner Account

This topic is part of “[Planning Your Siebel Deployment](#)” on page 276.

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

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

- The Siebel service owner account must be defined or available on each applicable server computer: on the Siebel Gateway Name Server, on each Siebel Server in the Siebel Enterprise, and on any computer on which the Siebel File System exists.
- The Siebel service owner account must be part of a Windows domain, so that services are operated under the same account on all of the Windows servers.
- If you are using a local account instead, then you must set up that account to be identical on each server, using the same login ID and password.
- The Siebel service owner account must be part of the administrator group. The Siebel service owner account might be the same administrator account under which the Siebel modules are installed, or a different account that is part of the administrator group.
- The Siebel service owner account must have the following Windows rights and privileges:
  - Log on as a Service
  - Act as part of the operating system
- The Siebel service owner account password must not require a change on next logon and must be set not to expire.
- The Siebel service owner account name or password cannot contain any spaces.
- When you determine the Siebel service owner account name and password, record this information in your copy of the worksheet in [Appendix A, “Siebel Deployment Planning Worksheet.”](#) (For security reasons, you might prefer not to record the password in the worksheet.) See also *Siebel Security Guide*.

### Related Topics

[Appendix A, “Siebel Deployment Planning Worksheet”](#)

## Installation and Configuration Methods by Deployment Type

You can use any of several different overall methods for installing and configuring Siebel Business Applications software. Use the following information to help you determine which overall method, or combination of methods, is most suitable for your deployment requirements.

- “Small to Medium-Sized Deployments” on page 294
- “Medium-Sized Deployments” on page 294
- “Large Deployments” on page 295
- “Installation and Configuration Options” on page 296

For more information, see [Chapter 2, “Overview of Installing Siebel Business Applications,”](#) and other relevant topics.

### Small to Medium-Sized Deployments

Do you require a small to medium-sized deployment? For smaller deployments, including some test or demonstration deployments, you might require all of the server-based Siebel Business Applications software to be installed on the same computer.

Verify that you have created the database instance (if you do not already have a Siebel database) and installed the Web server. The Siebel database might be located on the same computer as the Siebel Enterprise Server and the Web server with the Siebel Web Server Extension (SWSE), or on a different computer.

In this scenario, you install the Siebel Enterprise Server components and you install the Siebel Web Server Extension (SWSE) on the computer with the Web server. Siebel Enterprise Server components include Siebel Gateway Name Server, Siebel Server, Database Configuration Utilities, and EAI Connector.

You use the Siebel Enterprise Server installer to install the Siebel Enterprise Server components, and you use the SWSE installer to install the SWSE.

Run Siebel Configuration Wizards to configure the components that you installed. First configure the Siebel Gateway Name Server, then the Siebel Enterprise, then the SWSE logical profile. (You configure the physical SWSE after SWSE installation.)

If you do not have a Siebel database, then you start the Database Configuration Wizard and perform the task to install the Siebel database into the database instance. After you install the Siebel database, you start the Siebel Server Configuration Wizard and configure the Siebel Server.

You install the SWSE on the Web server computer, where you also installed Siebel Enterprise Server components, then you apply the SWSE logical profile.

### Medium-Sized Deployments

Do you require a medium-sized deployment? Will you install all of the Siebel Enterprise Server components on the same computer? Siebel Enterprise Server components include Siebel Gateway Name Server, Siebel Server, Database Configuration Utilities, and EAI Connector.

Verify that you have created the database instance (if you do not already have a Siebel database) and installed the Web server. The Siebel database is assumed to be located on a different computer than the computer with Siebel Enterprise Server software.

In this scenario, all of the Siebel Enterprise Server components are to be installed on the same computer, but the Web server and Siebel Web Server Extension (SWSE) are to be installed on a different computer.

You use the Siebel Enterprise Server installer to install the Siebel Enterprise Server components, and you use the SWSE installer to install the SWSE.

You can install in GUI mode or use unattended installation. For more information about unattended installation, see [“Large Deployments” on page 295](#).

Run Siebel Configuration Wizards to configure the components that you installed. First configure the Siebel Gateway Name Server, then the Siebel Enterprise, then the SWSE logical profile. (You configure the physical SWSE after SWSE installation.)

If you do not have a Siebel database, then you start the Database Configuration Wizard and perform the task to install the Siebel database into the database instance. After you install the Siebel database, you start the Siebel Server Configuration Wizard and configure the Siebel Server.

You install the SWSE on the Web server computer, then you apply the SWSE logical profile.

## Large Deployments

Do you require a relatively large deployment? Will you use multiple servers to deploy your Siebel Enterprise Server components? Siebel Enterprise Server components include Siebel Gateway Name Server, Siebel Server, Database Configuration Utilities, and EAI Connector.

If you must support many users or multiple Siebel Business Applications and have multiple servers available, then you will probably install the Siebel Gateway Name Server on a different computer than the Siebel Server.

A large deployment usually also requires multiple Siebel Servers running on different computers. Each Siebel Server might be configured to run a particular application or set of applications. Or, multiple Siebel Servers might be configured similarly for participation in load balancing. Install and configure additional Siebel Servers after completing initial installation and configuration tasks.

Verify that you have created the database instance (if you do not already have a Siebel database) and installed the Web server. The Siebel database and the Web server are assumed to be located on different computers than those with Siebel Enterprise Server software.

You use the Siebel Enterprise Server installer to install the Siebel Enterprise Server components, and you use the SWSE installer to install the SWSE.

You install the Database Configuration Utilities with the first Siebel Server. For a new deployment, you must install both of these on the same computer where you installed the Siebel Gateway Name Server. (Configuring and deploying this Siebel Server is optional.) The Siebel database itself is located on a different computer than the Siebel Enterprise Server software.

You can install in GUI mode or use unattended installation.

Run Siebel Configuration Wizards to configure the components that you installed. First configure the Siebel Gateway Name Server, then the Siebel Enterprise, then the SWSE logical profile. (You configure the physical SWSE after SWSE installation.)

If you do not have a Siebel database, then you start the Database Configuration Wizard and perform the task to install the Siebel database into the database instance. After you install the Siebel database, you start the Siebel Server Configuration Wizard and configure the Siebel Server.

You install the SWSE on the Web server computer, then you configure the installed SWSE (apply the SWSE logical profile).

## Installation and Configuration Options

This topic is part of [“Installation and Configuration Methods by Deployment Type” on page 294](#).

Options that can help you install and configure Siebel Business Applications software efficiently include:

- Installation and configuration tasks are separate and are performed at different times, optionally by different users. After basic deployment decisions are made, installations can be done under the supervision of administrators who are most familiar with Siebel Business Applications. Such specialized administrators might perform all of the Siebel Configuration Wizards tasks.
- You can perform unattended installation or configuration, which can save you time, provide greater flexibility, and reduce error, compared to installing and configuring each installed component manually.
  - For information about unattended installation, see [“Installing Siebel Enterprise Server Components and Siebel Web Server Extension in Unattended Mode” on page 56](#).
  - For information about unattended configuration, see [Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension.”](#)

# Requirements for Installing and Configuring Siebel Enterprise Server Components

Review the requirements and guidelines in the following topics before installing and configuring the Siebel Enterprise Server:

- [“General Requirements for Installing and Configuring Siebel Enterprise Server Components” on page 297](#)
- [“Requirements for Siebel Gateway Name Server Authentication” on page 299](#)
- [“Requirements for Installing and Configuring the Siebel Gateway Name Server” on page 301](#)
- [“Requirements for Installing and Configuring the Siebel Server” on page 301](#)
- [“Requirements for Installing the Siebel EAI Connector” on page 304](#)

For requirements specific to the Siebel database, see [“Requirements for Installing and Configuring the Siebel Database” on page 312](#).



## General Requirements for Installing and Configuring Siebel Enterprise Server Components

This topic is part of [“Requirements for Installing and Configuring Siebel Enterprise Server Components” on page 296](#).

Review this topic before installing and configuring Siebel Enterprise Server components. See also the topics about individual components.

- Before installing Siebel Business Applications software, you must review all of the relevant information in the Certifications tab on My Oracle Support. Also check for applicable alerts, bulletins, or other documents on My Oracle Support.
- Review [“About Installing Siebel Business Applications” on page 271](#) and [“Planning Your Siebel Deployment” on page 276](#).
- All computers on which the Siebel Enterprise Server software is installed must meet the hardware and software requirements detailed in the Certifications tab on My Oracle Support or elsewhere. The Siebel Enterprise Server installer verifies that you have required software at the necessary version levels.
- In general, you must have installed all of the third-party products that you will require for the Siebel Enterprise Server software that you are installing. Some products can be installed after Siebel Business Applications software. Such products are listed in the Certifications tab on My Oracle Support.
- You must have created a Siebel Business Applications installation image that includes all of the modules and components that you require. Users who run Siebel installers or modify installer files must have the necessary permissions to the network directories where the Siebel image is located. For information about creating the Siebel installation image, see [Chapter 14, “Creating the Siebel Installation Image on the Network.”](#)
- When you install multiple components of the Siebel Enterprise Server, such as Siebel Gateway Name Server and Siebel Server, on the same computer, they are installed into a common root directory, such as C: \siebel \8. 1. 1. 14. 0\ses or C: \siebel \8. 2. 2. 14. 0\ses.
- Installation directories must meet the requirements described in [“File and Directory Naming Conventions” on page 287](#).
- If you will be clustering the Siebel Gateway Name Server or Siebel Server, then plan your use of clustering or redundant disk arrays (RAID) to configure against a single point of failure. For more information about this topic, see *Siebel Deployment Planning Guide*.
- Each computer that supports Siebel Enterprise Server software must have TCP/IP network connectivity to other computers that are part of or that work with the Siebel Enterprise Server. For example, the Siebel Gateway Name Server computer requires connectivity to all of the Siebel Server computers. Verify connectivity between all such computers, using the ping utility. For more information, see [“Verifying Network Connectivity for the Siebel Server Computer” on page 211](#).

- Before running any of the Siebel Configuration Wizards in which you will specify a server computer's host name or IP address, validate the host name or IP address that you will enter during configuration. You can use the ping utility for this purpose. The host name and IP address data that you specify when you run the wizards must be correct in order for the configuration process to proceed correctly.
- Verify that the network names of the servers that will support the Siebel Gateway Name Server and all of the Siebel Servers are recorded in [Appendix A, "Siebel Deployment Planning Worksheet."](#) You need this information when configuring the Siebel Servers.
- If you intend to use Transport Layer Security (TLS) or Secure Sockets Layers (SSL) with any Siebel Business Applications modules described in this guide, then you must review all of the applicable information before you configure the software.

If you are not yet ready to configure TLS or SSL for Siebel Enterprise Server (and Siebel Web Server Extension), then you can either postpone configuration until you are fully ready to configure TLS or SSL, or you can configure these components without TLS or SSL and reconfigure them later to use TLS or SSL.

**CAUTION:** It is strongly recommended to use TLS for best security, where possible. Using SSL is not recommended for secure environments. For more information, see *Siebel Security Guide*. See also 1944467.1 on My Oracle Support.

- Review the issues described in ["Managing Temporary Disk Space Required by Siebel Installers and Wizards"](#) on page 282. For example, make sure that you have adequate disk space.
- It is strongly recommended that you install and deploy, or at least install, all of the languages that you expect to require. For more information, see ["Installing and Deploying Siebel Business Applications with Multiple Languages"](#) on page 133.

For more information, see additional relevant topics, including:

- ["About Installing Siebel Business Applications"](#) on page 271
  - ["Planning RDBMS Installation and Configuration"](#) on page 280
  - ["Siebel Installation Media Contents"](#) on page 351
  - ["About Configuring Siebel Business Applications"](#) on page 61 and following topics
  - ["Preparing to Run Siebel Server Components"](#) on page 125
- You cannot install new Siebel Enterprise Server components into an existing installation.
  - Note that the Siebel Enterprise Server installer user interface can run in the supported languages described in ["About The Language in Which Siebel Installers and Wizards Run"](#) on page 283.
  - Before you configure Siebel Enterprise Server components, you must have created the Siebel File System. It must meet all of the criteria described in ["Creating the Siebel File System"](#) on page 289.
  - Before you install Siebel Business Applications, review documented information about the installation and configuration process and applicable requirements. Customers must manage the overall installation and configuration process carefully to ensure success.

#### Related Topics

[Chapter 2, "Overview of Installing Siebel Business Applications"](#)

[“Installation and Configuration Methods by Deployment Type” on page 294](#)

[“About Configuring Siebel Business Applications” on page 61](#) and following topics

## Requirements for Siebel Gateway Name Server Authentication

This topic is part of [“Requirements for Installing and Configuring Siebel Enterprise Server Components” on page 296](#).

Before you configure any Siebel Enterprise Server software, review the requirements associated with authentication for access to the Siebel Gateway Name Server. Authentication applies to access using Siebel Configuration Wizards or Siebel Server Manager.

Note the following requirements:

- When you initially configure the Siebel Enterprise (after installing and configuring the Siebel Gateway Name Server), you propagate settings to the Siebel Gateway Name Server that specify authentication settings. Siebel Gateway Name Server authentication uses Siebel security adapters, which are discussed in detail in *Siebel Security Guide*.
- Database authentication is the default Siebel Gateway Name Server authentication method. LDAP, ADSI, or custom methods are also supported, but additional configuration is required. You must use database authentication for your initial Siebel Server configuration.
- The user account that you use for Siebel Gateway Name Server authentication must have the same privileges as the Siebel administrator account created during the Siebel installation process; these privileges are required to connect to the Siebel Gateway Name Server. You can choose to use the Siebel administrator account for Siebel Gateway Name Server authentication, or you can create a new database user account, ensuring that you assign it the same level of rights and privileges as the Siebel administrator account. For more information about requirements for this account, see *Siebel Security Guide*.
- If you do not have an existing Siebel database, then you must install an instance of Siebel Server and Siebel Database Configuration Utilities on the same computer where you install the Siebel Gateway Name Server. You can select all three options to install together. In this case, you must configure the installed modules in the sequence shown in [Figure 2 on page 34](#). Note in particular that you must install the Siebel database before you can configure the Siebel Server.  
**NOTE:** After you install the Siebel database, you can optionally configure and deploy the Siebel Server that you installed with Siebel database Configuration Utilities. Or, you can skip configuring this Siebel Server and instead install and configure a Siebel Server on one or more other computers.
- If you already have a Siebel database, such as in an upgrade case, then you do not install the Siebel database before you configure the Siebel Server. In this case, you do not have to install Siebel Server and Database Configuration Utilities on the same computer with the Siebel Gateway Name Server. For a general illustration of this case, see [Figure 3 on page 37](#).

- After you configure the Siebel Gateway Name Server and the Siebel Enterprise, users doing subsequent Configuration Wizard tasks that require Siebel Gateway Name Server authentication, or using Server Manager, must enter Siebel administrator user credentials that are valid for the authentication method in use.

Configuration Wizard tasks subject to Siebel Gateway Name Server authentication include configuring the Siebel Server, configuring a Siebel Enterprise (after initial configuration), modifying a Siebel Enterprise, and removing an existing Siebel Enterprise or Siebel Server.

For more information about using Server Manager, see *Siebel System Administration Guide*.

- When you propagate authentication settings to the Siebel Gateway Name Server, these settings are written to the gateway.cfg file, which is located in the bin subdirectory in the Siebel Gateway Name Server installation. Security adapter configuration data stored in this file corresponds to the configuration settings that apply to the Siebel Enterprise, which are stored on the Siebel Gateway Name Server itself (in the siebns.dat file).
- If you want to use LDAP, ADSI, or a custom authentication method for the Siebel Gateway Name Server, then you can configure this method as part of the Configuration Wizard tasks for creating or modifying the Siebel Enterprise. However, although the wizard configures the security adapter, it does not enable it (for the Siebel Enterprise or for the Siebel Gateway Name Server).

To enable an authentication method, edit the gateway.cfg file on the Siebel Gateway Name Server and specify appropriate values for the SecAdptMode and SecAdptName parameters in the section [InfraSecMgr]. Use similar values to those described in *Siebel Security Guide*. After editing this file, you restart the Siebel Gateway Name Server. For this scenario, make these configuration changes after your initial configuration of the first Siebel Server.

- Additional parameters in the gateway.cfg file include:
  - NSAdminRole, which is set to Siebel Administrator by default. This parameter defines the role that is required to access the Siebel Gateway Name Server.
  - EnableAuditTrail, which is set to False by default. When this is set to True, most accesses to the Siebel Gateway Name Server are logged, including login operations, writes, modifications, and deletions (simple reads are not logged). When this parameter is False, only failed login attempts are logged. The audit trail is in the file nameserver\_audit.log, which is located in the bin subdirectory of the Siebel Gateway Name Server installation directory.
- If you want to configure a second Siebel Enterprise on the same Siebel Gateway Name Server, then do not check the option to propagate authentication settings to the Siebel Gateway Name Server when prompted. Otherwise, your settings will overwrite the existing settings.

## Requirements for Installing and Configuring the Siebel Gateway Name Server

This topic is part of [“Requirements for Installing and Configuring Siebel Enterprise Server Components” on page 296](#).

Review this topic before installing and configuring the Siebel Gateway Name Server. See also [“General Requirements for Installing and Configuring Siebel Enterprise Server Components” on page 297](#).

- Install the Siebel Gateway Name Server once for each Siebel Enterprise. If necessary, multiple Siebel Enterprises can be supported by a single Siebel Gateway Name Server. Installing multiple instances of the same version of Siebel Gateway Name Server on the same computer is not supported.

For more information, see [“Planning to Install Multiple Instances of Siebel Business Applications” on page 284](#). See also 477770.1 (Article ID) on My Oracle Support. This document was previously published as Siebel Technical Note 531.

- Siebel Gateway Name Server uses port 2320 by default. If necessary, you can select any port number (32767 or lower) that is free on the computer where the Siebel Gateway Name Server is running. Do not use port number 2321, which is the default port number for the SCBroker (Siebel Connection Broker) component, or any other port already in use on the server.

## Requirements for Installing and Configuring the Siebel Server

This topic is part of [“Requirements for Installing and Configuring Siebel Enterprise Server Components” on page 296](#).

Review this topic before installing and configuring the Siebel Server. See also [“General Requirements for Installing and Configuring Siebel Enterprise Server Components” on page 297](#).

- To configure a Siebel Server, a Siebel Gateway Name Server must be installed and running, and the Siebel Enterprise must be configured, unless you are using the Configuration Wizard option to skip validation.
- After you install the Siebel Gateway Name Server, you run the Configuration Wizard to configure it, and then you configure the Siebel Enterprise. All Siebel Servers you install that are part of the same Siebel Enterprise, regardless of the operating system, must connect to the same Siebel database. For most deployments, all of the Siebel Servers connecting to this database will belong to the same Siebel Enterprise.

Additional Siebel Servers that you install and configure inherit parameters from the Siebel Enterprise. You configure each Siebel Server using the Siebel Server Configuration Wizard.

- When you run the Siebel Server Configuration Wizard for each Siebel Server, all of the component groups are listed and you must enable the ones that you need for this server. If you do not enable component groups during Siebel Server configuration, then you can enable them manually after installation, using Server Manager. For more information about component groups and about using Server Manager, see *Siebel System Administration Guide*. See also [“Preparing to Run Siebel Server Components” on page 125](#).
- The Siebel Server software must be installed only once on each computer. For test or development purposes only, you can use the Siebel Server Configuration Wizard to configure an additional Siebel Server on a single computer where the Siebel Server is already installed and configured. For more information, see [“About Installing Additional Siebel Servers for an Existing Siebel Enterprise” on page 133](#).
- Depending on your business requirements, you might deploy one or more Siebel Enterprise Servers. For information about deploying multiple Siebel Enterprise Servers, see *Siebel Deployment Planning Guide*. See also 477770.1 (Article ID) on My Oracle Support. This document was previously published as Siebel Technical Note 531.

**NOTE:** In special cases, such as for some large deployments, a single Siebel database can support multiple Siebel Enterprises. Such a deployment must be planned carefully. For details, see 477829.1 (Article ID) on My Oracle Support. This document was previously published as Siebel Technical Note 544.

## About Clustering the Siebel Gateway Name Server and Siebel Server

If you will operate certain servers as part of a cluster, then it is strongly recommended that you install and configure the Siebel Gateway Name Server and the Siebel Server on separate resource groups. For information about clustering, see *Siebel Deployment Planning Guide*.

## Language and Locale Requirements

Make sure that you have the appropriate locales installed on the computers on which you intend to deploy Siebel Server. Siebel log and configuration files use UTF-8 with Byte Order Mark as the default encoding. If these files contain any non-ASCII characters, then proper viewing and editing requires a UTF-8 locale.

For more information about supported locales, see the Certifications tab on My Oracle Support.

The locale can affect how dates and times are displayed. For more information, see *Siebel Global Deployment Guide*.

## Guidelines for Installing Multiple Language Packs on the Siebel Server

If you will install multiple language versions of Siebel Business Applications on your Siebel Servers, then review the following configuration guidelines:

- You can include multiple languages when you install and configure a Siebel Server.
- For each installed language that you choose to deploy in the Siebel Server Configuration Wizard, language-specific Application Object Manager components are created.

For more information about scenarios for multilingual deployments, see [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#) and related topics. See also *Siebel Global Deployment Guide*.

- If multiple languages are installed on a Siebel Gateway Name Server or Siebel Server, then you will be prompted for the primary (base) language. The primary (base) language is the language in which you want your server to run and in which you normally want to read messages. If you want to change the language in which you bring up your server, then you must change this setting.

## Search Server

A Siebel Server computer can be configured to execute searching using a locally installed search server or can be pointed to a remote search server to handle search execution tasks.

**NOTE:** For search-related installation guidelines and requirements, see *Siebel Search Administration Guide*.

## Database Requirements

Make sure that your database administrator has installed the RDBMS that your site will use and created the Siebel database instance and that you meet all of the database connectivity requirements. For more information, see [Chapter 13, “Configuring the RDBMS,”](#) including [“Configuring Siebel Server Connectivity to the Siebel Database” on page 347](#). See also [“Planning RDBMS Installation and Configuration” on page 280](#).

The RDBMS that you are using must support the same languages and code pages that you install on the Siebel Servers. For Siebel language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) for Siebel CRM version 8.1.1.x or 1524342.1 (Article ID) for Siebel CRM version 8.2.2.x on My Oracle Support.

**NOTE:** After performing a migration installation of the current release, then you must run Incremental Repository Manager. For more information, see [“About Database Updates for the Current Release” on page 103](#).

## Siebel Repository Files Requirement

Make sure that you have the Siebel Repository files (SRF files) that are correct for your installed Siebel CRM version and the version of your Siebel database, such as Siebel CRM version 8.1.1.14 or version 8.2.2.14. For the current release, updated SRF files are provided with new installations and migration installations of Siebel CRM.

## Third-Party Software Requirements

Make sure that you have already installed the appropriate version of all of the third-party software products required. Otherwise, the Required Software Components prompt appears. For more information, see the Certifications tab on My Oracle Support.

## Temporary Disk Space

Review the issues described in [“Managing Temporary Disk Space Required by Siebel Installers and Wizards” on page 282](#). For example, make sure that you have adequate disk space.

## Requirements for Installing the Siebel EAI Connector

This topic is part of [“Requirements for Installing and Configuring Siebel Enterprise Server Components” on page 296](#).

For a list of supported operating systems for EAI connectors, see the Certifications tab on My Oracle Support. See also [“General Requirements for Installing and Configuring Siebel Enterprise Server Components” on page 297](#).

# Requirements for Installing and Configuring the Siebel Web Server Extension

Before installing and configuring the SWSE, review the requirements described in the following information:

- [“About the Siebel Web Server Extension” on page 305](#)
- [“Installing the Web Server” on page 306](#)
- [“General Requirements for Installing and Configuring the Siebel Web Server Extension” on page 307](#)
- [“Support for Heterogeneous Environments” on page 308](#)
- [“Siebel Web Server Extension Requirements for Siebel Load Balancing” on page 308](#)
- [“Requirements for User Permissions for the Siebel Web Server Extension” on page 309](#)
- [“Requirements for Stopping and Starting the Web Server” on page 309](#)
- [“Requirements for Configuring Anonymous Users for the Siebel Web Server Extension” on page 310](#)
- [“Requirements for Binary Coexistence of the Siebel Web Server Extension” on page 311](#)



## About the Siebel Web Server Extension

Siebel Web Server Extension (SWSE) enables communication between Siebel Web Clients and Siebel Servers. Siebel Business Applications are a family of Web-based applications that users access through a standard Web browser. Several components work together to deliver the applications to end users:

- **Siebel Web Client.** The Siebel Business Applications client that runs in the browser on the end user's computer and connects to the Web server. Particular Siebel applications might be deployed using Siebel Open UI, high interactivity, or standard interactivity.

For information about other Siebel clients, see the applicable documentation. For example, for information about the Siebel Mobile applications, see *Siebel Mobile Guide: Connected* and *Siebel Mobile Guide: Disconnected*.

- **Web server.** Client Web browsers connect to Web servers to access Siebel Business Applications. Supported Web servers and operating systems include:
  - Microsoft IIS (on Microsoft Windows)
  - IBM HTTP Server (on AIX and supported Linux operating systems)
  - HP Apache Web Server (on HP-UX)
  - Oracle HTTP Server (on supported Linux operating systems)
  - Oracle iPlanet Web Server (on Oracle Solaris)

**NOTE:** For more information about Web servers, see ["Installing the Web Server" on page 306](#). For Web server platform support, see the Certifications tab on My Oracle Support. You must use a supported version of the Web server. If you are using Oracle HTTP Server, then see also 475370.1 (Article ID) on My Oracle Support. This document was previously published as Siebel Alert 1317.

Depending on the operating system of the Web server computer, specific Web servers are discussed in either the Windows version or the UNIX version of this guide (the *Siebel Installation Guide* for the operating system you are using).

For Web server and operating system tuning information, see *Siebel Performance Tuning Guide*.

- **Siebel Web Server Extension (SWSE).** A plug-in extension, installed on the Web server computer, that runs within the Web server and that communicates with the Siebel Web Engine (which is part of an Application Object Manager component, such as Call Center Object Manager) on the Siebel Server.

For SWSE installation instructions, see ["Installing the Siebel Web Server Extension" on page 49](#). For SWSE configuration instructions, see ["Process of Configuring the Siebel Web Server Extension" on page 82](#).

- **Siebel Web Engine (part of Application Object Manager on Siebel Server).** The Siebel Web Engine is part of the Application Object Manager component on the Siebel Server, such as Call Center Object Manager. The Application Object Manager provides access to Siebel Business Applications data and logic.

For information about the hardware, operating systems, Web servers, and Web browsers supported for Siebel Business Applications, see the Certifications tab on My Oracle Support.

## Installing the Web Server

Before installing the SWSE, you must install, configure, and start the supported Web server software on the designated computers. Follow the vendor documentation for this task, and also see relevant information in this chapter.

For the best performance and scalability, put the Web server on a dedicated computer.

Some Web server configuration tasks are also included in [“Additional Tasks for the Siebel Web Server Extension and the Web Server” on page 146](#).

This topic is part of [“Requirements for Installing and Configuring the Siebel Web Server Extension” on page 304](#).

## Planning the Web Server Topology

Before you install the Siebel Web Server Extension (SWSE), as described in [Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension,”](#) you must decide how to will distribute the Web servers and other components. Two basic methods are as follows:

- **Single-node.** Installing Siebel Enterprise Server components and your Web server and SWSE on a single computer or node. (If you do this, then use separate installation directories to avoid file permission problems at installation time.)
- **Distributed.** Distributing the preceding components, where multiple Web servers connect to multiple Siebel Servers in the Siebel Enterprise. These Web servers can be dynamically balanced for Application Object Manager components on different Siebel Server computers.

Each deployment choice involves a trade-off. However, in enterprise-sized deployments, it is strongly recommended that you use a distributed node deployment for the following reasons:

- **Less resource contention.** Distributing the Web servers and the Siebel Servers (with Application Object Manager components) on different computers eliminates contention for CPU and other server resources. However, to take advantage of the performance improvement, you must have a high-speed network connection between the two computers.
- **Higher fault tolerance.** Operating multiple instances of components on multiple computers reduces downtime and the effect of failure on any one computer.
- **Greater flexibility with firewalls.** Putting the Web components of Siebel Business Applications on a different computer from the Siebel Server with Application Object Managers lets you deploy your Web server in the DMZ while keeping the Siebel Enterprise Server behind a secure firewall.
- **High availability.** A multinode configuration is required for deployments that support large numbers of concurrent users or where high availability is an operating requirement.

For more information about Web servers and Siebel Web Server Extension, see [“About the Siebel Web Server Extension” on page 305](#).

See also *Siebel Deployment Planning Guide* and *Siebel Security Guide*.

## Installing Microsoft Internet Information Services Version 7 or Later

Native support is provided for Microsoft Internet Information Services (IIS) version 7 or later. You must include the ISAPI extensions.

On Microsoft IIS 7.5, you must enable 32-bit applications for the application pool defaults in order to support Siebel Business Applications. For more information about this issue, see 1340948.1 (Article ID) on My Oracle Support and see documentation from Microsoft.

## General Requirements for Installing and Configuring the Siebel Web Server Extension

This topic lists general requirements for installing and configuring the SWSE.

This topic is part of [“Requirements for Installing and Configuring the Siebel Web Server Extension” on page 304](#).

- Before installing Siebel Business Applications software, you must review all of the relevant information in the Certifications tab on My Oracle Support. Also check for applicable alerts, bulletins, or other documents on My Oracle Support.
- Review the issues described in [“Managing Temporary Disk Space Required by Siebel Installers and Wizards” on page 282](#). For example, make sure that you have adequate disk space.
- You must have installed a supported Web server as identified in the Certifications tab on My Oracle Support for the current release. See also [“Installing the Web Server” on page 306](#).

Make sure that the Web server computer on which you install the SWSE meets all of the hardware and software platform requirements documented in the Certifications tab on My Oracle Support.

- You must have installed all of the key Siebel Enterprise Server components, including the Siebel Gateway Name Server, at least one Siebel Server, and the Database Configuration Utilities.

You must have configured the Siebel Gateway Name Server, created and configured the Siebel Enterprise, created the SWSE logical profile, and configured the Siebel Server.

Application Object Manager components must be enabled for the Siebel CRM products that you purchased and intend to use. You enable components during initial Siebel Server configuration. For information about enabling server components using Server Manager, see *Siebel System Administration Guide*.

**NOTE:** Wait to install additional Siebel Servers until after you have completed installation of the SWSE software and verified the connection from the Web server to the initial Siebel Server.

- You can deploy multiple language packs on one Web server and one SWSE instance. The Siebel Server and the Web server do not have to be operated in the same language. However, the Siebel Server, the Web server, and all of the other server components must use the same character set. For more information, see *Siebel Global Deployment Guide*. See also [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#).
- At least one SWSE is required for each Siebel Enterprise.

- Note that uninstalling an SWSE instance that you have configured removes the associated Siebel application virtual directories. See also [“Uninstalling the Siebel Web Server Extension” on page 264](#).
- Note that the SWSE installer user interface can run in the supported languages described in [“About The Language in Which Siebel Installers and Wizards Run” on page 283](#).

## Support for Heterogeneous Environments

SWSE configuration can be performed in homogeneous environments or in heterogeneous environments where the Siebel Gateway Name Server (where you configure the SWSE logical profile) and the Web server and SWSE are on different operating systems.

This topic is part of [“Requirements for Installing and Configuring the Siebel Web Server Extension” on page 304](#).

Heterogeneous environments might resemble the following scenarios:

- You installed the Siebel Gateway Name Server on a UNIX or Linux computer, and installed the Web server and SWSE on a Windows computer.
- You installed the Siebel Gateway Name Server on a Windows computer, and installed the Web server and SWSE on a UNIX or Linux computer.

According to your needs, you can move the SWSE logical profile directory to another computer before configuring the physical SWSE (applying the logical profile to an installed instance of SWSE). For more information, see [“Applying the SWSE Logical Profile” on page 88](#).

## Siebel Web Server Extension Requirements for Siebel Load Balancing

If you will use Siebel native load balancing for your Siebel Servers, then you must generate the load-balancing configuration file (lbconfig.txt).

This topic is part of [“Requirements for Installing and Configuring the Siebel Web Server Extension” on page 304](#).

After you create the SWSE logical profile, you generate the load balancing file and place the file in the SWSE logical profile directory. When you apply the profile to an installed SWSE instance, the SWSE Configuration Wizard copies the lbconfig.txt file to the installed SWSE.

After initially applying the SWSE logical profile, you might have to generate the lbconfig.txt file again after installing and configuring additional Siebel Servers that will participate in load balancing. Then apply the SWSE logical profile again.

For more information, see [“Process of Configuring the Siebel Web Server Extension” on page 82](#) and [“Process of Configuring Load Balancing for Siebel Business Applications” on page 120](#).

## Requirements for User Permissions for the Siebel Web Server Extension

This topic describes some requirements for permissions that affect installation or operation of the SWSE software and the Siebel virtual directories on the Web server.

This topic is part of [“Requirements for Installing and Configuring the Siebel Web Server Extension” on page 304](#).

The user who will run the SWSE plug-in must have read, write, and execute permissions on the `SWSE_ROOT\public\language` directories and their subdirectories (in this path, `SWSE_ROOT` is the directory in which the SWSE is installed and `language` is a language directory such as ENU, FRA, CHT, and so on). On Windows, grant these permissions to the IUSR user account. These permissions allow static public files to be cached on the Web server. These directories are created during SWSE installation and configuration. In general, Siebel administrators require full access to `SWSE_ROOT` and all of its subdirectories.

The Web server administrator and all of the Siebel users and groups must have read and execute permission on all of the virtual directories for Siebel Business Applications. The virtual directories are created on the Web server during SWSE configuration. If these permissions are not granted, then login pages will not be rendered properly.

See also [“Setting SWSE and Virtual Directory Permissions” on page 148](#).

## Requirements for Stopping and Starting the Web Server

At various points in the process of installing and configuring the Siebel Web Server Extension, you might be required to stop the Web server, perform certain tasks, and then restart the Web server. Or you might only have to restart the Web server. The SWSE Configuration Wizard also stops and starts the Web server automatically, as needed.

For example, you have to stop the Web server before installing the current release as a migration installation, and you have to restart the Web server after completing this installation. For more information about when you might have to restart the Web server, see [“Restarting the Web Server” on page 148](#). See also the third-party documentation for the Web server product.

### **To stop and restart Microsoft IIS**

- 1** Stop the Microsoft IIS services:
  - a** Stop the IIS Administration service.
  - b** Stop the World Wide Web Publishing service.
- 2** Restart the Microsoft IIS services:
  - a** Start the World Wide Web Publishing service.
  - b** Start the IIS Administration service.

This topic is part of [“Requirements for Installing and Configuring the Siebel Web Server Extension” on page 304](#).

## Requirements for Configuring Anonymous Users for the Siebel Web Server Extension

As noted in [“Configuring the SWSE Logical Profile” on page 82](#), when you configure the SWSE logical profile, you are prompted for user names and passwords of Siebel users who will serve as anonymous users for employee applications and customer applications, respectively. Provide the credentials for the anonymous users, as appropriate for your deployment.

This topic is part of [“Requirements for Installing and Configuring the Siebel Web Server Extension” on page 304](#).

The following are the two main types of anonymous users:

- **Anonymous user for employee applications.** Where applicable, the anonymous user for employee applications (sometimes called the employee user or the high interactivity user) starts the anonymous session that displays the login page to an end user for an employee application.

**NOTE:** Most of the employee applications can be deployed using either high interactivity or Siebel Open UI. Most of the employee applications are configured by default for high interactivity, while newer applications, such as the Siebel Mobile applications, require Siebel Open UI.

- **Anonymous user for customer applications.** Where applicable, the anonymous user for customer applications (sometimes called the contact user or the standard interactivity user) starts the anonymous session that displays the login page to an end user for a customer application, and allows anonymous navigation within the application. This user must have access to any public view in the application.

**NOTE:** Most of the customer applications can be deployed using either standard interactivity or Siebel Open UI. Most of the customer applications are configured by default for standard interactivity, while newer applications, such as Siebel eService for Siebel Open UI or Siebel Partner Portal for Siebel Open UI, require Siebel Open UI.

If, after initial configuration, you change the password for the database account that you are using for an anonymous user, or decide to specify a different anonymous user for a particular application, then you can edit the `eapps.cfg` or `eapps_sia.cfg` files manually and update values for the parameters `AnonUserName` and `AnonPassword`. Alternatively, you can re-create the SWSE logical profile and reapply it to each physical SWSE.

Record the credentials for each anonymous user in your deployment in the worksheet provided in [Appendix A, “Siebel Deployment Planning Worksheet.”](#)

For more information about configuring anonymous users, see *Siebel Security Guide*.

Note the following guidelines and requirements:

- All anonymous users for your deployment must be defined in the Siebel database and must be defined as Siebel users. Strong passwords are highly recommended for anonymous user accounts. Anonymous users should have limited access rights, no more than is necessary for the usage context.
- If your Siebel application does not use functionality that requires anonymous browsing, then you can disable access by the anonymous user by setting the `AllowAnonUsers` parameter for the Application Object Manager to `False`. If anonymous browsing must be enabled, then you set `AllowAnonUsers` to `True`.

- Some Siebel application functionality that requires that anonymous browsing be enabled include using a Siebel login view (not just an HTML page), using external authentication such as LDAP, browsing by unregistered users, self-registration, and so on.
- If password encryption is in effect, then you must use the `encryptstring` utility to encrypt any password before inserting it into `eapps.cfg` or `eapps_sia.cfg` as a value for `AnonPassword`. See also 475381.1 (Article ID) on My Oracle Support. This document was previously published as Siebel Alert 1306.
- The anonymous user for employee applications that you configure in the wizard is defined in `eapps.cfg` as a default that applies to all of the applications of this type. The `AnonUserName` and `AnonPassword` parameters are defined once, in the [defaults] section of this file.
- The anonymous user for customer applications that you configure in the wizard is defined in `eapps.cfg` and `eapps_sia.cfg` for each application of this type. The `AnonUserName` and `AnonPassword` parameters are defined in separate application-specific sections of these files.
- To use application-specific anonymous users, you must define `AnonUserName` and `AnonPassword` in separate application-specific sections of `eapps.cfg` or `eapps_sia.cfg`.
- Optionally, you can create new database users before initial configuration through editing the `grantusr.sql` script, which you review, modify, and execute before you install the Siebel database. You still must add corresponding Siebel users. For more information, see [“Creating Table Owner and Administrator Accounts” on page 104](#).

#### Related Books

*Siebel Security Guide*

*Siebel Security Hardening Guide*

*Siebel System Administration Guide*

#### Related Topics

[“Configuring the SWSE Logical Profile” on page 82](#)

[“Creating Table Owner and Administrator Accounts” on page 104](#)

## Requirements for Binary Coexistence of the Siebel Web Server Extension

If you do *not* require side-by-side installations of the same or different versions of SWSE on the same computer, then uninstall any existing version of SWSE on the computer before installing the current version. See [“Uninstalling the Siebel Web Server Extension” on page 264](#).

This topic is part of [“Requirements for Installing and Configuring the Siebel Web Server Extension” on page 304](#).

Side-by-side installations of the same or different versions of SWSE on the same computer (sometimes referred to as *binary coexistence*) might be helpful in some upgrade scenarios or for development or testing purposes. In general, however, it is recommended that you install only one instance of SWSE on each Web server computer. Binary coexistence scenarios might be subject to limitations for your operating system and Web server platform.

For more information about creating and applying the SWSE logical profile, see [“Process of Configuring the Siebel Web Server Extension” on page 82](#).

**NOTE:** Scalability and performance implications must be taken into consideration when running multiple instances of SWSE on a single Web server computer.

Note the following considerations and limitations applicable to binary coexistence:

- **Oracle Solaris using Oracle iPlanet Web Server.** You can install multiple instances (virtual server instances) of Oracle iPlanet Web Server on the same computer. You can also install multiple instances of SWSE to run against these virtual server instances. Configure each SWSE instance to communicate with a separate virtual server instance using a different port.
- **UNIX operating systems (including Linux) using Apache-based Web server.** You can install multiple instances of a supported Apache-based Web server on the same computer. You can also install multiple instances of SWSE to run against these Web server instances. Configure each SWSE instance to communicate with a separate Web server instance using a different port.
- **Microsoft Windows using Microsoft IIS.** You can install only a single instance of the Web server on the same computer. You can install multiple instances of SWSE on this computer, but you cannot run multiple instances of SWSE simultaneously, unless you configure them to run in separate memory spaces.

Before you configure a new installed instance of SWSE where another instance is already installed and configured, you must edit the batch file that creates the virtual directories for Siebel Business Applications so that the virtual directory names for the new instance are unique. The virtual directories are created by batch files in the SWSE logical profile directory. You can also edit these batch files before configuring the SWSE to remove entries for virtual directories that you do not need.

## Requirements for Installing and Configuring the Siebel Database

Before you install and configure the Siebel database, review the following information:

- Review database information in the Certifications tab on My Oracle Support and elsewhere.  
For Siebel language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) for Siebel CRM version 8.1.1.x or 1524342.1 (Article ID) for Siebel CRM version 8.2.2.x on My Oracle Support.
- For new installations, make sure that the Siebel database instance has been created and is properly configured, as documented in [Chapter 13, “Configuring the RDBMS.”](#)
- Review [Chapter 5, “Installing the Siebel Database on the RDBMS,”](#) including [“About Installing the Siebel Database” on page 101](#) and the topics that follow.



- Obtain the services of a qualified database administrator (DBA) to assist you with your installation and, where applicable, upgrade.
- Complete the appropriate RDBMS-specific information in your copy of the worksheet in [Appendix A, "Siebel Deployment Planning Worksheet,"](#) as follows.

## General Requirement

Installing the Siebel database is subject to installation requirements for Siebel Database Configuration Utilities related to Siebel Gateway Name Server authentication, which are noted in ["General Requirements for Installing and Configuring Siebel Enterprise Server Components" on page 297.](#)

## Oracle Database

For Oracle Database, make sure that the following elements are defined for your Siebel database:

- **Oracle SQLNet alias connect string.** You need this to connect to your Oracle Database.
- **Table owner account (schema) name and password.** Using an Oracle Database requires that you assign a user name and password to any database tables that you create. The term *table owner* refers to the schema that owns the database objects, such as tables, indexes, views, and triggers.

Before installing the Siebel database components, you have to edit the grantusr.sql script, enter this and related information, and execute the script. See ["Creating Table Owner and Administrator Accounts" on page 104.](#)

- **Siebel data tablespace.** The name of the tablespace on the Oracle Database server where the Siebel data tables are stored.
- **Siebel index tablespace.** The name of the tablespace on the Oracle Database server where the Siebel indexes are stored.
- Install the Oracle Database Client software onto the computer where you will install the Database Configuration Utilities. For information about installing the Oracle Database Client for the current release, see *Siebel Security Guide*.

**NOTE:** Make sure that the Oracle Database Client and Oracle Database versions are the same, unless you are otherwise advised by Oracle Global Software Support or unless required for your particular deployment. For supported versions of Oracle Database products, see the [Certifications tab on My Oracle Support](#).

## IBM DB2

For IBM DB2, make sure that the following elements are defined for your Siebel database:

- **Database alias.** The DB2 database alias that you created when you installed the DB2 software.
- **Table owner or database owner account user name and password.** DB2 requires that you assign a user name and password to each database that you create.  
  
Before you install the tablespaces and indexes, you are prompted to edit the grantusr.sql script, enter this and related information, and execute the script. See [“Creating Table Owner and Administrator Accounts” on page 104](#).
- **Siebel index tablespace.** The name of the tablespace on the DB2 server where the Siebel indexes are stored.
- **Siebel 4-KB tablespace.** The name of the tablespace on the DB2 server where the 4 KB Siebel data tables are stored.
- **Siebel 16-KB tablespace.** The name of the tablespace on the DB2 server where tables reside whose row length is equal to or greater than 4005 bytes, but less than 16384 bytes.
- **Siebel 32-KB tablespace.** The name of the tablespace on the DB2 server where tables reside whose row length is 32768 bytes.
- Statistics are generated automatically during table, index, and seed data installation, and during the Siebel Repository import process. However, it is recommended that statistics be kept up to date through standard database administration procedures.
- Make sure that you have installed the required IBM fix pack on your database server computer. For more information, see the Certifications tab on My Oracle Support.
- Make sure that IBM DB2 is properly configured and you have allocated disk space appropriate to your installation requirements.

## Microsoft SQL Server

For Microsoft SQL Server, make sure that the following elements are defined for your Siebel database:

- **Database name.** The name of the SQL Server database that you created for Siebel Business Applications.
- **Table owner account user name and password.** SQL Server requires that you assign a user name and password to any database tables that you create.

Before installing the Siebel database components, you have to edit the grantusr.sql script, enter this and related information, and execute the script. See [“Creating Table Owner and Administrator Accounts” on page 104](#).

# Requirements for Installing Siebel Web Clients

Review the issues and tasks in this topic before running the Siebel Web Client installer.

## Administrative Rights for Installation

Administrative rights are required for installation or uninstallation of the Siebel Mobile Web Client or Developer Web Client.

For information about setting administration rights, consult the operating system manuals for the version of Microsoft Windows on which you are installing the Siebel Web Client software.

For information about uninstalling Siebel Web Client software, see [“Uninstalling Siebel Web Clients or Siebel Tools” on page 266](#).

## Directory Naming Conventions

By default, the Siebel Web Client installer assumes an installation directory of C:\siebel\8.1.1.14.0\client or C:\siebel\8.2.2.14.0\client or a similar location. You can specify to install in a different location, but the default location is generally recommended.

If you must change the installation location to use a nondefault path, then use installation directory names that describe both the version number and the component being installed. The directory name can use any characters appropriate for Windows-compatible long file names, except that spaces must not be used in your install directory.

In this guide, the directory into which you install the Siebel Web Client is often referred to as *SIEBEL\_CLIENT\_ROOT*. If you install into a directory other than the default, then make appropriate substitutions throughout this guide.

**CAUTION:** Do not install other Siebel components, such as Siebel Tools, into the same directory where you have installed the Siebel Web Client, such as C:\siebel\8.1.1.14.0\client or C:\siebel\8.2.2.14.0\client. Install each component into a separate directory, or into a subdirectory of the top-level directory, such as a subdirectory of C:\siebel\8.1.1.14.0\client or C:\siebel\8.2.2.14.0\client. If you install the Sample Database, then do so in the same directory as the Siebel Mobile Web Client. (Alternatively, you can install the Sample Database into the Siebel Tools directory instead of the Siebel Mobile Web Client directory.) If you install multiple Siebel components on the same computer (that will access different data sources), then determine your directory-naming convention before you begin installing.

## Related Topics

[“Installing Siebel Tools” on page 164](#)

[“Installing and Using the Siebel Sample Database” on page 174](#)

## Requirements and Recommendations for Siebel Web Client

Before beginning Siebel Web Client installation, review the requirements and recommendations for hardware, system software, and third-party software described in the Certifications tab on My Oracle Support.

## Restricted Support for Siebel Developer Web Client

The Siebel Developer Web Client is not supported for end-user deployment. This Siebel Web Client type is supported only for development, troubleshooting, and limited administration usage scenarios.

## Database Connectivity Software for Siebel Developer Web Client

Siebel Developer Web Client computers connecting directly to the Siebel database must have the correct vendor-specific database connectivity software installed. See the Certifications tab on My Oracle Support.

**NOTE:** The correct version of database connectivity software must be installed before you install the Siebel Web Client.

For additional information, see [“Logging in to Your Siebel Application” on page 179](#).

When you have installed your database connectivity software, configure it as follows:

- For Oracle Database, you install and configure the Oracle client software to connect to the Siebel database. Record the connect string and table owner information on the worksheet in [Appendix A, “Siebel Deployment Planning Worksheet.”](#) Use the driver version specified in the Certifications tab on My Oracle Support.

For an Oracle client, use a binary sort order for development environment databases. This setting is required for adequate performance from the Siebel Developer Web Client.

For more information, see [“Specifying the Locale for Siebel Business Applications” on page 285](#). See also [“Configuring an Oracle Database for Siebel Business Applications” on page 321](#) and *Siebel Database Upgrade Guide*.

- For IBM DB2, you install and configure the DB2 Client software to connect to the Siebel database. Record the connect string and table owner information on the worksheet in [Appendix A, “Siebel Deployment Planning Worksheet.”](#) Use the ODBC driver version specified in the Certifications tab on My Oracle Support.
- For IBM DB2 for z/OS, you use DB2 Connect to connect from the Siebel Developer Web Client to the Siebel database. For details, see *Implementing Siebel Business Applications on DB2 for z/OS*.
- For Microsoft SQL Server deployments, the correct versions of SQL Server Native Client (or SQL Native Client) and Microsoft Data Access Components (MDAC) must reside on the computer where you install the Siebel Web Client. For Microsoft SQL Server 2008, use SQL Server Native Client. For more information, see the Certifications tab on My Oracle Support.

The Siebel Web Client uses these drivers, but creates its own ODBC data source during the installation. Record this data source on the worksheet in [Appendix A, “Siebel Deployment Planning Worksheet.”](#)

## Siebel Repository Files Requirement

Make sure that you have the Siebel Repository files (SRF files) that are correct for your installed Siebel CRM version and the version of your Siebel database, such as Siebel CRM version 8.1.1.14 or version 8.2.2.14. For the current release, updated SRF files are provided with new installations and migration installations of Siebel CRM.

## Other Third-Party Software

Your Siebel application might require some third-party software products to be installed on the client computer, for full functionality. For more information about third-party software, see the Certifications tab on My Oracle Support.

For information about requirements for the Web browser environment for running Siebel Web Clients, see also *Siebel System Administration Guide*.

**NOTE:** Remember to install on the client computers all of the software required to view any standard attachment types your Siebel Business Applications deployment might use.

## Closing Browser Sessions

Before you install the Siebel Web Client software, it is strongly recommended that you close any browser sessions on the client computer.

For information about requirements for the Web browser environment for running Siebel Web Clients, see also *Siebel System Administration Guide*. See also [“Enabling Siebel Open UI” on page 129](#).

# Requirements for Installing Siebel Tools

Before you install Siebel Tools, check the following requirements:

- Your Siebel Tools platform must meet the requirements defined in the Certifications tab on My Oracle Support.
- You must have all of the third-party software required for your implementation installed, including the database connectivity software for your chosen RDBMS. See the Certifications tab on My Oracle Support.
- You must have installed and configured the Siebel Enterprise Server software, as described in [Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension,”](#) and [Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension.”](#)
- You must have created the Siebel database and installed the Siebel schema and seed data, as described in [Chapter 13, “Configuring the RDBMS,”](#) and [Chapter 5, “Installing the Siebel Database on the RDBMS.”](#) This database stores the Siebel Tools project repositories.

A local database can also be initialized for each developer user, as applicable. For more information, see *Configuring Siebel Business Applications* and *Using Siebel Tools*.

**NOTE:** Siebel Tools can also access demonstration data in the Siebel Sample Database, which you can install with the Siebel Mobile Web Client. For more information, see [“Installing and Using the Siebel Sample Database” on page 174](#) and related topics.

- For Microsoft SQL Server deployments, the correct versions of SQL Server Native Client (or SQL Native Client) and Microsoft Data Access Components (MDAC) must reside on the computer where you install the Siebel Tools Client. For Microsoft SQL Server 2008, use SQL Server Native Client. For more information, see the Certifications tab on My Oracle Support.

The Siebel Tools Client uses these drivers, but creates its own ODBC data source during the installation. Record this data source on the worksheet in [Appendix A, “Siebel Deployment Planning Worksheet.”](#)

- The sort order for the Siebel database for development environments must be set to binary. If it is set otherwise, then you cannot compile or merge repositories.
- Administrative rights are required for installation or uninstallation of Siebel Tools. For information about setting administration rights, consult the operating system manuals for the version of Microsoft Windows on which you are installing the Siebel Web Client software.

#### Related Topics

[“Installing Siebel Tools” on page 164](#)

[“Uninstalling Siebel Web Clients or Siebel Tools” on page 266](#)

# 13 Configuring the RDBMS

This chapter provides guidelines for configuring the third-party RDBMS and creating the database instance that you will use for the Siebel database. It includes the following topics:

- [Overview of Database Configuration on page 319](#)
- [Configuring an Oracle Database for Siebel Business Applications on page 321](#)
- [Configuring an IBM DB2 Database for Siebel Business Applications on page 329](#)
- [Configuring a Microsoft SQL Server Database for Siebel Business Applications on page 341](#)
- [Configuring Siebel Server Connectivity to the Siebel Database on page 347](#)

## Overview of Database Configuration

This chapter is intended for use by database administrators (DBAs) and by others who can perform the tasks for configuring the third-party RDBMS and creating the database instance that you will use for the Siebel database.

Follow the general steps for your supported RDBMS platform, as described in this chapter. For more information, see your third-party vendor documentation, the guidelines presented in this chapter for each RDBMS, and other applicable parts of this guide.

For the third-party RDBMS product versions supported for this release of Siebel Business Applications, see the Certifications tab on My Oracle Support.

For Siebel language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) for Siebel CRM version 8.1.1.x or 1524342.1 (Article ID) for Siebel CRM version 8.2.2.x on My Oracle Support.

**CAUTION:** *Do not perform any of the tasks mentioned in this chapter in an upgrade environment (or in another environment where you have an existing Siebel database). In particular, you do not create the database instance on the RDBMS. However, after the upgrade is complete, you might have to modify database parameters for your RDBMS platform to match settings described in this chapter. For more information, see “About Installing in Upgrade Environments” on page 274 and “Roadmap for Installing and Configuring Siebel Business Applications in an Upgrade Case (Existing Database)” on page 36.*

For nonupgrade deployments (where there is no existing Siebel database), after creating the database instance and installing Siebel Business Applications software, you use scripts and utilities that are provided with the Database Configuration Utilities installation to create the Siebel database. Creating the Siebel database loads the Siebel schema and seed data into the database instance. For more information, see [Chapter 5, “Installing the Siebel Database on the RDBMS.”](#)

See also [“Planning RDBMS Installation and Configuration” on page 280.](#)

In this guide, *DBSRVR\_ROOT* refers to the installation directory of the Siebel Database Configuration Utilities. For more information, see [“File and Directory Naming Conventions” on page 287](#).

**NOTE:** In general, it is easier to configure and administer a Siebel database that does not share a database instance with other applications. This approach is considered a best practice. However, some customers might decide to include multiple applications in a single database instance. The implications of this choice might differ by RDBMS type: for example, the term *database instance* has a different meaning for an Oracle Database than it does for IBM DB2. The shared database instance must be configured according to the requirements described in this chapter.

After you have completed configuring your database as described in this chapter, you can perform all of the Siebel installation and configuration tasks, including those described in:

- [Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)
- [Chapter 4, “Configuring Siebel Enterprise Server Components and the Siebel Web Server Extension”](#)
- [Chapter 5, “Installing the Siebel Database on the RDBMS”](#)
- [Chapter 6, “Additional Postinstallation and Configuration Tasks”](#)

### Overview of Configuring the Database

The overall process of configuring the RDBMS and installing the Siebel database is outlined as follows. The exact process depends on your deployment requirements.

- 1 Install the RDBMS software:
  - Install the RDBMS server software on the appropriate server computers.
  - Install the RDBMS client software on computers where you will install Siebel Server, Siebel Tools, or other modules that directly connect to the Siebel database.
- 2 Create the database instance.
- 3 Configure the parameters for the database instance.
- 4 (IBM DB2 and Microsoft SQL Server) Create the database, and configure the parameters for the database.
- 5 Configure storage settings, log space, and other elements for the Siebel database.

**NOTE:** After you perform these tasks, you install the Siebel Enterprise Server software, including Siebel Gateway Name Server, Siebel Database Configuration Utilities, and Siebel Server. You must install Database Configuration Utilities and Siebel Server on the computer where you run the Siebel Gateway Name Server; it is optional to configure and deploy this installed Siebel Server. Then you configure the Siebel Gateway Name Server, the Siebel Enterprise, and the Siebel Web Server Extension (SWSE) logical profile.



- 6 On the computer where you installed the Database Configuration Utilities, run the Database Configuration Wizard. Perform the task to install the Siebel database (schema) in the database instance.

This step creates the Siebel objects (tables and indexes) in the Siebel database, imports seed data for the primary language, and adds the Siebel Repository for the primary language. Also perform the other applicable tasks for the Siebel database. For more information, see [Chapter 5, "Installing the Siebel Database on the RDBMS."](#)

**NOTE:** After you perform these tasks, you configure the Siebel Server, install and configure the SWSE, and perform additional configuration tasks that are required for your deployment.

## About Using Sample Scripts for Creating Siebel Database Objects

Sample scripts that are provided with the Database Configuration Utilities installation can optionally be used to create the Siebel database. *These scripts are for testing purposes in small, nonproduction environments only.* If you intend to use such a script, then first perform the tasks listed previously, through [Step 6 on page 321](#), but omit [Step 4](#) and [Step 5](#).

### Related Topics

["Guidelines for Creating Oracle Database Objects" on page 327](#)

["Guidelines for Creating IBM DB2 Database Objects" on page 340](#)

["Guidelines for Creating Microsoft SQL Server Database Objects" on page 345](#)

# Configuring an Oracle Database for Siebel Business Applications

This topic contains guidelines for obtaining optimum performance from an Oracle Database. These guidelines will be useful to a broad segment of customers. Choose values for the parameters that are described in this guide that reflect the conditions in your particular environment. For more information, see Oracle Database technical documentation.

See also ["Overview of Database Configuration" on page 319](#).

**NOTE:** When scripts from the Siebel Database Configuration Utilities installation are executed in an Oracle Database, as described in [Chapter 5, "Installing the Siebel Database on the RDBMS,"](#) sequences are generated with the CACHE option. Do not drop these sequences and regenerate them with the NOCACHE option, or else performance might be adversely affected and database contention might occur. If you require additional Oracle sequence objects, then you must create them manually, and you must grant SELECT on these objects to SSE\_ROLE.

Collect statistics for the tables, indexes, and histograms for the columns where the data shape is skewed. Recollect these statistics whenever a large amount of data has been updated, deleted, or inserted. For more information about how to collect statistics, see the Oracle Database administration manuals.

For performance reasons, do not collect statistics for an empty table. For more information, see 478242.1 (Article ID) on My Oracle Support. This document was previously published as Siebel Alert 1162.

## Guidelines for Configuring an Oracle Database

Various kinds of guidelines are presented for configuring an Oracle Database:

- ["Guidelines for Selecting a Language for Oracle Database" on page 322](#)
- ["Guidelines for Configuring Settings in the init.ora File" on page 323](#)
- ["Guidelines for Sizing Redo Logs for an Oracle Database" on page 324](#)
- ["Guidelines for Creating Oracle Tablespaces" on page 325](#)
- ["Guidelines for Sizing the Oracle Database" on page 326](#)
- ["Guidelines for Creating Temporary Oracle Tablespaces" on page 326](#)
- ["Guidelines for Overriding Oracle Default Tablespaces for Database Objects" on page 326](#)
- ["Guidelines for Creating Oracle Database Objects" on page 327](#)
- ["Guidelines for Ongoing Oracle Database Administration" on page 328](#)
- ["Guidelines for Using Real Application Clusters for an Oracle Database" on page 329](#)

## Guidelines for Selecting a Language for Oracle Database

When creating your database, you must specify the character set at the database level. You specify other language characteristics at the database client level.

This topic is part of ["Configuring an Oracle Database for Siebel Business Applications" on page 321](#).

### Related Topics

- ["Planning RDBMS Installation and Configuration" on page 280](#)
- ["Specifying the Locale for Siebel Business Applications" on page 285](#)
- ["Verifying Installation for the Siebel Database" on page 196](#)

### *To specify the character set of your database*

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

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

where:

- *INSTANCE\_NAME* is the name of your Oracle Database instance; for example, SIEBCRM.
- *CHARACTER\_SET\_NAME* is the textual name of the character set that you want to run; for example, WE8MSWIN1252 or AL32UTF8.

## National Character Set

Siebel Business Applications do not use the three data types that store Unicode data using the national character set (NCHAR, NVARCHAR2, NCLOB). The default national character set, AL16UTF16, is acceptable.

## Sort Order and Date Format

Follow the documented Oracle Database guidelines for client-level settings for the NLS\_SORT and NLS\_DATE\_FORMAT parameters.

## Guidelines for Configuring Settings in the init.ora File

The init.ora file contains parameters that have a major effect on the performance of Siebel Business Applications using Oracle Database.

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

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

This topic is part of [“Configuring an Oracle Database for Siebel Business Applications” on page 321](#).

Brief descriptions follow for several parameters for which you might have to adjust values:

- **CURSOR\_SHARING**. This parameter is set to EXACT by default and must not be changed.  
**CAUTION:** Changing this value might lead to failure of some Siebel Server components.
- **DB\_FILE\_MULTIBLOCK\_READ\_COUNT**. The database buffer cache parameter dictates the number of data blocks that are read in a single Oracle I/O operation during a table scan. For most implementations, set this parameter to an initial value of 32. If you are using NAS storage (such as a NetApp Filer), then set the value to 8 to reduce potential network traffic problems.
- **MEMORY\_TARGET**. This parameter specifies the Oracle system-wide usable memory. A common recommendation is to set it to a value equalling the physical memory minus 1 GB. For example, if the Oracle Database server has 16 GB of memory, then set MEMORY\_TARGET to 15 GB.
- **NLS\_DATE\_FORMAT**. Set this parameter as needed. The default setting is DD-MON-YY. For information about the supported formats, see Oracle Database documentation and see [“Specifying the Locale for Siebel Business Applications” on page 285](#).
- **NLS\_SORT**. The sort order is specified during the initial installation of a database and defines the way in which the database sorts character data. Sort order support depends on both the code page of the database and whether it will be used in a development or a production environment. For more information, see [“Specifying the Locale for Siebel Business Applications” on page 285](#).

Considerations for development and production environments are as follows:

- **Development environment databases.** The repository object names in your development environment database must sort using a binary sort order, because Siebel Tools uses this sort order internally. Specify the same sort order at the database client level, so that output there does not have to be resorted.

**NOTE:** Binary sort order is the simplest and fastest sort order to perform in the database. Binary sorting is case-sensitive and is based on the numeric values (for example, 0 through 255 for an 8-bit character set) of the characters in the installed character set.

Customers are responsible for making sure their data is backed up and restored correctly.

- **Production environment databases.** For information about production environment database restrictions, see the Certifications tab on My Oracle Support. See also Oracle Database documentation.
- **OPEN\_CURSORS.** This parameter controls the amount of spaces that are reserved for the maximum number of cursors (a cursor being the same as an open query). The minimum open cursor requirement for Oracle Database is 1000 and the maximum is 2000. Within these limits, this parameter can be adjusted according to observed usage patterns.
- **OPTIMIZER\_FEATURES\_ENABLE.** This is an umbrella parameter for enabling a series of optimizer features that are based on an Oracle release number. For example, set this parameter to a value corresponding to the current release level of your Oracle Database. For more information, see Oracle Database documentation. For more information about performance tuning for Siebel CRM with an Oracle Database, see 781927.1 (Article ID) on My Oracle Support.
- **OPTIMIZER\_INDEX\_COST\_ADJ.** It is recommended that you set this parameter to 1. Use this parameter to tune the optimizer to use index access path over a full table scan. However, depending on the data shape for your Siebel database, how statistics are gathered, and the nature of your Siebel configuration changes, other values might provide better results.
- **OPTIMIZER\_MODE.** Set this parameter to ALL\_ROWS (the default) for the Cost-Based Optimizer (CBO).

**NOTE:** For more information about performance tuning for Siebel CRM with an Oracle Database, see 781927.1 (Article ID) on My Oracle Support. See also *Siebel Database Upgrade Guide*.

## Guidelines for Sizing Redo Logs for an Oracle Database

If redo logs are too small, then frequent log switches occur, creating resource-intensive Oracle Database check-pointing in which all of the dirty buffers are flushed. A range of 10 to 15 minutes or longer for log switching is preferable under a normal OLTP (Online Transaction Processing) load. However, during periods of heavy DML (data manipulation language) activity, such as during large Siebel EIM loads or upgrades, the logs might switch more frequently than every two minutes. When this occurs, overall database performance suffers as a result.

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

If this activity occurs too frequently, then drop and re-create individual redo log groups with larger sizes. A suggested minimum size is 300 MB.

This topic is part of [“Configuring an Oracle Database for Siebel Business Applications” on page 321](#).

## Guidelines for Creating Oracle Tablespaces

The initial (minimum) tablespace allocation recommendations are as follows:

- Data: 5 GB
- Index: 5 GB
- Temp: 2 GB
- System: 2 GB
- Sysaux: 1 GB

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

The following additional guidelines will help you in creating tablespaces:

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

Besides the table owner, the database user ID used for Siebel Marketing also requires additional rights at the database level within the OLTP schema. You must grant DROP TABLE, DROP INDEX, CREATE TABLE, and CREATE INDEX rights to this user. For more information, see *Siebel Marketing Installation and Administration Guide*.

- Set storage parameters for your data and index tablespaces. The Siebel database installation procedure does not set storage parameters for the objects it creates. The storage configuration for each object follows the default storage parameters of its tablespace. It is recommended that you create locally managed tablespaces by using the following syntax:

```
extent management local autoallocate segment space management auto;
```

- In a development or test environment, multiple Siebel Business Applications installations can coexist on one Oracle Database instance. Install each Siebel database under a separate table owner, so that each schema owner is unique.
- Function-based indexes based on expressions that require QUERY\_REWRITE\_ENABLED to equal TRUE are not supported. However, DESC (descending) indexes are supported, as in a standard schema.

This topic is part of [“Configuring an Oracle Database for Siebel Business Applications” on page 321](#).

## Guidelines for Sizing the Oracle Database

Monitor object growth and fragmentation carefully and alter the database storage parameters as required. Also use the following guidelines for initial sizing of your Oracle Database. (If you use EXTENT MANAGEMENT LOCAL AUTOALLOCATE for CREATE DATABASE, then these guidelines *do not apply*.)

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

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

- Set the default next extent for your data and index tablespaces to a minimum of 100 KB.

This topic is part of [“Configuring an Oracle Database for Siebel Business Applications” on page 321](#).

## Guidelines for Creating Temporary Oracle Tablespaces

Modify all of the user temporary tablespace definitions from the default of SYSTEM to the name of the temporary tablespace; for example, TEMP.

To find out which users are assigned to which temporary tablespaces, query the TEMPORARY\_TABLESPACE column of DBA\_USERS. If any users are assigned to a tablespace other than the one allocated for temporary sort-type operations, then correct the situation.

This topic is part of [“Configuring an Oracle Database for Siebel Business Applications” on page 321](#).

## Guidelines for Overriding Oracle Default Tablespaces for Database Objects

Siebel Business Applications provide the option of overriding the default storage parameters for the tablespaces in which specific tables or indexes are created. You created these tablespaces by using the instructions in [“Guidelines for Creating Oracle Tablespaces” on page 325](#). To override these parameters, edit the ddl.ctl file located in the `DBSRVR_ROOT\oracle` directory.

**NOTE:** The ddl.ctl file must not be modified except by a qualified DBA.

For each Siebel object (table or index), you can specify a tablespace by using the Table Space parameter. In the following example, the tablespace for the table S\_APP\_VIEW is set to DATA1.

This topic is part of [“Configuring an Oracle Database for Siebel Business Applications” on page 321](#).

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

- When the table does not yet exist (for example, when you are performing a new database installation).
- When the table must be rebuilt. In other words, when schema changes are made to the table such that an ALTER TABLE command is insufficient to implement the schema changes. In this case, the table must be dropped and re-created.

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

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

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

For an example (IBM DB2) of overriding the defaults for specific tables and indexes, see [“Guidelines for Overriding IBM DB2 Default Tablespaces for Database Objects” on page 337](#).

## Guidelines for Creating Oracle Database Objects

Siebel Business Applications provide sample scripts (CrBlankOracleSiebelDEMO.sql and CrBlankOracleSiebelDEMOPostCrDB.sql), located in the *DBSRVR\_ROOT\Oracle* directory. Use these scripts as a reference to help you create your own scripts for creating a blank Siebel database, based on the requirements for your deployment.

Use the settings in the script as guidelines for your initial configuration. Your final settings will vary depending on the server hardware configuration, the number of users, and the type of workload. Use a small, nonproduction environment for testing purposes.

Before using these scripts, read the file CrBlankOracleSiebelDEMOReadMe.txt. See also [“Overview of Database Configuration” on page 319](#).

After you install the Database Configuration Utilities on the Siebel Server computer, as described in [Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension,”](#) you can modify the database table and index creation scripts to specify the tablespace names that you created for Siebel tables and indexes. For more information, see [“Guidelines for Overriding Oracle Default Tablespaces for Database Objects”](#) on page 326.

Additional information about Oracle Database configuration and tuning options is available from Oracle, your hardware vendor, and other sources.

This topic is part of [“Configuring an Oracle Database for Siebel Business Applications”](#) on page 321.

## Guidelines for Ongoing Oracle Database Administration

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

- **Insertion rates on tables.** You probably will want to set the INI\_TRANS value for tables with high insertion rates to a value higher than 1; a typical setting is 4.

This parameter determines how many simultaneous inserts can occur on the database blocks that store data for those tables and, therefore, can affect performance in an intensive data-entry environment. Use multiple freelists for the table S\_DOCK\_TXN\_LOG, because this table receives numerous inserts.

- **SGA cache hits.** Determine whether SGA parameters have to be adjusted for your system.
- **The extents used by each object.** A large number of extents on a table or index creates response time degradation for transactions that access the table or index.
- **Siebel tables that are subject to frequent INSERT and DELETE operations.** This transaction mixture can cause some database tables to become fragmented over time.

If you are using Siebel Remote, then your DBA must monitor space utilization and fragmentation of the following tables, and perform regular database maintenance procedures as recommended for an Oracle Database. Monitor the following tables in particular, because they will have frequent changes when transaction logging is enabled:

- S\_SRM\_REQUEST
- S\_DOCK\_TXN\_LOG
- S\_DOCK\_TXN\_LOGT
- S\_DOCK\_TXN\_SET
- S\_DOCK\_TXN\_SETT
- S\_DOCK\_INST
- S\_DOCK\_INIT\_ITEM

Your DBA might also choose to monitor all of the tables and indexes in the Siebel schema, reorganizing them when required.

This topic is part of [“Configuring an Oracle Database for Siebel Business Applications”](#) on page 321.



## Guidelines for Using Real Application Clusters for an Oracle Database

Siebel Business Applications support Oracle Real Application Clusters (RAC) failover configurations for Oracle Database. Both active-passive and active-active RAC configurations are supported.

For more information, see:

- [473859.1 \(Article ID\) on My Oracle Support](#). This document was previously published as Siebel Technical Note 635.
- [478215.1 \(Article ID\) on My Oracle Support](#). This document was previously published as Siebel FAQ 2220.
- [Certifications tab on My Oracle Support](#).
- [Concepts documentation for Oracle Real Application Clusters software on Oracle Technology Network](#).

This topic is part of [“Configuring an Oracle Database for Siebel Business Applications” on page 321](#).

## Configuring an IBM DB2 Database for Siebel Business Applications

This topic contains guidelines for obtaining optimal performance from an IBM DB2 Database for use with Siebel Business Applications. These guidelines will be useful to a broad segment of customers. Choose values for the parameters described in this guide that reflect conditions in your particular environment. For more information, see IBM DB2 technical documentation.

**NOTE:** In this guide, the terms *IBM DB2* or *DB2* are often used to refer to the database platform IBM DB2 for Linux, UNIX, and Windows.

See also [“Overview of Database Configuration” on page 319](#).

When you use IBM DB2, the IBM Data Server Client must be installed on the Siebel Server computer. Verify that the IBM Data Server Client is installed before proceeding. For details, see *Siebel Database Upgrade Guide*. In addition, the IBM Data Server Runtime Client must be installed on the Siebel Server computer. For IBM DB2 version information, see the Certifications tab on My Oracle Support.

**NOTE:** If your database is IBM DB2 for z/OS, then see *Implementing Siebel Business Applications on DB2 for z/OS* instead of this chapter. See also the relevant information under [“Planning RDBMS Installation and Configuration” on page 280](#).

### Guidelines for Configuring an IBM DB2 Database

Various kinds of guidelines are presented for configuring an IBM DB2 database:

- [“Guidelines for Setting IBM DB2 Database Manager Configuration Parameters” on page 330](#)
- [“Guidelines for Selecting a Language for IBM DB2” on page 331](#)
- [“Guidelines for Creating the IBM DB2 Database” on page 332](#)

- [“Guidelines for Setting IBM DB2 Configuration Parameters” on page 333](#)
- [“Guidelines for Setting Up IBM DB2 Buffer Pools” on page 335](#)
- [“Guidelines for Creating IBM DB2 Tablespaces” on page 336](#)
- [“Guidelines for Overriding IBM DB2 Default Tablespaces for Database Objects” on page 337](#)
- [“Guidelines for Preventing IBM DB2 from Running Out of ODBC Statement Handles” on page 339](#)
- [“Guidelines for Determining IBM DB2 Log Space” on page 339](#)
- [“Guidelines for Creating IBM DB2 Database Objects” on page 340](#)
- [“Guidelines for Managing IBM DB2 Fragmentation” on page 340](#)

## Guidelines for Setting IBM DB2 Database Manager Configuration Parameters

You can set the IBM DB2 database configuration parameters by using the update database manager configuration command of the DB2 command line processor or DB2 command prompt. For more information about modifying these configuration parameters, see IBM DB2 technical documentation.

[Table 24 on page 330](#) describes IBM DB2 database manager configuration parameters that differ from the default settings. Set these parameters for each DB2 instance. Use the configuration information in [Table 24](#) for the listed parameters. For parameters not listed in this table, accept the default settings.

This topic is part of [“Configuring an IBM DB2 Database for Siebel Business Applications” on page 329](#).

Table 24. IBM DB2 Database Manager Configuration Parameters

Parameter	Explanation	Setting or Comment
SHEAPTHRES	Sort heap threshold (4 KB)	200000  Deployments with 3,000 or more concurrent users and using over 5 GB of RAM can increase this to 300000.  If you are using automatic management, then set this parameter to 0.
DIR_CACHE	Directory cache support	YES
ASLHEAPSZ	Application support layer heap size	15
RQRIOBLK	Maximum requester I/O block size (bytes)	65535
MON_HEAP_SZ	Database monitor heap size (4 KB)	128 (minimum)
KEEPFENCED	Keep Fenced process	YES

Table 24. IBM DB2 Database Manager Configuration Parameters

Parameter	Explanation	Setting or Comment
NUM_INITAGENTS	Initial number agents in pool	10
NUM_POOLAGENTS	Number of agents in the agent pool kept active at all times	80
MAX_COORDAGENTS	Maximum number coordinating agents	automatic
INDEXREC	Index re-creation time	RESTART
INTRA_PARALLEL	Enable intra-partition parallelism	NO
INSTANCE_MEMORY	Amount of memory to be reserved for instance management	automatic

## DB2set Parameters

Use the `db2set` command to set the parameters (for example, `db2set DB2_HASH_JOIN = NO`) referenced in [Table 25 on page 331](#). On Windows, you access this command through the DB2 command prompt (`db2cmd`).

Table 25. db2set Parameters

Parameter	Explanation	Setting
DB2_PARALLEL_IO	Useful when using RAID devices. For more information, see IBM DB2 documentation.	* (asterisk)
DB2_REDUCED_OPTIMIZATION	Controls optimization techniques used at specific optimization levels.	I XOROFNR

## Guidelines for Selecting a Language for IBM DB2

As part of database creation, you must set the language characteristics of your database, even if you deploy in only one language.

To do this, you must know in which of the Siebel-supported languages your database runs, the codeset your database uses, the territory for your language, and the sort order (also known as the collation sequence) that your users prefer.

For an IBM DB2 production environment database, you can use any sort order. For a development environment database, you must use binary (identity) sort order.

Setting the language characteristics of the database is part of the sample script in the `DBSRVR_ROOT\DB2UDB` directory.

For Siebel language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) for Siebel CRM version 8.1.1.x or 1524342.1 (Article ID) for Siebel CRM version 8.2.2.x on My Oracle Support.

See also [“Planning RDBMS Installation and Configuration” on page 280](#) and [“Specifying the Locale for Siebel Business Applications” on page 285](#).

See also [“Verifying Installation for the Siebel Database” on page 196](#).

This topic is part of [“Configuring an IBM DB2 Database for Siebel Business Applications” on page 329](#).

## Codeset

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

## Territory

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

## Sort Order

The sort order is specified during the initial installation of a database and defines the way in which the database sorts character data. Sort order support depends on both the code page of the database and whether it will be used in a development or a production environment.

For more information about supported sort orders, see the Certifications tab on My Oracle Support.

- **Development environment databases.** The repository object names in your development environment database must sort in the same order that they would under the UTF-16 binary sort order, because Siebel Tools uses this sort order internally.

**NOTE:** Binary sort order is the simplest and fastest sort order to perform in the database. Binary sorting is case-sensitive and is based on the numeric values (for example, 0 through 255 for an 8-bit character set) of the characters in the installed character set.

Customers are responsible for making sure that their data is backed up and restored correctly.

- **Production environment databases.** For information about production environment database restrictions, see the Certifications tab on My Oracle Support. See also IBM DB2 documentation.

## Guidelines for Creating the IBM DB2 Database

If you are installing a database that is to be enabled for Unicode, then you must specify UTF-8 as the codeset (including the hyphen). UTF-8 is the parameter used for Unicode implementations on IBM DB2, although the processing will use UCS-2. When you specify UTF-8 as the encoding for the VARCHAR type, the encoding for the VARGRAPHIC type is automatically set to UCS-2, even though UCS-2 is not specified as the parameter.

Verify that your data is exported and imported correctly.

For Siebel language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) for Siebel CRM version 8.1.1.x or 1524342.1 (Article ID) for Siebel CRM version 8.2.2.x on My Oracle Support.

This topic is part of [“Configuring an IBM DB2 Database for Siebel Business Applications”](#) on page 329.

### ***To create the IBM DB2 database***

- 1 Locate the primary (base) language that your database will use, the territory for your language, and the applicable codeset.
- 2 Using the DB2 command line processor or DB2 command prompt, enter the following command:

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

where:

- *dbname* is the alias for your database
- *codeset* is the textual representation of your code page
- *territory* is the territory for the language that your database runs in, under that codeset

## **Guidelines for Setting IBM DB2 Configuration Parameters**

The database configuration parameters can be set by using the `update database configuration` command of the DB2 command line processor or DB2 command prompt.

For more information about modifying these configuration parameters, see IBM DB2 technical documentation.

This topic is part of [“Configuring an IBM DB2 Database for Siebel Business Applications”](#) on page 329.

[Table 26 on page 334](#) describes IBM DB2 database configuration parameters that differ from the default settings. However, these descriptions are guidelines only. Set these parameters for *each* database within an instance on which you run your Siebel application. For other parameters, accept the default settings.

Table 26. IBM DB2 Configuration Parameters

Parameter	Explanation	Setting
DFT_DEGREE	Degree of parallelism (the value 1 turns query parallelism off).	1
DFT_QUERYOPT	Default query optimization class. This parameter only takes effect on the database server and affects the Siebel Server components, such as Siebel EIM or Siebel Remote.  Queries run through the UI are not affected by this setting. They take the value of the Siebel system preference DB2: Default Opt Level, or you can override them at the business component level by using Siebel Tools.	3
DBHEAP	Database heap (4 KB).	10000
CATALOGCACHE_SZ	Catalog cache size (4 KB).	10000
LOGBUFSZ	Log buffer size (4 KB).	512
LOCKLIST	Maximum storage for lock list (4 KB).	Automatic.
SORTHEAP	Sort list heap (4 KB).  Use lower values for development environments; use higher values for production. However, increasing this value can lead to insufficient memory on the database server. Also, this parameter might have to be set below the recommended range if you have a high number of Siebel users.  Always monitor database server memory and performance to find the best setting for your environment.	Automatic.
STMTHEAP	Minimum setting. If necessary, increment this parameter in 1048 blocks.	25600
STAT_HEAP_SZ	Statistics heap size (4 KB).	14000
MAXLOCKS	Percentage of lock lists for each application.	Automatic.
LOCKTIMEOUT	Lock time out (seconds).	300
CHNGPGS_THRESH	Changed pages threshold.	60
NUM_IOCLEANERS	Number of asynchronous page cleaners.	Automatic.
SEQDETECT	Sequential detect flag.	YES
DFT_PREFETCH_SZ	Default prefetch size (4 KB).	32

Table 26. IBM DB2 Configuration Parameters

Parameter	Explanation	Setting
MAXAPPLS	Maximum number of active applications.	Automatic.
AVG_APPLS	Average number of active applications.	Automatic.
MAXFILOP	Maximum DB files open for each application.	500
LOGFILSIZ	Log file size (in 4 KB increments).	65535
LOGPRIMARY	Number of primary log files.	25 to 50 The value of LOGPRIMARY and LOGSECOND together must not exceed 256.
LOGSECOND	Number of secondary log files.	Up to 103 The value of LOGPRIMARY and LOGSECOND together must not exceed 256.
SOFTMAX	Percent log file reclaimed before soft checkpoint.	80
APPLHEAPSZ	Default application heap (4 KB).	2500
PCKCACHESZ	Package cache size (4 KB).	Automatic.
NUM_IOSERVERS	Number of disks on which the database resides.	Automatic.

## Guidelines for Setting Up IBM DB2 Buffer Pools

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

You must have at least three buffer pools for the Siebel tablespaces. You can use the default buffer pool to buffer data pages from all of the Siebel 4-KB tablespaces.

You must also create additional buffer pools with 16-KB and 32-KB page sizes for sorting and other SQL processing. A sample configuration is shown in [Table 27 on page 335](#).

Table 27. Sample Buffer Pool Configuration

Buffer Pool	Suggested Buffer Pool Size	Page Size
BUF4K	50% of available memory	4 KB
BUF16K	25% of available memory	16 KB
BUF32K	32 MB	32 KB

Different operating systems support different maximum amounts of IBM DB2 addressable memory. Depending on the memory configuration of a given server, the suggested pool sizes for BUF4K and BUF16K buffer pools might exceed these maximums, requiring you to allocate a smaller percentage. To determine the optimal buffer pool sizes, use IBM DB2 monitoring features.

This topic is part of [“Configuring an IBM DB2 Database for Siebel Business Applications” on page 329.](#)

## Guidelines for Creating IBM DB2 Tablespaces

The Siebel database installation process described in [Chapter 5, “Installing the Siebel Database on the RDBMS,”](#) specifies the tablespaces in which to store your Siebel tables and indexes.

A Siebel database on IBM DB2 requires at least four tablespaces using database-managed space (DMS). Each tablespace can have one or more tablespace containers to store the data. Create a *minimum* of four DB2 tablespaces to hold your tables and indexes: a 4-KB, a 16-KB, and a 32-KB tablespace, for your various sized tables, and an additional tablespace to hold your indexes. The tablespaces must be created as database-managed space. Use a small, nonproduction environment for testing purposes.

This topic is part of [“Configuring an IBM DB2 Database for Siebel Business Applications” on page 329.](#)

Observe the following guidelines when creating tablespaces:

- Create at least three IBM DB2 tablespaces for tables of various sizes, as shown in [Table 28 on page 336.](#) Using the default tablespace names is recommended.

Table 28. IBM DB2 Tablespace Values for Non-Unicode and Unicode-Enabled Databases

DB2 Tablespace Name	Buffer Pool Name	Recommended Value	Description
<b>Non-Unicode Database</b>			
SIEBEL_4K	BUF4K	2 GB	Tablespace name for tables with row sizes less than 4006 bytes.
SIEBEL_16K	BUF16K	300 MB	Tablespace name for tables with row sizes from 4006 bytes through 16,293 bytes.
SIEBEL_32K	BUF32K	100 MB	Tablespace name for tables with row sizes greater than 16,293 bytes.
<b>Unicode-Enabled Database</b>			
SIEBEL_4K	BUF4K	4 GB	Tablespace name for tables with row sizes less than 4006 bytes.
SIEBEL_16K	BUF16K	700 MB	Tablespace name for tables with row sizes from 4006 bytes through 16,293 bytes.
SIEBEL_32K	BUF32K	100 MB	Tablespace name for tables with row sizes greater than 16,293 bytes.



- Create additional tablespaces as required for individual tables, such as S\_DOCK\_TXN\_LOG. If you expect to have large, heavily used tables, then put these in their own tablespace.
- In addition, for performance reasons it is highly recommended that you create a separate tablespace for indexes. For example, you might create a tablespace named SIEBEL\_IDX and using buffer pool BUF16K, with a page size of 16 KB, and with 3 GB allocated for this tablespace.
- Create at least 4-KB, 16-KB, and 32-KB temporary tablespaces to use for sorting and other SQL processing as described in the following topics. If you do not create them, then your database will experience serious performance and stability problems. Use system-managed space (SMS) for all of the temporary tablespaces. Make sure that these temporary tablespaces are expandable to 2 GB for storage purposes.
- If you intend to use the DB2 Load utility to populate EIM tables, then this method makes the tablespace in which EIM tables resides unavailable for the duration of the load. Placing the EIM tables in one or more separate tablespaces allows concurrent activity on the database while the load utility is running.
- To override default storage parameters, such as the tablespace definitions, see [“Guidelines for Overriding IBM DB2 Default Tablespaces for Database Objects” on page 337](#).
- Record the tablespace names in [Appendix A, “Siebel Deployment Planning Worksheet.”](#)

## Guidelines for Overriding IBM DB2 Default Tablespaces for Database Objects

Siebel Business Applications provide the option of overriding the default storage parameters for the tablespaces in which specific tables or indexes are created. You created these tablespaces by using the instructions in [“Guidelines for Creating IBM DB2 Tablespaces” on page 336](#). To override these defaults, edit the ddl.ctl file located in the *DBSRVR\_ROOT\DB2UDB* directory.

**NOTE:** The ddl.ctl file must not be modified except by a qualified DBA.

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

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

- When the table does not yet exist (for example, when you are performing a new database installation).
- When the table must be rebuilt. In other words, when schema changes are made to the table such that an ALTER TABLE command is insufficient to implement the schema changes. In this case, the table must be dropped and re-created.

This topic is part of [“Configuring an IBM DB2 Database for Siebel Business Applications” on page 329](#).

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

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

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

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

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

```
[Object 7137]
Type = Index
Name = S_EVT_ACT_F10
Table = S_EVT_ACT
Allow Reverse Scans = Yes
```

```
Column 1 = TARGET_OU_ID ASC  
Column 2 = APPT_START_DT DESC  
Column 3 = ROW_ID ASC  
  
[Object 7138]  
Type = Index  
Name = S_EVT_ACT_F11  
Table = S_EVT_ACT  
Column 1 = PAR_EVT_ID ASC  
Index Space = S_EVT_ACT_TBS_IDX
```

## Guidelines for Preventing IBM DB2 from Running Out of ODBC Statement Handles

IBM DB2 can quickly run out of ODBC statement handles, depending on the number of business objects your enterprise uses. Because it is difficult to know how many business objects your users use, increase this number automatically each time that you install the DB2 Client, or when you rebind database utilities. You can increase the number of CLI packages with the CLI PKG option for the bind command.

This topic is part of [“Configuring an IBM DB2 Database for Siebel Business Applications”](#) on page 329.

### *To rebind the CLI packages*

- 1 Navigate to `sql lib\bnd` (C:\sql lib\bnd from a DB2 Command Window) in the IBM DB2 instance home directory, by using a method appropriate to your operating system.
- 2 Connect to the DB2 database, and enter a command similar to the following example, which sets the number of CLI packages to 30:

```
db2 bind @db2cli.lst blocking all grant public clipkg 30
```

Specify a value for CLI PKG that is sufficient to run your applications. For more information about the DB2 bind command and the CLI PKG option, see IBM DB2 documentation.

## Guidelines for Determining IBM DB2 Log Space

You must create database transaction log files large enough to support various large transactions used by Siebel Business Applications. On IBM DB2, three parameters affect the amount of log file space reserved:

- **LOGFILSIZ.** The size of the log file.
- **LOGPRIMARY.** The number of log files to preallocate and use.
- **LOGSECOND.** Extra log files that are allocated only if they are needed for a large transaction.

For a large system, allocate 4 to 8 GB of total log file space, as needed. Create 25 to 50 primary log files of 160 MB each, by setting the LOGFILSIZ database configuration parameter to 40000 and the LOGPRIMARY parameter to a value between 25 to 50. To support very large transactions, set the LOGSECOND parameter to 128 minus the value of LOGPRIMARY. Smaller systems can use less log file space.

This topic is part of [“Configuring an IBM DB2 Database for Siebel Business Applications” on page 329](#).

## Guidelines for Creating IBM DB2 Database Objects

Siebel Business Applications provide a sample script (CrBlankDB2UDBSiebelDEMO.sql), located in the *DBSRVR\_ROOT\DB2UDB* directory. Use this script as a reference to help you create your own scripts for creating a blank Siebel database based on the requirements for your deployment.

Use the settings in the script as guidelines for your initial configuration. Your final settings will vary depending on the server hardware configuration, the number of users, and the type of workload. Use a small, nonproduction environment for testing purposes.

Before using this script, read the file CrBlankDB2UDBSiebelDEMOReadMe.txt. See also [“Overview of Database Configuration” on page 319](#).

After you install the Database Configuration Utilities on the Siebel Server computer, as described in [Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension,”](#) you can modify the database table and index creation scripts to specify the tablespace names that you created for Siebel tables and indexes. For more information, see [“Guidelines for Overriding IBM DB2 Default Tablespaces for Database Objects” on page 337](#).

Additional information about IBM DB2 configuration and tuning options is available from IBM, your hardware vendor, and other sources.

This topic is part of [“Configuring an IBM DB2 Database for Siebel Business Applications” on page 329](#).

## Guidelines for Managing IBM DB2 Fragmentation

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

**NOTE:** Do not reorganize S\_ESCL\_LOG, S\_DOCK\_INIT\_ITEM, S\_ESCL\_ACTN\_REQ, S\_APSRVR\_REQ, and all tables named S\_DOCK\_INITM\_%% (in this table name, % is a digit), because these tables are defined to be in append mode.

This topic is part of [“Configuring an IBM DB2 Database for Siebel Business Applications” on page 329](#).

Use the following strategy to manage table fragmentation:

- Run REORGCHK on heavily used tables, and then review the resulting reports and extract a list of any fragmented objects.

- Based on the results of REORGCHK, reorganize any tables, as needed, by running REORG TABLE. For details on how to reorganize tables or indexes, see the following:
  - 477378.1 (Article ID) on My Oracle Support. This document was previously published as Siebel FAQ 2072.
  - 477402.1 (Article ID) on My Oracle Support. This document was previously published as Siebel FAQ 2073.
- After reorganizing tables, update statistics by using the runstats utility on any reorganized tables with the following minimum parameters:

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

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

**CAUTION:** The runstats utility overwrites statistics loaded by Siebel Business Applications. If you use runstats, then always execute loadstats.sql afterwards, by using either the DB2 command line processor or odbcsql. Otherwise, valuable statistics will be lost.

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

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

## Configuring a Microsoft SQL Server Database for Siebel Business Applications

This topic contains guidelines for obtaining optimal performance from the Microsoft SQL Server database for use with Siebel Business Applications. These guidelines will be useful to a broad segment of customers. Choose values for the parameters described in this guide that reflect conditions in your particular environment. For more information, see Microsoft SQL Server technical documentation.

**NOTE:** If you plan to use Microsoft SQL Server 2008, then see 758656.1 (Article ID) on My Oracle Support for important information before proceeding.

See also [“Overview of Database Configuration” on page 319](#).

### Guidelines for Configuring a Microsoft SQL Server Database

Various kinds of guidelines are presented for configuring a Microsoft SQL Server database:

- [“Guidelines for Configuring Microsoft SQL Server Parameters” on page 342](#)
- [“Guidelines for Selecting a Language for Microsoft SQL Server” on page 343](#)
- [“Guidelines for Creating the Microsoft SQL Server Database” on page 344](#)
- [“Guidelines for Allocating Microsoft SQL Server Database Log Space” on page 344](#)

- [“Guidelines for Overriding Microsoft SQL Server Default Tablespaces for Database Objects” on page 344](#)
- [“Guidelines for Creating Microsoft SQL Server Database Objects” on page 345](#)
- [“Guidelines for Ongoing Microsoft SQL Server Administration” on page 346](#)

## Guidelines for Configuring Microsoft SQL Server Parameters

Guidelines for setting the Microsoft SQL Server parameters for maximum performance follow. For more information, see Microsoft SQL Server technical documentation.

This topic is part of [“Configuring a Microsoft SQL Server Database for Siebel Business Applications” on page 341](#).

Review the descriptions of the following parameters and reset the values as appropriate to your deployment:

- **max degree of parallelism.** This parameter specifies whether query plans are generated for parallel execution on multiple processors or for execution on a single processor.
  - A value of 0 means that each query plan is generated so that the query executes on all of the available processors on the database server computer. In general, parallel query execution is not recommended, because of its effect on scalability.
  - A value of 1 means that each query plan is generated so that the query executes on only one processor. In other words, this value turns off parallelism for query execution. Using one processor for query execution is recommended. For this option, in the SQL Server Properties screen select the Processor tab, and in the Parallelism section select Use 1 Processor.

Also use a single processor for query execution for the component Enterprise Integration Mgr (alias EIM), for Siebel EIM. Do this even when you are using parallel Siebel EIM threads.

- **auto create statistics.** This parameter allows SQL Server to create new statistics for database columns as needed to improve query optimization. Enable this option.
- **auto update statistics.** This parameter allows Microsoft SQL Server to automatically manage database statistics and update them as necessary to promote proper query optimization. Enable this option.

Turn both auto create statistics and auto update statistics off when running concurrent Siebel EIM threads and performing a full scan of your tables. For information about running full scans, see [“Updating Microsoft SQL Server Statistics” on page 346](#).

- **tempdb.** This parameter specifies the database that Microsoft SQL Server uses for the temporary space needed during the execution of various queries. Set the initial size of TEMPDB to a minimum of 100 MB. Also configure the parameter to allow auto-growth, which allows SQL Server to expand the temporary database as needed to accommodate your activity.

## Guidelines for Selecting a Language for Microsoft SQL Server

As part of database creation, you must set the language characteristics of your database, even if you deploy in only one language.

See also [“Planning RDBMS Installation and Configuration” on page 280](#) and [“Specifying the Locale for Siebel Business Applications” on page 285](#).

See also [“Verifying Installation for the Siebel Database” on page 196](#).

This topic is part of [“Configuring a Microsoft SQL Server Database for Siebel Business Applications” on page 341](#).

### Sort Order

The sort order is a characteristic that requires special consideration regarding the Siebel database. On Microsoft SQL Server, the sort order of a database instance is specified during database creation and defines the way in which the instance will sort character data.

Although each SQL Server system database and each object within a database can have its own unique sort order, you must set the sort order at the database instance level only.

Siebel Business Applications support for a given sort order depends both on the code page of the database and on whether it will be used in a development or a production environment.

For more information about supported sort orders, see the Certifications tab on My Oracle Support.

- **Development environment databases.** The repository object names in your development environment database must sort using binary sort order, because Siebel Tools uses this sort order internally.

**CAUTION:** When Microsoft SQL Server is installed, the instance is set by default to dictionary sort order and, if this is not changed, then every database inherits this setting. The master database cannot be changed without rebuilding the instance. Therefore, it is strongly recommended that the instance sort order be set to binary at installation time. Consult your Microsoft SQL Server documentation for instructions on setting this sort order.

**NOTE:** Binary sort order is the simplest and fastest sort order to perform in the database. Binary sorting is case-sensitive and is based on the numeric values (for example, 0 through 255 for an 8-bit character set) of the characters in the installed character set.

Customers are responsible for making sure that their data is backed up and restored correctly.

- **Production environment databases.** Binary or dictionary sort orders can be used in production environment databases. Binary sort order can give improved performance. For information about production environment database restrictions, see the Certifications tab on My Oracle Support. See also Microsoft SQL Server documentation.

## Guidelines for Creating the Microsoft SQL Server Database

Use a small, nonproduction environment for testing purposes.

After you install the Database Configuration Utilities on the Siebel Server computer, as described in [Chapter 3, "Installing Siebel Enterprise Server Components and the Siebel Web Server Extension,"](#) you can modify the database table and index creation scripts to specify the tablespace names that you created for Siebel tables and indexes. For more information, see ["Guidelines for Overriding Microsoft SQL Server Default Tablespaces for Database Objects"](#) on page 344.

For Siebel language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) for Siebel CRM version 8.1.1.x or 1524342.1 (Article ID) for Siebel CRM version 8.2.2.x on My Oracle Support.

This topic is part of ["Configuring a Microsoft SQL Server Database for Siebel Business Applications"](#) on page 341.

## Guidelines for Allocating Microsoft SQL Server Database Log Space

You must place your log file on a disk large enough to hold the log file as it expands. Monitor the disk regularly for its level of utilization. Very large transactions might, for example, require at least 1 GB.

This topic is part of ["Configuring a Microsoft SQL Server Database for Siebel Business Applications"](#) on page 341.

## Guidelines for Overriding Microsoft SQL Server Default Tablespaces for Database Objects

Siebel Business Applications provide the option of overriding the default storage parameters for the tablespaces that you create to hold specific tables or indexes. To do this, edit the `ddl.ctl` file located in the `DBSRVR_ROOT\MSSQL` directory.

**NOTE:** The `ddl.ctl` file must not be modified except by a qualified DBA.

For each Siebel table, you can specify a tablespace by using the Table Space parameter. In the following example, the tablespace for the table `S_APP_VIEW` is set to `DATA1`. As provided, the `.ctl` file does not set storage parameters for the objects it creates, so the objects default to the parameters of the tablespaces in which they are created.

This topic is part of ["Configuring a Microsoft SQL Server Database for Siebel Business Applications"](#) on page 341.



As shown in the example that follows, you can use the Table Space parameter to set storage parameters for specific tables:

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

For an example (IBM DB2) of overriding the defaults for specific tables and indexes, see [“Guidelines for Overriding IBM DB2 Default Tablespace for Database Objects” on page 337](#).

## Guidelines for Creating Microsoft SQL Server Database Objects

Siebel Business Applications provide sample scripts (CrBlankMSSQLSiebelDEMO.sql and CrBlankMSSQLSiebelDEMO.bat), located in the *DBSRVR\_ROOT\MSSQL* directory. Use these scripts as a reference to help you create your own scripts for creating a blank Siebel database based on the requirements for your deployment.

Use the settings in the script as guidelines for your initial configuration. Your final settings will vary depending on the server hardware configuration, the number of users, and the type of workload. Use a small, nonproduction environment for testing purposes.

Before using these scripts, read the file CrBlankMSSQLSiebelDEMOReadMe.txt. See also [“Overview of Database Configuration” on page 319](#).

After you install the Database Configuration Utilities on the Siebel Server computer, as described in [Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension,”](#) you can modify the database table and index creation scripts to specify the tablespace names that you created for Siebel tables and indexes. For more information, see [“Guidelines for Overriding Microsoft SQL Server Default Tablespaces for Database Objects” on page 344](#).

Additional information about Microsoft SQL Server configuration and tuning options is available from Microsoft, your hardware vendor, and other sources.

This topic is part of [“Configuring a Microsoft SQL Server Database for Siebel Business Applications” on page 341](#).

## Guidelines for Ongoing Microsoft SQL Server Administration

After you have installed your Siebel Business Applications on Microsoft SQL Server, some other tasks must be performed on a periodic basis. These are in addition to such common database administration tasks as monitoring and backing up.

This topic is part of [“Configuring a Microsoft SQL Server Database for Siebel Business Applications” on page 341](#).

### Updating Microsoft SQL Server Statistics

The cost-based optimizer in Microsoft SQL Server uses statistics about tables and indexes to compute the most efficient access plans. When the statistics become inaccurate, as can happen for tables with high insertion or deletion rates and for their associated indexes, the performance of database operations can degrade dramatically.

Perform a full scan of all of the tables under the following circumstances, even if you implement automatic statistics updating:

- After installing the Siebel database and before starting Siebel Business Applications.
- After running concurrent Siebel EIM threads.
- After inserting, updating, or deleting large amounts of data.

Using Query Analyzer, perform a full scan of each table by entering the following command:

```
update statistics TableName with full scan
```

It is strongly recommended that you enable the automatic creation and updating of statistics, by using the parameters documented in [“Configuring a Microsoft SQL Server Database for Siebel Business Applications” on page 341](#). This way, statistics are automatically kept up to date and the administrative overhead of updating them manually is removed.

If you do not implement automatic statistics updating, then periodically perform the full scan described in this topic.

### Managing Microsoft SQL Server Fragmentation

Use the following Microsoft SQL Server command to determine whether a clustered index and its associated tables are highly fragmented:

```
DBCC SHOWCONTIG
```

If this command returns a value for scan density of less than 60%, then use the following Microsoft SQL Server command to defragment tables without having to drop indexes:

```
DBCC INDEXDEFRAG
```

You might want to use this option periodically against the entire database.

If `DBCC SHOWCONTIG` returns a value of less than 30%, or if you suspect that indexes might be interleaved on the disk, then consider rebuilding the index, by using the following command:

```
DBCC DBREINDEX
```

For more information about monitoring fragmentation, see Microsoft SQL Server documentation.

## Configuring Siebel Server Connectivity to the Siebel Database

Review this topic to configure connectivity to the Siebel database from the computer where you will install Siebel Server.

The database will already have been created, as described in this chapter.

For database connectivity software requirements, see the Certifications tab on My Oracle Support.

### Oracle Database

Verify that the Oracle Database connectivity software is installed on each computer, according to the Oracle Database documentation.

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

Use Oracle's Easy Configuration utility to define a database alias with the proper connection information for your Siebel database. Record the connect string in [Appendix A, "Siebel Deployment Planning Worksheet."](#) You specify this connect string when configuring the Siebel Enterprise.

### IBM DB2

Define a database alias with the proper connection information for your Siebel database. Record the connect string in [Appendix A, "Siebel Deployment Planning Worksheet."](#) You specify this connect string when configuring the Siebel Enterprise.

You can use the DB2 command line processor to define your database alias. For more information, see IBM DB2 documentation.

### IBM DB2 for z/OS

For information about configuring database connectivity for IBM DB2 for z/OS, see *Implementing Siebel Business Applications on DB2 for z/OS*.

### Microsoft SQL Server

No configuration is required after the Microsoft SQL Server ODBC driver has been installed on each computer, as specified in the Certifications tab on My Oracle Support

Siebel Business Applications automatically create an ODBC data source using connectivity parameters that you specify when configuring the Siebel Enterprise. Record this data source in [Appendix A, "Siebel Deployment Planning Worksheet."](#)

**NOTE:** For Microsoft SQL Server deployments, the correct versions of SQL Server Native Client (or SQL Native Client) and Microsoft Data Access Components (MDAC) must reside on the server computer where you will install the Siebel Server. For Microsoft SQL Server 2008, use SQL Server Native Client. For more information, see the Certifications tab on My Oracle Support.

# 14 Creating the Siebel Installation Image on the Network

This chapter describes how to obtain the Siebel installation media files and how to create a network image from which you install Siebel Business Applications software. It includes the following topics:

- [About the Siebel Network Image on page 349](#)
- [Obtaining Siebel Installation Media Files on page 350](#)
- [Siebel Installation Media Contents on page 351](#)
- [Preparing to Create a Siebel Installation Image on page 354](#)
- [Creating a Siebel Installation Image on page 359](#)
- [Troubleshooting Siebel Image Creation on page 362](#)

## About the Siebel Network Image

For each Siebel Business Applications release representing the products that you have purchased, you run the Siebel Image Creator utility to create a Siebel network image, which is also called a Siebel image. All installations of Siebel Business Applications modules must be performed from a Siebel image. The Siebel Image Creator is also called the Network Image Creator. Unless otherwise stated in documentation for a particular release, each Siebel release includes Siebel Image Creator and you use this utility to create a version-specific Siebel image.

To install all of the Siebel CRM software for Siebel Innovation Pack 2014, you require an image of a single version: Siebel CRM version 8.1.1.14 or version 8.2.2.14. You must create network images as described in this chapter.

For Siebel Enterprise Server, Siebel Web Server Extension (SWSE), Siebel Web Client, Siebel Tools, or Siebel Sample Database, create a network image for the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14.

Installing these modules is a one-step task. The installers perform a complete installation of the current release. Siebel CRM version 8.1.1.14 and version 8.2.2.14 are base releases, and no Siebel CRM version 8.1.1 or version 8.2.2 network images are required or used. For existing deployments, you can use the same installers to install the current release as a migration installation.

For the Siebel Sample Database, the migration installation option does not apply. For an existing installation, you first uninstall the existing Siebel Sample Database from Siebel CRM version 8.1.1, version 8.2.2, or any prior Siebel CRM version 8.1.1.x or version 8.2.2.x. Then you install the Siebel Sample Database for the current version on the Siebel Mobile Web Client installation.

You must allocate disk space on the network for the Siebel images that you will use as the source location for Siebel installations. Retain all of the Siebel images until they no longer apply. Also retain all of the Siebel media files, particularly the JAR files that you use to create the Siebel images.

The remaining topics in this chapter describe how to obtain the Siebel media files from Oracle and how to create a Siebel image.

**NOTE:** The Siebel image is always of application type *Siebel Industry Applications*. The application type *Siebel Business Applications* (formerly used for Siebel Cross-Industry Applications) no longer applies. For more information about the implications of this change, see 549362.1 (Article ID) and related articles on My Oracle Support. This document often refers to Siebel Business Applications in a generic way that currently means the same thing as Siebel Industry Applications.

#### Related Topics

["Installation-Related Changes for Siebel Innovation Pack 2014" on page 25](#)

["Installation-Related Changes for Siebel Innovation Pack 2013" on page 28](#)

["About Siebel CRM Releases" on page 272](#)

## Obtaining Siebel Installation Media Files

In general, Oracle distributes the media files for Siebel Business Applications to customers as follows:

- The media files for Siebel CRM base releases, including Siebel Innovation Pack 2014, are provided as ZIP files on Oracle Software Delivery Cloud.  
<https://edelivery.oracle.com>
- The media files for Siebel Patchset releases are provided as ZIP files on My Oracle Support.  
<https://support.oracle.com>

**NOTE:** Whether particular releases are distributed as described above might change in some cases. If you cannot find your release, then check the *Siebel Release Notes* and other relevant information on My Oracle Support.

Use a standard unpacking tool such as WinZip to extract from each ZIP file a set of JAR files that serve as the Siebel media files. (Validate that the unpacking tool that you are using can handle files of the sizes of the Siebel media files.) These JAR files, which are compressed files using the Java Archive format, are processed when you run the Siebel Image Creator utility. Siebel Business Applications releases are also available on DVD.

**NOTE:** Siebel Business Applications software must be installed from a Siebel network image that was created using Siebel Image Creator. You cannot install directly from the ZIP files, JAR files, or DVDs.

Download the ZIP files representing the Siebel modules and languages that you require into one or more target locations. After you download the files, review the ZIP file sizes and validate the checksum values of the downloaded files against the published values. Also provided are the Siebel Image Creator executable program and the files it requires. Extract the JAR files from the ZIP files and place them in a single directory on your network. Typically, you run Siebel Image Creator from the JAR files directory. All of the JAR file names include the designation *SBA* (for Siebel Business Applications).

**TIP:** If you obtain JAR files for more than one release, then it is generally recommended that you put them into a separate directory for each release, corresponding to the version number.

You use Siebel Image Creator to create a *network image* (also called a *Siebel image*) from which you subsequently install Siebel Business Applications. All installations for Siebel modules must be performed from the Siebel image, for each software version that supports a full installation of the current release, and for any applicable Siebel Patchset releases. The installation process is described in [Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension,”](#) and other chapters for installing particular Siebel modules.

For more information about the contents and organization of the Siebel media files, see [“Siebel Installation Media Contents” on page 351.](#)

Before you download the ZIP files to your network, see [“Preparing to Create a Siebel Installation Image” on page 354.](#)

## Siebel Installation Media Files Provided on DVD

Alternatively, you can obtain Siebel media ZIP files on DVD. These files are the same as the ZIP files that you can obtain from Oracle Software Delivery Cloud.

Accessing the Siebel media files that are provided on DVD requires a compatible DVD drive (+R compatible).

For each DVD, copy the ZIP media files representing the Siebel modules or languages that you require into one or more target locations. Review the ZIP file sizes before you copy them. Each DVD uses up to 5 GB of storage.

For more information about the contents and organization of the Siebel media files, see [“Siebel Installation Media Contents” on page 351.](#)

Before you copy the ZIP files to your network, see [“Preparing to Create a Siebel Installation Image” on page 354.](#)

### Related Documents

For more information about the available patch releases for Siebel CRM, see 975515.1 (Article ID) on My Oracle Support.

For more information about finding and downloading patch releases for Siebel CRM, see 975535.1 (Article ID) on My Oracle Support.

For more information about the Siebel CRM installers and media files, see 1461640.1 (Article ID) on My Oracle Support.

# Siebel Installation Media Contents

For each Siebel Business Applications release, the software is provided through the base media for individual installable Siebel modules and media for associated Siebel language packs, for all of the applicable languages. Most Siebel modules require one or more language packs for successful installation. Siebel Business Applications deployments include installations from both base media and language media.

The media for ancillary third-party modules are also provided with the base media. Siebel installable modules that are based on third-party modules do not use Siebel language media.

As the Siebel image is created when you use Siebel Image Creator, each JAR file is extracted and the directories and files for the corresponding module are copied to the Siebel image location.

**NOTE:** This guide generally refers to Siebel *modules* to mean the same thing as the items selectable as *products* in Siebel Image Creator.

See also [“Obtaining Siebel Installation Media Files” on page 350](#).

## Siebel Installation Base Media

The base media for Siebel Business Applications software are organized by operating system, product category, version number, and product (module) name. For most of the Siebel modules, language support is delivered separately through the language media. The operating systems are as follows:

- Microsoft Windows
- IBM AIX
- HP-UX
- Linux
- Oracle Solaris (for SPARC)

For detailed support information about the listed operating systems, see the Certifications tab on My Oracle Support.

The base media for the listed operating systems are provided as described in [“Obtaining Siebel Installation Media Files” on page 350](#). Note the following points regarding the organization of the base media files:

- For Siebel Enterprise Server, Siebel Web Server Extension, Siebel Web Client, Siebel Tools, and Siebel Sample Database, the network image for the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14, is the base media.
- For client modules, the base, language, and third-party media files are available for Windows only, and might apply for customers on all of the server operating systems. Example client modules include Siebel Web Client (Siebel Mobile Web Client) and Siebel Tools.

**NOTE:** When you run Siebel Image Creator, you must select the Windows operating system to be able to select any Windows-based modules. For more information about cross-platform issues when creating Siebel images, see [“Cross-Platform Issues When Creating Siebel Image Directories” on page 356](#).

- For server modules, the base, language, and third-party media files are included with the base media for your operating system, where applicable. The media files for such modules are provided with the UNIX base media where these modules run natively on Windows and are not available on UNIX.

**NOTE:** When you run Siebel Image Creator, you must select the Windows operating system to be able to select any Windows-based modules.



- For Siebel CRM version 8.2.2.14, customers must obtain the third-party media and must place the JAR files from this media into the JAR files directory before running Siebel Image Creator.

Some of the third-party media files provide library files that are required for Siebel installers. In particular, JAR files like the following ones for third-party library files must be present when you run Siebel Image Creator to create the network image for Siebel Enterprise Server, Siebel Web Server Extension, Siebel Web Client, or Siebel Tools Client.

The following are the third-party JAR files for Siebel CRM version 8.2.2.14, for Microsoft Windows:

- SBA\_8.2.2.14\_Base\_Windows\_Siebel\_Enterprise\_Server\_3rdparty.jar
- SBA\_8.2.2.14\_Base\_Windows\_Siebel\_Web\_Server\_Extension\_3rdparty.jar
- SBA\_8.2.2.14\_Base\_Windows\_Siebel\_Web\_Client\_3rdparty.jar
- SBA\_8.2.2.14\_Base\_Windows\_Siebel\_Tools\_3rdparty.jar

For Siebel Enterprise Server and Siebel Web Server Extension, similar JAR files are available for each supported UNIX operating system. Language-specific versions of these JAR files are also required, for each language that you include in the network image. See also [“Requirements for Running Siebel Image Creator” on page 357](#).

Other third-party media files provide separately installable third-party software modules that work with Siebel Business Applications. In this context, *third-party* products might also include non-Siebel products from Oracle. These third-party modules are not installed through Siebel installers, and do not use language media. Documentation is provided in this guide (the *Siebel Installation Guide* for the operating system you are using), in other books on the *Siebel Bookshelf*, or in the *Siebel Business Applications Third-Party Bookshelf* in the product media pack on Oracle Software Delivery Cloud.

## Language Media

The language media, also known as language extension packs or language packs, provide language support for Siebel Business Applications.

When you run Siebel Image Creator to create a Siebel image or to add modules to an existing Siebel image, you specify the languages for all of the modules that you include in the Siebel image. Alternatively, you can also add languages to all of the modules in an existing Siebel image.

When you install Siebel modules, you can include languages when you install. You can also install additional languages later. It is strongly recommended that you install and deploy, or at least install, all of the languages that you expect to require, on each physical server.

For Siebel Tools, a base JAR file and a U.S. English (ENU) language JAR file are provided. Support for other languages is provided through separate JAR files. When using Siebel Image Creator to add Siebel Tools to your Siebel image, you must select ENU and any other desired languages to proceed with extracting the base JAR file for Siebel Tools. When you later install Siebel Tools, you must select U.S. English (ENU) and optionally select any other languages that are part of the Siebel image.

For more information about the supported languages and about deploying languages, see:

- [“Installing and Deploying Siebel Business Applications with Multiple Languages” on page 133](#)

- For Siebel language support, Unicode support, and legacy code page support for supported databases, see 1513102.1 (Article ID) for Siebel CRM version 8.1.1.x or 1524342.1 (Article ID) for Siebel CRM version 8.2.2.x on My Oracle Support.
- Certifications tab on My Oracle Support
- *Siebel Global Deployment Guide*

## Preparing to Create a Siebel Installation Image

Before you create a Siebel installation image on your network, review the issues described in the following information:

- [“Determining the Location for the Siebel Media Files and the Siebel Image” on page 354](#)
- [“Requirements for the Siebel Image Directories” on page 356](#)
- [“Cross-Platform Issues When Creating Siebel Image Directories” on page 356](#)
- [“Requirements for Running Siebel Image Creator” on page 357](#)

### Determining the Location for the Siebel Media Files and the Siebel Image

This topic is part of [“Preparing to Create a Siebel Installation Image” on page 354](#).

It is recommended that you download or copy all of the Siebel media files to a central location on your network where you have sufficient disk space. This location might be the same location where you will create your Siebel image, a subdirectory of this location, or some other location.

The default top-level names used by Siebel Image Creator for the Siebel image directory are C: \Si ebel \_I nstal I \_I mage on Windows or /Si ebel \_I nstal I \_I mage on UNIX.

For example, if you are creating a Siebel image for Siebel CRM version 8.1.1.14 on a Windows computer, then you might create a directory C: \Si ebel \_I nstal I \_I mage, in which you store your Siebel media files and Siebel images. In this example, when you run Siebel Image Creator, specify C: \Si ebel \_I nstal I \_I mage as the top-level directory.

It is recommended that you also create one or more subdirectories in which to store the ZIP files and JAR files. For example, for Siebel CRM version 8.1.1.14, you might create subdirectories ZIP\_8. 1. 1. 14 and JAR\_8. 1. 1. 14, in which you would store the ZIP files and JAR files that you use to create the Siebel image for files of Siebel CRM version 8.1.1.14. You can use a similar approach for Siebel CRM version 8.2.2.14.

Siebel Image Creator automatically creates another subdirectory (such as 8. 1. 1. 14 or 8. 2. 2. 14) to contain the installable Siebel modules, organized by operating system, that you choose to include in the Siebel image.

## Siebel Image Directories

Your directories for the Siebel image, the ZIP files, and the JAR files might be as shown in [Table 29 on page 355](#). For other Siebel CRM releases, substitute the appropriate version numbers. As needed, you can create similar directories later for ZIP files and JAR files for subsequent Siebel CRM releases.

**NOTE:** Optionally, after you create the network image in a central location, you might choose to copy a module-specific subdirectory of the Siebel image to a computer where you will install this module. Doing so can significantly improve performance during the installation, particularly for installations of Siebel Enterprise Server or Siebel Web Server Extension. For additional recommendations or requirements, see Oracle Universal Installer documentation on Oracle Technology Network.

Table 29. Siebel Image Directories

Directory Function	Example Directory Locations	Comments
Siebel image directory	C:\Siebel_Installation_Image\8.1.1.14 C:\Siebel_Installation_Image\8.2.2.14	Siebel Image Creator creates version-specific subdirectories like these, which contain the installer files for each applicable module.  For Siebel Enterprise Server and SWSE, the installers are located in the directory for the current release.
ZIP files directory (optional)	C:\Siebel_Installation_Image\ZIP_8.1.1.14 C:\Siebel_Installation_Image\ZIP_8.2.2.14	Before you run Image Creator, you can optionally create version-specific subdirectories like these to contain the ZIP files that you obtain from Oracle.
JAR files directory (optional)	C:\Siebel_Installation_Image\JAR_8.1.1.14 C:\Siebel_Installation_Image\JAR_8.2.2.14	Before you run Image Creator, you can optionally create version-specific subdirectories like these to contain the JAR files that you extract from the ZIP files that you obtain from Oracle.  <b>NOTE:</b> For each version for which you create a Siebel image, the JAR files directory must also include the files for Siebel Image Creator.

## Requirements for the Siebel Image Directories

This topic is part of [“Preparing to Create a Siebel Installation Image” on page 354](#).

The directory in which you create a Siebel image, or the directory that you specify as the location for Siebel media files (JAR files), must meet the following requirements:

- The user creating the Siebel image must have write permission in the Siebel image directory.  
Users who have to access the Siebel image directory in order to perform installations must have read and execute permissions. Users who have to modify files to support unattended installation mode must also have write permission.  
See also the relevant topics in [“Planning Your Siebel Deployment” on page 276](#).
- Any directory that you specify for creating a Siebel image must contain sufficient disk space for all of the Siebel modules and languages that you include in the Siebel image.
- When you specify the network image directory for adding modules or languages, you must specify the top-level directory containing the valid network image for the JAR files that you are using. For example, if you are adding languages to a Siebel image for the current release, Siebel CRM version 8.1.1.14 or version 8.2.2.14, then the top-level directory that you specify, such as C: \Siebel\_Installation\_Image, must contain a subdirectory 8.1.1.14 or 8.2.2.14, which must contain an existing Siebel image for the corresponding release. Siebel Image Creator cannot add modules or languages to the network image, unless a valid top-level directory is specified.
- Any directory that you specify for creating a Siebel image must follow the conventions described in [“File and Directory Naming Conventions” on page 287](#). For example, on Windows, a directory name must not contain spaces or number signs (pound or hash signs).
- Any directory that you specify for creating a Siebel image must have a drive letter assigned to it. Siebel Image Creator does not recognize mounted network drives (UNC paths) without a drive letter assigned to them.
- Do not copy or move any Siebel image subdirectories. Create each Siebel image and all of its directories by running Siebel Image Creator. It is acceptable to move or rename the top-level directory in which the Siebel image was created.

## Cross-Platform Issues When Creating Siebel Image Directories

This topic is part of [“Preparing to Create a Siebel Installation Image” on page 354](#).

Each Siebel image that you create contains directories representing the specified operating system platforms that you will use, such as Windows, AIX, and so on. The Siebel image itself can reside on any supported operating system. Siebel Image Creator can run natively on Microsoft Windows, IBM AIX, HP-UX, Linux, and Oracle Solaris.

Many customers support multiple operating systems. For example, a customer who installs server modules on UNIX still might have to install client or server modules that run only on a supported Microsoft Windows operating system, such as Siebel Web Client (Siebel Mobile Web Client) and Siebel Tools. For more information, see [“Siebel Installation Media Contents” on page 351](#).

If you support multiple operating systems (such as Windows and one of the supported UNIX operating systems), then use one or more of the following strategies in creating your Siebel images:

- Create a single multi-platform Siebel image on one of your operating systems. Use a cross-platform networking tool, such as Samba, to make the Siebel image accessible from operating systems other than the one where the Siebel image was created.

For example, when you run Siebel Image Creator on Windows, include Windows and all of the applicable UNIX operating systems and include all of the modules for applicable operating systems. Before you run Siebel Image Creator, make sure that you have located the JAR files as described in [“Determining the Location for the Siebel Media Files and the Siebel Image” on page 354](#). In order to install modules on UNIX computers (in this example), users who perform installations must be able to access the Windows-based Siebel image files.

This approach is generally recommended, because it consolidates all of the modules and applicable operating systems in a single Siebel image.

- On each applicable operating system, create a separate Siebel image that includes the modules that will be installed on that operating system.

For example, run Siebel Image Creator on Windows and include only the Windows operating system and the modules that will be installed on Windows. Then run Siebel Image Creator on Oracle Solaris (or another UNIX operating system) and include only Oracle Solaris and the modules that will be installed on that operating system.

Before you run Siebel Image Creator, make sure that you have located the JAR files for the applicable operating system as described in [“Determining the Location for the Siebel Media Files and the Siebel Image” on page 354](#). In order to install the Siebel modules (in this case), no cross-platform tool would be necessary to access the Siebel image files, because the files for each module already reside on the operating system on which the installations will be performed.

## Requirements for Running Siebel Image Creator

This topic is part of [“Preparing to Create a Siebel Installation Image” on page 354](#).

Before you run Siebel Image Creator for one of the supported operating systems, consider the following requirements:

- Make sure that you have extracted all of the JAR files from the ZIP files.
- You must place the Siebel module JAR files and the Siebel Image Creator files in the appropriate directory or directories, as described in [“Determining the Location for the Siebel Media Files and the Siebel Image” on page 354](#).

You must place at least one JAR file representing a Siebel module in the directory where you run Siebel Image Creator, referred to here as the JAR files directory. Doing so enables the utility to determine the version of the Siebel image that is to be created. For example, running Siebel Image Creator in the Siebel CRM version 8.1.1.14 or version 8.2.2.14 JAR files directory creates a Siebel image for that version. If the directory contains JAR files with multiple versions, then the utility prompts for the version when you start it.

It is strongly recommended that all of the Siebel module JAR files for the same version be located in the same directory (the JAR files directory). Optionally, some JAR files might be located in one or more other directories that you specify while running Siebel Image Creator.

- Siebel Image Creator includes the following files, which must be present in the JAR files directory where you run the utility. Do not modify these files.
  - The Siebel Image Creator executable program for the operating system on which you run the utility: `snic.bat` (for Windows) or `snic.sh` (for UNIX)
  - `snic.jar`
  - `siebel.ini`
- Siebel Image Creator also includes the following template response files, which you can edit and use to run the utility in unattended mode:
  - `sample_snic_windows.rsp`
  - `sample_snic_unix.rsp`
- You can run Siebel Image Creator in GUI mode or in unattended mode. The following requirements apply only to running the utility in unattended mode:
  - To run Siebel Image Creator in unattended mode, you must use the U.S. English (ENU) locale.
  - When using unattended mode, you can only create a new Siebel image. You cannot add languages or products to an existing Siebel image.
  - To run Siebel Image Creator in unattended mode, you must use a template response file provided by Oracle that you have edited for your purposes. These files are named `sample_snic_windows.rsp` and `sample_snic_unix.rsp`. Example values are shown in the template response files. For example, you might specify values like the following, from the file `sample_snic_windows.rsp`:

```
imageVersion="8.1.1.14"
imageDirectory="Siebel_Install_Image"
platformList={Windows}
productList={Siebel_Tools}
languageList={ENU}
```
- Java Runtime Environment (JRE) must be installed on any computer where you will run Siebel Image Creator. Also, the `JAVA_HOME` environment variable must be set to point to the JRE installation location at the time that you run Image Creator (for example, `C:\Program Files\Java\jre6` on Windows). For supported version information, see the Certifications tab on My Oracle Support.
- The JAR files from the third-party media must be present when you run Siebel Image Creator to create the network image for Siebel Enterprise Server, Siebel Web Server Extension, Siebel Web Client, or Siebel Tools Client. If these JAR files are not present when you run Siebel Image Creator, then errors about missing library files occur when you later try to install these Siebel modules. For more information, see [“Siebel Installation Media Contents” on page 351](#).
- A Siebel Image Creator session might take a long time to complete. While the files are being extracted or copied, you cannot click Cancel to cancel a Siebel Image Creator session. Be sure of your selections before you begin creating the Siebel image.

- For any issues that you encounter while running Siebel Image Creator as described in [“Creating a Siebel Installation Image” on page 359](#), see [“Troubleshooting Siebel Image Creation” on page 362](#).

## Creating a Siebel Installation Image

You use Siebel Image Creator to create the Siebel installation image (the Siebel image) on the network for all of the Siebel CRM modules that were delivered through the Siebel media files.

The procedure in this topic describes running Siebel Image Creator to create a new Siebel image or running the utility to add modules or languages to an existing Siebel image. When you add modules or languages to an existing Siebel image, some of the steps do not apply.

**NOTE:** You can run Siebel Image Creator in GUI mode or unattended mode. If you will run Siebel Image Creator in unattended mode, then you must first prepare a response file. For more information about running Siebel Image Creator in unattended mode, see [“Requirements for Running Siebel Image Creator” on page 357](#).

See also [“Troubleshooting Siebel Image Creation” on page 362](#).

### *To create a Siebel installation image*

- 1 Review the information that is presented in [“Obtaining Siebel Installation Media Files” on page 350](#) and [“Siebel Installation Media Contents” on page 351](#).
- 2 Review the issues that are described in [“Preparing to Create a Siebel Installation Image” on page 354](#). In particular, determine where the Siebel media files will reside and where you will create the Siebel image.
- 3 Obtain the Siebel media ZIP files, as described in [“Obtaining Siebel Installation Media Files” on page 350](#). If you download the files, then validate the checksum values of the downloaded files against the published values. Then extract the JAR files from the ZIP files.
- 4 Place the JAR files into one or more directories that you created for the purpose.  
  
For example, for Siebel CRM version 8.1.1.14, you might place the Siebel CRM version 8.1.1.14 JAR files into a directory like JAR\_8.1.1.14. For more information, see [“Determining the Location for the Siebel Media Files and the Siebel Image” on page 354](#).
- 5 Log on to the server computer on which you will run Siebel Image Creator.
- 6 Open a DOS command window and navigate to the directory where you placed the Siebel media JAR files and the Siebel Image Creator files. For example, for Siebel CRM version 8.1.1.14, navigate to a directory like C:\Siebel\_Installation\Image\JAR\_8.1.1.14.
- 7 If it is not already set, then set the JAVA\_HOME environment variable to point to the Java Runtime Environment installation location.
- 8 To run Siebel Image Creator in unattended mode from the JAR files directory, first prepare a response file, and then run a command like the following:

```
sni c.bat -silent -responseFile response_file
```

The Siebel image is created, according to the settings you made in the response file, as described in [“Requirements for Running Siebel Image Creator” on page 357](#). Go to [Step 19 on page 362](#).

- 9 To run Siebel Image Creator in GUI mode from the JAR files directory, run the following command:

```
sni c. bat
```

Siebel Image Creator displays a welcome message.

- 10 Click Next to proceed.
- 11 Specify whether you are creating a new Siebel image (or adding modules to an existing Siebel image) or adding languages to an existing Siebel image. Click Next.
- 12 If you are creating a new Siebel image, then specify the directory in which the version-specific image directory is to be created. For example, navigate to a directory like C: \Si ebel \_I nstal I \_I mage. You can enter a directory (which must be an absolute path) or click Browse to specify the directory. Click Next.

When you specify the network image directory for adding modules or languages, you must specify the top-level directory containing the valid network image for the JAR files that you are using. For more information, see [“Requirements for the Siebel Image Directories” on page 356](#).

For guidelines for creating the directories for Siebel images, see [“Preparing to Create a Siebel Installation Image” on page 354](#).

- 13 If applicable, then specify the version for the Siebel image.

The Siebel image version automatically derives from the presence of one or more Siebel media JAR files for Siebel modules in the directory from which you are running Siebel Image Creator. If JAR files exist for multiple versions, such as Siebel CRM version 8.1.1.14 and another version, then specify one of the versions shown.

The version determines the version-specific subdirectory in which the Siebel image is created, such as 8. 1. 1. 14 or 8. 2. 2. 14. Or, the version specifies an existing Siebel image to be added to.

If you are adding modules to an existing Siebel image, then go to [Step 14 on page 360](#).

If you are adding languages to an existing Siebel image, then go to [Step 16 on page 361](#).

- 14 Specify one or more operating systems to include in your version-specific Siebel image. You can specify Windows, AIX, HP-UX, Linux, and Oracle Solaris. Click Next.

You can specify one or more operating systems to include in your Siebel image. In general, include all of the operating systems for which you will install one or more Siebel modules. You can add operating systems and modules to the Siebel image later. For more information, see [“Cross-Platform Issues When Creating Siebel Image Directories” on page 356](#).

For more information about the contents of the Siebel media, see [“Siebel Installation Media Contents” on page 351](#).



- 15** Specify the Siebel modules to include in your version-specific Siebel image. Click Next.

Each module can be selected by clicking its check box. The listed modules represent the superset of the client and server modules, including third-party modules, that are supported by this version of Siebel Image Creator for all of the applicable operating systems.

The Siebel image will include the selected modules for each applicable operating system that you specified in [Step 14 on page 360](#). Some modules do not apply to certain operating systems. For example, Siebel Tools applies to Windows only.

For more information about the contents of the Siebel media, see [“Siebel Installation Media Contents” on page 351](#).

- 16** Specify all of the languages that you want to include in the Siebel image. When you are ready to begin creating the Siebel image based on your selections, click Next.

The selected languages are included for each selected or existing module, where they apply. The languages do not apply to some modules, such as third-party modules. For information about Siebel Tools and the U.S. English language pack, see [“Siebel Installation Media Contents” on page 351](#).

**NOTE:** If you are adding modules to an existing Siebel image, then you must specify all of the languages that were previously included in the Siebel image, in order to be able to install these modules correctly.

Siebel Image Creator now processes all of the Siebel media JAR files in the current directory, and includes all of the selected modules and languages in the version-specific Siebel image subdirectory of the directory that you specified in [Step 12 on page 360](#). Siebel Image Creator displays the current processing status, as follows:

- If all of the Siebel media JAR files matching your selections were found in the current directory, then Siebel Image Creator completes creating or adding modules or languages to the Siebel image. Go to [Step 18 on page 362](#).
- If one or more of the JAR files matching your selections were not found in the current directory, then the utility prompts for the location of the next file. Go to [Step 17 on page 361](#).

- 17** If Siebel Image Creator cannot locate a JAR file matching your selections, then specify the location of the indicated Siebel media JAR file. You can enter a directory (which must be an absolute path) or click Browse to specify the directory. Click Next.

For example, for a Siebel CRM version 8.1.1 Siebel image, assume that you selected Windows and the Siebel Charts module (which is based on Visual Mining NetCharts), but Siebel Image Creator could not locate the file SBA\_8.1.1.0\_Base\_Windows\_Visual\_Mining\_Netcharts\_Server.jar. Specify the location of this file, and click Next. If the file is found, then it is processed and the module that it represents is included in your Siebel image.

If you do not have the current media JAR file, then you might have to obtain the required Siebel media from Oracle before proceeding. Place the JAR file in the appropriate directory before clicking Next. If all of the remaining Siebel media files matching your selections were found in the current directory, then Siebel Image Creator completes creating or adding the modules or languages to the Siebel image.

If you decide that you do not require the module or language component represented by the current media file to be included in the Siebel image at this time, then click Next again. You are prompted to either skip the file (click Skip) or look for the file in another directory (click Select). You might have to rerun Siebel Image Creator later to add items that you previously skipped because of missing JAR files. See also “[Troubleshooting Siebel Image Creation](#)” on page 362.

- 18 After all of the modules or languages have been added to the Siebel image, or skipped, Siebel Image Creator indicates that the Siebel image has been successfully created. Click Finish.
- 19 After the Siebel image has been created, review the products.txt file to validate the modules that were included in the Siebel image. This file is located in the main directory for the Siebel image, such as C:\Siebel\_Installation\Image\8.1.14 or C:\Siebel\_Installation\Image\8.2.2.14.

## Troubleshooting Siebel Image Creation

When you run Siebel Image Creator, the utility validates the integrity of each JAR file that it processes as it creates the Siebel image. Consequently, it is unnecessary to validate the JAR files beforehand.

If a JAR file is invalid for some reason, then Siebel Image Creator displays a message to this effect. Obtain a new copy of the JAR file and rerun Siebel Image Creator in order to include the content in the Siebel image. Rerunning Siebel Image Creator might also be necessary in some other cases identified in this topic.

When you run Siebel Image Creator and create a Siebel image successfully, the files in the Siebel image have the same timestamp as the corresponding files that were included in the JAR files.

When you rerun Siebel Image Creator, it will not replace any files that have the same or a newer timestamp.

Rerunning Siebel Image Creator might be necessary in the following cases:

- If you have deleted a Siebel image or any part of the Siebel image by mistake. In this case, remove all of the files generated by Siebel Image Creator for any affected Siebel modules, then run Siebel Image Creator again to re-create the Siebel image for those modules.
- If a JAR file is invalid and you have since obtained a new version of the JAR file.
- If you skipped a missing JAR file during a Siebel Image Creator session and have since obtained the missing JAR file.
- If any Siebel module was incompletely processed by Siebel Image Creator. In this case, remove all of the files generated by Siebel Image Creator for the affected module, then run Siebel Image Creator again to re-create the Siebel image for this module.

**TIP:** Keep track of the operating systems, Siebel modules, and languages in your Siebel image for the applicable version. If you have to rerun Siebel Image Creator, then reselect the options that you require to complete the Siebel image.

You might also have to run Siebel Image Creator multiple times if you intentionally processed only some of the Siebel modules that you require and have to process the JAR files in multiple batches. For example, if you obtained Siebel CRM version 8.1.1.14 and version 8.1.1 files, then you might create the Siebel CRM version 8.1.1.14 image for all of the Siebel modules. After this, you might have to create a Siebel CRM version 8.1.1 image for a module like Siebel Charts. Multiple operations might require moving or copying JAR files and the Siebel Image Creator files into different directories for your purposes.

## Siebel Image Creator Logging

Siebel Image Creator logs details about its processing in the file `log.txt`, which is created in the top-level directory that you specified for the Siebel image (for example, `C:\Siebel_Install_Image`).

Review the log file to identify where problems occurred when you created the Siebel image, such as in the following cases:

- Siebel Image Creator logs a message like the following after each JAR file has been successfully extracted. (If a JAR file is only partially extracted, then this message is not written.)

```
Extracted SBA_8.1.1.14_Base_Windows_Siebel_Enterprise_Server.jar
```

- Siebel Image Creator logs a message like the following when a JAR file has been skipped.

```
Skipped JAR_file_name - Please run Siebel Image Creator again and add module_name to the network image, once all image files are available.
```

## Installer Errors and the Siebel Image

You must validate that the Siebel image was created correctly for all of the applicable modules. However, installation errors sometimes indicate problems in the Siebel image.

If, when you run a Siebel installer, errors are returned about missing or corrupt files, then remove all of the files generated by Siebel Image Creator for any module that was incompletely processed, make sure that you have all of the JAR files that you require (including those representing third-party files), and then run Siebel Image Creator again to re-create the Siebel image for that module.

For installation instructions, see [Chapter 3, “Installing Siebel Enterprise Server Components and the Siebel Web Server Extension,”](#) and other chapters for installing particular Siebel modules.

For installation requirements, see [Chapter 12, “Requirements for Installing and Configuring Siebel Business Applications.”](#)

For installation troubleshooting information, see [Chapter 8, “Verifying and Troubleshooting Your Installation.”](#)



# A

## Siebel Deployment Planning Worksheet

This appendix provides the Deployment Planning Worksheet. It includes the following topics:

- [About the Deployment Planning Worksheet on page 365](#)
- [Team Lead Summary on page 366](#)
- [Siebel Enterprise Server Names and Installation Directories on page 366](#)
- [Siebel Accounts, Host Names, and Static IP Addresses on page 367](#)
- [Cluster Deployment Data on page 368](#)
- [Ports and RDBMS Details Data on page 369](#)

### About the Deployment Planning Worksheet

The topics that follow provide the Deployment Planning Worksheet for installing Oracle's Siebel Business Applications product family. This worksheet is an integral part of the installation process.

Before proceeding with installation-related tasks, make a copy of the worksheet topics that follow. Using the copy, the deployment team fills out the first section. Members of the team fill out the information in the sections for which they are responsible. As you work through preparation steps, record the information that you will need while installing and configuring Siebel Business Applications.

In various places in this book, you are prompted to refer to the Deployment Planning Worksheet for specific information about your site and deployment. You also use it to record other important information for future installations, upgrades, reconfiguration, and expansion of your deployment.

Each time that you install a new Siebel Enterprise Server in your deployment, make new copies of the Deployment Planning Worksheet for the deployment team.

**CAUTION:** Customers are responsible for ensuring the security of sensitive information, such as account passwords, that might be recorded in this worksheet or in similar documents or information stores created or employed by the customer.

# Team Lead Summary

## Section 1: Deployment Team Members

Deployment Team Lead	
Siebel Administrator	
System Administrator	
Database Administrator	

## Section 2: Deployment Overview

Component Name	Version	Codepage or Unicode	Owner	Number of Users	Server Operating System
Database Server (RDBMS: )					
Siebel Servers					
Web Server					

# Siebel Enterprise Server Names and Installation Directories

Make a copy for *each* Siebel Enterprise Server that you install.

ODBC data sources are created automatically by the Siebel Enterprise Server installer. For more information, see [“Planning RDBMS Installation and Configuration” on page 280](#).

## Section 3: Server Names

Siebel Enterprise Name	
ODBC Data Source Name	
Primary Language	
Other Deployed Languages	<p><b>NOTE:</b> Different languages might be deployed on different servers. Keep track of all of the languages deployed and the servers on which they are deployed.</p>

Component Name	Network Host Name	Installation Directory
Siebel Gateway Name Server		
Siebel Server		
Database Configuration Utilities		
Web Server and Siebel Web Server Extension (SWSE)		<b>NOTE:</b> Also record the locations of all of the SWSE logical profiles that you create for configuring installed SWSE instances.
Siebel File System Directories		

## Siebel Accounts, Host Names, and Static IP Addresses

Make a copy for *each* Siebel Enterprise Server that you install.

**NOTE:** Requirements vary for user accounts mentioned in this topic. For example, the employee user (anonymous user) must be defined as an employee within the Siebel database.

### Section 4: Siebel Account Information

	Login or User ID	Password
Siebel Service Owner		
Siebel Administrator	SADMIN	
Employee Anonymous User		
Contact Anonymous User		
Additional Anonymous User		
Security User		

### Section 5: Host Name and Static IP Addresses

Server Name	Static IP or Host Name	Subnet Mask
Siebel Gateway Name Server		

Load balancer virtual IP, if third-party load balancer is used		
Siebel Server		

## Cluster Deployment Data

Make a copy for *each* partition of your shared disk (for example: H: \, I: \, J: \, and so on). (Choice of resource groups clustered is optional.)

### Section 6: Cluster Node Network Names and IP Addresses

Cluster Node Network Name 1	
Cluster Node Network Name 2	
Cluster Node 1 IP Addresses	
Cluster Node 2 IP Address	
Subnet Mask for All Sample Addresses	
Physical Disk Name (example: D)	

### Section 7: Resource Group Configuration

Resource Group Name	Physical Disk Name	IP Addresses	Network Names	Generic Service, File Share, or Microsoft IIS Server Instance
Siebel Gateway Group				
Siebel File System Group				
Siebel Server Group				
Web Server Group				



# Ports and RDBMS Details Data

## Section 8: Port Numbers

Make a copy for *each* Siebel Enterprise Server that you install.

**NOTE:** If your database is IBM DB2 for z/OS, then use the Deployment Planning Worksheet dedicated to the Siebel database installation that is provided in *Implementing Siebel Business Applications on DB2 for z/OS*.

Siebel Gateway Name Server	
Synchronization Manager for Remote Users	
Request Manager (optional)	
Siebel Connection Broker	
Web Server (Virtual Web Site Name: )	
Other Ports	

## Section 9: Database Information

Items (if applicable)	Value
RDBMS Operating System, Version and Patch	
RDBMS Platform, Version, and Patch	
Database Server	
Host Instance Name	
Database Name	
Port Number	
Table Owner and Password	
Tablespace Name, Usage (Data or Index), and Page Size	
Tablespace Name, Usage (Data or Index), and Page Size	
Tablespace Name, Usage (Data or Index), and Page Size	



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