Siebel

Installation Guide for Microsoft Windows

September 2020

Siebel
Installation Guide for Microsoft Windows

September 2020

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Preface

This preface introduces information sources that can help you use the application and this guide.

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1 What's New in This Release

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 20.9 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 20.9 Update. **Note:** For the general purposes of this documentation, the *current release* is Siebel CRM 20.9 Update. Similar installation characteristics and requirements apply to multiple Siebel CRM 20.x, 19.x, and 18.x Update releases. Siebel CRM 20.9 Update includes all of the functionality from these prior Siebel CRM releases.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 20.8 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 20.8 Update.
Installing and Uninstalling Siebel CRM 20.x Update *Installing and Using Oracle Database SE2 for the Local Database* Multiple topics	Modified topics. As of Siebel CRM 20.8 Update, Oracle Database SE2 has replaced Oracle Database XE for the local database. The sample database is no longer supported and can no longer be used.
About Database Updates for Siebel CRM 20.x Update	Modified topic. Updated information about PostInstallDBSetup and other utilities. As of Siebel CRM 20.8 Update, customers no longer have to run the EditWebLayout and LOV_EIM utilities manually.

Topic	Description
Configuration Settings for a Siebel Application Interface Profile	Modified topic. **Note:** In Siebel CRM 20.2 Update, the default values changed for Method to Check Server Availability and Command to Check Server Availability to the values shown in the linked topic. As a consequence, customers must update any Siebel Application Interface profiles created before Siebel CRM 20.2 Update to reflect the current default values.
Restoring the Siebel Gateway Cluster Topology	New topic. Added information about how to prevent a situation where no valid Siebel Gateway connection information is available following an update installation. The described functionality applies to Siebel CRM 20.4 Update and later.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 20.7 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 20.7 Update.
About Database Updates for Siebel CRM 20.x Update	Modified topic. Updated information about PostInstallDBSetup and other utilities. As of Siebel CRM 20.7 Update, you can check a box to skip running PostInstallDBSetup as part of installation.
Inactivating Workflow Processes	New topic. As of Siebel CRM 20.7 Update, after installation you can optionally inactivate workflow processes that are no longer required.
About Uninstalling Siebel CRM	Modified topic. Updated information about uninstallation options for Siebel CRM.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 20.6 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 20.6 Update.
About Database Updates for Siebel CRM 20.x Update	Modified topic. Updated information about the LOV_EIM and RepositoryUpgrade utilities.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 20.5 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 20.5 Update.
Multiple topics	Modified topics. As of Siebel CRM 17.0, Siebel Tools no longer supports the local or sample database, with Oracle Database XE. The local or sample database is only for use with Siebel Mobile Web Client. Developers now use Siebel Web Tools or Siebel Tools with workspaces in the enterprise Siebel database. (As of Siebel CRM 20.8 Update, Oracle Database SE2 has replaced Oracle Database XE for the local database. The sample database is no longer provided.)
Guidelines for Setting Up IBM DB2 Buffer Pools	Modified topic. Added information about buffer pools and the Full Publish process.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 20.4 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update	Modified topics. Updated topics for Siebel CRM 20.4 Update.

Topic	Description
Installing and Uninstalling Siebel CRM 20.x Update	
Changing the Primary Nodes for a Siebel Gateway Cluster	New topic. As of Siebel CRM 20.4 Update, you can change the primary service node and primary registry node in a Siebel Gateway cluster.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 20.3 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 20.3 Update.
Roadmap for Installing Siebel CRM 20.x Update for an Existing Installation of Siebel CRM 17.x or Later *About Database Updates for Siebel CRM 20.x Update*	Modified topics. As of Siebel CRM 20.3 Update, the installer runs the new Post Install DB Setup (PostInstallDBSetup) utility. Along with other functions, this utility supports features that use the new seamless repository framework. The Siebel runtime repository is now a hybrid of objects that are loaded into memory from the Siebel database and objects that are loaded into memory from nonextensible object (NEO) files. For more information about new features since Siebel CRM 17.0, see *Siebel CRM Update Guide and Release Notes* on My Oracle Support for Siebel CRM 20.3 Update.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 20.2 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update	Modified topics. Updated topics for Siebel CRM 20.2 Update.

Topic	Description
Installing and Uninstalling Siebel CRM 20.x Update	
Configuration Settings for a Siebel Application Interface Profile	Modified topic. • Removed the setting Minimum Possible Connections, which is no longer used. • Updated the default values for the settings Method to Check Server Availability and Command to Check Server Availability. **Note:** As a consequence of the default values changing for Method to Check Server Availability and Command to Check Server Availability, customers must update any Siebel Application Interface profiles created before Siebel CRM 20.2 Update to reflect the values shown in the table.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 20.1 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 20.1 Update.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 19.12 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 19.12 Update.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 19.11 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 19.11 Update.
Using Safe Mode for Siebel Management Console	New topic. As of Siebel CRM 19.11 Update, you can configure a safe mode user for Siebel Management Console.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 19.10 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 19.10 Update.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 19.9 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 19.9 Update.
About Persistence for Siebel Enterprise Cache (new) *Configuration Settings for a Siebel Enterprise Cache Server Profile* (modified)	New and modified topics. As of Siebel CRM 19.9 Update, Siebel CRM supports persistence for the caches managed by Siebel Enterprise Cache. Added information about the new settings Use Persistence for All Caches, Persistence Directory, and Persist Cache in Siebel Enterprise Cache Server profile configuration. Updated the information about the Cluster Name and Service Name settings.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 19.8 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 19.8 Update.
Configuration Settings for a Siebel Application Interface Profile	Modified topic. Added information about the Maximum Possible Tabbed Sessions setting for the Siebel Application Interface profile. Multiple tabbed browsing is available as of Siebel CRM 19.7 Update.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 19.7 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 19.7 Update.

Topic	Description

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 19.6 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 19.6 Update.
Installation-Related Changes for Siebel CRM 20.x Update	Modified topic. As of Siebel CRM 19.6 Update, Siebel Remote supports TLS (Transport Layer Security) encryption and no longer supports RSA encryption. For more information about configuring TLS for Siebel Remote, see *Siebel Remote and Replication Manager Administration Guide* and *Siebel Security Guide* .
Installing Siebel CRM in a Migration Installation *Installing Multiple Instances of the Same Version of Siebel CRM*	Modified topics. Clarified the requirements for installing additional instances of Siebel CRM server modules, including Siebel Application Interface.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 19.5 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 19.5 Update.
Customizing URLs for Siebel CRM Applications	New topics. Created new topics for Siebel CRM 19.5 Update.

Topic	Description
Modifying the HTTPS Redirect Port or HTTP Port for Siebel Application Interface	As of Siebel CRM 19.5 Update, you can customize URLs for Siebel CRM applications. You can also modify the HTTPS redirect port or HTTP port. These customizations involve modifying the application container (Apache Tomcat) for Siebel Application Interface.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 19.4 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 19.4 Update.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 19.3 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 19.3 Update.
About Database Updates for Siebel CRM 20.x Update	Modified topic. Updated information about the following mandatory or optional utilities: • The WSRanking utility. • The EditWebLayout utility. • The RepositoryUpgrade utility (optional). • The LOV_EIM utility.
About Installation Tasks for Siebel CRM	Modified these and other topics. Updated information about Siebel Application Interface installation requirements and load balancing options.

Topic	Description
Planning the Siebel Application Interface Topology	

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 19.2 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 19.2 Update.
Configuring the Siebel Constraint Engine	Modified topic. As of Siebel CRM 19.2 Update, you can deploy multiple instances of Siebel Constraint Engine in your Siebel deployment, to support load balancing.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 19.1 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 19.1 Update.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 18.12 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 18.12 Update.
Overview of Siebel Management Console	Modified topic. Updated to reflect enhancements to Siebel Management Console added in Siebel CRM 18.12 Update.
Managing the Siebel Deployment	New topic. As of Siebel CRM 18.12 Update, Siebel system administrators can manage server elements in the Siebel deployment by using the Management screen in the Siebel Management Console.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 18.11 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 18.11 Update.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 18.10 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 18.10 Update.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 18.9 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 18.9 Update.
Roadmap for Installing Siebel CRM 20.x Update for an Existing Installation of Siebel CRM 17.x or Later	New topic. Summarizes the tasks for installing Siebel CRM 18.9 Update or the latest Siebel CRM 18.x Update release, where there is an existing installation of Siebel CRM 17.x or 18.x.
Configuring the Siebel Migration Application *Creating the Siebel File System*	Modified topics. As of Siebel CRM 18.8 Update, the Migration Package Location setting in the Siebel Management Console allows you to specify the package location for import and export operations by the Siebel Migration application. Added information about the server components required for successful use of the Siebel Migration application. Added information about configuring the Siebel File System for use by the Siebel Migration application.
About Database Updates for Siebel CRM 20.x Update	Modified topic. Updated information about: • The Workspace Ranking (WSRanking) utility. • The Repository Upgrade utility.
Configuring the Common Logger for Siebel Application Interface	New topic. As of Siebel CRM 18.9 Update, you can configure the log level for the Siebel Application Interface common logger, which is used for certain common logging tasks.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 18.8 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 18.8 Update.
About Database Updates for Siebel CRM 20.x Update	Modified topic. Provided critical information about: • The Workspace Ranking (WSRanking) utility. • The Repository Upgrade utility.
Stopping and Starting the Siebel Application Container	Moved and modified topic. Moved this topic from a later chapter and updated the information. As of Siebel CRM 18.8 Update, application containers (Apache Tomcat) for installations of Siebel Gateway, Siebel Server, and Siebel Application Interface run as a service on Microsoft Windows. Application containers start automatically on Microsoft Windows.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 18.7 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 18.7 Update.
About Database Updates for Siebel CRM 20.x Update	Modified topic. Siebel CRM 18.7 Update provides Siebel Repository updates for Siebel CRM applications. Customers currently using Siebel CRM 17.x or 18.x releases can optionally implement these updates by using a new repository upgrade utility.

Topic	Description
Configuring the Siebel Deployment	New topic. As of Siebel CRM 18.7 Update, Siebel system administrators can configure server elements in the Siebel CRM deployment by using the new Configuration screen in the Siebel Management Console.
Accessibility for Siebel Management Console	New topic. As of Siebel CRM 18.7 Update, Siebel Management Console supports enhanced accessibility.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 18.6 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update *Installing and Uninstalling Siebel CRM 20.x Update*	Modified topics. Updated topics for Siebel CRM 18.6 Update.
Creating a Siebel Application Interface Profile	Modified topic. Added some settings not previously documented.
Planning the Siebel Application Interface Topology	Modified topic. As of Siebel CRM version 17.5, application containers for Siebel Application Interface instances on multiple nodes can be load balanced using products such as Apache HTTP Server (httpd) with the mod_jk module. The products you use must provide reverse proxy services and support load balancing based on jsessionid cookies. All instances of Siebel Application Interface must be protected by a reverse proxy.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 18.5 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update	Modified topics. Updated topics for Siebel CRM 18.5 Update.

Topic	Description
Installing and Uninstalling Siebel CRM 20.x Update	
Configuring the Siebel Gateway Cluster	New topic. Siebel CRM supports an optional native clustering feature for Siebel Gateway to provide high availability benefits to Siebel CRM customers. This feature works at the software level and is the preferred and recommended approach for clustering the Siebel Gateway. **Note:** This feature, first provided in Siebel CRM 18.5 Update, became generally available as of Siebel CRM 18.7 Update.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 18.4 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Installation-Related Changes for Siebel CRM 20.x Update	New topics. Provides more information about some of the new features and technology changes in Siebel 2018 (also known as Siebel CRM 18.x). **Note:** Siebel CRM 18.4 Update, the first Siebel CRM 18.x release, includes all of the functionality from previous Siebel CRM 17.x patchset releases. You install Siebel CRM 18.4 Update on top of an existing installation of Siebel CRM 17.x. The installers behave similarly to those for Siebel CRM 17.x patchset releases previously provided.
Installing and Uninstalling Siebel CRM 20.x Update	New topic. Provides information about how to install the current release of Siebel CRM 18.x on top of Siebel CRM 17.x, and about uninstalling Siebel CRM 18.x.
About Siebel CRM Releases	Modified topic. Updated to include Siebel CRM 18.x in the described installation cases.

What's New in Siebel Installation Guide for Microsoft Windows, Siebel Innovation Pack 2017

The following information lists the changes in this revision of the documentation to support Siebel Innovation Pack 2017 (Siebel CRM 17.0).

Topic	Description
Installation-Related Changes for Siebel CRM 17.0	New topic. Contains more information about some of the new features and technology changes in Siebel Innovation Pack 2017.
"Installation-Related Changes for Siebel Innovation Pack 2016" (removed)	Removed topic. Removed this topic about the previous release.
Installing Siebel CRM Server Modules	Modified topics. In Siebel CRM 17.0, some installable modules have changed, and the Siebel Enterprise Server installer has been updated to accommodate them. The Siebel Web Server Extension (SWSE) and its separate installer are no longer provided. This module has been replaced by a new module, Siebel Application Interface, which you install in the secured application intranet zone using the Siebel Enterprise Server installer. For migration installations, you must install Siebel Application Interface before the other modules, and you must configure it after doing all migration installations. The additional tasks for migration installations have been updated for Siebel CRM 17.0. The Siebel Gateway Name Server has been replaced by a new module called Siebel Gateway. You can use the Siebel Enterprise Server installer to install additional new modules. The installer now prompts for authentication and port number information as part of accommodating Siebel CRM product changes intended to facilitate deployment in a variety of computing environments.
Configuring Siebel CRM Server Modules *Running the Siebel Management Console* (new) "Starting a Siebel Configuration Wizard" (removed) "More Information About Using the Siebel Configuration Wizards" (removed)	Modified and removed topics. In Siebel CRM 17.0, the Web-based Siebel Management Console, which is installed with Siebel Application Interface, has replaced most of the Siebel Configuration Wizards previously provided, except for the Database Configuration Wizard. Use the Siebel Management Console to create configuration profiles and deploy them in your physical environment. Configuration information is stored in the Siebel Gateway registry instead of in the siebns.dat file.
Starting the Siebel Database Configuration Wizard	New topic. Moved some Siebel Configuration Wizard content from the previous chapter here, applicable to the Database Configuration Wizard.
Installing the Siebel Database	Modified topic. Installing a new database using the Database Configuration Wizard now creates an ODBC data source name that allows you to use database authentication when you run Siebel Management Console.
Starting the Siebel Server Service	Modified topic. The system service for Siebel Server starts automatically after you have configured the Siebel Server.
"Additional Tasks for the Siebel Web Server Extension and the Web Server" (removed)	Removed topic. Most of this information applied to SWSE and Web servers, and is not relevant to Siebel Application Interface for Siebel CRM 17.0. The topics about using Siebel Management Console to configure Siebel Application Interface include information about some settings formerly noted in this topic for SWSE.
"Process of Configuring Load Balancing for Siebel Business Applications" (removed) "Generating the Load Balancing Configuration File (lbconfig.txt)" (removed)	Removed topics. Load balancing as configured in previous releases no longer applies. In Siebel CRM 17.0, Siebel native load balancing works differently than in previous releases, and provides dynamic load balancing to Siebel Servers.

Topic	Description
"Planning Siebel Server Load Balancing" (removed) "Siebel Web Server Extension Requirements for Siebel Load Balancing" (removed)	In addition, you can distribute incoming network traffic over multiple servers by using third-party HTTP load balancers that support session-based load balancing in front of a Siebel reverse proxy Web server.
Installing and Using Oracle Database SE2 for the Local Database	Modified topic. In Siebel CRM 17.0, the local database and sample database are provided in the 64-bit versions only; the 32-bit versions are no longer provided.
Siebel Web Client Shortcuts and Startup Options	Modified topic. In Siebel CRM 17.0, demo shortcuts are no longer created with installations of the sample database for Siebel Mobile Web Client.
"About the Environment Verification Tool" (removed) "Using the Environment Verification Tool" (removed)	Removed topics. The Environment Verification Tool is obsolete in Siebel CRM 17.0.
"Cloning a Siebel Installation" (removed)	Removed chapter. The cloning utility described in previous versions of this guide is no longer supported. This utility has been superseded by the Siebel Management Console technique of creating and deploying configuration profiles for your installed Siebel CRM modules. You can use the new method to achieve results similar to those of the cloning operations previously described.
Process of Removing Configuration Data	Modified topic. As of Siebel Innovation Pack 2017, you use the Siebel Management Console to remove configuration data of the types that you would formerly remove using the Siebel Configuration Wizards.
"About Oracle Configuration Manager" (removed)	Removed topic. As of Siebel Innovation Pack 2017, Oracle Configuration Manager is no longer installed with Siebel CRM.
Requirements for Configuring Anonymous Users for the Siebel Application Interface	Modified topic. Anonymous users are now configured using Siebel Management Console.
"Installing the Web Server" (removed) "Support for Heterogeneous Environments" (removed) "Requirements for Stopping and Starting the Web Server" (removed) "Requirements for Binary Coexistence of the Siebel Web Server Extension" (removed)	Removed topics. Removed topics that were mostly applicable to SWSE and Web servers, and are not relevant to Siebel Application Interface. Other information in *Requirements for Installing and Configuring the Siebel Application Interface* and elsewhere has been adapted from the SWSE context to the Siebel Application Interface context.
"Requirements for Installing Oracle LDAP Client" (removed) "Uninstalling Oracle LDAP Client" (removed)	Removed topics. The Oracle LDAP Client installer is no longer provided as part of Siebel CRM product media. Obtain it separately from Oracle Software Delivery Cloud.

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 CRM modules) for this release.

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. *Siebel Installation Guide for UNIX* does not contain instructions for installing Siebel CRM on Windows or about Microsoft SQL Server.

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

> **Note:** The *Siebel Installation Guides* for several prior releases are available on My Oracle Support, at 1461732.1 (Article ID).

Additional Information

The procedures in this guide assume that you do not use left-hand navigation. For information about implementing left-hand navigation, see *Siebel Fundamentals Guide* .

For additional information about Siebel CRM 20.x Update releases, see *Siebel CRM Update Guide and Release Notes* on My Oracle Support, 2382435.1 (Article ID), for each applicable release.

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.

For more information about third-party products, such as supported operating systems, RDBMS platforms, and so on, see the Certifications tab on My Oracle Support: https://support.oracle.com

> **Note:** Siebel CRM makes extensive use of application containers. For detailed information about the configuration and administration of an application container outside of the Siebel configuration framework, see Apache Tomcat documentation. See also *Stopping and Starting the Siebel Application Container* and *Customizing the Application Container for Siebel Application Interface*.

2 Overview of Installing Siebel CRM

Overview of Installing Siebel CRM

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

- *Installation-Related Changes for Siebel CRM 20.x Update*
- *Installation-Related Changes for Siebel CRM 17.0*
- *Before You Install Siebel CRM*
- *Overview of Siebel CRM Server Architecture*
- *Roadmap for Installing Siebel CRM for a New Deployment*
- *Roadmap for Installing Siebel CRM 20.x Update for an Existing Installation of Siebel CRM 17.x or Later*
- *Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)*
- *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*

Installation-Related Changes for Siebel CRM 20.x Update

The *Siebel Installation Guide* for the operating system you are using, for Siebel CRM 20.x Update, describes product changes and requirements that affect your installation tasks and the overall flow of these tasks. See also all of the relevant references in *What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 20.9 Update* and similar topics for prior releases.

- **Documentation is for Siebel CRM 20.9 Update.** The *Siebel Installation Guide* for the operating system you are using is for installing the Siebel CRM software for Siebel CRM 20.9 Update.

  For Siebel CRM 18.4 Update through Siebel CRM 20.9 Update, you install the release on top of an existing installation of a prior release of Siebel CRM 17.x or later. For instructions for installing and uninstalling Siebel CRM 20.x Update, see *Installing and Uninstalling Siebel CRM 20.x Update*.

  > **Note:** For the general purposes of this documentation, the *current release* is Siebel CRM 20.9 Update. Similar installation characteristics and requirements apply to multiple Siebel CRM 20.x, 19.x, and 18.x Update releases. Installers behave similarly to those for prior Siebel CRM 20.x, 19.x, and 18.x Update releases and Siebel CRM 17.x patchset releases. Siebel CRM 20.9 Update includes all of the functionality from these prior Siebel CRM releases. This guide will be updated again as the installation and configuration requirements evolve for later Siebel CRM 20.x Update releases and other future Siebel CRM releases. For information about the Siebel CRM continuous update deployment strategy, see 2378034.1 (Article ID) on My Oracle Support.

- **Evolving installation scenarios.** Note the following characteristics of the different installation scenarios, which continue to evolve. More information is provided later in this topic.

- **New installation.** For a new installation, you first install Siebel CRM 17.0 as a new installation and then install the current release of Siebel CRM 20.x Update. Documented requirements for Siebel CRM 17.x and later apply, such as for installing the software, installing the Siebel database, running Siebel Management Console, and so on. See *Roadmap for Installing Siebel CRM for a New Deployment*.
- **Existing installation of Siebel CRM 17.x or later.** If you have an existing installation of Siebel CRM 17.x or later, then you install the current release of Siebel CRM 20.x Update on top of your existing installation. See *Roadmap for Installing Siebel CRM 20.x Update for an Existing Installation of Siebel CRM 17.x or Later*.

  - All Siebel CRM 20.x Update releases contain bug fixes and binary enhancements.
  - The Siebel CRM 20.x Update installer runs various utilities on the Siebel database. See also the information that follows about the Post Install DB Setup (PostInstallDBSetup) utility.
  - Siebel CRM 20.x Update requires that you manually run various utilities on the Siebel database, where applicable.
  - Siebel CRM 20.x Update also provides optional Siebel Repository updates for Siebel CRM applications.
- **Existing installation of Siebel CRM 16.x or earlier (migration installation, with IRM).** If you have an existing installation of a release prior to Siebel CRM 17.0, then you first install Siebel CRM 17.0 as a migration installation, and then install the current release of Siebel CRM 20.x Update. Documented requirements for Siebel CRM 17.x and later apply, such as for installing the software, running Incremental Repository Merge, running Siebel Management Console, and so on. See *Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)*.

  For more information, see *About Database Updates for Siebel CRM 20.x Update*. See also *Siebel CRM Update Guide and Release Notes* on My Oracle Support for the latest Siebel CRM 20.x Update release. For supported Siebel database upgrade paths and instructions for running Incremental Repository Merge, see *Siebel Database Upgrade Guide* .
- **Existing installation of a release prior to Siebel CRM 8.1.1 or 8.2.2 (full database upgrade).** For an upgrade-type migration from some older Siebel CRM releases, you first install Siebel CRM 17.0 as a new installation and then install the current release of Siebel CRM 20.x Update. Documented requirements for Siebel CRM 17.x and Siebel CRM 20.x Update apply, such as for installing the software, upgrading the Siebel database, running Siebel Management Console, and so on. See *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*. For supported Siebel database upgrade paths and upgrade instructions, see *Siebel Database Upgrade Guide* .

In release media or software contexts showing the Siebel version number, the version is represented as version 20.x, such as version 20.9 for Siebel CRM 20.9 Update. When you install a subsequent Siebel CRM release, the version number of the installed software increments to version 20.10, 20.11, and so on, according to the release installed.

- **Installer now runs Post Install DB Setup (PostInstallDBSetup) utility.** As of Siebel CRM 20.3 Update, when you install Siebel CRM 20.x Update for an existing installation of Siebel CRM 17.x or later of Siebel Server and Database Configuration Utilities, after installation, the installer runs the Post Install DB Setup (PostInstallDBSetup) utility on the Siebel database. PostInstallDBSetup runs several processes to ensure that the customer database schema, manifest, and seed data is up to date for the current monthly update release.

  Where applicable, you can also optionally run the optional RepositoryUpgrade utility to support new features since Siebel CRM 17.0. For more information, see *About Database Updates for Siebel CRM 20.x Update*. See also *Siebel CRM Update Guide and Release Notes* on My Oracle Support and *Siebel Database Upgrade Guide* .
- **You can now configure installed nodes of Siebel Gateway to work together as a cluster.** As of Siebel CRM 18.5 Update, Siebel Gateway supports clustering to provide high availability benefits to Siebel CRM customers. The clustering feature supports both the Siebel Gateway service (application container) and the Siebel Gateway

registry (Apache ZooKeeper). Siebel Gateway clustering is optional. You might choose to use Siebel Gateway clustering only for your production environment, for example.

The tasks associated with installing an individual instance of Siebel Gateway are unchanged in the current release, as is the Siebel Management Console task for configuring the primary Siebel Gateway (the first one installed and configured). Siebel Management Console supports a new profile type, the Siebel Gateway cluster profile, and a new step to deploy the cluster profile.

As of Siebel CRM 20.4 Update, you can change the primary service node and primary registry node in a Siebel Gateway cluster. For more information, see *Configuring the Siebel Gateway Cluster*.

- **You can now configure load balancing for Siebel Application Interface application containers.** As of Siebel CRM version 17.5, application containers for Siebel Application Interface instances on multiple nodes can be load balanced using products such as Apache HTTP Server (httpd) with the mod_jk module. The products you use must provide reverse proxy services and support load balancing based on jsessionid cookies. All instances of Siebel Application Interface must be protected by a reverse proxy. For more information, see *Planning the Siebel Application Interface Topology*.
- **Siebel Management Console now includes a Configuration screen.** As of Siebel CRM 18.7 Update, system administrators can configure server elements in the Siebel deployment by using the Configuration screen in the Siebel Management Console. Administrators can perform tasks that are equivalent to those that are traditionally performed in the Administration - Server Configuration screen in the Siebel application or in the Server Manager command-line utility, as described in *Siebel System Administration Guide* . This functionality is provided as an alternative to the traditional methods. For more information, see *Configuring the Siebel Deployment*.
- **Siebel Management Console now includes a Management screen.** As of Siebel CRM 18.12 Update, system administrators can manage server elements in the Siebel deployment by using the Management screen in the Siebel Management Console. Administrators can perform tasks that are equivalent to those that are traditionally performed in the Administration - Server Management screen in the Siebel application or in the Server Manager command-line utility, as described in *Siebel System Administration Guide* . This functionality is provided as an alternative to the traditional methods. For more information, see *Managing the Siebel Deployment*.
- **Siebel Management Console now supports accessibility.** As of Siebel CRM 18.7 Update, Siebel Management Console supports enhanced accessibility. For more information, see *Accessibility for Siebel Management Console*.
- **Siebel Management Console now supports safe mode.** As of Siebel CRM 19.11 Update, you can configure a safe mode user for Siebel Management Console. For more information, see *Using Safe Mode for Siebel Management Console*.
- **Siebel Migration configuration in Siebel Management Console now includes a Migration Package Location setting.** As of Siebel CRM 18.8 Update, you can optionally specify the path representing the location of the migration package. You can use the Migration Package Location setting to specify a single shared location that supports both export and import operations for synchronous and asynchronous migrations. For more information, see *Configuring the Siebel Migration Application*.
- **Siebel Enterprise Cache configuration in Siebel Management Console now supports cache persistence.** As of Siebel CRM 19.9 Update, Siebel CRM supports persistence for the caches managed by Siebel Enterprise Cache. For more information, see *About Persistence for Siebel Enterprise Cache*.
- **Siebel Constraint Engine now supports load balancing.** As of Siebel CRM 19.2 Update, you can deploy multiple instances of Siebel Constraint Engine in your Siebel deployment, to support load balancing. See also *Configuring the Siebel Constraint Engine*.
- **Siebel Remote now supports TLS (Transport Layer Security).** As of Siebel CRM 19.6 Update, Siebel Remote supports TLS encryption and no longer supports RSA encryption. For more information about configuring TLS

for Siebel Remote, see *Siebel Remote and Replication Manager Administration Guide* and *Siebel Security Guide*.

- **Enhanced autostart capability for application containers (Apache Tomcat).** As of Siebel CRM 18.8 Update, application containers (Apache Tomcat) for installations of Siebel Gateway, Siebel Server, and Siebel Application Interface run as a service on Microsoft Windows. Application containers start automatically on Microsoft Windows. For more information, see *Stopping and Starting the Siebel Application Container*.
- **Ability to customize application container for Siebel Application Interface.** As of Siebel CRM 19.5 Update, you can customize URLs for Siebel CRM applications. You can also modify the HTTPS redirect port or HTTP port. These customizations involve modifying the application container (Apache Tomcat) for Siebel Application Interface. For more information, see *Customizing URLs for Siebel CRM Applications* and *Modifying the HTTPS Redirect Port or HTTP Port for Siebel Application Interface*.
- **Workflow inactivation utility is provided.** As of Siebel CRM 20.7 Update, you can run the InactivateWFs.exe utility in development environments to inactivate workflow processes that are no longer required. For more information, see *Inactivating Workflow Processes*.
- **Siebel Tools no longer supports the local or sample database.** As of Siebel CRM 17.0, Siebel Tools no longer supports the local or sample database. The local or sample database is only for use with Siebel Mobile Web Client. Developers now use Siebel Web Tools or Siebel Tools with workspaces in the enterprise Siebel database.
- **Oracle Database SE2 has replaced Oracle Database XE for the local database.** As of Siebel CRM 20.8 Update, Oracle Database SE2 has replaced Oracle Database XE for the local database. The sample database is no longer supported and can no longer be used at this release level or later.

  Unless you already installed Siebel CRM 20.8 Update, before you install the current release, all users of Siebel Remote clients (Mobile Web Clients with local database) must synchronize the local database. Oracle Database SE2 must be downloaded from Oracle and installed with the current release on each remote client. After installations are complete, the local database must be reextracted and initialized for each remote client. For more information, see *Installing and Using Oracle Database SE2 for the Local Database*.

> **Tip:** To continue using the sample database for prior versions of Siebel CRM 20.x Update, see *About the Sample Database for Prior Versions of Siebel Mobile Web Client*.

Related Topics

Installation-Related Changes for Siebel CRM 17.0

Installing and Uninstalling Siebel CRM 20.x Update

About Database Updates for Siebel CRM 20.x Update

Configuring the Siebel Deployment

Planning the Siebel Application Interface Topology

Related Books

Siebel CRM Update Guide and Release Notes on My Oracle Support

Installation-Related Changes for Siebel CRM 17.0

Note: This topic provides information that applies specifically to Siebel CRM 17.x and now also applies to environments in which you are now installing Siebel CRM 20.x Update. This information is provided for your reference and has not been updated for Siebel CRM 20.x Update releases. See also *Installation-Related Changes for Siebel CRM 20.x Update*.

The *Siebel Installation Guide* for the operating system you are using 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 *What's New in Siebel Installation Guide for Microsoft Windows, Siebel CRM 20.9 Update* and topics for prior releases.

- **Documentation is for Siebel CRM 17.0.** The *Siebel Installation Guide* for the operating system you are using is for installing Siebel CRM 17.0. With some differences, installation for this release is similar to that for previous releases. You can install Siebel CRM 17.0 as a new installation or as a migration installation.

  Siebel CRM 17.0 includes new functionality and applicable functionality from previous releases.

  Customers who had previously installed a Siebel CRM release prior to Siebel CRM 17.0 can install Siebel CRM 17.0 as a migration installation. When you migrate from the prior release, you must also run Incremental Repository Merge, as described in *Siebel Database Upgrade Guide* .

  Previous versions of the *Siebel Bookshelf* are still available. The *Siebel Installation Guides* for prior releases are available on My Oracle Support, at 1461732.1 (Article ID). For detailed information about the installation features of prior releases, see these earlier guides.
- **Enhanced support for deployment in a variety of computing environments.** In Siebel CRM 17.0, several changes have been made to the Siebel CRM installation and deployment process and to the Siebel CRM architecture. Many of these changes, described in the rest of this topic and elsewhere, make it easier to deploy Siebel CRM 17.0 in a variety of computing environments: on-premise, on the cloud, or some combination of these. The Siebel CRM environment now uses embedded application container functionality and RESTful services. The new framework eliminates dependency on third-party Web servers and reduces dependency on other operating system-specific modules. Installations of Siebel Enterprise Server and Siebel Application Interface modules now include deployment of WAR files into the application container and configuration of application container ports.

  Note: For detailed information about the configuration and administration of an application container outside of the Siebel CRM configuration framework, see Apache Tomcat documentation.
- **New Siebel Gateway replaces Siebel Gateway Name Server.** As of Siebel CRM 17.0, the functions previously provided by Siebel Gateway Name Server are now performed by a new module called Siebel Gateway. This module is installed with the updated version of the Siebel Enterprise Server installer.

  Siebel Gateway uses embedded application container functionality to manage communications with other modules. Configuration data for the Siebel environment is stored internally to Siebel Gateway. The siebns.dat file is no longer used. The Siebel Server installation also includes embedded application container functionality as part of communication with the Siebel Gateway. The authentication framework for accessing Siebel Gateway has changed. For more information, see *Installing Siebel CRM Server Modules*.
- **New Siebel Application Interface replaces Siebel Web Server Extension.** As of Siebel CRM 17.0, the functions previously provided by Siebel Web Server Extension (SWSE) are now performed by a new module called Siebel Application Interface. This module is installed with the updated version of the Siebel Enterprise Server installer.

Install Siebel Application Interface in the secured application intranet zone, in a different location on the same computer as the other Siebel CRM modules, or on a different computer.

Siebel Application Interface uses an internal Web application server, including application container functionality, to manage Siebel CRM Web requests that were formerly handled by SWSE installed on a third-party Web server.

Siebel Application Interface plays a new role in supporting Siebel native load balancing for Siebel Servers in Siebel CRM 17.0. When a user requests a new application connection, Siebel Application Interface sends a request to Siebel Gateway, which returns a connect string for the least-loaded Application Object Manager from among the Siebel Servers supporting that server component. The user session will use this Application Object Manager.

All instances of Siebel Application Interface must be protected by a reverse proxy. For more information about deployment options for Siebel Application Interface with Web servers for the current release, see *Planning the Siebel Application Interface Topology*.

The application configurations formerly defined in the eapps.cfg file and associated with virtual directories on the Web server are now managed by the Siebel Management Console and stored in the Siebel Gateway registry. The new_virdirs script for adding newly available applications to a previously configured SWSE is not applicable for this release. Where virtual directories formerly mapped to the `public` directory on the SWSE, application configurations now map to `applicationcontainer\webapps\siebel` in the Siebel Application Interface installation.

The URL format for Siebel CRM has been updated and standardized for Siebel applications, Siebel EAI (inbound SOAP, inbound HTTP), REST, CalDAV, CardDAV, and other programs or technologies. For more information, see *Installing Siebel CRM Server Modules*.

- **New Siebel Management Console replaces Siebel Configuration Wizards.** As of Siebel CRM 17.0, most of the initial configuration of the Siebel CRM environment is done through the Siebel Management Console, a new Web-based application provided with the Siebel Application Interface installation. Most of the Siebel Configuration Wizards are no longer provided. (Database Configuration Wizard and related utilities still use the old Siebel Configuration Wizard framework.) Several new modules can now be configured using the Siebel Management Console. The sequence in which you perform configuration tasks has also changed. For more information, see *Configuring Siebel CRM Server Modules*.
- **New Siebel Migration application installed with Siebel Application Interface.** The new Siebel Migration application, a Web-based tool for migrating Siebel Repositories and seed data and performing related tasks, is provided with the Siebel Application Interface installation. The Siebel Management Console includes tasks for configuring the Siebel Migration application. For more information, see *Installing Siebel CRM Server Modules* and *Configuring Siebel CRM Server Modules*. See also *About Installing in Upgrade Environments* and *Siebel Database Upgrade Guide* .
- **Enhanced support for Siebel Enterprise Cache.** The Siebel Enterprise Server installer now provides the option of installing the Siebel Enterprise Cache (formerly called Siebel Cache Server), and the Siebel Management Console includes tasks for configuring and managing the Enterprise Cache Server and the Enterprise Cache Client. The Siebel Enterprise Cache, which is based on Oracle Coherence, is used by the Siebel Constraint Engine (which is available as a developer preview). For more information, see *Installing Siebel CRM Server Modules* and *Configuring Siebel CRM Server Modules*.
- **Enhanced support for Siebel Constraint Engine used by Siebel Product Configurator.** The Siebel Product Configurator integration with Oracle Advanced Constraint Technology is available as a developer preview. The Siebel Constraint Engine is part of this integration, which also requires the Siebel Enterprise Cache. The Siebel Enterprise Server installer now provides options for installing both the Siebel Enterprise Cache and the Siebel Constraint Engine, and the Siebel Management Console includes tasks for configuring and managing these

modules. For more information, see *Installing Siebel CRM Server Modules* and *Configuring Siebel CRM Server Modules*. See also *Siebel Product Administration Guide* .

- **Siebel runtime repository replaces Siebel Repository Files.** In Siebel CRM 17.0, Siebel Composer is now generally available. Siebel Repository Files (SRF) are no longer used, and Siebel applications use the Siebel runtime repository instead. Siebel Tools and Siebel Web Tools always use the Siebel runtime repository configuration provided by Oracle and cannot use a customer-modified Siebel runtime repository. (For troubleshooting purposes, Siebel applications using the Siebel Web Client or Mobile Web Client can also be configured to use the Siebel runtime repository provided by Oracle.) The `objects` directory (former SRF location) has been removed for all applicable Siebel CRM modules. For more information, see *Using Siebel Tools* . See also *Siebel System Administration Guide* .
- **Custom Siebel Web template files migrate to Siebel database.** In Siebel CRM 17.0, custom Siebel Web template files migrate into the Siebel database when you run Incremental Repository Merge, as described in *Siebel Database Upgrade Guide* . For more information, see *Additional Tasks for Migration Installations*.
- **Existing customers must perform additional migration tasks.** In Siebel CRM 17.0, existing configuration settings for SWSE are not automatically migrated to Siebel Application Interface. You must remove the existing configuration for SWSE. Before installing, you must run an additional command to attach the Oracle home from the prior release. You must perform the Siebel Application Interface migration installation first, before that for all other modules. After completing the migration installation for all server modules, you must configure Siebel Application Interface using the Siebel Management Console. Other requirements apply for all migration installations. For more information, see *Additional Tasks for Migration Installations*.
- **Migration customers might need to upgrade the database client.** In a migration installation case, you might need to upgrade the database client software to a supported version for Siebel CRM 17.0, as noted in the Certifications tab on My Oracle Support. Also update the path to the database client installation in the environment variables. Do this after performing the migration installations. For more information, see *About Configuring Siebel CRM*. See also *Additional Tasks for Migration Installations*.
- **Additional customer applications are available.** In Siebel CRM 17.0, additional customer applications for Siebel Open UI are provided that were previously desupported in Siebel CRM 16.0, but were available for standard interactivity in prior releases. The additional applications are available for new deployments or, through the upgrade process, for existing deployments. For more information, see *Siebel Database Upgrade Guide* and relevant application-related guides.
- **32-bit versions of the local database and sample database are no longer provided.** In Siebel CRM 17.0, the local database and sample database are provided in the 64-bit versions only. The 32-bit versions are no longer provided as JAR files or as selections in Siebel Image Creator. For more information about Siebel Image Creator, see *Creating the Siebel Installation Image on the Network*.
- **Enhanced support for CalDAV and CardDAV.** In Siebel CRM 17.0, support for CalDAV and CardDAV is enhanced. For information about enabling this functionality, see *Configuring Support for CalDAV or CardDAV Publishing*.
- **Enhanced support for Desktop Integration Siebel Agent (DISA) and Outlook to Siebel Drag and Drop.** In Siebel CRM 17.0, support for Desktop Integration Siebel Agent (DISA) and Outlook to Siebel Drag and Drop has been enhanced. For more information, see *Installing Desktop Integration Siebel Agent on Client Computers* and *Installing Outlook to Siebel Drag and Drop on Client Computers*. For more information, see *Desktop Integration Siebel Agent Guide* .
- **Siebel Test Execution is now available.** In Siebel CRM 17.0, Siebel Test Execution can now be installed alongside of Siebel CRM. This module, which facilitates automated testing of Siebel CRM, is available through separate packaging than the media for Siebel CRM 17.0. For more information, see *Testing Siebel Business Applications* .
- **Siebel Approval Manager is now available.** In Siebel CRM 17.0, the Siebel Approval Manager can now be installed alongside of Siebel CRM. This module, which facilitates tracking of approvals for development work

related to Siebel CRM, is available through separate packaging than the media for Siebel CRM 17.0. For more information, see *Siebel Approval Manager Guide* .

- **Oracle LDAP Client is no longer provided.** In Siebel CRM 17.0, the Oracle LDAP Client is no longer provided as part of Siebel CRM product media. Obtain it separately from Oracle Software Delivery Cloud.
- **Oracle Configuration Manager is no longer installed.** In Siebel CRM 17.0, the Oracle Configuration Manager is no longer installed with Siebel CRM. As a result, Siebel installer steps are simplified.

Related Topics

Installation-Related Changes for Siebel CRM 20.x Update

Before You Install Siebel CRM

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

1. Review all documented hardware and software requirements.

   For more information, see the installation guidelines in this topic and the information referenced there.
2. Review the worksheet in *Siebel Deployment Planning Worksheet* or create your own worksheet, and fill it in as you prepare for installing Siebel CRM.
3. Plan and prepare for your deployment.
4. 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 Siebel CRM for a New Deployment*. For more information, see *Planning RDBMS Installation and Configuration* and *Configuring the RDBMS* .
5. Obtain the Siebel media and create a Siebel installation image on the network, from which you will perform installations.

   - Obtain the media for Siebel CRM 17.0.
   - Obtain the media for Siebel CRM 20.9 Update.

   For more information, see *Creating the Siebel Installation Image on the Network* .
6. Create directories for Siebel CRM software and directories for the Siebel File System.

   For more information, see *File and Directory Naming Conventions* and *Creating the Siebel File System*.
7. Create the required Siebel accounts.

   For more information, see *Creating the Siebel Service Owner Account*.
8. Review all security requirements and take the necessary preparatory steps for either a new installation or a migration installation.
9. Perform any manual migration tasks that might be required prior to performing migration installations for an existing deployment, as described in *Additional Tasks for Migration Installations*.

This step applies only for *Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)*.

General Guidelines for Installing Siebel CRM

Follow these general guidelines for your installations:

- Before installing any Siebel CRM module, review all documented requirements, including those found in *About Installation Tasks for Siebel CRM* and in *Requirements for Installing and Configuring Siebel CRM*. Also review the information in *Siebel Deployment Planning Guide* , *Siebel Security Guide* , other relevant guides on *Siebel Bookshelf* , and the Certifications tab on My Oracle Support.
- You must plan for the installation and management of the Siebel CRM server modules that you are installing. Review the installation instructions and the installer screens to help you understand the information that is requested by the installers. Such information includes installation locations, languages, application container port numbers, other port numbers, and authentication settings.
- When you install Siebel CRM, as described in *Installing Siebel CRM*, the installer prompts you to specify valid keystore and truststore files, which are Java files containing certificates.

  The keystore and truststore files are necessary for the application container to use secure two-way communications when connecting with other Siebel CRM modules, as occurs during Siebel Management Console configuration and in normal operation. These files must contain the server certificate chain and an imported CA certificate. Generate your files so that the keystore file references both the private key and the public key, while the truststore file references the public key only. Specify the password that was previously configured to open the certificate files. If you do not configure these files correctly, then you will not be able to configure Siebel CRM, as described in *Configuring Siebel CRM Server Modules*. See also *Siebel Security Guide* .
- Various restrictions and guidelines apply regarding which server modules must be installed separately or are recommended to be installed separately from other modules. The installer prevents installation combinations that are not allowed, and warns for installation combinations that are not recommended for production or other end-user environments. For more information, see *About Installation Tasks for Siebel CRM*.
- You install Siebel Gateway for each Siebel Enterprise. You can install it with Siebel Server or install it separately, depending on your requirements. You can optionally install it on multiple nodes in order to support Siebel Gateway clustering. For more information, see *About Installation Tasks for Siebel CRM*. See also *Configuring the Siebel Gateway Cluster*.
- You install Siebel Database Configuration Utilities once, together with the first Siebel Server installed. You must install it with a Siebel Server.
- You install all of the Siebel CRM server modules that you will require to get started, and then you configure them.

  Various requirements apply to the sequence in which you must perform configuration tasks. Security requirements such as for authentication affect many phases of your installation and configuration process, including the overall task sequence. For example, depending on your authentication method, you might need to install the Siebel database for a new deployment before you configure the Siebel CRM server modules using the Siebel Management Console.
- The migration installation and database upgrade cases differ in their requirements for installation sequence, Siebel database tasks, configuration of the Siebel environment, and other post-installation tasks.

For example, for migration installations, you must perform the migration installation of the Siebel Application Interface first (for your existing installation of SWSE). Then perform the migration installation of the Siebel Gateway and Siebel Server.

- You can install additional instances of Siebel Server and Siebel Application Interface, as needed, for medium-sized or larger deployments.
- After you install Siebel CRM 17.0 for each applicable Siebel CRM module, you install Siebel CRM 20.9 Update.
- You must activate license keys for Siebel CRM, using the License Key Activation utility, after you install a new database, run Incremental Repository Merge (for migration installations), or complete a full database upgrade.

Related Topics

About Installation Tasks for Siebel CRM

Installing and Uninstalling Siebel CRM 20.x Update

Requirements for Installing and Configuring Siebel CRM

About Siebel CRM Releases

Related Books

Siebel Deployment Planning Guide

Siebel Security Guide

Deploying Siebel Open UI

Siebel Performance Tuning Guide

Siebel System Administration Guide

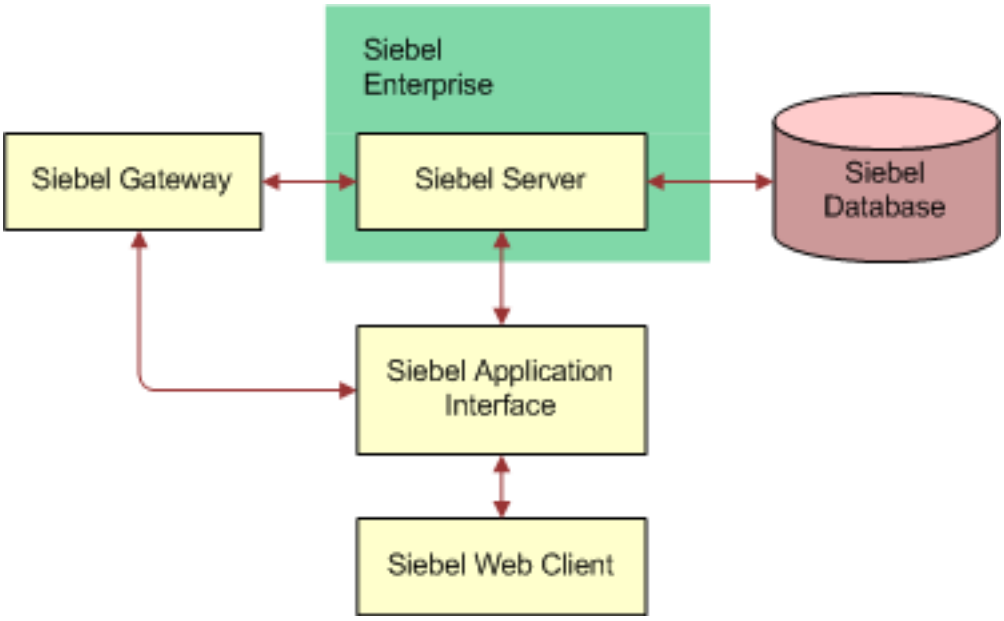
Certifications tab on My Oracle Support

Install & Configure Advisor: Siebel Innovation Pack 2017 (17.0), 2277538.2 (Article ID) on My Oracle Support

Siebel CRM Update Guide and Release Notes on My Oracle Support

Overview of Siebel CRM Server Architecture

The following 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* .



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 Siebel CRM for a New Deployment*
- *Roadmap for Installing Siebel CRM 20.x Update for an Existing Installation of Siebel CRM 17.x or Later*
- *Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)*
- *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*

Related Topics

Before You Install Siebel CRM

Requirements for Installing and Configuring Siebel CRM

Related Books

Siebel Deployment Planning Guide

Siebel Security Guide

Siebel System Administration Guide

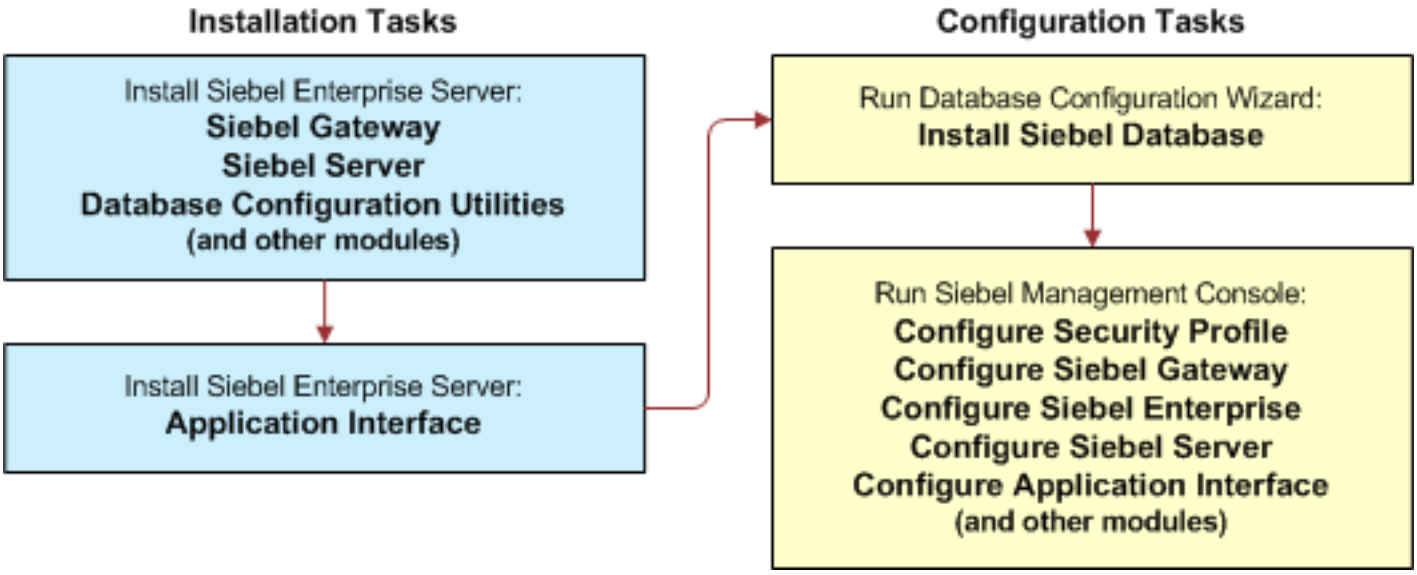
Certifications tab on My Oracle Support

Roadmap for Installing Siebel CRM for a New Deployment

Use this roadmap to guide you in performing the installation and configuration tasks for deploying Siebel CRM, where there is no existing Siebel CRM installation and no existing Siebel database.

The following figure presents a simplified view of the installation and configuration tasks for Siebel CRM server modules for a new deployment.

> **Note:** This illustration does not mention installation or configuration tasks for Siebel Enterprise Cache, Siebel Constraint Engine, or the Siebel Migration application. However, those tasks, where applicable, are implicitly part of this roadmap. The Siebel Constraint Engine is available as a developer preview.



Unless you use another authentication method, a Siebel database must exist before you can configure the Siebel CRM modules, in order to provide an authentication framework for the configuration tasks. You install Database Configuration Utilities with the first Siebel Server.

> **Note:** For each applicable Siebel CRM module, you install Siebel CRM 20.9 Update after you install Siebel CRM 17.0 and before you install the Siebel database or configure the Siebel CRM products. For more information, see *Installation-Related Changes for Siebel CRM 20.x Update*.

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

1. Before performing installation and configuration tasks, review all documented requirements.
   See *Before You Install Siebel CRM*.
2. Create the network images for all applicable releases of Siebel CRM:
   - Create a network image for Siebel CRM 17.0.

- Create a network image for Siebel CRM 20.9 Update.

See *Creating the Siebel Installation Image on the Network*.

3. For the Siebel Enterprise Server, install Siebel CRM 17.0. Then install Siebel CRM 20.9 Update. You can install the following Siebel CRM modules:

   - Siebel Application Interface
   - Siebel Gateway
   - Siebel Server
   - Database Configuration Utilities (install with the first Siebel Server)
   - EAI Connector (optional)
   - Siebel Enterprise Cache (optional)
   - Siebel Constraint Engine (optional, available as a developer preview)

   > **Note:** Some restrictions apply to installing Siebel CRM modules together. For more information, see *About Installation Tasks for Siebel CRM*.

   As part of installation, you also specify authentication information and port numbers that will be used by your Siebel CRM deployment. The port numbers must be unique on each installation computer or operating system instance.

   See *Installing Siebel CRM Server Modules*.

4. (Optional) Install Siebel Gateway on additional nodes, if you will use clustering.

   See *Configuring the Siebel Gateway Cluster*.

5. Verify the installation of Siebel CRM modules.

   See *Verifying and Troubleshooting Your Installation*.

6. Configure the RDBMS.

   See *Configuring the RDBMS*.

7. Install the Siebel database.

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

   See *Installing the Siebel Database on the RDBMS*.

8. Activate the license keys.

   See *Activating License Keys*.

9. Run the Siebel Management Console and configure your Siebel deployment:

   a. Configure a security profile.
   b. Configure the Siebel Gateway. (Configure the primary Siebel Gateway, for a cluster environment.)
   c. (Optional) Configure the Siebel Gateway cluster.
   d. Configure the Siebel Enterprise.
   e. Configure the Siebel Server.
   f. Configure the Siebel Application Interface.
   g. Perform any other configuration tasks that you require for your deployment.

See *Configuring Siebel CRM Server Modules*.

10. Perform additional postinstallation tasks for the Siebel Server.

    See *Additional Postinstallation and Configuration Tasks*.
11. For Siebel Tools, install Siebel CRM 17.0. Then install Siebel CRM 20.9 Update.

    See *Installing Siebel Web Clients and Siebel Tools*.
12. For Siebel Mobile Web Clients (or Developer Web Clients), install Siebel CRM 17.0. Then install Siebel CRM 20.9 Update.

    > **Note:** When you install Siebel CRM 20.8 Update or later, Oracle Database SE2 is installed for use with the local database, for Siebel Mobile Web Client.

    See *Installing Siebel Web Clients and Siebel Tools*.
13. Verify the installation of Siebel Tools and Siebel Mobile Web Clients.

    See *Verifying and Troubleshooting Your Installation*.
14. (Optional) Install additional Siebel CRM modules. For example:
    - Desktop Integration Siebel Agent (DISA)
    - Siebel Search software
    - Siebel Test Execution
    - Siebel Approval Manager
15. (Optional) Install and configure additional instances of Siebel Gateway, Siebel Server, or Siebel Application Interface if they are required for your deployment, then verify each installation.
16. Perform any remaining postinstallation tasks. For example, install any required third-party products.

    See the Certifications tab on My Oracle Support.

    See *Additional Postinstallation and Configuration Tasks*.

Related Topics

Roadmap for Installing Siebel CRM 20.x Update for an Existing Installation of Siebel CRM 17.x or Later

Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)

Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)

Related Books

Siebel CRM Update Guide and Release Notes on My Oracle Support

Roadmap for Installing Siebel CRM 20.x Update for an Existing Installation of Siebel CRM 17.x or Later

Use this roadmap to guide you in performing the installation tasks for installing Siebel CRM 20.9 Update or the latest Siebel CRM 20.x Update release, where there is an existing installation of Siebel CRM 17.x or later.

> **Note:** For each applicable installed Siebel CRM module of a qualified version, you install only Siebel CRM 20.9 Update. For more information, see *Installation-Related Changes for Siebel CRM 20.x Update*.

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

1. Before performing installation and configuration tasks, review all documented requirements.

   See *Before You Install Siebel CRM*.

   > **Note:** It is recommended to back up the Siebel database before installing Siebel CRM 20.9 Update.

2. Create the network images for all applicable releases of Siebel CRM:

   - Create a network image for Siebel CRM 20.9 Update.

   See *Creating the Siebel Installation Image on the Network*.
3. For each installed Siebel Enterprise Server module, install Siebel CRM 20.9 Update.

   See *Installing Siebel CRM Server Modules*.

   > **Note:** As of Siebel CRM 20.3 Update, the installer also runs the PostInstallDBSetup utility. Along with other functions, this utility supports new features using the seamless repository framework. You can also run the optional RepositoryUpgrade utility to support new features since Siebel CRM 17.0 that require repository updates but do not use nonextensible objects. Some other postinstallation tasks for the Siebel database might also apply. For more information, see *About Database Updates for Siebel CRM 20.x Update*.

4. Verify the installation of Siebel CRM modules.

   See *Verifying and Troubleshooting Your Installation*.
5. For each installed instance of Siebel Tools and Siebel Mobile Web Client (or Developer Web Client), install Siebel CRM 20.9 Update.

   > **Note:** When you install Siebel CRM 20.8 Update or later, Oracle Database SE2 is installed for use with the local database, for Siebel Mobile Web Client.

   See *Installing Siebel Web Clients and Siebel Tools*.
6. Verify the installation of Siebel Tools and Siebel Mobile Web Clients.

   See *Verifying and Troubleshooting Your Installation*.

Related Topics

Roadmap for Installing Siebel CRM for a New Deployment

Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)

Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)

About Database Updates for Siebel CRM 20.x Update

Related Books

Siebel CRM Update Guide and Release Notes on My Oracle Support

Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation)

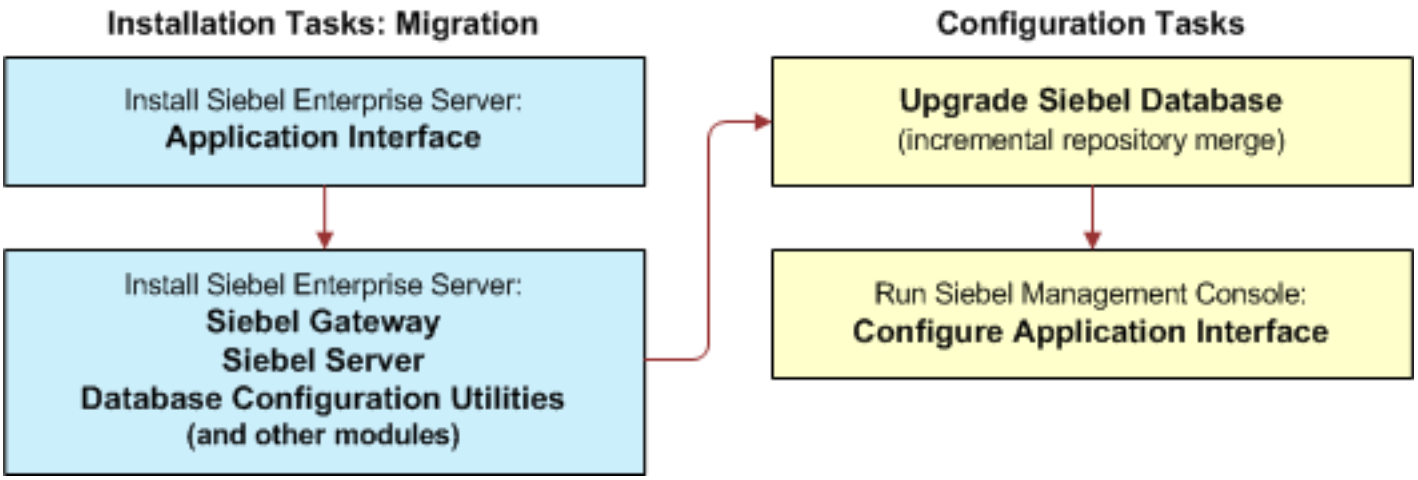
Use this roadmap to guide you in performing the installation tasks for deploying Siebel CRM, where there is an existing installation of a prior version. This is the migration installation case.

You use this roadmap when you have an existing Siebel CRM installation of a prior release of Siebel CRM (prior to Siebel CRM 17.0). You must perform the migration installation tasks for your existing installed Siebel CRM software.

> **Tip:** For the upgrade case, where you are upgrading from a Siebel CRM release prior to version 8.1.1 or version 8.2.2, see *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)* instead. In an upgrade case, you also perform a full database upgrade instead of running Incremental Repository Merge (IRM). In general, this book uses the term *migration* to refer to a migration installation and uses the term *upgrade* to refer to a full database upgrade.

The following figure presents a simplified view of the installation and configuration tasks for Siebel CRM server modules for a migration deployment.

> **Note:** This illustration does not mention installation or configuration tasks for security, Siebel Enterprise Cache, Siebel Constraint Engine, or the Siebel Migration application. However, those tasks, where applicable, are implicitly part of this roadmap. The Siebel Constraint Engine is available as a developer preview.



Note: For each applicable installed Siebel CRM module of a qualified version, you install Siebel CRM 20.9 Update after you install Siebel CRM 17.0 as a migration installation and before you run Incremental Repository Merge or configure the Siebel CRM products. For more information, see *Installation-Related Changes for Siebel CRM 20.x Update*.

This roadmap only summarizes the migration installation process and does not include details about required tasks. For example, you must do the following tasks after performing the migration installation tasks. See also *Additional Tasks for Migration Installations*.

- **Upgrade the database client.** You might need to upgrade the database client software to a supported version for Siebel CRM, as noted in the Certifications tab on My Oracle Support. Also update the database client installation path in the defined environment variables. See *About Configuring Siebel CRM*.
- **Run Incremental Repository Merge (IRM).** Customers must run Incremental Repository Merge. Before doing this, you must have installed at least one Siebel Server with Database Configuration Utilities and installed Siebel Tools. For more information about Incremental Repository Merge, see *Siebel Database Upgrade Guide* .
- **Reset passwords in Siebel Gateway and on the Siebel Server.** Customers must reset any passwords on the Siebel Gateway that were previously encrypted using encryption other than AES. Such passwords are now encrypted using AES. For more information about reencrypting these passwords, see *Siebel Security Guide* . See also *Additional Tasks for Migration Installations*.

The installation process for Siebel CRM in a migration installation case requires multiple tasks that you perform in the following general sequence:

1. Before performing installation tasks, review all documented requirements and perform any necessary premigration tasks.

   See *Before You Install Siebel CRM* and *Additional Tasks for Migration Installations*.
2. Create the network images for all applicable releases of Siebel CRM:
   - Create a network image for Siebel CRM 17.0.
   - Create a network image for Siebel CRM 20.9 Update.

   See *Creating the Siebel Installation Image on the Network*.
3. Remove the existing configuration on the Web server computer where you previously installed Siebel Web Server Extension (SWSE).

> **CAUTION:** You must perform this task before you perform the migration installation of Siebel Application Interface for the existing installation of SWSE.

See *Additional Tasks for Migration Installations* and *About Configuring Siebel CRM*.

4. For the Siebel Application Interface, install Siebel CRM 17.0 as a migration installation for each existing installation of Siebel Web Server Extension (SWSE). Then install Siebel CRM 20.9 Update.

   As part of installation, also specify authentication information and port numbers that will be used by your Siebel CRM deployment. The port numbers must be unique on each installation computer or operating system instance.

   See *Installing Siebel CRM Server Modules*.
5. For the remaining Siebel Enterprise Server modules, install Siebel CRM 17.0 as a migration installation for each existing installation. Then install Siebel CRM 20.9 Update. Also perform any necessary postmigration tasks.

   As part of installation, also specify authentication information and port numbers that will be used by your Siebel CRM deployment. The port numbers must be unique on each installation computer or operating system instance.

   > **Note:** When you migrate the Siebel Gateway, you also must provide information to allow your existing configurations to migrate. This includes the port number of the existing Siebel Gateway Name Server as well as some Siebel Application Interface settings that you specified in Step 4. (If you installed multiple instances of Siebel Application Interface, then specify the settings that apply to the instance of Siebel Application Interface from which you will run Siebel Management Console.)

   See *Installing Siebel CRM Server Modules*. See also *Additional Tasks for Migration Installations*.
6. (Optional) Install Siebel Gateway on additional nodes, if you will use clustering.

   See *Configuring the Siebel Gateway Cluster*.
7. Verify the installation of Siebel CRM modules.

   See *Verifying and Troubleshooting Your Installation*.
8. For Siebel Tools, install Siebel CRM 17.0 as a migration installation for each existing installation. Then install Siebel CRM 20.9 Update. Also perform any necessary postmigration tasks.

   See *Installing Siebel Web Clients and Siebel Tools*. See also *Additional Tasks for Migration Installations*.
9. For Siebel Mobile Web Clients (or Developer Web Clients), install Siebel CRM 17.0 as a migration installation for each existing installation. Then install Siebel CRM 20.9 Update. Also perform any necessary postmigration tasks.

   > **Note:** When you install Siebel CRM 20.8 Update or later, Oracle Database SE2 is installed for use with the local database, for Siebel Mobile Web Client.

   See *Installing Siebel Web Clients and Siebel Tools*. See also *Additional Tasks for Migration Installations*.
10. Verify the installation of Siebel Tools and Siebel Mobile Web Clients.

    See *Verifying and Troubleshooting Your Installation*.
11. Run Incremental Repository Merge on the Siebel database.

    See *Siebel Database Upgrade Guide* .
12. Run the Siebel Management Console and configure your Siebel deployment:

a. (Optional) Configure the Siebel Gateway cluster.
b. Configure the Siebel Application Interface.
c. Perform any other configuration tasks that you require for your deployment.

See *Configuring Siebel CRM Server Modules*.

13. Perform additional postinstallation tasks for the Siebel Server.

See *Additional Postinstallation and Configuration Tasks*.

14. (Optional) Install additional Siebel CRM modules. For example:

- Desktop Integration Siebel Agent (DISA)
- Install Siebel Search software
- Siebel Test Execution
- Siebel Approval Manager

15. (Optional) Install and configure additional instances of Siebel Gateway, Siebel Server, or Siebel Application Interface if they are required for your deployment, then verify each installation.
16. Perform any remaining postinstallation tasks. For example, install or upgrade any required third-party products.

See the Certifications tab on My Oracle Support.

See *Additional Postinstallation and Configuration Tasks*.

Related Topics

Roadmap for Installing Siebel CRM for a New Deployment

Roadmap for Installing Siebel CRM 20.x Update for an Existing Installation of Siebel CRM 17.x or Later

Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)

Related Books

Siebel Database Upgrade Guide

Siebel CRM Update Guide and Release Notes on My Oracle Support

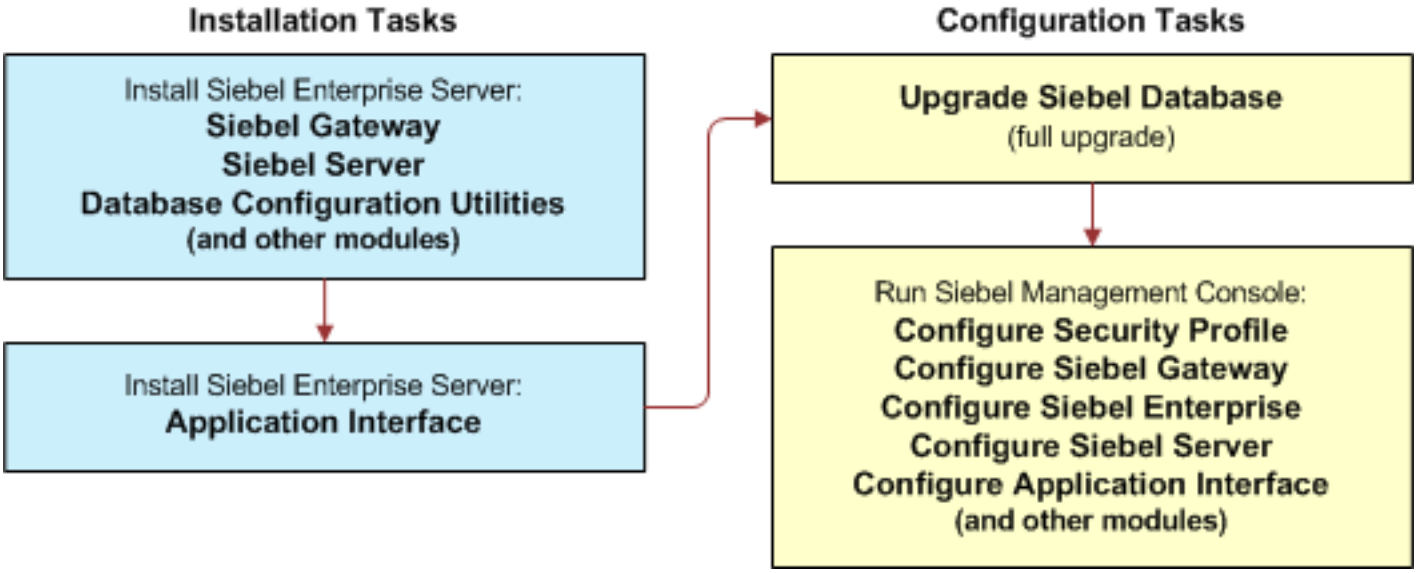
Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)

Use this roadmap to guide you in performing the installation and configuration tasks for deploying Siebel CRM, where there is an existing Siebel database and you are upgrading from a Siebel CRM release prior to Siebel CRM 8.1.1 or 8.2.2.

Tip: For the migration installation case, where you are upgrading from an existing installation of a prior release of Siebel CRM, see *Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)* instead. In a migration installation, you also run Incremental Repository Merge instead of performing a full database upgrade. In general, this book uses the term *migration* to refer to a migration installation and uses the term *upgrade* to refer to a full database upgrade.

The following figure presents a simplified view of the installation and configuration tasks for Siebel CRM server modules for an upgrade installation case. You install Database Configuration Utilities with the first installed Siebel Server.

Note: This illustration does not mention installation or configuration tasks for Siebel Enterprise Cache, Siebel Constraint Engine, or the Siebel Migration application. However, those tasks, where applicable, are implicitly part of this roadmap. The Siebel Constraint Engine is available as a developer preview.



Note: For each applicable Siebel CRM module, you install Siebel CRM 20.9 Update after you install Siebel CRM 17.0 as a new installation and before you upgrade the Siebel database or configure the Siebel CRM products. For more information, see *Installation-Related Changes for Siebel CRM 20.x Update*.

This roadmap only briefly mentions the Siebel database upgrade tasks. Before you upgrade the database, 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* and see *Siebel Database Upgrade Guide* .

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

1. Before performing installation and configuration tasks, review all documented requirements.

   See *Before You Install Siebel CRM*.
2. Create the network images for all applicable releases of Siebel CRM:
   - Create a network image for Siebel CRM 17.0.
   - Create a network image for Siebel CRM 20.9 Update.

   See *Creating the Siebel Installation Image on the Network*.

3. For the Siebel Enterprise Server, install Siebel CRM 17.0. Then install Siebel CRM 20.9 Update. You can install the following Siebel CRM modules:
    - Siebel Application Interface
    - Siebel Gateway
    - Siebel Server
    - Database Configuration Utilities (install with the first Siebel Server)
    - EAI Connector (optional)
    - Siebel Enterprise Cache (optional)
    - Siebel Constraint Engine (optional, available as a developer preview)

    > **Note:** Some restrictions apply to installing Siebel CRM modules together. For more information, see *About Installation Tasks for Siebel CRM*.

    As part of installation, also specify authentication information and port numbers that will be used by your Siebel CRM deployment. The port numbers must be unique on each installation computer or operating system instance.

    See *Installing Siebel CRM Server Modules*.
4. (Optional) Install Siebel Gateway on additional nodes, if you will use Siebel Gateway clustering.

    See *Configuring the Siebel Gateway Cluster*.
5. Verify the installation of Siebel CRM modules.

    See *Verifying and Troubleshooting Your Installation*.
6. Upgrade the Siebel database.

    See *About Installing in Upgrade Environments* and see *Siebel Database Upgrade Guide* .
7. Activate the license keys.

    See *Activating License Keys*.
8. Run the Siebel Management Console and configure your Siebel deployment:
    a. Configure a security profile.
    b. Configure the Siebel Gateway. (Configure the primary Siebel Gateway, for a cluster environment.)
    c. (Optional) Configure the Siebel Gateway cluster.
    d. Configure the Siebel Enterprise.
    e. Configure the Siebel Server.
    f. Configure the Siebel Application Interface.
    g. Perform any other configuration tasks that you require for your deployment.

    See *Configuring Siebel CRM Server Modules*.
9. Perform additional postinstallation tasks for the Siebel Server.

    See *Additional Postinstallation and Configuration Tasks*.
10. For Siebel Tools, install Siebel CRM 17.0. Then install Siebel CRM 20.9 Update.

    See *Installing Siebel Web Clients and Siebel Tools*.
11. For Siebel Mobile Web Clients (or Developer Web Clients), install Siebel CRM 17.0. Then install Siebel CRM 20.9 Update.

> **Note:** When you install Siebel CRM 20.8 Update or later, Oracle Database SE2 is installed for use with the local database, for Siebel Mobile Web Client.

See *Installing Siebel Web Clients and Siebel Tools*.

12. Verify the installation of Siebel Tools and Siebel Mobile Web Clients.

    See *Verifying and Troubleshooting Your Installation*.
13. (Optional) Install additional Siebel CRM modules. For example:
    - Desktop Integration Siebel Agent (DISA)
    - Siebel Search software
    - Siebel Test Execution
    - Siebel Approval Manager
14. (Optional) Install and configure additional instances of Siebel Gateway, Siebel Server, or Siebel Application Interface if they are required for your deployment, then verify each installation.
15. Perform any remaining postinstallation tasks. For example, install or upgrade any required third-party products.

    See the Certifications tab on My Oracle Support.

    See *Additional Postinstallation and Configuration Tasks*.

Related Topics

Roadmap for Installing Siebel CRM for a New Deployment

Roadmap for Installing Siebel CRM 20.x Update for an Existing Installation of Siebel CRM 17.x or Later

Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)

Related Books

Siebel Database Upgrade Guide

Siebel CRM Update Guide and Release Notes on My Oracle Support

3 Installing Siebel CRM Server Modules

Installing Siebel CRM Server Modules

This chapter explains how to install the Siebel CRM server modules. It includes the following topics:

- *About Installation Tasks for Siebel CRM*
- *Installing Siebel CRM*
- *Installing and Uninstalling Siebel CRM 20.x Update*
- *Installing Siebel CRM in Unattended Mode*
- *Additional Tasks for Migration Installations*

About Installation Tasks for Siebel CRM

Use the Siebel Enterprise Server installer to install the Siebel CRM server modules, including Siebel Gateway, Siebel Server, Database Configuration Utilities, and Siebel Application Interface. Optionally, you can also install EAI Connector, Siebel Enterprise Cache, and Siebel Constraint Engine (which is available as a developer preview). This chapter describes both new installations and migration installations.

Before installing Siebel CRM modules, review the following and perform any necessary preinstallation tasks:

- *Before You Install Siebel CRM* and other topics in *Overview of Installing Siebel CRM*
- *Additional Tasks for Migration Installations*
- *About Database Updates for Siebel CRM 20.x Update*
- *Installation and Configuration Methods by Deployment Type* and other topics in *Requirements for Installing and Configuring Siebel CRM*

Use the instructions in this chapter to install the following Siebel CRM modules:

- Siebel Application Interface
- Siebel Gateway
- Siebel Server
- EAI Connector (optional)
- Database Configuration Utilities (install with the first Siebel Server)
- Siebel Enterprise Cache (optional)
- Siebel Constraint Engine (optional, available as a developer preview; see also *Siebel Product Administration Guide*)

Various restrictions and guidelines apply regarding which Siebel CRM modules must be installed separately or are recommended to be installed separately from other modules. Note the following restrictions and guidelines for installing these modules:

- Siebel Application Interface cannot be installed in the same location as the other Siebel CRM modules. You install Siebel Application Interface in the secured application intranet zone, in a different location on the same computer as the other Siebel CRM modules, or on a different computer.
- Siebel Gateway cannot be installed with either of the following Siebel CRM modules:
  - Siebel Enterprise Cache
  - Siebel Constraint Engine
- You cannot install Database Configuration Utilities without also installing a Siebel Server.
- You can install EAI Connector with other Siebel Enterprise Server modules or install it a separate location.
- If you are installing and deploying Siebel Constraint Engine (available as a developer preview), then you must also install and deploy Siebel Enterprise Cache somewhere in your Siebel deployment.
- For Siebel CRM modules that are new in Siebel CRM 17.0, you must perform a new installation, because the migration installation option is not available. This requirement applies to Siebel Enterprise Cache and Siebel Constraint Engine.
- Some installation combinations are strongly recommended against. The installer prevents installation combinations that are not allowed, and warns for installation combinations that are not recommended for production or other end-user environments.
- You cannot install another Siebel CRM module into an existing installation of the same version. You must perform a new installation into a different location.

You can install and deploy multiple instances of Siebel CRM modules. For example:

- You can optionally install Siebel Gateway on multiple nodes in order to support Siebel Gateway clustering. For more information, see *Configuring the Siebel Gateway Cluster*.
- You can optionally install Siebel Server on multiple nodes in order to support Siebel Server load balancing. For more information, see *About Installing Additional Siebel Servers for an Existing Siebel Enterprise*.
- You can optionally install Siebel Application Interface on multiple nodes in order to configure load balancing for these Siebel Application Interface instances. For more information, see *Planning the Siebel Application Interface Topology*.
- You can optionally install Siebel Constraint Engine on multiple nodes in order to support load balancing for these Siebel Constraint Engine instances. For more information, see *Configuring the Siebel Constraint Engine*.

For more information about different ways of deploying Siebel CRM modules, see *Installation and Configuration Methods by Deployment Type*.

After a new installation, you install the Siebel database and then you configure Siebel CRM modules using the Siebel Management Console. You perform the configuration tasks after installing Siebel CRM 17.0 and installing Siebel CRM 20.9 Update.

You perform migration installations using the same installer that you use for new installations. A migration installation replaces your existing installation with a new installation. However, the installation location, installation languages, server configuration data, and other settings from the existing installation are used for the new installation, where feasible. Before the new installation is performed, the existing installation is moved to a backup location and can no longer be used.

Note: In a migration installation case, you must install Siebel Application Interface before you install any other Siebel CRM modules. A migration installation of Siebel Application Interface does not copy customer configurations or files from your existing installation of SWSE to the new installation. After completing all of the migration installations, you must configure the Siebel Application Interface.

CAUTION: You must perform any necessary manual migration tasks prior to performing migration installations, as described in *Additional Tasks for Migration Installations*. For example, you must remove the existing configuration for the SWSE *before* you install Siebel Application Interface as a migration installation. If you are using data encryption, then you must back up the key file.

For client installation, see *Installing Siebel Web Clients and Siebel Tools*.

Related Topics

Installation-Related Changes for Siebel CRM 17.0

Installing Siebel CRM

Installing Siebel CRM in Unattended Mode

Additional Tasks for Migration Installations

Configuring Siebel CRM Server Modules

Installing Siebel Web Clients and Siebel Tools

Requirements for Installing and Configuring Siebel CRM

About Installing Siebel CRM

Installing Siebel CRM

Note: After you have installed Siebel CRM 17.0, as described in this topic, you then install Siebel CRM 20.9 Update, as described in *Installing and Uninstalling Siebel CRM 20.x Update*. For more information, see *Installation-Related Changes for Siebel CRM 20.x Update*.

This topic provides instructions for installing Siebel CRM modules, using the GUI installation method, as part of standard deployment. Use these instructions to install the following modules:

- Siebel Application Interface
- Siebel Gateway
- Siebel Server
- EAI Connector (optional)
- Database Configuration Utilities (install with the first Siebel Server)
- Siebel Enterprise Cache (optional)
- Siebel Constraint Engine (optional, available as a developer preview; see also *Siebel Product Administration Guide*)

For more information about installing these modules, see *About Installation Tasks for Siebel CRM*. See also *Requirements for Installing and Configuring Siebel CRM*.

> **Note:** This topic includes instructions for installing Siebel CRM modules in a new installation or in 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 CRM in a New Installation*
- *Installing Siebel CRM in a Migration Installation*

Related Topics

About Installation Tasks for Siebel CRM

Installing Siebel CRM in Unattended Mode

Configuring Siebel CRM Server Modules

Additional Postinstallation and Configuration Tasks

Verifying Installation for Siebel CRM

Uninstalling Siebel CRM

Requirements for Installing and Configuring Siebel CRM

Related Books

Siebel Security Guide

Siebel Deployment Planning Guide

Siebel Global Deployment Guide

Siebel Product Administration Guide

Installing Siebel CRM in a New Installation

Use the following procedure to install Siebel CRM modules in a new installation. This topic is part of *Installing Siebel CRM*.

> **Note:** Use this procedure only where existing Siebel CRM modules are not already installed. Where an earlier version of a module is already installed, you perform a migration installation instead, as described in *Installing Siebel CRM in a Migration Installation*.

This task is a step in:

- *Roadmap for Installing Siebel CRM for a New Deployment*
- *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*

To install Siebel CRM modules in a new installation

1. Review *Before You Install Siebel CRM* and *About Installation Tasks for Siebel CRM* and observe the requirements and recommendations.

   For example, if you are installing a Siebel Server that will communicate with an existing configured installation of Siebel Gateway on another computer or operating system instance, then make sure that the Siebel Gateway 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 *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 your Siebel CRM deployment 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 Siebel CRM 17.0. 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\17.0.0.0`.
5. To start the Siebel Enterprise Server installer, double-click setup.bat.

   The Select Installation Task screen appears. The New Installation task is selected by default.
6. To perform a new installation of Siebel CRM where no existing installation of a prior release of Siebel CRM is present, click Next.

   The New Installation Details screen appears.
7. Specify the installation location, and then click Next. (Note the installation location for future reference.)

   You might specify an installation path for a new installation like `C:\Siebel`, `C:\Siebel_SES`, `C:\Siebel_AI`, 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 installation path requirements, see *File and Directory Naming Conventions*.

   The Select Components screen appears.
8. Select the Siebel Enterprise Server modules that you want to install. Choose one or more of the following options, as allowed or as appropriate for your deployment, and click Next:

   - Application Interface
   - Gateway
   - Siebel Server
   - EAI Connector (optional)
   - Database Configuration Utilities (install with the first Siebel Server)
   - Enterprise Cache (optional)
   - Constraint Engine (optional, available as a developer preview)

   For more information about installing these modules, see *About Installation Tasks for Siebel CRM*. See also *Requirements for Installing and Configuring Siebel CRM*.

The specific screens that appear in the installer depend on the modules that you are installing.

The Select Languages screen appears.

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

   All of the languages that were included in the Siebel network image for Siebel Enterprise Server are available for selection. 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 the languages to install in order to run Siebel 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 or the Siebel Application Interface, you can specify which installed languages to deploy and which installed language is the primary language.

   For the Siebel Application Interface, you must install and deploy the superset of all of the languages required by the Application Object Manager components that connect to it.

   > **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 CRM with Multiple Languages*.

   The Application Container Port Configuration screen appears. This screen applies to all installable modules except EAI Connector and Database Configuration Utilities.

10. Specify port numbers for this installation, and click Next. Specify the following:

    - **HTTPS Redirect Port** (default: 443, or example: 9011). Used for secure HTTPS connections to the application container, which can include connections redirected from the HTTP port.
    - **HTTP Connection Port** (default: 8080, or example: 9012). Incoming connections on the HTTP port are redirected to the secure HTTPS port.
    - **Shutdown Port** (default: 8005, or example: 9013). Used for management purposes by Siebel CRM, for local use only.

    > **Note:** Specifying these port numbers allows the application containers and other parts of the configuration framework to work together during and after the configuration and deployment tasks you perform using Siebel Management Console. The port numbers must be unique on each installation computer or operating system instance. See also *Configuring Siebel CRM Server Modules*.

   If you are installing Siebel Application Interface, then the Application Interface Authentication screen appears.

11. Specify the appropriate authentication credentials for access to Siebel Management Console, and click Next.

    - **User Name.** Specify the user name to use when you log in to Siebel Management Console, as described in *Starting the Siebel Management Console*.
    - **Password.** Specify the password for this user name.
    - **Confirm Password**

> **Note:** You use the credentials specified here when you first log in to Siebel Management Console, after installing the first Siebel Application Interface node. These credentials, which are stored in the applicationinterface.properties file, are valid only before you have configured the security profile. Once you have configured security, you must log in to Siebel Management Console again with valid credentials for the authentication method specified in the security profile. Then, when you install any subsequent instance of Siebel Application Interface, you would also specify those same valid credentials (that are used by the first Siebel Application Interface node) for the specified authentication method, for example, user name sadmin and password mypwd.

The Client Authentication screen appears. This screen appears if you are installing Siebel Gateway, Siebel Server, Siebel Application Interface, Siebel Enterprise Cache, or Siebel Constraint Engine.

12. Specify information that supports secure communications for the installed software. Specify the following:
    - **Keystore Name.** Specify a file (such as a JKS file) you have generated that will serve as the keystore.
    - **Truststore Name.** Specify a file (such as a JKS file) you have generated that will serve as the truststore.
    - **Password.** Specify the password for the specified keystore and truststore files.
    - **Confirm Password**

> **Note:** The keystore and truststore files are Java files containing certificates. These files are necessary for the application container to use secure two-way communications when connecting with other Siebel CRM modules, as occurs during Siebel Management Console configuration and in normal operation. These files must contain the server certificate chain and an imported CA certificate. Generate your files so that the keystore file references both the private key and the public key, while the truststore file references the public key only. Specify the password that was previously configured to open the certificate files. Use the same password for the keystore and truststore files. Use fully qualified domain names rather than IP addresses. If you do not configure these files correctly, then you will not be able to configure Siebel CRM, as described in *Configuring Siebel CRM Server Modules*. See also *Siebel Security Guide* .

If you are installing Siebel Gateway, then the Gateway Port Configuration screen appears.

13. Specify the TLS port number for the Siebel Gateway (default: 2320, or example: 9014).

    This port number is used for internal purposes, to provide access to the Siebel Gateway. You also include this port number when you specify the Siebel Gateway in the command to run srvrmgr.

If you are installing Siebel Constraint Engine, then the Constraint Engine Port Configuration screen appears.

14. Specify the TLS port number for the Siebel Constraint Engine (example: 9115).

    This port number is used for internal purposes, to provide access to the Siebel Constraint Engine.

The Summary screen appears.

15. In the Summary screen, review the information presented.

    This screen displays the location where Siebel CRM will be installed. 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 Siebel CRM, 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 CRM in Unattended Mode*.

The Installation Progress screen appears. Siebel CRM is installed into the directory that you specified in Step 7.

> **Note:** For future reference, note that the Oracle Home Name is defined based on the installation directory. For example, for an installation directory of `c:\Siebel`, the Oracle Home Name is Siebel_Home_c_Siebel.

16. 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.
17. To close the installer, click Close.

    This new installation of Siebel CRM is now finished. If you installed Database Configuration Utilities, then the shortcut for the Database Configuration Wizard is created in the program folder, which is created using a generated name.
18. After installing Siebel CRM:
    - Verify the installed software, as described in *Verifying Installation for Siebel CRM*.
    - Install Siebel CRM 20.9 Update, as described in *Installing and Uninstalling Siebel CRM 20.x Update*. Then verify the installation again.
    - Install additional Siebel CRM server modules.
    - After all of the installations are complete, configure the installed Siebel CRM software, as described in *Configuring Siebel CRM Server Modules*. You must observe requirements for configuration sequence.
    - Perform any additional postinstallation steps, as described in *Additional Postinstallation and Configuration Tasks*.
19. Repeat this procedure, modifying selections as appropriate, on each computer or operating system instance where you are installing Siebel CRM server modules.

Installing Siebel CRM in a Migration Installation

Use the following procedure to install Siebel CRM server modules in a migration installation.

> **Note:** Use this procedure only when server modules for a prior release of Siebel CRM are already installed. Otherwise, you must follow the steps in *Installing Siebel CRM in a New Installation* instead.

During a migration installation, the original Siebel CRM installation directory is renamed from `OriginalName` to `OriginalName_pre17.0`. For example, if the original installation directory name was `ses` or `sweapp`, then this directory is renamed to `ses_pre17.0` or `sweapp_pre17.0`. The new installation directory is named `OriginalName`, such as `ses` or `sweapp`. Retain the original installation directory, in case you choose to perform a rollback uninstallation later. For more information, see *Rolling Back the Siebel CRM Server Modules*.

For more information about migration installations, see *About Installation Tasks for Siebel CRM*.

> **Note:** If you need to add any modules that were not present in your original installation, including, for example, new modules or additional instances of Siebel Server or Siebel Application Interface, then you must install them as a new installation, as described in *Installing Siebel CRM in a New Installation*.

This topic is part of *Installing Siebel CRM*.

This task is a step in *Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)*.

> **CAUTION:** You must perform the migration installation for Siebel Application Interface before you perform the migration installations for any other Siebel CRM server modules. When you do the migration installations for other Siebel Enterprise Server modules, the installer prompts you to provide the host name and installation location for the migrated installation of Siebel Application Interface. Without this information, the migration installations of Siebel Gateway, Siebel Server, or other modules cannot complete successfully.

To install Siebel CRM in a migration installation

1. Review *Before You Install Siebel CRM* and *About Installation Tasks for Siebel CRM* and observe the requirements and recommendations.
2. Perform any premigration tasks that might be necessary, as noted in *Additional Tasks for Migration Installations*.

   > **CAUTION:** For example, you must remove the existing configuration for the SWSE before you install Siebel Application Interface as a migration installation. If you are using data encryption, then you must back up the original key file.

   If you are installing a Siebel Server that will communicate with an existing configured installation of Siebel Gateway on another computer or operating system instance, then make sure that the Siebel Gateway is running.
3. (Optional) Shut down the Siebel CRM modules to be updated on this computer.

   For example, stop any services (for the existing installed instance of a prior version) for the Siebel Gateway Name Server, Siebel Server, Siebel Management Agent, or Oracle Configuration Manager. Also shut down any running instances of the Siebel Server Manager (srvrmgr). If you do not shut down these services, then the installer shuts them down.

   > **Note:** Siebel Management Agent and Oracle Configuration Manager are not installed or supported in the current Siebel CRM release.

4. For a migration installation of Siebel Application Interface, stop the Microsoft IIS services:
   - Stop the IIS Administration service.
   - Stop the World Wide Web Publishing service.
5. 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 *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 your Siebel CRM deployment and must have full write permissions to the Siebel File System.
6. Shut down all of the open programs that are running on the server.
7. In Windows Explorer, navigate to the Siebel image location for Siebel CRM 17.0. 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\17.0.0.0`.

> **Note:** You must perform the migration installation of Siebel Application Interface before you migrate other modules, such as Siebel Gateway or Siebel Server.

8. Before you run the Siebel Enterprise Server installer to perform the migration installation of a Siebel CRM module, run the following command:

```
module.exe -debug -silent -attachhome ORACLE_HOME_NAME=Oracle_Home_Name
ORACLE_HOME=Oracle_Home
```

   For example, you might enter a command like this, depending on the Oracle home name for the module you are installing and on the original installation directory:

```
module.exe -debug -silent -attachhome ORACLE_HOME_NAME=SES_HOME
ORACLE_HOME=c:\Siebel\ses
```

9. To start the Siebel Enterprise Server installer (to install any of the modules listed at the start of *Installing Siebel CRM*), double-click setup.bat.

   The Select Installation Task screen appears.
10. To perform a migration installation of Siebel CRM where an existing prior installation is present, choose Migration Installation, and click Next.

    The Installation Migration Details screen appears.
11. 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.
    - Confirm the existing installation location, or select it from the drop-down list. For more information about installation path requirements, see *File and Directory Naming Conventions*.

    The Application Container Port Configuration screen appears. This screen applies to all installable modules except EAI Connector and Database Configuration Utilities.
12. Specify port numbers, and click Next. Specify the following:
    - **HTTPS Redirect Port** (default: 443, or example: 9011). Used for secure HTTPS connections to the application container, which can include connections redirected from the HTTP port.
    - **HTTP Connection Port** (default: 8080, or example: 9012). Incoming connections on the HTTP port are redirected to the secure HTTPS port.
    - **Shutdown Port** (default: 8005, or example: 9013). Used for management purposes by Siebel CRM, for local use only.

    > **Note:** Specifying these port numbers allows the application containers and other parts of the configuration framework to work together during and after the configuration and deployment tasks you perform using Siebel Management Console. The port numbers must be unique on each installation computer or operating system instance. See also *Configuring Siebel CRM Server Modules*.

    The Client Authentication screen appears. This screen appears if you are installing Siebel Gateway, Siebel Server, or Siebel Application Interface.
13. Specify information that supports secure communications for the installed software. Specify the following:
    - **Keystore Name.** Specify a file (such as a JKS file) you have generated that will serve as the keystore
    - **Truststore Name.** Specify a file (such as a JKS file) you have generated that will serve as the truststore.

- **Password.** Specify the password for the specified keystore and truststore files.
- **Confirm Password**

> **Note:** The keystore and truststore files are Java files containing certificates. These files are necessary for the application container to use secure two-way communications when connecting with other Siebel CRM modules, as occurs during Siebel Management Console configuration and in normal operation. These files must contain the server certificate chain and an imported CA certificate. Generate your files so that the keystore file references both the private key and the public key, while the truststore file references the public key only. Specify the password that was previously configured to open the certificate files. Use the same password for the keystore and truststore files. If you do not configure these files correctly, then you will not be able to configure Siebel CRM, as described in *Configuring Siebel CRM Server Modules*. See also *Siebel Security Guide* .

If you are migrating an installation of Siebel Gateway, then the Gateway Port Configuration screen appears.

14. Specify the TLS port number for the existing installation of Siebel Gateway Name Server (default: 2320, or example: 9014).

> **CAUTION:** The TLS port number for a migration installation must be the port number on which the Siebel Gateway Name Server was configured in the prior installation. Failing to enter the right port will result in failure of the migration installation.

The Summary screen appears.

15. In the Summary screen, review the information presented.

This screen displays the location where the Siebel CRM software will be installed. 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 Siebel CRM, 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 CRM in Unattended Mode*.

The Installation Progress screen appears. Siebel CRM is installed into the directory that you specified in a prior step.

16. When the Next button becomes available, this 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.

17. 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 applicable 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\cfgtoollogs\oui` directory (in the new migrated installation).

18. To close the installer, click Close.

This migration installation of Siebel CRM is now finished.

After the migration process is complete, the installer starts applicable services, such as for the Siebel Gateway and Siebel Server. Note that the software that runs is part of the new installation you are migrating to, not part of the original installation.

19. After installing Siebel CRM:
    - Verify the installed software, as described in *Verifying Installation for Siebel CRM*.
    - Install Siebel CRM 20.9 Update, as described in *Installing and Uninstalling Siebel CRM 20.x Update*. Then verify the installation again.
    - After all of the migration installations are complete, configure the Siebel Application Interface, as described in *Configuring Siebel CRM Server Modules*.
    - Perform any additional postinstallation steps, as described in *Additional Postinstallation and Configuration Tasks*. See also *Additional Tasks for Migration Installations*.
20. Repeat this procedure, modifying selections as appropriate, on each computer or operating system instance with a Siebel CRM installation to be migrated.

Installing and Uninstalling Siebel CRM 20.x Update

> **Note:** After you have installed Siebel CRM 17.0 for a new, migration, or upgrade installation, as described in *Installing Siebel CRM*, you then install Siebel CRM 20.9 Update. For more information, see *Installation-Related Changes for Siebel CRM 20.x Update*.

This topic describes how to install Siebel CRM 20.9 Update on top of an existing and valid installation of a prior release of Siebel CRM 17.x or later. Siebel CRM 20.9 Update can only be installed in the manner described, which is similar to installation for a prior Siebel CRM 20.x, 19.x, or 18.x Update release or a Siebel CRM 17.x patchset release.

This topic applies to Siebel Mobile Web Client and Siebel Tools as well as to Siebel Enterprise Server installations.

This task is a step in:

- *Roadmap for Installing Siebel CRM for a New Deployment*
- *Roadmap for Installing Siebel CRM 20.x Update for an Existing Installation of Siebel CRM 17.x or Later*
- *Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)*
- *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*

This topic contains the following information:

- *Preinstallation Tasks*
- *Installing Siebel CRM 20.x Update*
- *Verifying Installation*
- *Uninstalling Siebel CRM 20.x Update*

The general installation steps for Siebel CRM 20.9 Update are as follows:

1. Review all of the information relevant to your installation.
2. Review and confirm the installation summary information displayed in the Siebel installation wizard. Click Save Response File if you want to record the installation steps to a response file to use for unattended installation. To do an unattended installation:

a. Cancel the wizard after saving the response file.
b. Run the installer again with a command that includes a pointer to the response file.

When the installer runs, it uses the input data stored in the response file and gives no prompts.

3. Monitor the progress of the installation using the Installation Details and Progress menu bar. The Installation Details window displays information about the modules that are being installed.
4. After the installation is complete, click Close to exit the Siebel installation wizard.

> **Note:** As of Siebel CRM 20.3 Update, the installer also runs the PostInstallDBSetup utility. Other optional repository updates are also available. Some other postinstallation tasks for the Siebel database might also apply. For more information, see *About Database Updates for Siebel CRM 20.x Update*.

Preinstallation Tasks

Note the following information before you begin installing Siebel CRM 20.9 Update:

- After downloading Siebel CRM 20.9 Update, run the Siebel Image Creator utility to create a network image for the release. Run the installers from this image. For more information, see *Creating the Siebel Installation Image on the Network*.
- For Siebel Mobile Web Client installations, download the ZIP file for Oracle Database SE2. For more information, see *Installing and Using Oracle Database SE2 for the Local Database*.
- Siebel Gateway and Siebel Server services are automatically stopped when you install or uninstall Siebel CRM 20.9 Update.
- Auto-Start Services are now available for the Siebel Gateway Server and Siebel Server. To enable this functionality, set the AUTOSTART_SERVICES parameter to Yes or No in:
  - `Disk1\install\oneclick.properties` (to auto-start services after installing Siebel CRM 20.9 Update)
  - `<PROD_HOME>\oui\bin\patchrollback.properties` (to auto-start services after a rollback)

> **Note:** The AUTOSTART_SERVICES parameter setting also applies to uninstallation (rollback), where you want to auto-start services after a rollback to an earlier version.

- Review the database-related tasks that might apply after you install Siebel CRM 20.9 Update. For more information, see *Installing the Siebel Database on the RDBMS*. See also *Siebel Database Upgrade Guide* .

Installing Siebel CRM 20.x Update

Use the following procedure to install Siebel CRM 20.9 Update for your installed Siebel CRM software. To install the release:

1. Review all of the information in *Preinstallation Tasks*. For Siebel Web Client installations, see also *Installing and Using Oracle Database SE2 for the Local Database*.
2. Depending upon your operating system, do one of the following:
   - Windows: For Siebel Enterprise Server and Siebel Application Interface instances, run setup.bat under `Windows\Server\Siebel_Enterprise_Server\Disk1\install`.
   - Windows: For Siebel Tools and the Siebel Web Client, run setup.bat under `Windows\Client\Siebel_product\Disk1\install`, where Siebel_product is `Siebel_Tools` or `Siebel_Web_Client`.

- UNIX: Run the following command under `UNIX_OS/Server/Siebel_Enterprise_Server/Disk1/install`:

  ```
  ./runInstaller.sh -invPtrLoc ~/oraInst.loc
  ```

3. As of Siebel CRM 20.8 Update, for Siebel Web Client installations, you are prompted for additional information for installing Oracle Database SE2.
   - For Mobile Web Client:
     - Choose Mobile Web Client.
     - In the Oracle SE2 Image Location field, specify the location of the ZIP file you obtained, as described in *Installing and Using Oracle Database SE2 for the Local Database*.
     - In the Oracle Client Path field, specify the location of the installed Oracle Database Client software, as described in *Installing and Using Oracle Database SE2 for the Local Database*.
     - Click Next. Proceed to complete the installation. Oracle Database SE2 is installed with Siebel Mobile Web Client.
   - For Developer Web Client, choose this option and then click Next. Proceed to complete the installation. Siebel Developer Web Client is installed.

   > **Note:** Oracle Database SE2 does not apply for Siebel Developer Web Client. It is not supported to attempt to install Oracle Database SE2 for this Siebel client type.

Verifying Installation

Use the following procedure to verify that Siebel CRM 20.9 Update installed successfully. For Microsoft Windows, use cmd.

To verify the installation

1. Navigate to the directory represented by the `ORACLE_HOME` variable.

   For example, your top-level Siebel CRM installation directory on Microsoft Windows might be `C:\siebel`.
2. Run the following command:
   - Windows: `set ORACLE_HOME=Oracle_Home`
   - UNIX: `setenv ORACLE_HOME Oracle_Home`
3. Navigate to the `opatch` location, and run the `opatch lsinventory` command to check the version number.

   > **Note:** The `opatch` command does not work on Linux platforms and the Siebel version number is updated in the `Oracle_Home\Siebel_version.properties` file after you install the release.
4. If necessary, start the Siebel services and application containers. For more information, see *Stopping and Starting the Siebel Application Container*.
5. Start the Siebel application in the browser to make sure that the application starts successfully.
6. From the application-level menu, select the Help drop-down menu and open up the Technical Support dialog to check the version number.

Uninstalling Siebel CRM 20.x Update

The following procedure shows you how to uninstall Siebel CRM 20.9 Update.

For more information about uninstalling Siebel CRM software, see *Uninstalling Siebel CRM*.

To uninstall Siebel CRM 20.x Update

- Depending upon your operating system, do one of the following:
  - Windows: Run `patchrollback.bat` under `Oracle_Home\oui\bin` for Siebel Enterprise Server or Siebel Application Interface, Siebel Tools, or Siebel Web Client.
  - UNIX: Run the following command under `Oracle_Home/oui/bin` for Siebel Enterprise Server modules or Siebel Application Interface:

    ```
    ./patchrollback.sh -invPtrLoc ~/oraInst.loc
    ```

Installing Siebel CRM in Unattended Mode

The installer for Siebel CRM server modules (Siebel Enterprise Server) supports 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, or to add languages to an existing installation. 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 CRM modules for which you intend to perform unattended installation or configuration.

This topic contains the following information:

- *Guidelines for Installing Servers in Unattended Mode*
- *Saving an Installation Response File*
- *Editing an Oracle-Provided Installation Response File*
- *Performing an Installation in Unattended Mode*

Related Topics

About Installation Tasks for Siebel CRM

Installing Siebel CRM

About Configuring Siebel CRM

Installing and Deploying Additional Languages

Verifying Installation for Siebel CRM

Requirements for Installing and Configuring Siebel CRM

Guidelines for Installing Servers in Unattended Mode

Review the following guidelines for installing Siebel Enterprise Server or Siebel Application Interface 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 one or more of the following Siebel CRM server modules (subject to restrictions on installing modules together): Siebel Gateway, Siebel Server, Siebel Database Configuration Utilities, Siebel Enterprise Cache, EAI Connector, or Siebel Application Interface.
- **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*, 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*. Unattended installations must meet all of the documented requirements, including those described in *About Installation Tasks for Siebel CRM* and in *Requirements for Installing and Configuring Siebel CRM*.
- **Validate the installation.** Validate each installation after it has completed, as described in *Verifying Installation for Siebel CRM*.

To install Siebel CRM server modules and the specified Siebel language packs using unattended mode, perform the following tasks:

- *Saving an Installation Response File*
- *Editing an Oracle-Provided Installation Response File*
- *Performing an Installation in Unattended Mode*

Saving an Installation Response File

Perform the following steps to save an installation response file to be used in an unattended installation of Siebel CRM server modules.

> **Note:** If you are adding languages to an existing installation, then do not use this procedure. Instead, follow the procedure in *Editing an Oracle-Provided Installation Response File*.

To save an installation response file

1. Navigate to the Siebel image location where the installer is located.
2. Start the Siebel Enterprise Server installer.

   For information about starting this installer, see *About Installation Tasks for Siebel CRM* and *Installing Siebel CRM*.
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\sesinstall.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\sesinstall.rsp`). Although the Siebel CRM module is not installed (because you clicked Cancel), this directory contains a subdirectory called `inventory`, which includes information about the product inventory.

   For information about performing a Siebel Enterprise Server or Siebel Application Interface installation in unattended mode, using the response file that you just generated, see *Performing an Installation in Unattended Mode*.

Editing an Oracle-Provided Installation Response File

If you are adding languages to an existing Siebel CRM 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*.

Performing an Installation in Unattended Mode

Perform the following steps to perform an unattended installation of Siebel CRM server modules.

First, you must save an installation response file as described in *Saving an Installation Response File* or prepare an installation response file for adding languages as described in *Editing an Oracle-Provided Installation Response File*. 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*.

To perform an installation in unattended mode

1. (For add language operations only) Uninstall Siebel CRM 20.9 Update if you have installed it on top of Siebel CRM 17.x or later, for each installed Siebel CRM 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 CRM 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 installer to install Siebel Enterprise Server or Siebel Application Interface:

   ```
   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 Siebel CRM*.
7. (For add language operations only) Reinstall Siebel CRM 20.9 Update, if you uninstalled it in Step 1. Then validate the installation again.

Additional Tasks for Migration Installations

Certain product changes that were made in Siebel CRM 17.0 (or in prior releases) can affect migration installations for existing customers. All customers performing migration installations must review the information in this topic before installing, to make sure that they can successfully migrate all custom files and settings to the current release and to avoid any of the issues described here. Some migration tasks previously documented for Siebel CRM 16.0 might not need to be done again for customers migrating from that release.

These product changes affect some of the files and directories of installations of Siebel Server, Siebel Application Interface, Siebel Web Client, and Siebel Tools. Also affected are some of the configuration settings for these modules. Many of the product changes described in this topic were made as part of consolidating support for Siebel Open UI and desupporting high interactivity and standard interactivity.

This topic describes specific product changes, describes how these changes might affect migration installations, and provides steps you can take to avoid any issues and complete the migration successfully. Some of the tasks you perform before installation, but most of them you would perform after installation. Additional migration considerations are also provided.

This topic contains the following information:

- *Migration Issues and Solutions for Siebel CRM 17.0 and Later*
- *Updating the Siebel Server System Service and Server Components to Use AES Password Encryption*

Related Topics

About Installation Tasks for Siebel CRM

About Configuring Siebel CRM

About Installing the Siebel Web Client or Siebel Tools

Installing and Using Oracle Database SE2 for the Local Database

Uninstalling Siebel CRM

Process of Removing Configuration Data

Migration Issues and Solutions for Siebel CRM 17.0 and Later

Many product and support changes for Siebel CRM 17.0 (and other recent releases) make it necessary for you to perform certain migration-related tasks. Issues and possible solutions are provided for some items. Review all items before proceeding. This list is not comprehensive. Many of the tasks are interrelated and are not necessarily presented in the order in which you would perform them. Various dependencies apply that might not be fully explained. Some of these issues apply only to migrations from releases prior to Siebel CRM 16.0.

This topic is part of *Additional Tasks for Migration Installations*.

- **Synchronize local databases before migrating or doing other premigration tasks.** Siebel Mobile Web Client users might need to synchronize their local database changes with the server, through Siebel Remote, as described in *Siebel Remote and Replication Manager Administration Guide* . Or, Siebel Tools developer users might need to check in any changes made to objects in the existing local database, as described in *Using Siebel Tools* for earlier releases of Siebel Tools.
- **Remove the Siebel Web Server Extension (SWSE) configuration before migrating, and then configure Siebel Application Interface after migrating.** In Siebel CRM 16.0, the virtual directories, which formerly mapped to `public\lang_code` (such as ENU), were mapped directly to `public`. In Siebel CRM 17.0 and later, virtual directories are replaced by application configurations, which now map to `applicationcontainer\webapps\siebel` in the Siebel Application Interface installation. When you install the Siebel Application Interface as a migration installation, the existing virtual directories on the Web server that were configured for SWSE in a prior release are not migrated. After all of the migration installations are complete, you must configure the Siebel Application Interface to create the application configurations. For more information, see *About Installation Tasks for Siebel CRM* and *About Configuring Siebel CRM*.

  > **CAUTION:** You must remove the configuration for the SWSE before you install Siebel CRM 17.0 as a migration installation, as described in *Process of Removing Configuration Data*.

- **When data encryption is enabled, you must back up the original key file (keyfile.bin) before performing a migration installation for Siebel Enterprise Server, and then copy it back after migrating.** For more information, see *General Requirements for Installing and Configuring Siebel Enterprise Server Modules*.

  > **CAUTION:** If data migration is enabled, then the migration installation overwrites your existing key file. If you have not backed up your existing key file and copied it back after the migration, then the encrypted columns will be inaccessible after the migration.

- **Preserve premigration installation.** You might want to preserve your premigration installations, in case you need to roll back to your prior version after doing the migration installations and making the manual migration changes described here. It is recommended that you manage your migration tasks to make sure that you have not permanently deleted, moved, or renamed files or directories in these installations. Also keep track of changed requirements, so that you can restore the overall environment if you roll back. Additional requirements apply for rollbacks. For more information, see *Uninstalling Siebel CRM*.
- **Move files and directories or delete unnecessary files.** Depending on the release you are migrating from and on your requirements, you might need to copy some files or directories from your existing installation into your new migrated installation, or you might need to delete some unnecessary files and directories from your new migrated installation. For example:

- **The webtempl directory on Siebel Server.** As of Siebel CRM 17.0, the `SIEBSRVR_ROOT\webtempl` directory is not part of the Siebel Server installation and is not migrated. The Siebel Web templates are now located in the Siebel database. Custom Siebel Web templates for Siebel Open UI migrate into the database when you run Incremental Repository Merge, as described in *Siebel Database Upgrade Guide* .

  In order for this migration to succeed, you must copy all of the applicable custom Siebel Web template files into a directory. Then, when you run Incremental Repository Merge and the Database Configuration Wizard prompts for the Web Templates Directory, specify this new directory location.

  - If you are migrating from Siebel CRM 16.x, then the applicable Siebel Web template files to copy are those located in the `SIEBSRVR_ROOT\webtempl\custom` subdirectory in your prior installation.
  - If you are migrating from a release prior to Siebel CRM 16.0, then the applicable Siebel Web template files to copy are those located in the `SIEBSRVR_ROOT\webtempl\ouiwebtempl\custom` subdirectory in your prior installation.

    For Siebel Web Client and Siebel Tools installations, the `webtempl` directory has also been removed and Siebel Web templates are now provided in the Siebel database. A newly extracted local database for Siebel Mobile Web Client also includes your custom Siebel Web templates.
- **The webmaster directory on Siebel Server.** As of Siebel CRM 16.0, the `SIEBSRVR_ROOT\webmaster` directory on the Siebel Server has been removed. If you are migrating from a release prior to Siebel CRM 16.0, then you can delete this directory from your migrated Siebel Server installation.
- **The public directory on Siebel Web Server Extension.** As of Siebel CRM 17.0, the `SWSE_ROOT\public` directory is not part of the Siebel Application Interface installation. The equivalent location is `SIEBEL_AI_ROOT\pplicationcontainer\webapps\siebel`. Files and directories are not automatically migrated for Siebel Application Interface. If you require any of the files from the `public` directory in your prior installation of SWSE, then you can copy them manually after completing installation and configuration tasks.

  Before you copy files, you must take into account the following changes that occurred in the structure of the `public` directory in Siebel CRM 16.0:

  - `public\lang_code\build_number` , where lang_code is an installed Siebel language (such as ENU) and build_number is one of the build numbers for the installed Siebel software. The `applet` subdirectory has been removed. The `scripts` subdirectory has moved under `public`. And the `build_number` directory has been removed.
  - `public\lang_code\files`. This directory has moved under `public`.
  - `public\lang_code\fonts`. This directory has moved under `public`.
  - `public\lang_code\htmltemplates`. This directory has moved under `public`.
  - `public\lang_code\images`. This directory has moved under `public`.
  - `public\lang_code\webeditor`. This directory has been removed.
  - `public\lang_code\default.htm`. This file has moved under `public`.
  - `public\lang_code\blank.htm`. This file has moved under `public`.
  - `public\lang_code\wait.htm`. This file has been removed.
  - `public\lang_code\*.pcd`. These files have been removed.
  - `public\lang_code\*.manifest`. The variable string %BuildNumber% has been removed from the .tmanifest files, from which the .manifest files are generated.

> **Note:** As of Siebel CRM 17.0, the Siebel application virtual directories, which formerly mapped to the `public\lang_code` directory on SWSE, are obsolete. Instead, the application configurations for Siebel Application Interface map to `SIEBEL_AI_ROOT\applicationcontainer\webapps\siebel` (without the lang_code element).

- **Move files and directories: Files and directories on Siebel Web Client and Siebel Tools have changed relative to equivalent locations for releases prior to Siebel CRM 16.0.** Similar changes apply for migration installations of Siebel Web Client and Siebel Tools, as described above for migration installations of Siebel Application Interface. However, the files are copied into the new migration installations of Siebel Tools. Note also that Siebel Web Client still uses the `public` directory, as in Siebel CRM 16.0.

  Issue (for migrations from release prior to Siebel CRM 16.0). After a migration installation of Siebel Web Client or Siebel Tools (from a release prior to Siebel CRM 16.0), duplicate directories will exist, because some of the directories will be in new locations relative to those seen for the files and directories that migrated from the prior release. Your custom files will be in the wrong locations and cannot be used until you have moved them to the new locations.

  Solution. Reorganize the files and directories in `SIEBEL_CLIENT_ROOT\public` and `SIEBEL_TOOLS_ROOT\public` on the migrated installations to incorporate the migrated custom files that you require and to conform to the changes described earlier in this topic for Siebel Application Interface. Finally, remove all extraneous files and directories in `SIEBEL_CLIENT_ROOT\public` and `SIEBEL_TOOLS_ROOT\public`.
- **Upgrade the database client.** In a migration installation case, after migrating, you must make sure that a supported version of the database client software is installed for use with Siebel CRM 20.x Update, as noted in the Certifications tab on My Oracle Support. You might also need to update the database client installation path in the defined environment variables. For more information, see *About Configuring Siebel CRM*.

  Using Oracle Database SE2 for Siebel Mobile Web Client requires a supported version of the Oracle Database Client, as noted in *Installing and Using Oracle Database SE2 for the Local Database*.
- **Edit configuration files for Siebel Web Client.** After doing a migration installation for Siebel Web Client from Siebel CRM 16.0 or from a release prior to Siebel CRM 16.0, you might need to edit all applicable migrated configuration files, such as uagent.cfg for Siebel Call Center. For example:

  For a migration from a release prior to Siebel CRM 16.0, in the [Siebel] section of each applicable configuration file, the existing WebClientSiteDir parameter value will include a language element, which is no longer needed. For example, for a value like `c:\Siebel\Client\public\enu`, update the parameter value to `c:\Siebel\Client\public`.
- **Remove obsolete parameters.** Several parameters for server components or in configuration files are now obsolete, as of Siebel CRM 17.0. To reduce confusion after migration installations, you might choose to delete some of the parameters that no longer apply, such as HighInteractivity and EnableOpenUI (which are obsolete as of Siebel CRM 16.0). For more information about obsolete parameters, see *Siebel System Administration Guide* .
- **Reset passwords on the Siebel Gateway and on the Siebel Server.** After doing a migration installation from a release prior to Siebel CRM 16.0, you must reset any passwords on the Siebel Gateway that were previously encrypted using encryption other than AES. Such passwords are now encrypted using AES. For more information about reencrypting these passwords, see *Siebel Security Guide* . Furthermore, the Siebel Server system service and server components do not work after a migration installation until you have updated them to use AES password encryption. Make these changes in coordination, as described in *Updating the Siebel Server System Service and Server Components to Use AES Password Encryption*.

Updating the Siebel Server System Service and Server Components to Use AES Password Encryption

The Siebel Server system service and server components do not work after a migration installation until you have performed steps to update them to use AES password encryption, as described in the following procedure. Most of the command examples in the procedure are for UNIX operating systems, but the same issue applies on Microsoft Windows.

This topic is part of *Additional Tasks for Migration Installations*.

To update the Siebel Server system service and server components to use AES password encryption

1. Unset any SIEBEL* environment variables.
2. Source the siebenv script from the Siebel Gateway installation directory, as follows:

   ```
   ./siebenv.sh
   ```

3. Start the Siebel Gateway and make sure that it is running.
4. Write down the old encrypted password from the current siebns.dat file. For example:

   ```
   [/enterprises/esia81/parameters/Password]
   Persistence=full
   Type=string
   Value="9ntkUOUf"
   Length=16
   ```

5. Run a command like the following, using the old encrypted password value:

   ```
   SIEBEL_ROOT/siebsrvr/lib/spu 9ntkUOUf
   ```

   This command obtains a reencrypted value for the password, such as in the following output:

   ```
   ENPVR6S/HKgBncoAAA==
   ```

6. Delete the current svc* and osdf* files from the `SIEBSRVR_ROOT/sys` directory.
7. Source the siebenv script from the `SIEBSRVR_ROOT` directory.
8. Change directory to the `SIEBSRVR_ROOT/bin` directory and then run a command like the following:

   ```
   siebctl -S siebsrvr -i esia81:srvr1 -a -g "-g localhost:2320 -e esia81 -s srvr1
   -u SADMIN -ep ENPVR6S/HKgBncoAAA=="
   ```

   Note that the new encrypted string from Step 5 is used.
9. Run the following command using the old encrypted password value, like the following:

   ```
   $SIEBEL_ROOT/siebsrvr/lib/gpu -g localhost:2320 -e esia81 -u SADMIN -p 9ntkUOUf
   ```

10. Customers who have overridden the user name or password at the component definition level must change the passwords again through srvrmgr in order to use the new encrypted password value. For example:

    ```
    change param password=<pwd_value> for compdef <comp_name>
    ```

```
change param password=<pwd_value> for comp <comp_name> server <server_name>
```

11. Update old encrypted passwords on the Siebel Gateway to use AES encryption.

    For more information, see *Siebel Security Guide* .
12. Restart both the Siebel Gateway and the Siebel Server.

4 Configuring Siebel CRM Server Modules

Configuring Siebel CRM Server Modules

This chapter explains how to use Siebel Management Console to configure all of the Siebel CRM modules that you can install using the Siebel Enterprise Server installer. It includes the following topics:

- *About Configuring Siebel CRM*
- *Running the Siebel Management Console*
- *Installing the Siebel Database*
- *Configuring the Siebel Gateway and Security*
- *Configuring the Siebel Enterprise*
- *Configuring the Siebel Server*
- *Configuring the Siebel Application Interface*
- *Configuring the Siebel Gateway Cluster*
- *Configuring the Siebel Enterprise Cache*
- *Configuring the Siebel Constraint Engine*
- *Configuring the Siebel Migration Application*
- *Configuring the Siebel Deployment*
- *Managing the Siebel Deployment*
- *Accessibility for Siebel Management Console*

About Configuring Siebel CRM

After performing a new installation of Siebel Enterprise Server modules or Siebel Application Interface, you must configure the appropriate modules by using the Siebel Management Console, as described in this chapter.

The Siebel Management Console, a Web-based application that you run on the Siebel Application Interface, supports configuration tasks for the following:

- Security
- Siebel Gateway
- Siebel Gateway Cluster
- Siebel Enterprise
- Siebel Server
- Siebel Application Interface
- Siebel Enterprise Cache Server
- Siebel Enterprise Cache Client
- Siebel Constraint Engine (available as a developer preview)

- Siebel Migration application

Siebel Management Console also provides the ability to configure and manage deployed server entities, similar to the functionality in the Administration - Server Configuration and Administration - Server Management screens in the Siebel application.

In most cases, you perform the configuration in a two-step process for each entity that you are configuring:

- Creating a profile for the type of entity you are configuring
- Deploying the profile into your Siebel deployment

A profile is a collection of configuration settings. You can create as many profiles as you require, and deploy these profiles according to your requirements, as appropriate for your physical installed Siebel software and your authentication methods. You can deploy profiles to multiple installed instances of Siebel Server or Siebel Application Interface, for example. When you create a profile, you must use a unique name in order to successfully create the profile.

Most of the configurable entities correspond to physical installed modules (Siebel Gateway, Siebel Server, Siebel Application Interface, Siebel Enterprise Cache, or Siebel Constraint Engine). Some entities are provided with other modules. For example, security adapters are provided with the Siebel Server, and the Siebel Migration application is provided with the Siebel Application Interface installation. The Siebel Enterprise is a logical entity that you must deploy for each Siebel deployment. The Siebel Gateway Cluster is also a logical entity that you can optionally configure for multiple installed Siebel Gateway nodes.

You must configure and deploy at least the Siebel Gateway, Siebel Enterprise, Siebel Server, and Siebel Application Interface in every Siebel deployment.

If you will be using the Siebel Product Configurator integration with Oracle Advanced Constraint Technology (available as a developer preview), then you must install, configure, and deploy the Siebel Enterprise Cache and the Siebel Constraint Engine. For more information, see *Siebel Product Administration Guide* .

After you configure the Siebel Gateway, you can create profiles in any sequence. Restrictions apply to the sequence in which you deploy these profiles in your Siebel deployment. In general, the configuration sequence for a new deployment corresponds to the sequence of the configuration topics in this chapter.

> **Note:** For a migration installation case, you must install Siebel Application Interface first and specify information such as application container port numbers. You then provide some of this data as input for the migration installation of Siebel Gateway, which allows the configurations to be migrated. After the migration installations, you do not configure the Siebel Gateway, Siebel Enterprise, or Siebel Server using the Siebel Management Console. However, you must then configure the Siebel Application Interface. Additional configuration requirements apply for migration installations, as described in *Configuration Requirements for Migration Installations*.

The Siebel Management Console uses the Siebel Gateway registry to store configuration data. Consequently, the first configuration task that you must perform when you run the Siebel Management Console is configuring the Siebel Gateway itself, and its registry. After doing this, you can create and deploy profiles for all other applicable modules in your Siebel deployment.

> **Note:** It is strongly recommended to back up the Siebel Gateway registry periodically for safety reasons, so that you will be able to restore the Siebel Gateway registry from a backup if something goes wrong. For more information, see *Siebel System Administration Guide* .

After configuration, the Siebel system services start automatically. You can use the Windows Control Panel to change whether a Siebel system service starts automatically or manually, or to change the user name or password under which the system service runs.

Note: You cannot operate any Siebel CRM modules for your deployment until you have configured and deployed them. You must be running the Siebel Gateway in order to configure and deploy any other entities.

Other Siebel Management Console Activities

You can also use the Siebel Management Console to remove configuration data for deployed entities, which is a necessary part of uninstalling the Siebel CRM software. Restrictions apply to the sequence in which you can remove configuration data for deployed modules. For more information, see *Process of Removing Configuration Data*.

To modify some configuration settings for an existing Siebel Enterprise or Siebel Server, or a Siebel Server component, you can optionally use the functionality in the Configuration screen in Siebel Management Console, as described in *Configuring the Siebel Deployment*. Alternatively, you can use the Administration - Server Configuration screen in the Siebel application or use Siebel Server Manager, as described in *Siebel System Administration Guide* . Depending on the specific configuration updates that you make, you might have to restart the Siebel Server before the changes take effect. The Siebel Management Console allows you to refresh the configuration data displayed so that it reflects the latest updates for the deployed Siebel Enterprise or Siebel Server.

In addition, you can manage server modules in the Siebel CRM deployment by using the Management screen in the Siebel Management Console, as described in *Managing the Siebel Deployment*. Alternatively, you can use the Administration - Server Management screen in the Siebel application or use Siebel Server Manager, as described in *Siebel System Administration Guide* .

Where to Find Configuration Tasks

The configuration tasks for Siebel CRM are described in the following locations, as shown in the following.

Siebel CRM Module to Configure	Where Documented
Siebel database (use Database Configuration Wizard)	*Installing the Siebel Database* **Note:** Installation of the Siebel database is still performed using the Database Configuration Wizard.
Security	*Configuring the Siebel Gateway and Security* and *Siebel Security Guide*
Siebel Gateway	*Configuring the Siebel Gateway and Security*
Siebel Gateway Cluster	*Configuring the Siebel Gateway Cluster*
Siebel Enterprise	*Configuring the Siebel Enterprise*
Siebel Server	*Configuring the Siebel Server*
Siebel Application Interface	*Configuring the Siebel Application Interface*
Siebel Enterprise Cache (server and client)	*Configuring the Siebel Enterprise Cache*

Siebel CRM Module to Configure	Where Documented
Siebel Constraint Engine (available as a developer preview)	*Configuring the Siebel Constraint Engine* and *Siebel Product Administration Guide*
Siebel Migration application	*Configuring the Siebel Migration Application* and *Siebel Database Upgrade Guide*
Siebel deployment (optional post-deployment configuration tasks)	*Configuring the Siebel Deployment* and *Siebel System Administration Guide*
Siebel deployment (optional post-deployment management tasks)	*Managing the Siebel Deployment* and *Siebel System Administration Guide*

Configuration Requirements for Migration Installations

The migration installation case has particular requirements that relate to configurations. For your installed Siebel CRM software for a prior release, do the following, in the order shown:

1. Review all relevant documentation. See *Before You Install Siebel CRM* and *About Installation Tasks for Siebel CRM*.
2. Perform any necessary premigration tasks, as noted in *Additional Tasks for Migration Installations*.

   > **CAUTION:** In particular, you must remove the existing Siebel Web Server Extension (SWSE) configuration on the Web server computer where you installed SWSE for the prior release. Do this before you perform the migration installation of Siebel Application Interface. Otherwise, the virtual directories cannot be cleaned up adequately. For more information, see *Removing the Siebel Application Interface Configuration*.

3. Install Siebel Application Interface as a migration installation for your existing installation of SWSE, as described in *Installing Siebel CRM in a Migration Installation*.
4. Install Siebel Enterprise Server as a migration installation, as described in *Installing Siebel CRM in a Migration Installation*.

   > **Note:** For the Siebel Enterprise Server that includes the Siebel Gateway, when you perform the migration installation, you provide input that configures the Siebel Gateway and allows the existing configurations for the Siebel Enterprise and Siebel Servers to migrate to the new Siebel Gateway. This instance is considered the primary Siebel Gateway if you deploy Siebel Gateway clustering.

5. (Optional) Install Siebel Enterprise Server as a new installation, and install any other Siebel CRM modules that you require, including modules that are new in Siebel CRM 17.0, as described in *Installing Siebel CRM in a New Installation*. For example:
   - Siebel Gateway (if you are using Siebel Gateway clustering on multiple nodes)
   - Siebel Enterprise Cache (new in Siebel CRM 17.0)
   - Siebel Constraint Engine (new in Siebel CRM 17.0, available as a developer preview)
6. Perform any necessary postinstallation tasks, as noted in *Additional Tasks for Migration Installations*. For example, do the following:

- Where necessary, upgrade the database client to a supported version for Siebel CRM 20.x Update. Also update the database client installation path in the defined environment variables.
- Update files and directories on Siebel Enterprise Server and Siebel Application Interface (where necessary).

7. Run Incremental Repository Merge, as described in *Siebel Database Upgrade Guide* .
8. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*. See also *About Configuring Siebel CRM*.

   - (Optional) Create a profile for the Siebel Gateway cluster, if you have installed Siebel Gateway on multiple nodes for this purpose, and then deploy this profile to deploy the cluster. For more information, see *Configuring the Siebel Gateway Cluster*.
   - Create a profile for Siebel Application Interface, and then deploy this profile to the installed Siebel Application Interface. For more information, see *Configuring the Siebel Application Interface*.
   - Configure any new Siebel CRM modules that you installed, including those noted in a prior step, or configure the Siebel Migration application.

Related Topics

Installation-Related Changes for Siebel CRM 20.x Update

Installation-Related Changes for Siebel CRM 17.0

Installing Siebel CRM Server Modules

About Installation Tasks for Siebel CRM

Additional Tasks for Migration Installations

Running the Siebel Management Console

Installing the Siebel Database on the RDBMS

Additional Postinstallation and Configuration Tasks

Requirements for Installing and Configuring Siebel CRM

Process of Removing Configuration Data

Related Books

Siebel Database Upgrade Guide

Running the Siebel Management Console

This topic describes how to run the Siebel Management Console. For more information, see *About Configuring Siebel CRM*. It includes the following information:

- *Starting the Siebel Management Console*
- *Overview of Siebel Management Console*
- *Siebel Management Console Screens*
- *Supported Activities in Siebel Management Console*

- *Using Safe Mode for Siebel Management Console*

See also *Accessibility for Siebel Management Console*.

Starting the Siebel Management Console

Use the instructions below to start the Siebel Management Console. This task is part of *Running the Siebel Management Console*.

To start the Siebel Management Console

1. Make sure that you have installed all the necessary Siebel CRM software and performed any required postinstallation steps.

   Depending on your authentication method, you might also have had to install or upgrade the Siebel database before you run the Siebel Management Console.
2. Review the information in *About Configuring Siebel CRM*.
3. Open a browser window and enter a URL like the following:

   SiebelApplicationInterfaceHost.FQDN:Port/siebel/smc

   In this URL:

   - SiebelApplicationInterfaceHost is the host name for the installed Siebel Application Interface.
   - FQDN is the fully qualified domain name for your deployment. An example is example.com.

     > **Note:** It is strongly recommended to use the fully qualified domain name (FQDN) when you enter a URL, because security certificates are generally obtained based on fully qualified domain name.

   - Port is the HTTPS redirect port number for the installed Siebel Application Interface. You specified this HTTPS redirect port during Siebel Application Interface installation.
4. On the login page that appears, enter the following information, and then click Login.

   - **User ID.** The first time you log in, you must use the credentials that you specified in the Application Interface Authentication screen when you installed Siebel Application Interface, as described in *Installing Siebel CRM in a New Installation*. Otherwise, use valid credentials for the authentication method in effect. For example, you might log in using the SADMIN account.
   - **Password.** The password for this user ID.
   - **Language.** The language in which to run the Siebel Management Console. You can select any of the languages that were installed on the Siebel Application Interface.

   > **Note:** After you have logged in to the Siebel Management Console for the first time and configured security for the Siebel Gateway, then you must log in to the Siebel Management Console again before you can proceed with additional configuration tasks. The Siebel Gateway must be running. For information about specific configuration tasks, see *Configuring the Siebel Gateway and Security*.

   If you have already configured the Siebel Gateway, or if you performed a migration installation of the Siebel Gateway instead of a new installation, then go to the topic for the configuration task that you are performing, as shown in the table in *Where to Find Configuration Tasks*.

To start Siebel Management Console in safe mode

1. Open a browser window and enter a URL like the following:

   SiebelApplicationInterfaceHost.FQDN:Port/siebel/smc/safemode.html

   The variable elements in this URL are the same as those described for starting Siebel Management Console in the normal manner.
2. Log in to Siebel Management Console using the safe mode user credentials.

   > **Note:** Use safe mode only when strictly necessary, as described in *Using Safe Mode for Siebel Management Console*. See also *Siebel Security Guide* .

3. Update the Siebel Gateway security profile, such as to change the data source information.
4. Save the Siebel Gateway security profile.

   When you save the profile, you are automatically logged out of safe mode and redirected to the normal login screen for Siebel Management Console.
5. Where necessary, log in to Siebel Management Console again in the usual way to perform configuration or other tasks.

Related Topics

About Configuring Siebel CRM

Overview of Siebel Management Console

Supported Activities in Siebel Management Console

Using Safe Mode for Siebel Management Console

Configuring the Siebel Gateway and Security

Accessibility for Siebel Management Console

Related Books

Siebel Security Guide

Overview of Siebel Management Console

Siebel Management Console is a Web-based application that you run on the Siebel Application Interface. The configuration tasks that you perform in this program use the graphical user interface shown in the figures. This topic is part of *Running the Siebel Management Console*.

> **Note:** Where possible, it is strongly recommended to explore this user interface as much as possible before performing important configuration tasks for any Siebel environment. For many tasks, multiple ways of performing those tasks are provided.

The Siebel Management Console, which displays this name in its title bar, includes user interface features such as menus, icons, lists and forms, and a hierarchical display of your Siebel deployment. The options and defaults that the

Management Console displays depend on which module you are configuring and on prior selections. For each profile configuration task, the settings you see are also displayed in a table.

The Siebel Management Console performs validation on the input that you provide. For example, you cannot proceed to the next screen unless you have provided values for all required fields. Pointing to items displayed in the console displays tooltips for many of the selections, which supplement the information provided in this guide.

Sample configurations are provided for most types of configuration profiles. As a shortcut for creating profiles, you can select these sample profiles and review their settings. As appropriate, you can copy and modify these profiles for your own use.

Click each section to review its options. When you are creating a new profile, you must specify settings for all required options, clicking Next where necessary to display options in subsequent sections. When you are reviewing an existing profile, the Next button is not available. However, for applicable profile types, you can view additional sections by clicking the next segment of the multipart horizontal bar.

The Siebel Management Console, which you run in the browser from the Siebel Application Interface installation, uses RESTful services and application containers to communicate with the physical Siebel CRM modules that you are configuring or that participate in the configuration process.

The Siebel Management Console primarily supports the initial configuration of Siebel CRM. In addition to creating profiles and deploying them to your initial Siebel deployment, you can configure modules you install subsequently to add to your existing deployment. You can also modify profiles (subject to limitations), clone profiles, compare profiles, and delete profiles.

You can modify the configuration of existing deployment items in Siebel Management Console, as follows:

- For Siebel Application Interface, the profile is in a read-write state after you deploy it. You can update configuration settings and save the profile to propagate the updates to the deployed Siebel Application Interface.
- For all other deployment items, the profile that you had used to configure the entity is in a read-only state after deployment. To modify the deployment item, you must remove it, modify the applicable profile, and then redeploy the profile to a new deployment item. For more information about deleting a deployment item, see *Process of Removing Configuration Data*.
- Deployment items in the Saved or Staging states can be modified. For other than Siebel Application Interface, deployments in any other state are not editable and cannot be modified other than as described in the previous paragraph.

Also note the following about the display of configuration data in Siebel Management Console:

- Restarting the Siebel Application Interface refreshes all profile data.
- If the deployment is migrated successfully by the Siebel Migration application, then, when you refresh the configuration, the state changes to Migrated.

Further configuration and management capabilities of Siebel Management Console are available as described in *Configuring the Siebel Deployment* and *Managing the Siebel Deployment*. For information about accessibility features for Siebel Management Console, see *Accessibility for Siebel Management Console*.

Siebel Management Console Screens

The screens within the Siebel Management Console are described here.

You can move from one screen to another by choosing a different selection from the navigation menu at left. Alternatively, as of Siebel CRM 18.12 Update, in some views of the Siebel Deployment, Profiles, Configuration, and

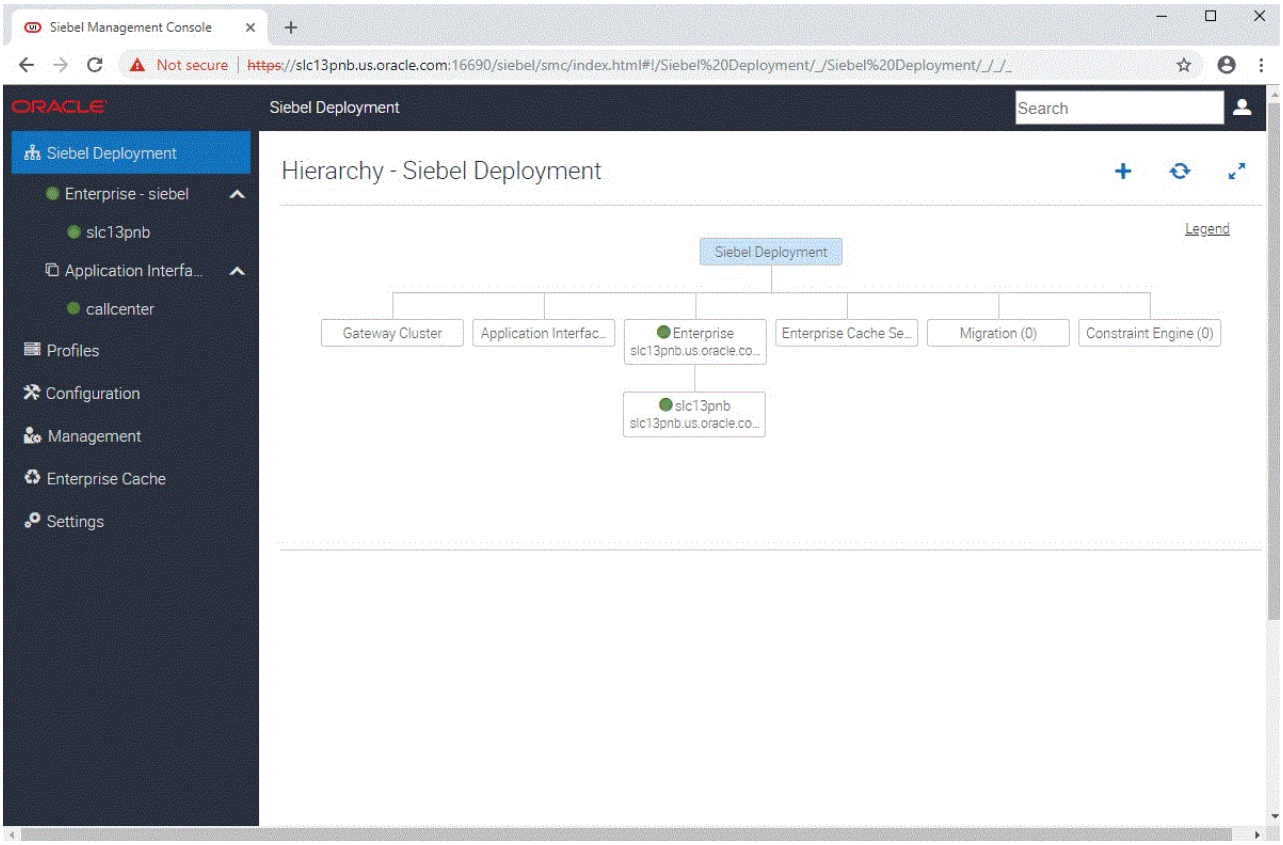
Management screens, you can move to another screen by clicking an icon representing that screen, while also preserving context. For example, if you are configuring a Siebel Server, then clicking the icon for the Siebel Deployment screen navigates to that screen, with the same Siebel Server selected.

See also *Supported Activities in Siebel Management Console*.

Siebel Deployment Screen

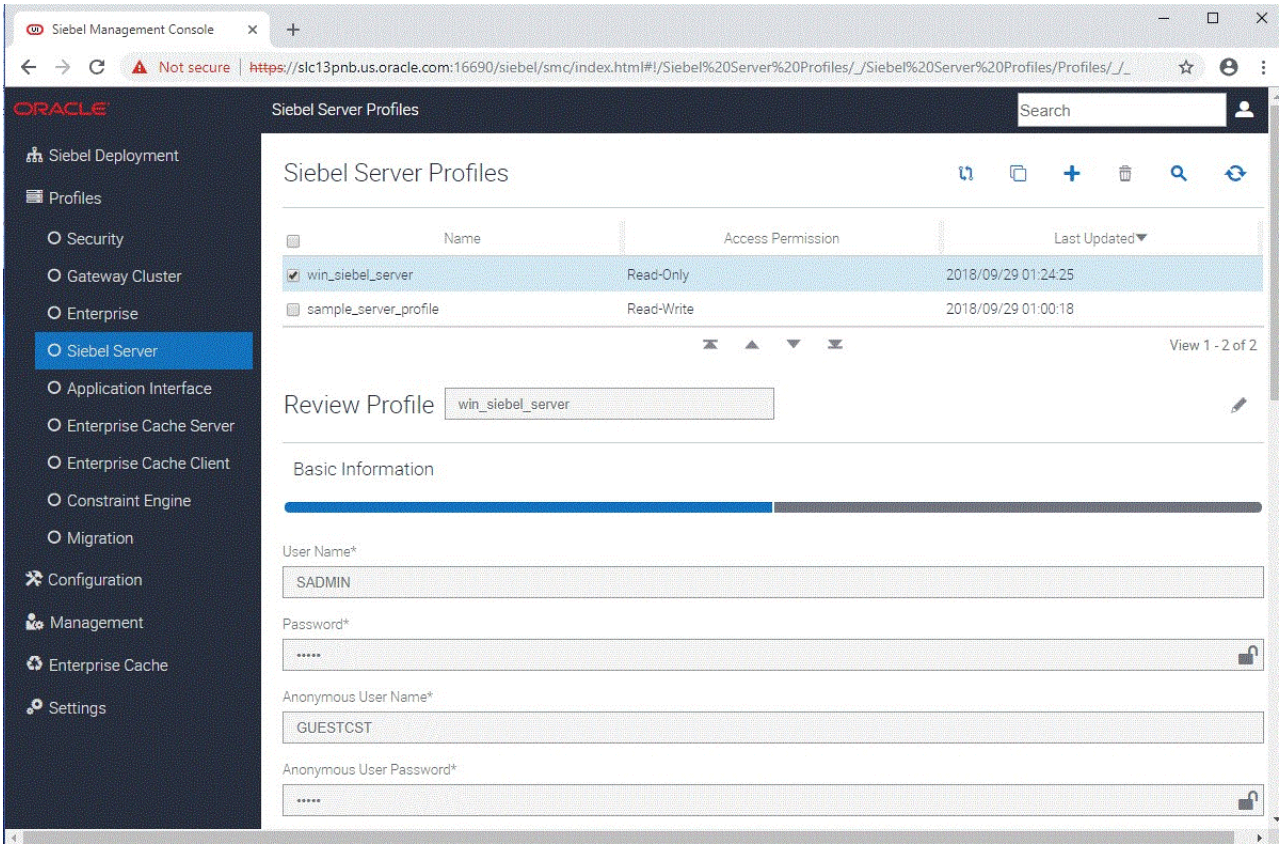
The following figure shows the Siebel Deployment screen in Siebel Management Console. Use this screen to deploy new items, using profiles that you have created, or to review or update settings for existing deployed items, where possible. When you select a deployment item that you have added, the icons at the top change to include those that correspond to actions that you can perform on this deployment item.

A legend identifies the deployment status values that each deployment item might have, such as Staging, Deployment in Progress, Deployed, Deployment Failed, and so on. More information is provided later about some of these status values. As of Siebel CRM 18.12 Update, the legend status values are shown when you point to the Legend label.



Profiles Screen

The following figure shows the Profiles screen in Siebel Management Console. Use this screen to create new profiles or to review or update settings for existing profiles. The navigation menu is shown at left.



Configuration Screen

The figure in *About the Configuration Screen* shows the Configuration screen in Siebel Management Console. You can optionally use this screen to perform configuration activities for the Siebel Enterprise, Siebel Server, server components, and related areas. For more information, see *Configuring the Siebel Deployment*.

Management Screen

The figure in *About the Management Screen* shows the Management screen in Siebel Management Console. You can optionally use this screen to perform management activities for the Siebel Enterprise, Siebel Server, server components, and related areas. For more information, see *Managing the Siebel Deployment*.

Other Screens

Additional screens in Siebel Management Console include:

- The Enterprise Cache screen, which you can use to clear a deployed cache, or all caches. See also *Supported Activities in Siebel Management Console* and *Configuring the Siebel Enterprise Cache*.
- The Settings screen, which you can use to refresh the configuration and perform other tasks. For more information, see *Supported Activities in Siebel Management Console*.

Related Topics

About Configuring Siebel CRM

Starting the Siebel Management Console

Supported Activities in Siebel Management Console

Configuring the Siebel Deployment

Managing the Siebel Deployment

Accessibility for Siebel Management Console

Supported Activities in Siebel Management Console

Siebel Management Console supports several different activities or actions, most of which are summarized here, organized by the user interface features where these activities are initiated. This topic is part of *Running the Siebel Management Console*.

- Siebel Deployment selection in navigation menu (in left panel), then overview area:
  - Reviewing overall deployment (overview area)
  - Adding a new deployment item (Add icon (+) at top of overview area)
  - Deploying a profile into your Siebel environment (Deploy selection in Action field, then Submit button)
  - Staging a profile for later deployment into your Siebel environment (Stage selection in Action field, then Submit button)
  - Deleting configuration data for a deployed entity (Delete icon at top of overview area). You might need to delete and redeploy a deployment item in order to modify its configuration in Siebel Management Console. Note that deleting a deployment item corresponding to a Siebel Server stops the system service.
  - Refreshing configuration data displayed in Siebel Management Console (Refresh icon at top of overview area)
  - Reviewing the deployment status of items and nodes in your Siebel deployment (using the Legend link at top of overview area)
- Profiles selection in navigation menu (in left panel), then overview area:
  - Comparing two or more profiles (Compare icon at top of overview area)
  - Cloning a profile (Clone icon at top of overview area)
  - Creating a profile for a configurable entity (Add icon (+) at top of overview area)
  - Deleting a profile (Delete icon at top of overview area)
  - Querying profile data (Query icon at top of in overview area)
  - Refreshing profile data (Refresh icon at top of overview area). For example, you can use this option to retrieve the stored profile data in case another user had been editing profiles at the same time.
  - Editing a profile (Edit icon at top of form view overview area)
- Configuration selection in navigation menu (in left panel). For more information, see *Configuring the Siebel Deployment*.
- Management selection in navigation menu (in left panel). For more information, see *Managing the Siebel Deployment*.
- Enterprise Cache selection in navigation menu (in left panel):
  - Clearing a deployed cache, or all caches
- Settings selection in navigation menu (in left panel), then overview area:

- Invoking introspection of the Siebel deployment in order to refresh the deployment data in Siebel Management Console (Refresh Configuration button). You can use this option to bring deployment data into Siebel Management Console from configuration activities that had been done outside of Siebel Management Console, such as using Server Manager or the server administration views in the Siebel application.
- Viewing the introspection log data (View Log button)
- Removing the configuration for the Siebel Gateway (removes all profiles and deployment data)
- Modifying the search synchronization interval (in minutes, between 5 and 30), which specifies how often searchable configuration data is synchronized with the server. This setting affects searches for the current user and browser only.
- Specifying the Gateway Safe Mode user. Doing this enables login to Siebel Management Console in safe mode. For more information, see *Using Safe Mode for Siebel Management Console*.
- Updating the security profile for Siebel Gateway after logging in to Siebel Management Console as the safe mode user. For more information, see *Using Safe Mode for Siebel Management Console*.

- Toolbar area (above overview area):
  - Searching the configuration data for available profiles or deployed entities
  - Viewing the current user of Siebel Management Console
  - Logging out of Siebel Management Console (Logout option for current user)

Related Topics

About Configuring Siebel CRM

Running the Siebel Management Console

Overview of Siebel Management Console

Configuring the Siebel Deployment

Managing the Siebel Deployment

Accessibility for Siebel Management Console

Using Safe Mode for Siebel Management Console

Safe mode for Siebel Management Console, available as of Siebel CRM 19.11 Update, addresses the problem where an administrator cannot log in to Siebel Management Console because the back-end server for the authentication system, such as a database or an LDAP server, is unavailable.

In this situation, you can start Siebel Management Console in safe mode and then update the Siebel Gateway security profile to specify the information necessary to connect to a working database or other authentication system. (Updating the Siebel Gateway security profile is the only action you can perform in safe mode.) Starting Siebel Management Console in safe mode uses a variation of the standard URL for starting Siebel Management Console. After performing the necessary tasks in safe mode, you can log in to Siebel Management Console normally to perform configuration or other tasks.

Logging in to Siebel Management Console in safe mode is not possible without first setting the Gateway Safe Mode user. For a new or existing deployment, you specify the safe mode user in the Settings screen of Siebel Management

Console. Any administrator can become or create, modify, or delete a Gateway Safe Mode use. There is no default Gateway Safe Mode user.

Note: After installing Siebel CRM 20.x Update, it is strongly recommended that you specify a safe mode user to help maintain access to Siebel Gateway as part of using Siebel Management Console.

- For more information about configuring the Siebel Management Console safe mode user and about using safe mode, see *Siebel Security Guide* .
- For more information about starting Siebel Management Console in safe mode, see *Starting the Siebel Management Console*.

Installing the Siebel Database

If you do not have an existing Siebel database, then you use the Siebel Database Configuration Wizard to install this database. This task is described in *Installing the Siebel Database on the RDBMS*.

Before you install the Siebel database, you must review the guidelines described for your RDBMS in *Configuring the RDBMS*.

This task is a step in *Roadmap for Installing Siebel CRM for a New Deployment*. When you are following the task sequence in this roadmap, depending on your authentication method, you might have to perform the Siebel database tasks before you can run the Siebel Management Console.

Related Topics

About Configuring Siebel CRM

About Installing the Siebel Database

About Database Updates for Siebel CRM 20.x Update

Starting the Siebel Database Configuration Wizard

Installing the Siebel Database on the RDBMS

Requirements for Installing and Configuring the Siebel Database

Configuring the RDBMS

Configuring the Siebel Gateway and Security

After you install Siebel CRM, you run the Siebel Management Console to configure the Siebel Gateway and the Security profile that it requires. You might also create additional Security profiles at some point after configuring the Siebel Gateway.

To configure the Siebel Gateway, perform the following tasks:

1. *Configuring the Siebel Gateway*
2. *Configuring a Security Profile*

Note: In general, configuring the Siebel Gateway applies to new installations only. For a migration installation, the installer configures the Siebel Gateway and you do not need to configure the Siebel Gateway as described here. However, it is strongly recommended that you modify the existing Siebel Gateway configuration to specify the Gateway Safe Mode user. In addition, you might choose to create additional Security profiles.

For detailed information about some of the security settings in the Siebel Management Console, see *Siebel Security Guide* .

For more information about the activities that you can perform in the Siebel Management Console, including viewing configuration log data, see *Supported Activities in Siebel Management Console*.

This task is a step in:

- *Roadmap for Installing Siebel CRM for a New Deployment*
- *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*

Related Topics

About Configuring Siebel CRM

Running the Siebel Management Console

Configuring the Siebel Gateway Cluster

Requirements for Installing and Configuring Siebel Enterprise Server Modules

Related Books

Siebel Security Guide

Configuring the Siebel Gateway

To configure the Siebel Gateway (which includes a Security profile), use the procedure that follows. This task is part of *Configuring the Siebel Gateway and Security*.

This task is required for new installations. It is not applicable for migration installations of Siebel Enterprise Server from a previous release, because the migration installation task migrates the prior configuration. However, after migrating to Siebel CRM 20.x Update, it is strongly recommended that existing customers specify the safe mode user for Siebel Management Console, as described in *Siebel Security Guide* .

Note: When you deploy Siebel Gateway clustering, then the Siebel Gateway that you configure here is referred to as the primary Siebel Gateway. This Siebel Gateway node participates in clustering, the same as other Siebel Gateway nodes. It is recommended that you configure the Siebel Gateway cluster after you configure the Siebel Gateway.

Related Topics

Running the Siebel Management Console

Using Safe Mode for Siebel Management Console

Configuring a Security Profile

Configuring the Siebel Gateway Cluster

Related Books

Siebel Security Guide

To configure the Siebel Gateway (first time running Siebel Management Console)

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*. Log in using the basic authentication credentials that were provided during Siebel Application Interface installation.

   These credentials were specified in the Application Interface Authentication screen when you installed Siebel Application Interface, as described in *Installing Siebel CRM in a New Installation*.
2. Identify the Siebel Gateway host name and HTTPS redirect port number, in the format SiebelGatewayHost:Port, then click Save.
3. Create the security profile to configure access to the Siebel Gateway. Specify a name for the security profile.

   Note: The security profile that is created on first login is named Gateway.
4. Click the plus sign, specify the data source information for the security profile, and then click Save. For more information about these settings, see the table in *Configuration Settings for a Security Profile*.
   a. Specify the type of authentication to use. For example, if you have already created the Siebel database, then you could optionally select Database Authentication.
   b. Specify the name of the security adapter, such as DBSecAdpt. This name corresponds to a named subsystem. For more information, see *Siebel Security Guide* .
   c. Specify the data source (for database authentication).
   d. Specify whether to propagate changes (for database authentication).
   e. Specify the authorization roles.
   f. Test the user and password that you want to use under the specified authentication system.

   Note: After saving these changes, you are forcibly logged out of the Siebel Management Console, in order to activate the security adapter. Go to *Running the Siebel Management Console* and log in again using the credentials you just specified. Then configure the Siebel Gateway registry, as identified in the next step.
5. Configure the Siebel Gateway registry, in which the configurations that you create in the Siebel Management Console will be stored, and then click Save:
   - Specify the Siebel Gateway registry port number. (If you configure Siebel Gateway clustering, then you can also specify this port number as part of configuring the Siebel Gateway cluster profile. See also *Configuring the Siebel Gateway Cluster*.)
   - Specify the user name that will access the registry.
   - Specify the password for this user.
   - Specify the primary language.
6. After configuring the Siebel Gateway and security, perform the configuration tasks for your Siebel deployment, which include the following:
   - Configure the safe mode user for Siebel Management Console. For more information, see *Siebel Security Guide* .
   - Configure an additional Security profile. For more information, see *Configuring a Security Profile*.
   - (Optional) Configure the Siebel Gateway cluster. For more information, see *Configuring the Siebel Gateway Cluster*.
   - Configure the Siebel Enterprise. For more information, see *Configuring the Siebel Enterprise*.

- Configure the Siebel Server. For more information, see *Configuring the Siebel Server*.
- Configure the Siebel Application Interface. For more information, see *Configuring the Siebel Application Interface*.
- (Optional) Configure the Siebel Enterprise Cache (server and client). For more information, see *Configuring the Siebel Enterprise Cache*.
- (Optional, available as a developer preview) Configure the Siebel Constraint Engine. For more information, see *Configuring the Siebel Constraint Engine*.
- (Optional) Configure the Siebel Migration application. For more information, see *Configuring the Siebel Migration Application*.

Configuring a Security Profile

When you configure the Siebel Gateway, you configure the first Security profile. You can use the same Security profile for Siebel Enterprise authentication, or create another Security profile for the Siebel Enterprise. To create another Security profile, use the procedure that follows. This task is part of *Configuring the Siebel Gateway and Security*.

This task is required for new installations. It is not required for migration installations of Siebel Enterprise Server from a previous release, because the migration installation task migrates the prior configuration. However, you might choose to create a new Security profile.

Related Topics

Running the Siebel Management Console

Configuring the Siebel Gateway

To configure a Security profile

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Profiles in the navigation menu in the left panel, then click Security.
   Existing Security profiles are listed, such as the profile created for the deployed Siebel Gateway.
3. Click the plus sign (+) at the top of the overview section to add a new Security profile, or click the Clone button to clone an existing profile.
4. Specify a name for the profile.

   Note: The security profile that is created on first login is named Gateway.

5. To the right of Data Sources, click the plus sign (+) to add a new data source.
6. Click Datasource.
7. Specify settings for the data source, as shown in the table in *Configuration Settings for a Security Profile*. Click Next when prompted.
8. When you have specified all applicable settings, click Submit to save your changes to the profile.

Configuration Settings for a Security Profile

The following table describes the settings that are requested in the Siebel Management Console for configuring a new Security profile or modifying an existing Security profile. Required fields display an asterisk (*) next to the field label. For most of the options, pointing to the option displays tooltip text that provides a brief description of the field.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Name	Data Sources > Data Source Name	Specify the name of the data source that will be created.
Type	Data Sources > Data Source Name	Specify the type of authentication you are using. The options are: • Database Authentication (development only) • Lightweight Directory Access Protocol (LDAP) Authentication • Custom Security Authentication (using Security SDK)
Host Name	Data Sources > Data Source Name This option appears if you selected Database Authentication or LDAP Authentication.	Specify the host name for the data source, such as the host name of the database server for database authentication.
Port	Data Sources > Data Source Name This option appears if you selected Database Authentication or LDAP Authentication.	Specify the port number for the data source, such as the port number of the database server for database authentication.
SQL Style of Database	Data Sources > Data Source Name This option appears if you selected Database Authentication or Custom Authentication.	Specify the SQL style for your Siebel database. Specify one of the following: • Oracle Database Enterprise Edition • Microsoft SQL Server • IBM DB2
Database Service Name	Data Sources > Data Source Name This option appears if you selected Database Authentication.	The service name of Oracle Enterprise Server edition, or the database name for IBM DB2 and Microsoft SQL Server.
Table Owner	Data Sources > Data Source Name This option appears if you selected Database Authentication.	The table owner for the database.
Application User Distinguished Name (DN)	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies the user name of a record in the directory with sufficient permissions to read any user's information and do any necessary administration.
Application Password	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies the password for the user specified in the Application User Distinguished Name (DN) field.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Base Distinguished Name (DN)	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies the base distinguished name, which is the root of the tree under which users of this Siebel application are stored in the directory.
Custom Library	Data Sources > Data Source Name This option appears if you selected Custom Authentication.	Name of the custom security adapter implementation.
CRC Checksum	Data Sources > Data Source Name	Provide the value of the checksum performed on the applicable security adapter library (DLL). This value, applicable for the Siebel Server only, ensures that each user accesses the Siebel database through the correct security adapter. If this field is empty or contains the value 0 (zero), then no checksum validation is performed. If you upgrade your version of Siebel CRM, then you must recalculate the checksum value and replace the value in this field.
Credentials Attribute	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies the attribute type that stores a database account.
Hash DB Password	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies password hashing for database credentials passwords.
Hash User Password	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies password hashing for user passwords.
Hash Algorithm	Data Sources > Data Source Name This option appears if you selected Hash DB Password or Hash User Password.	Specifies the hash algorithm to be used for password hashing. Choose one of the following: • SHA2 • SHA1
Password Attribute Type	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies the attribute type that stores a database account.
Propagate Change	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies whether to allow administration of the directory through the Siebel application user interface.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Roles Attribute (optional)	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies the attribute type for roles stored in the directory.
Shared Database Account Distinguished Name (fully qualified domain name)	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies the absolute path of an object in the directory that has the shared database account for the application.
Shared DB User Name	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies the user name to connect to the Siebel database.
Shared DB Password	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies the password for the shared database user name.
Security Adapter Mapped User Name	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies that, when the user key passed to the security adapter is not the Siebel user name, the security adapter retrieves the user name for authenticated users from an attribute defined by the parameter SiebelUsernameAttributeType.
Siebel User Name Attribute	Data Sources > Data Source Name This option appears if you selected Security Adapter Mapped User Name for LDAP or Custom Authentication.	Specifies the attribute from which the security adapter retrieves an authenticated user's Siebel user ID.
SSL	Data Sources > Data Source Name This option appears if you selected LDAP Authentication.	Specifies to enable Secure Sockets Layer for socket connections to the host.
Wallet Password	Data Sources > Data Source Name This option appears if you selected SSL for LDAP or Custom Authentication.	Specifies the password to open the wallet that contains a certificate for the certification authority used by the directory server.
Configure Web Single Sign-On (Web SSO)	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies that the security adapter uses Web Single Sign-On (Web SSO) authentication rather than security adapter authentication.
Trust Token	Data Sources > Data Source Name	Specifies a password to be used with Web Single Sign-On (Web SSO) authentication.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
	This option appears if you selected Configure Web Single Sign-On for LDAP or Custom Authentication.	
Salt Attribute Type	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies the attribute that stores the salt value if you are using password salting.
Salt User Password	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies whether to add salt values to user passwords before they are hashed.
User Name Attribute Type	Data Sources > Data Source Name This option appears if you selected LDAP or Custom Authentication.	Specifies the attribute type under which the user's login name is stored in the directory.
Enterprise Security Authentication Profile	Basic Information	Select one of the following options for your enterprise security authentication: • Database Authentication (development only) • Lightweight Directory Access Protocol (LDAP) Authentication • Custom Security Authentication (using Security SDK) **Note:** You must create the security profile before you configure the Siebel Enterprise.
Security Adapter Name (named subsystem)	Basic Information	Select the security adapter name.
Database Security Adapter Data Source	Basic Information This option appears if you selected Database Authentication.	Select the security adapter data source.
Database Security Adapter Propagate Changes	Basic Information This option appears if you selected Database Authentication.	Specify whether to propagate changes for the security adapter.
Authorization Roles (comma-separated)	Basic Information	Specify one or more authorization roles for accessing the Siebel Gateway. Default value: Siebel Administrator (which is provided by Oracle and cannot be changed). For more information, see *Requirements for Siebel Gateway Authentication*.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
User Name	Testing	Specify the user name for testing authentication under the specified authentication system.
Password	Testing	Specify the password for the user account used for testing.

Configuring the Siebel Enterprise

The task for configuring the Siebel Enterprise lets you configure authentication using Siebel security adapters, TLS encryption, and related settings.

To configure the Siebel Enterprise, perform the following tasks:

1. *Creating a Siebel Enterprise Profile*
2. *Deploying the Siebel Enterprise*

Note: Configuring the Siebel Enterprise applies to new installations only. For a migration installation, the installer migrates the Siebel Enterprise configuration.

For detailed information about the security settings in the Siebel Management Console, see *Siebel Security Guide* .

For more information about the activities that you can perform in the Siebel Management Console, including viewing configuration log data, see *Supported Activities in Siebel Management Console*.

This task is a step in:

- *Roadmap for Installing Siebel CRM for a New Deployment*
- *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*

Related Topics

About Configuring Siebel CRM

Running the Siebel Management Console

Requirements for Installing and Configuring Siebel Enterprise Server Modules

Related Books

Siebel Security Guide

Siebel System Administration Guide

Creating a Siebel Enterprise Profile

This procedure describes how to configure a Siebel Enterprise profile. You can create multiple profiles, but you can deploy only one instance of Siebel Enterprise in your Siebel deployment. This task is part of *Configuring the Siebel Enterprise*.

Related Topics

Running the Siebel Management Console

Deploying the Siebel Enterprise

To create a Siebel Enterprise profile

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Profiles in the navigation menu in the left panel, then click Enterprise.

   Existing Enterprise profiles are listed, if any.
3. Click the plus sign (+) at the top of the overview section to add a new Enterprise profile, or click the Clone button to clone an existing profile.
4. Specify a name for the profile.
5. Specify additional settings, as shown in the table in *Configuration Settings for a Siebel Enterprise Profile*.
6. When you have specified all applicable settings, click Submit to save your changes to the profile.

Configuration Settings for a Siebel Enterprise Profile

The following table describes the settings that are requested in the Siebel Management Console for configuring a new Siebel Enterprise profile or modifying an existing Siebel Enterprise profile. Required fields display an asterisk (*) next to the field label. For most of the options, pointing to the option displays tooltip text that provides a brief description of the field.

For requirements and restrictions for some of these parameters, see *Requirements for Installing and Configuring Siebel Enterprise Server Modules*. 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.

> **Note:** After you have already configured the Siebel Enterprise, you can modify its configuration using Siebel Server Manager, as described in *Siebel System Administration Guide* .

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Primary Siebel File System	Basic Information	Specify the location or locations of the Siebel File System. If the folder path provided does not exist, then the deployment step creates it. For more information, see *Creating the Siebel File System*.
User Name	Authentication	Specify the authorized user name for logging into the Siebel Gateway.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Password	Authentication	Specify the password for this user.
RDBMS Platform	Database Information	Specify the RDBMS platform for the Siebel database. The options are: • Oracle Database Enterprise Edition • Microsoft SQL Server • IBM DB2 UDB for Linux UNIX Windows • IBM DB2 UDB for z/OS
Oracle SQLNet Connect String	Database Information	(Oracle Database only) Specify the Oracle SQLNet connect string.
Microsoft SQL Server Host Name	Database Information	(Microsoft SQL Server only) Specify the host name for Microsoft SQL Server.
Microsoft SQL Server Port	Database Information	(Microsoft SQL Server only) Specify the database port number for Microsoft SQL Server.
Microsoft SQL Server Database Name	Database Information	(Microsoft SQL Server only) Specify the database name for Microsoft SQL Server.
IBM DB2 Database Alias	Database Information	(IBM DB2 only) Specify the database alias for IBM DB2.
Current IBM DB2 SQL ID / Group Name	Database Information	(IBM DB2 for z/OS only) Specify the current SQL ID or group name for IBM DB2.
IBM DB2 Client Instance Home Directory	Database Information	(IBM DB2 or DB2 for z/OS only) Provide the absolute path of the parent directory where IBM DB2 client software is installed on UNIX, or the value of the DB2INSTPROF parameter on Windows. UNIX example: **`/export/home/myuser`** Windows example: **`C:\Program Data\IBM\DB2\Copy Name`**
Database User Account Name	Database Information	(For all database platforms) Specify the database user account.
Database User Account Password	Database Information	(For all database platforms)

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
		Specify the password for the database user account.
Table Owner	Database Information	(Oracle Database, DB2, or DB2 for z/OS only) Specify the table owner.
Authentication Profile	Authentication	Specify the security profile to use for Siebel Enterprise authentication.
Primary Language	Authentication	Specify the primary language for your Siebel deployment.
Security Encryption Level or Type	Security Information	Specify the security encryption level or type. Select one of the following options: • SISNAPI Without Encryption • SISNAPI Using TLS 1.2 (default)
Certification Authority (CA) Certificate File Name	Security Information This option and all of the remaining items appear only if you selected the TLS option in Security Encryption Level or Type.	Provide the name that can identify the trusted authority who issued the certificate file. For more information, see *Siebel Security Guide* .
Private Key File Name	Security Information	Provide the name of the PEM private key file. For more information, see *Siebel Security Guide* .
Private Key File Password	Security Information	Provide the password that can decrypt the PEM private key file. For more information, see *Siebel Security Guide* .
Enable Peer Authentication	Security Information	Check this field to enable peer authentication during the SSL handshake. For more information, see *Siebel Security Guide* .
Validate Peer Certificate	Security Information	Check this field to verify that the host name matches with the host name information presented in the certificate. For more information, see *Siebel Security Guide* .

Deploying the Siebel Enterprise

This procedure describes the steps for deploying Siebel Enterprise. You can deploy only one instance of Siebel Enterprise in your Siebel deployment. This task is part of *Configuring the Siebel Enterprise*.

This task is required for new installations. It is not applicable for migration installations of Siebel Enterprise Server from a previous release, because the migration installation task migrates the prior configuration.

Before you can deploy the Siebel Enterprise, you must have already configured the Siebel Gateway, as described in *Configuring the Siebel Gateway and Security*.

> **Note:** After deployment, the Siebel Enterprise profile is in a read-only state. If you need to update the configuration, then it is recommended to use Server Manager. Then refresh the configuration data displayed in Siebel Management Console.

Related Topics

Additional Tasks for Migration Installations

About Configuring Siebel CRM

Running the Siebel Management Console

Creating a Siebel Enterprise Profile

To deploy the Siebel Enterprise

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Siebel Deployment in the navigation menu in the left panel.
3. Above the hierarchical display of deployment items in the overview area, click the plus sign (+) and then select Enterprise to add a new instance to your Siebel deployment.
4. For Action, specify whether you will deploy this Siebel Enterprise or stage it for later deployment:
   - If you want to stage this Siebel Enterprise for later deployment, then click Staging.
   - If you want to deploy this Siebel Enterprise to your Siebel deployment now, then click Deploy.
5. For Profile, select the profile to use for this instance of Siebel Enterprise.

   You created this profile in *Creating a Siebel Enterprise Profile*.
6. For Siebel Enterprise Name, specify the name of this Siebel Enterprise.

   For more information, see *Restrictions on Names for Siebel Enterprise and Siebel Server*.
7. For Enterprise Description, specify an optional description of this Siebel Enterprise.
8. To continue, click Submit. Otherwise, click Cancel.

   After the configuration has been submitted, the state of this Siebel Enterprise deployment item changes to one of the following states, based on your selection in Step 4: Staging or Deployment in Progress.
   - If the deployment completes successfully, then, when you refresh the configuration, the state changes to Deployed.
   - If the deployment fails, then the state changes to Deployment Failed.
   - For a deployment in the Staging state, you can deploy it by either clicking the Deploy icon or by setting the Action to Deploy and resubmitting the deployment.
9. (Optional) View log data about this Siebel Enterprise deployment.

Configuring the Siebel Server

After you have installed Siebel Server and performed the prerequisite tasks, you run the Siebel Management Console and choose tasks to configure the Siebel Server, as described in this topic. To configure the Siebel Server, perform the following tasks:

1. *Creating a Siebel Server Profile*
2. *Deploying the Siebel Server*

Note: Configuring the Siebel Server applies to new installations. For a migration installation, the installer migrates the Siebel Server configuration.

For detailed information about the security settings in the Siebel Management Console, see *Siebel Security Guide* .

For more information about the activities that you can perform in the Siebel Management Console, including viewing configuration log data, see *Supported Activities in Siebel Management Console*.

This task is a step in:

- *Roadmap for Installing Siebel CRM for a New Deployment*
- *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*

Related Topics

About Configuring Siebel CRM

Running the Siebel Management Console

Requirements for Installing and Configuring Siebel Enterprise Server Modules

Related Books

Siebel Security Guide

Siebel System Administration Guide

Creating a Siebel Server Profile

This procedure describes how to configure a Siebel Server profile. The same steps apply whether you are configuring the first Siebel Server profile or configuring any additional profile. This task is part of *Configuring the Siebel Server*.

Related Topics

Running the Siebel Management Console

Deploying the Siebel Server

To create a Siebel Server profile

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Profiles in the navigation menu in the left panel, then click Siebel Server.

Existing Siebel Server profiles are listed, if any.

3. Click the plus sign (+) at the top of the overview section to add a new Siebel Server profile, or click the Clone button to clone an existing profile.
4. Specify a name for the profile.
5. Specify additional settings, as shown in the table in *Configuration Settings for a Siebel Server Profile*.
6. When you have specified all applicable settings, click Submit to save your changes to the profile.

Configuration Settings for a Siebel Server Profile

The following table describes the settings that are requested in the Siebel Management Console for configuring a new Siebel Server profile or modifying an existing Siebel Server profile. Required fields display an asterisk (*) next to the field label. For most of the options, pointing to the option displays tooltip text that provides a brief description of the field.

For requirements for and restrictions on some of these parameters, see *Requirements for Installing and Configuring Siebel Enterprise Server Modules*. Parameters that are set as a result of configuring the Siebel Server are set at the Siebel Server level.

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* .

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
User Name	Basic Information	Specify the authorized user name for logging into the Siebel Gateway.
Password	Basic Information	Specify the password for this user.
Anonymous User Name	Basic Information	Enter the user name required for anonymous browsing and initial access to the login pages of the application you are implementing. For more information about anonymous users, see *Requirements for Configuring Anonymous Users for the Siebel Application Interface*.
Anonymous User Password	Basic Information	Specify the password for this anonymous user.
Enable Component Groups	Basic Information	Specify one or more component groups to enable for the Siebel Server. For more information about component groups, see *Siebel System Administration Guide* .
Siebel Connection Broker Port	Basic Information	Specify the TCP/IP port number for the Siebel Connection Broker component (alias SCBroker). The default port number is 2321. This port number is used for all of the communications between SCBroker and other components, including the Siebel Application Interface. Make sure that the port number that you specify is not already used

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
		by any other applications or components. You also specify this port number when you configure the Siebel Application Interface, as described in *Deploying the Siebel Application Interface*. For more information about the SCBroker component, see *Siebel Deployment Planning Guide* and *Siebel System Administration Guide* .
Network TCP/IP Port for Synchronization Manager	Basic Information	Specify the TCP/IP port number for the Synchronization Manager component, which is part of Siebel Remote. Make sure that the port number that you specify is not already used by any other applications or components. The default port number is 40400.
Server-Specific Security Encryption Settings	Enhanced Settings > Security	Select this option to configure security and encryption for communications between this Siebel Server and other servers. If you do not select this option, then the applicable settings are inherited from the Enterprise.
Server-Specific Security Authentication Profile Assignment	Enhanced Settings > Security	Select this option to assign an existing security adapter to this Siebel Server or to specific components.
Security Encryption Level or Type	Enhanced Settings > Security This option appears if you selected Server-Specific Security Encryption Settings.	Specify the security encryption level or type. Select one of the following options: • SISNAPI Without Encryption • SISNAPI Using TLS 1.2 (default) For information about configuring TLS for Siebel Remote, see *Siebel Remote and Replication Manager Administration Guide* and *Siebel Security Guide* .
Certificate File Name	Enhanced Settings > Security This option appears if you selected the TLS option in Security Encryption Level or Type.	Provide the name of the ASN/PEM certificate file. For more information, see *Siebel Security Guide* .
Certification Authority (CA) Certificate File Name	Enhanced Settings > Security This option appears if you selected the TLS option in Security Encryption Level or Type.	Provide the name that can identify the trusted authority who issued the certificate file. For more information, see *Siebel Security Guide* .
Clustering Configuration	Enhanced Settings > Clustering	Specify the clustering configuration. You can select one of the following clustering options: • Not Clustered • Clustered Using Virtual Host Name (valid NETBIOS name)

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
		• Clustered Using Virtual IP Address (for example, 192.168.0.1) In certain cases, it is useful to cluster Siebel Servers for high availability. The cluster nodes must be started per cluster instructions, if clustering is selected. For more information about clustering Siebel Servers, see *Siebel Deployment Planning Guide* .
Siebel Server Cluster Virtual Host Name/IP	Enhanced Settings > Clustering This option appears if you selected either of the two clustering options.	Specify one of the following, depending on your selection under Clustering Configuration: • If you selected Clustered Using Virtual Host Name, then specify the host name. • If you selected Clustered Using Virtual IP Address, then specify the IP address.
RDBMS Platform	Enhanced Settings > Other Information	Specify the RDBMS platform for the Siebel database. The options are: • Oracle Database Enterprise Edition • Microsoft SQL Server • IBM DB2
Register External Oracle ODBC Driver	Enhanced Settings > Other Information This option appears if you selected Oracle Database Enterprise Edition.	This option is read-only and is set to True.
Microsoft SQL Server Port Number	Enhanced Settings > Other Information This option appears if you selected Microsoft SQL Server.	Provide the port number for Microsoft SQL Server.
IBM DB2 Client Instance Home Directory	Enhanced Settings > Other Information This option appears if you selected IBM DB2.	Provide the absolute path of the parent folder where the IBM DB2 client is installed. This setting is optional for Microsoft Windows.

Deploying the Siebel Server

This procedure describes the steps for deploying an installed instance of Siebel Server. You perform the same procedure for each installed instance of Siebel Server. This task is part of *Configuring the Siebel Server*.

This task is required for new installations. It is not applicable for migration installations of Siebel Enterprise Server from a previous release, because the migration installation task migrates the prior configuration. However, you might choose to install and deploy a new Siebel Server.

Before you can deploy an installed instance of Siebel Server, you must have already configured the Siebel Enterprise, as described in *Configuring the Siebel Enterprise*.

> **Note:** After deployment, the Siebel Server profile is in a read-only state. If you need to update the configuration, then it is recommended to use Server Manager. Then refresh the configuration data displayed in Siebel Management Console.

Related Topics

Additional Tasks for Migration Installations

About Configuring Siebel CRM

Running the Siebel Management Console

Creating a Siebel Server Profile

To deploy the Siebel Server

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Siebel Deployment in the navigation menu in the left panel.
3. Above the hierarchical display of deployment items in the overview area, click the plus sign (+) and then select Siebel Server to add a new instance to your Siebel deployment.
   The Siebel Server must already have been installed.
4. For Host Name:HTTPS Port, specify the host name and HTTPS redirect port for this instance of Siebel Server. You specified this HTTPS redirect port during Siebel Server installation.
5. For Profile, select the profile to use for this deployment of Siebel Server.
   You created this profile in *Creating a Siebel Server Profile*.
6. For Action, specify whether you will deploy this Siebel Server or stage it for later deployment:
   - If you want to stage this Siebel Server for later deployment, then click Staging.
   - If you want to deploy this Siebel Server to your Siebel deployment, then click Deploy.
7. For Siebel Server Name, specify the name of this Siebel Server.
   For more information, see *Restrictions on Names for Siebel Enterprise and Siebel Server*.
8. For Siebel Server Description, specify an optional description of this Siebel Server.
9. For Deployed Languages, specify all of the languages that you plan to deploy for this Siebel Server.
10. To continue, click Submit. Otherwise, click Cancel.
    After the configuration has been submitted, the state of this Siebel Server deployment item changes to one of the following states, based on your selection in Step 6: Staging or Deployment in Progress.
    - If the deployment completes successfully, then, when you refresh the configuration, the state changes to Deployed. The Siebel Server system service starts automatically.
    - If the deployment fails, then the state changes to Deployment Failed.
    - For a deployment in the Staging state, you can deploy it by either clicking the Deploy icon or by setting the Action to Deploy and resubmitting the deployment.

11. (Optional) View log data about this Siebel Server deployment.

Configuring the Siebel Application Interface

After you have installed Siebel Application Interface, and after you have configured the Siebel Gateway, Siebel Enterprise, and Siebel Server, you run the Siebel Management Console and choose tasks to configure the Siebel Application Interface, as described in this topic. To configure the Siebel Application Interface, perform the following tasks:

1. *Creating a Siebel Application Interface Profile*
2. *Deploying the Siebel Application Interface*

For information about deploying multiple instances of Siebel Application Interface, see *Planning the Siebel Application Interface Topology*.

For more information about the activities that you can perform in the Siebel Management Console, including viewing configuration log data, see *Supported Activities in Siebel Management Console*.

This task is a step in:

- *Roadmap for Installing Siebel CRM for a New Deployment*
- *Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)*
- *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*

Related Topics

Additional Tasks for Migration Installations

About Configuring Siebel CRM

Running the Siebel Management Console

Customizing the Application Container for Siebel Application Interface

Requirements for Installing and Configuring the Siebel Application Interface

Planning the Siebel Application Interface Topology

Related Books

Siebel REST API Guide

Siebel Security Guide

Siebel System Administration Guide

Siebel System Monitoring and Diagnostics Guide

Creating a Siebel Application Interface Profile

This procedure describes how to configure a Siebel Application Interface profile. The same steps apply whether you are configuring the first Siebel Application Interface profile, reconfiguring the same profile with different settings, or configuring any additional profile. This task is part of *Configuring the Siebel Application Interface*.

> **Note:** Before you create a Siebel Application Interface profile, run the Server Manager and make sure that the Siebel Server has been deployed and is running, along with its Application Object Manager server components. If these components are running, then the Object Manager and Application settings in Siebel Application Interface profile configuration are populated with values you can choose from that reflect the available components on the Siebel Server. For information about using Server Manager, see *Siebel System Administration Guide* .

Related Topics

Running the Siebel Management Console

Deploying the Siebel Application Interface

To create a Siebel Application Interface profile

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Profiles in the navigation menu in the left panel, then click Application Interface.

   Existing Siebel Application Interface profiles are listed, if any.
3. Click the plus sign (+) at the top of the overview section to add a new Siebel Application Interface profile, or click the Clone button to clone an existing profile.
4. Specify a name for the profile.
5. Specify additional settings, as shown in the table in *Configuration Settings for a Siebel Application Interface Profile*.
6. When you have specified all applicable settings, click Submit to save your changes to the profile.

Configuration Settings for a Siebel Application Interface Profile

The following table describes the settings that are requested in the Siebel Management Console for configuring a new Siebel Application Interface profile or modifying an existing Siebel Application Interface. Required fields display an asterisk (*) next to the field label. For most of the options, pointing to the option displays tooltip text that provides a brief description of the field. Clicking the large plus sign (+) to the right of some options adds a new instance of a configurable item, which is represented in the second column using italics.

> **Note:** In Siebel CRM 20.2 Update, the default values changed for Method to Check Server Availability and Command to Check Server Availability to the values shown in this table. As a consequence, customers must update any Siebel Application Interface profiles created before Siebel CRM 20.2 Update to reflect the values shown in the table. Failing to do so could result in idle sessions not getting logged out in timely fashion.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
HTTP 1.1-Compliant Firewall / Enable Web Compression	Basic Information	Specify that the Siebel Application Interface compresses HTTP traffic. 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 more information about specifying compression, see *Siebel Security Guide* .
Configure Fully Qualified Domain Name	Basic Information	Specify whether you are using a fully qualified domain name (FQDN) for your Siebel CRM deployment. It is strongly recommended to use the FQDN feature. For more information, see *Configuring Siebel CRM for Pop-Up Blocker Compatibility*.
Fully Qualified Domain Name	Basic Information This option appears if you selected Configure Fully Qualified Domain Name.	Specify the fully qualified domain name (FQDN) for your Siebel CRM deployment, such as example.com. It is strongly recommended to use the FQDN feature.
Active Session Timeout Value	Authentication	Specify 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)
Login Session (guest session) Timeout Value	Authentication	Specify the timeout value for the login session. Default value: 300 (seconds)
Method to Check Server Availability	Authentication	Specify the method to use for checking server availability. Default value: UpdatePrefMsg
Command to Check Server Availability	Authentication	Specify the command to use for checking server availability. Default value: HeartBeat
Session Token Usage Duration	Authentication	Specify the usage duration for the session token. Default value: 2880 (minutes)
Session Token Timeout Value	Authentication	Specify the timeout value for the session token. Default value: 900 (seconds)
Maximum Possible Tabbed Sessions	Authentication	Specify the maximum possible number of tabs for multiple tab browsing. Default value: 1 This setting is effective only when the EnableMultiTab server parameter is set to True for the specified Application Object Manager. For more information about configuring multiple tab browsing, see *Configuring Siebel Open UI* . This feature is available as of Siebel CRM 19.7 Update.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Configure Web Single Sign-On (Web SSO)	Authentication	Specify whether to use Web single sign-on.
Anonymous User Name	Authentication	Specify the Siebel user ID that starts the anonymous session from which an end user is shown the login page for an application. For example: GUESTCST Later in profile configuration, you can optionally configure a different anonymous user for individual applications, if you require settings different from the defaults. For example, you might use a different anonymous user for customer applications than for employee applications. For more information about anonymous users, see *Requirements for Configuring Anonymous Users for the Siebel Application Interface*.
Anonymous User Password	Authentication	Specify the password for the anonymous user.
Trust Token	Authentication This option appears if you selected Configure Web Single Sign-On.	Specify the trust token to use for Web SSO authentication.
User Specification	Authentication This option appears if you selected Configure Web Single Sign-On.	Specify the user specification to use for Web SSO authentication.
Anonymous User Name	Authentication > REST Inbound Authentication	Specify the anonymous user to use for REST inbound authentication. For more information about anonymous users, see *Requirements for Configuring Anonymous Users for the Siebel Application Interface*. See also *Siebel REST API Guide* .
Anonymous User Password	Authentication > REST Inbound Authentication	Specify the password for the anonymous user for REST inbound authentication.
Authentication Type	Authentication > REST Inbound Authentication	Specify the authentication type for REST inbound authentication. You can select one of the following options: • Basic Authentication • Single Sign-On • OAuth For more information, see *Siebel REST API Guide* .

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Authentication URL	Authentication > REST Inbound Authentication This option appears if you selected OAuth.	Specify the URL to use for REST inbound authentication. For more information, see *Siebel REST API Guide* .
Trust Token	Authentication > REST Inbound Authentication This option appears if you selected Single Sign-On or OAuth.	Specify the trust token to use for REST inbound authentication. For more information, see *Siebel REST API Guide* .
User Specification	Authentication > REST Inbound Authentication This option appears if you selected Single Sign-On.	Specify the user specification to use for REST inbound authentication. For more information, see *Siebel REST API Guide* .
Session Timeout (seconds)	Authentication > REST Inbound Authentication	Specify the session timeout, in seconds, to use for REST inbound authentication. For more information, see *Siebel REST API Guide* .
Secure Channel	Authentication > REST Inbound Authentication	Specify whether to use a secure channel. For more information, see *Siebel REST API Guide* .
User Interface Log Level	Logging	Specify the user interface logging level. Select one of the following options: Fatal, Error (default), Warning, Debug, Trace, Information, All
EAI Log Level	Logging	Specify the EAI logging level. Select one of the following options: Fatal, Error, Warning, Debug, Trace, Information, All
DAV Log Level	Logging	Specify the DAV logging level. Select one of the following options: Fatal, Error (default), Warning, Debug, Trace, Information, All
REST Outbound Log Level	Logging	Specify the REST outbound logging level. Select one of the following options: Fatal, Error (default), Warning, Debug, Trace, Information, All
REST Inbound Log Level	Logging	Specify the REST inbound logging level. Select one of the following options: Fatal, Error (default), Warning, Debug, Trace, Information, All
SOAP Outbound Log Level	Logging	Specify the SOAP outbound logging level. Select one of the following options: Fatal, Error (default), Warning, Debug, Trace, Information, All

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Object Manager	REST Inbound Defaults	Select the Object Manager component to use for REST inbound communications, such as EAI Object Manager. For more information, see *Siebel REST API Guide* .
REST Response Base URL	REST Inbound Defaults	Specify the base URL for a REST response. For more information, see *Siebel REST API Guide* .
Maximum Possible Connections	REST Inbound Defaults	Specify the REST connection pool size. Default value: 20. For more information, see *Siebel REST API Guide* .
Method Name	REST Inbound Defaults > REST Resource Parameter List > Query	Specify the method name to use for queries. For more information, see *Siebel REST API Guide* .
Name	REST Inbound Defaults > REST Resource Parameter List > Query > Parameter List	Specify the name for each query parameter. For more information, see *Siebel REST API Guide* .
Alias	REST Inbound Defaults > REST Resource Parameter List > Query > Parameter List	Specify the alias for each query parameter. For more information, see *Siebel REST API Guide* .
Application Name	Applications > Language > Basic Information	Specify an application to configure for this instance of Siebel Application Interface, for each specified language.
Object Manager	Applications > Language > Basic Information	Specify the Object Manager component for the selected application.
Language	Applications > Language > Basic Information	Displays the language for the selected application.
Request Start Command	Applications > Language > Basic Information	Specify the request start command for the selected application.
Configure EAI HTTP Inbound Transport	Applications > Language > Basic Information	Specify whether to configure the EAI HTTP Inbound Transport. Choose this option for EAI applications only, and not for any other applications.
Configure Anonymous Pool	Applications > Language > Basic Information This option appears if you selected Configure EAI HTTP Inbound Transport.	Specify whether to configure the anonymous pool for EAI requests. For more information, see *Siebel Performance Tuning Guide* .

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Anonymous Pool Size	Applications > Language > Basic Information This option appears if you selected Configure EAI HTTP Inbound Transport and Configure Anonymous Pool.	Specify the size of the anonymous pool for EAI requests. For more information, see *Siebel Performance Tuning Guide* .
Maximum Retry for Processing EAI-SOAP Request	Applications > Language > Basic Information This option appears if you selected Configure EAI HTTP Inbound Transport.	Specify the maximum number of retries for processing SOAP requests for EAI.
No Session Preference in EAI-SOAP	Applications > Language > Basic Information This option appears if you selected Configure EAI HTTP Inbound Transport.	Specify whether the session preference is required in EAI-SOAP.
Configure Siebel Mobile	Applications > Language > Mobile	Specify whether to configure Siebel Mobile applications.
Application Display Name	Applications > Language > Mobile This option appears if you selected Configure Siebel Mobile.	Specify the display name of the Siebel Mobile application.
Application Display Order	Applications > Language > Mobile This option appears if you selected Configure Siebel Mobile.	Specify the display order of the Siebel Mobile application.
Application Icon Name	Applications > Language > Mobile This option appears if you selected Configure Siebel Mobile.	Specify the icon name of the Siebel Mobile application.
Active Session Timeout Value	Applications > Language > Enhanced Authentication **Note:** Use the Enhanced Authentication settings to optionally configure authentication for individual applications, if you require override settings different	Specify 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 (seconds)

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
	from the defaults specified under Basic Information and Authentication.	
Login Session (guest session) Timeout Value	Applications > Language > Enhanced Authentication	Specify the timeout value for the login session. Default value: 300 (seconds)
Method to Check Server Availability	Applications > Language > Enhanced Authentication	Specify the method to use for checking server availability. Default value: UpdatePrefMsg
Command to Check Server Availability	Applications > Language > Enhanced Authentication	Specify the command to use for checking server availability. Default value: HeartBeat
Session Token Usage Duration	Applications > Language > Enhanced Authentication	Specify the usage duration for the session token. Default value: 2880 (minutes)
Session Token Timeout Value	Applications > Language > Enhanced Authentication	Specify the timeout value for the session token. Default value: 900 (seconds)
Configure Web Single Sign-On (Web SSO)	Applications > Language > Enhanced Authentication	Specify whether to use Web single sign-on.
Anonymous User Name	Applications > Language > Enhanced Authentication	Specify the Siebel user name that starts the anonymous session for the specified application. For example: GUESTCST For more information about anonymous users, see *Requirements for Configuring Anonymous Users for the Siebel Application Interface*.
Anonymous User Password	Applications > Language > Enhanced Authentication	Specify the password for the anonymous user.
Trust Token	Applications > Language > Enhanced Authentication This option appears if you selected Configure Web Single Sign-On.	Specify the trust token to use for Web SSO authentication.
User Specification	Applications > Language > Enhanced Authentication This option appears if you selected Configure Web Single Sign-On.	Specify the user specification to use for Web SSO authentication.
Resource Type	REST Inbound Resources > Data	In this section, you optionally provide alias names to the REST parameters.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
		Specify the resource type for the REST resource parameter: Data, Service, or Workspace.
Method Name	REST Inbound Resources > Data > REST Resource Parameter List > Query	Specify the method name: Query (for example).
Name Alias	REST Inbound Resources > Data > REST Resource Parameter List > Query > Parameter List	For the current method name (such as Query), specify each REST resource parameter name for which you want to specify an alias, and specify the alias. For example, for the REST resource parameter named PageSize, you can configure an alias, such as Limit, as shown: Name=PageSize Alias=Limit Or, for the StartRowNumber parameter, you can specify an alias like Offset, as shown: Name=StartRowNumber Alias=Offset
Language	Other Information > SWE	Provide the default language for Siebel CRM.
HTTP-POST Request Size	Other Information > SWE	Specify the maximum size, in bytes, of HTTP POST requests from the Siebel Application Interface.
Seed File Location	Other Information > SWE	Specify the location of the seed file. (This setting is available for future use.)
Monitor Sessions	Other Information > SWE	Specify whether to gather statistics on all of the current sessions and report them in the Siebel Application Interface statistics (stats) page. For more information about this page, see *Siebel System Monitoring and Diagnostics Guide* .
Collect Application-Specific Statistics	Other Information > SWE	Specify whether to enable the collection of application-specific statistics.

Deploying the Siebel Application Interface

This procedure describes the steps for deploying a specific installed instance. You perform the same procedure for each installed instance of Siebel Application Interface. This task is part of *Configuring the Siebel Application Interface*.

This task is required both for new installations and for migration installations from a previous release, because the migration installation task does not migrate the prior configuration. You might also choose to install and deploy a new Siebel Application Interface.

Before you can deploy an installed instance of Siebel Application Interface, you must have already configured and deployed at least one Siebel Server, as described in *Configuring the Siebel Server*.

> **Note:** After deployment, the Siebel Application Interface profile is in a read-write state. You can update configuration settings and save the profile to propagate the updates to the Siebel Application Interface.

Related Topics

Additional Tasks for Migration Installations

About Configuring Siebel CRM

Running the Siebel Management Console

Creating a Siebel Application Interface Profile

To deploy the Siebel Application Interface

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Siebel Deployment in the navigation menu in the left panel.
3. Above the hierarchical display of deployment items in the overview area, click the plus sign (+) and then select Application Interface to add a new instance to your Siebel deployment.

   The Siebel Application Interface must already have been installed.
4. For Host Name:HTTPS Port, specify the host name and HTTPS redirect port for this instance of Siebel Application Interface. You specified this HTTPS redirect port during Siebel Application Interface installation.
5. For Profile, select the profile to use for this deployment of Siebel Application Interface.

   You created this profile in *Creating a Siebel Application Interface Profile*.
6. For Action, specify whether you will deploy this Siebel Application Interface or stage it for later deployment:
   - If you want to stage this Siebel Application Interface for later deployment, then click Staging.
   - If you want to deploy this Siebel Application Interface to your Siebel deployment, then click Deploy.
7. For Application Interface Node Name, specify the node name of this Siebel Application Interface.
8. For Application Interface Description, specify an optional description of this Siebel Application Interface.
9. To continue, click Submit. Otherwise, click Cancel.

   After the configuration has been submitted, the state of this Siebel Application Interface deployment item changes to one of the following states, based on your selection in Step 6 : Staging or Deployment in Progress.
   - If the deployment completes successfully, then, when you refresh the configuration, the state changes to Deployed. The Siebel Application Interface starts automatically.
   - If the deployment fails, then the state changes to Deployment Failed.
   - For a deployment in the Staging state, you can deploy it by either clicking the Deploy icon or by setting the Action to Deploy and resubmitting the deployment.
10. (Optional) View log data about this Siebel Application Interface deployment.

Configuring the Siebel Gateway Cluster

After you have configured the primary Siebel Gateway and installed Siebel Gateway on additional nodes, you can optionally run the Siebel Management Console and perform tasks to configure the Siebel Gateway cluster, as described in this topic. This topic contains the following information:

- *About Siebel Gateway Clustering*
- *Creating a Siebel Gateway Cluster*
- *Configuration Settings for a Siebel Gateway Cluster Profile*
- *Deploying the Siebel Gateway Cluster*
- *Changing the Primary Nodes for a Siebel Gateway Cluster*
- *Restoring the Siebel Gateway Cluster Topology*

Note: The type of clustering described in this chapter applies only to the Siebel Gateway and is not available for other modules such as Siebel Server.

For more information about the activities that you can perform in the Siebel Management Console, including viewing configuration log data, see *Supported Activities in Siebel Management Console*.

This task is an optional step in:

- *Roadmap for Installing Siebel CRM for a New Deployment*
- *Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)*
- *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*

About Siebel Gateway Clustering

Siebel CRM supports an optional native clustering feature for Siebel Gateway to provide high availability benefits to Siebel CRM customers. This feature works at the software level and is the preferred and recommended approach for clustering the Siebel Gateway. This topic is part of *Configuring the Siebel Gateway Cluster*.

Note: This feature, first provided in Siebel CRM 18.5 Update, became generally available as of Siebel CRM 18.7 Update.

The clustering feature supports both the Siebel Gateway service (application container) and the Siebel Gateway registry (Apache ZooKeeper). You might choose to use Siebel Gateway clustering only for your production environment, for example. Further, you can use clustering for only the Siebel Gateway service, or only the Siebel Gateway registry. It is recommended to configure clustering for both the Gateway service and the Gateway registry.

For this feature, Siebel Management Console supports a new profile type, the Siebel Gateway cluster profile, and a new step to deploy the cluster profile.

Overview of Configuring Siebel Gateway Clustering

To use Siebel Gateway clustering, you perform the following tasks:

1. Install at least three instances of Siebel Gateway on different nodes (that is, install both Siebel CRM 17.0 and Siebel CRM 20.9 Update). You can collocate a Siebel Gateway with a Siebel Server, for example, as noted in *Installing Siebel CRM*.

   In a migration installation case, you perform a migration installation for the existing installed Siebel Gateway. Then you perform new installations for all other Siebel Gateway nodes that you require.
2. (New deployment only) Configure and deploy the primary Siebel Gateway node in Siebel Management Console, as described in *Configuring the Siebel Gateway and Security*.

   The first Siebel Gateway installed and configured is the primary node, unless you later changed the primary node to a different instance. This task does not apply in a migration installation case, because the existing Siebel Gateway is migrated and serves as the primary Siebel Gateway.
3. Start the Siebel Management Console.
4. Configure a Siebel Gateway cluster profile in Siebel Management Console, as described in *Creating a Siebel Gateway Cluster*.

   In the cluster profile, you specify values for Registry Client Port, Registry Follower Port, and Registry Leader Port. For Registry Client Port, you specify the same Siebel Gateway registry port number that you specified when you configured the primary Siebel Gateway, as described in *Configuring the Siebel Gateway and Security*. The Registry Follower Port and Registry Leader Port are used for internal communication between Siebel Gateway nodes.
5. (Required as precaution) Back up the Siebel Gateway registry, as described in *Siebel System Administration Guide* .
6. Deploy the Siebel Gateway cluster profile, specifying all participating nodes, as described in *Deploying the Siebel Gateway Cluster*.

Siebel Gateway Clustering Requirements and Operations

The specific requirements for Siebel Gateway clustering differ for the Siebel Gateway service and the Siebel Gateway registry. Optionally, you can deploy the Siebel Gateway service cluster and registry cluster on different nodes.

- Siebel Gateway service clustering requires a minimum of two nodes. You can include all the same nodes that you include for the registry cluster, or include only a subset of these nodes.
- Siebel Gateway registry clustering requires a minimum of three nodes and an odd number of nodes: three, five, and so on.

Note: At any time after the primary Siebel Gateway has been configured in Siebel Management Console and the participating nodes have been installed, you can configure and deploy the Siebel Gateway cluster or change an existing cluster, such as to add or remove nodes or change the primary service node and primary registry node. In general, it is recommended to deploy the Siebel Gateway cluster before you configure the Siebel Enterprise, Siebel Server, and so on. If you deploy the Siebel Gateway cluster after you configure the rest of the Siebel environment, then afterward you must restart the application containers for all of the other services.

After cluster deployment, all applicable nodes function as part of the cluster, for the Siebel Gateway service and the Siebel Gateway registry, as applicable. The Siebel Deployment screen in Siebel Management Console shows all of the components of the Siebel Gateway cluster, within the overall deployment hierarchy. The item Gateway Cluster has child items Gateway Service Cluster and Gateway Registry Cluster, each of which has child items representing the participating nodes. Deployment status is shown for each cluster node. The primary node is highlighted, for your

reference. If deployment does not succeed for the minimum number of nodes required for each cluster, then cluster deployment fails and the system uses the primary Siebel Gateway.

Siebel Application Interface and Siebel Server function as clients for the Siebel Gateway service. When a Siebel Gateway service cluster is deployed, then Siebel Application Interface or Siebel Server can communicate with any of the nodes in the Siebel Gateway service cluster, and route requests to each available node, in a round-robin manner.

Similarly, the Siebel Gateway service that receives a request functions as a client for the Siebel Gateway registry. When a Siebel Gateway registry cluster is deployed, then the Siebel Gateway service can communicate with any of the nodes in the Siebel Gateway registry cluster, and routes each request to an available node, in a manner determined by ZooKeeper.

If an individual node goes down within the Siebel Gateway cluster, then the Siebel Application Interface or Siebel Server client connection switches to another available node, within the tolerance allowed by the cluster. After any Siebel Gateway cluster node goes down, when it is restarted, the node will again participate in the cluster.

- For a Siebel Gateway service cluster, all but one node can go down, and the Siebel Gateway service will still function.
- However, for the Siebel Gateway registry cluster, among those nodes configured as part of the cluster, a simple majority of running instances is required in order for the registry cluster to function: for example, two out of three nodes, or three out of five nodes.

If the Siebel Gateway cluster deployment fails (for example, if two out of three Siebel Gateway registry cluster nodes go down), then the system reverts to the non-clustered architecture: Siebel Application Interface and Siebel Server connect to the primary Siebel Gateway node, assuming it is running. (As needed, you can change the primary service node or primary registry node to a node that is running.)

The Siebel Gateway cluster uses an active-active model, in which actions can originate in any available node. For the Siebel Gateway registry cluster, updates are replicated to the other nodes, thus keeping all of the cluster nodes synchronized. The active-active model enables the cluster nodes to participate in load balancing of Siebel Gateway activities.

> **Note:** If multiple network interface controllers are used in your deployment environment, then advanced DNS and IP networking concepts must be applied in your cluster configuration. To avoid DNS routing conflicts that could occur, you might need to specify IP addresses rather than host names. For more information, see 2454568.1 (Article ID) on My Oracle Support.

Related Topics

About Configuring Siebel CRM

Running the Siebel Management Console

Configuring the Siebel Gateway and Security

Changing the Primary Nodes for a Siebel Gateway Cluster

Removing the Siebel Gateway

Related Books

Siebel Deployment Planning Guide

Siebel System Administration Guide

Creating a Siebel Gateway Cluster

This procedure describes how to configure a Siebel Gateway cluster profile. You can create multiple profiles, but you can deploy only one Siebel Gateway cluster in your Siebel deployment. This task is part of *Configuring the Siebel Gateway Cluster*.

Related Topics

Running the Siebel Management Console

About Siebel Gateway Clustering

Deploying the Siebel Gateway Cluster

To create a Siebel Gateway Cluster profile

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Profiles in the navigation menu in the left panel, then click Gateway Cluster.

   Existing Siebel Gateway cluster profiles are listed, if any.
3. Click the plus sign (+) at the top of the overview section to add a new Siebel Gateway cluster profile, or click the Clone button to clone an existing profile.
4. Specify a name for the profile.
5. Specify additional settings, as shown in the table in *Configuration Settings for a Siebel Gateway Cluster Profile*.
6. When you have specified all applicable settings, click Submit to save your changes to the profile.

Configuration Settings for a Siebel Gateway Cluster Profile

The following describes the settings that are requested in the Siebel Management Console for configuring a new Siebel Gateway cluster profile or modifying an existing Siebel Gateway cluster profile. Required fields display an asterisk (*) next to the field label. Pointing to the option displays tooltip text that provides a brief description of the field.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Registry Client Port	Gateway Cluster Settings	Specify the port number to use for the Siebel Gateway registry on all nodes. You can specify a new port number or specify the same Siebel Gateway registry port number that you specified when you configured the primary Siebel Gateway, as described in *Configuring the Siebel Gateway and Security*.
Registry Follower Port	Gateway Cluster Settings	The Registry Follower Port and Registry Leader Port are used for internal communication between nodes participating in Siebel Gateway registry clustering.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Registry Leader Port	Gateway Cluster Settings	The Registry Follower Port and Registry Leader Port are used for internal communication between nodes participating in Siebel Gateway registry clustering.

Deploying the Siebel Gateway Cluster

This procedure describes how to deploy the Siebel Gateway cluster. You can deploy only one Siebel Gateway cluster in your Siebel deployment. This task is part of *Configuring the Siebel Gateway Cluster*.

Note: You must back up the registry of the primary Siebel Gateway before you deploy the Siebel Gateway cluster. If a failure is observed, then you must restore the Siebel Gateway registry, after which you can make another attempt to deploy the Siebel Gateway cluster. Restoring the Siebel Gateway registry requires you to restart your CRM deployment. For more information about backing up and restoring the Siebel Gateway registry and about stopping and starting the Siebel CRM deployment, see *Siebel System Administration Guide* . See also *Stopping and Starting the Siebel Application Container*.

Related Topics

About Configuring Siebel CRM

Running the Siebel Management Console

About Siebel Gateway Clustering

Creating a Siebel Gateway Cluster

To deploy the Siebel Gateway cluster

1. (Required as precaution) Back up the Siebel Gateway registry, as described in *Siebel System Administration Guide* .
2. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
3. Click Siebel Deployment in the navigation menu in the left panel.
4. Above the hierarchical display of deployment items in the overview area, click the plus sign (+) and then select Gateway Cluster to add a new instance to your Siebel deployment.

   Siebel Gateway must already have been installed, on a sufficient number of nodes. You can deploy a Siebel Gateway cluster only once, but you can then modify the cluster if necessary, such as to add nodes.
5. For Profile, select the profile to use for this deployment of Siebel Gateway cluster.

   You created this profile in *Creating a Siebel Gateway Cluster*.
6. Under Gateway Service Cluster, for each installed instance that will participate in this cluster, specify the host name and port number.
7. Under Gateway Registry Cluster, for each installed instance that will participate in this cluster, specify the host name and port number.
8. For Action, specify whether you will deploy this Siebel Gateway cluster or stage it for later deployment:

- If you want to stage this Siebel Gateway cluster for later deployment, then click Staging.
- If you want to deploy this Siebel Gateway cluster to your Siebel deployment, then click Deploy.

9. To continue, click Submit. Otherwise, click Cancel.

   After the configuration has been submitted, the state of this Siebel Gateway cluster deployment item changes to one of the following states, based on your selection in Step 8: Staging or Deployment in Progress.

   - If the deployment completes successfully, then the state changes to Deployed. The Siebel Gateway cluster starts automatically.
   - If the deployment fails, then the state changes to Deployment Failed.
   - For a deployment in the Staging state, you can deploy it by either clicking the Deploy icon or by setting the Action to Deploy and resubmitting the deployment.

10. (Optional) View log data about this Siebel Gateway cluster deployment.

Changing the Primary Nodes for a Siebel Gateway Cluster

As of Siebel CRM 20.4 Update, after you have configured and deployed the primary Siebel Gateway and additional nodes for a Siebel Gateway cluster, you can optionally change which service and registry nodes serve as the primary nodes for the cluster. This topic is part of *Configuring the Siebel Gateway Cluster*.

Note the following requirements for using this feature:

- You can change the primary node for the Siebel Gateway service, for the Siebel Gateway registry, or both.
- You can set the primary service node and primary registry node on two different host computers.
- For either operation, the current primary node does not have to be running in order to specify a different node as the primary. The node you are specifying as the new primary must be running.
- If you attempt to delete the cluster, this action removes all of the nodes from the cluster hierarchy except the primary service node and primary registry node. You must add additional nodes to the Siebel Gateway cluster before it can function as a cluster again.
- Before you can roll back the installed Siebel CRM deployment to a prior release, the primary service node and registry node for the Siebel Gateway cluster must be located on the same host computer. Also validate that the `applicationcontainer\webapps\gateway.properties` file for this primary service node (and for no other node) includes the setting Primed=True. This primary service node must be operational in order to serve as the primary Siebel Gateway node after rollback. Otherwise, cluster modification might fail and the Siebel Gateway service might go down. See also *Requirements for Uninstalling Siebel CRM*.

To change the primary node for the Siebel Gateway service

1. In the Siebel Deployment screen in Siebel Management Console, navigate to the Hierarchy - Gateway Service Cluster view.

   For more information about this screen, see *Siebel Management Console Screens*. Under Gateway Service, the primary service node within this cluster is shown with bold text.
2. Select the node that you want to designate as the primary service node.
3. Click the Primary button at the top of the view.

   A dialog box prompts you to confirm that you want to designate this node as the primary service node for the cluster.

4. Click OK to confirm this change.

   An alert box indicates that the change has been made.
5. Click OK again.

   The Siebel Deployment screen appears again, which includes the cluster for which you changed the service node.

To change the primary node for the Siebel Gateway registry

1. In the Siebel Deployment screen in Siebel Management Console, navigate to the Hierarchy - Gateway Registry Cluster view.

   For more information about this screen, see *Siebel Management Console Screens*. Under Gateway Registry, the primary registry node within this cluster is shown with bold text.
2. Select the node that you want to designate as the primary registry node.
3. Click the Primary button at the top of the view.

   A dialog box prompts you to confirm that you want to designate this node as the primary registry node for the cluster.
4. Click OK to confirm this change.

   An alert box indicates that the change has been made.
5. Click OK again.

   The Siebel Deployment screen appears again, which includes the cluster for which you changed the registry node.

Related Topics

Siebel Management Console Screens

Restoring the Siebel Gateway Cluster Topology

Requirements for Uninstalling Siebel CRM

Restoring the Siebel Gateway Cluster Topology

As of Siebel CRM 20.4 Update, your Siebel Gateway cluster topology could get out of sync with the Siebel Application Interface in rare situations, leading to an inability to connect to a Siebel Gateway. This problem can occur only when you have taken down the primary Siebel Gateway service node and removed it from a cluster. In order to prevent a situation where no valid Siebel Gateway connection information is available following an update installation, an upgrade sequence for Siebel CRM 20.x Update installations is provided that resolves the described problem.

The file cgclientstore.dat, located in `SIEBEL_AI_ROOT\applicationcontainer\webapps` on the Siebel Application Interface, is a runtime file that is created when the Siebel Gateway cluster is first created. In normal operation, this file contains the names of all of the Siebel Gateway service nodes (Tomcat instances) that are currently running, and provides connection information for a running instance in response to requests. These three nodes would include, for example:

- The primary Siebel Gateway service node, from which the Siebel Gateway was bootstrapped. For example, this node might be GTWY1.
- Additional Siebel Gateway service nodes that were added as part of a cluster. For example, these nodes might be GTWY2 and GTWY3.

The application.properties file on the Siebel Application Interface includes the following entry, where GTWY1 represents the primary Siebel Gateway service node. The CGHostURI parameter setting provides a backup source for connection information for a running Siebel Gateway service node, in case cgclientstore.dat is empty. The following is an example value for CGHostURI, allowing connection to GTWY1:

```
CGHostURI=https://GTWY1.us.oracle.com:4431/siebel/v1.0/cloudgateway
```

Assume, for this troubleshooting scenario, that the customer has taken down GTWY1 and removed it from the cluster. In that case, CGHostURI indicates an invalid Siebel Gateway service node. When you update to a new Siebel CRM 20.x Update release, you must follow the upgrade sequence here to avoid a case where cgclientstore.dat is empty and CGHostURI points to an invalid node.

1. Install Siebel CRM 20.x Update for all Siebel Gateway nodes before you update any other modules.
2. Stop the Siebel Gateway service instances that start automatically following installation.
3. Start the Siebel Gateway registry instances.
4. Start the Siebel Gateway service instances.
5. Install Siebel CRM 20.x Update for all Siebel Application Interface instances, Siebel Servers, and so on.

When you perform the update in this sequence, then cgclientstore.dat is repopulated with connection information for running instances of Siebel Gateway service node, in response to requests. For more information about starting and stopping the Siebel Gateway, see *Starting the Siebel Gateway*. See also the information about starting and shutting down a Siebel CRM deployment, located in *Siebel System Administration Guide* .

This topic is part of *Configuring the Siebel Gateway Cluster*.

Related Topic

Changing the Primary Nodes for a Siebel Gateway Cluster

Related Book

Siebel System Administration Guide

Configuring the Siebel Enterprise Cache

Siebel Enterprise Cache, which is based on Oracle Coherence, provides a caching service for Siebel CRM. For more information about using Oracle Coherence, see product documentation on the Oracle Help Center.

To configure the Siebel Enterprise Cache, perform the following tasks:

1. *Creating a Siebel Enterprise Cache Server Profile*
2. *Deploying the Siebel Enterprise Cache Server*
3. *Creating a Siebel Enterprise Cache Client Profile*

Note: Siebel Enterprise Cache supports the Siebel Constraint Engine, which provides an integration with Oracle Advanced Constraint Technology for Siebel Product Configurator. (This integration is available as a developer preview.) The Siebel Constraint Engine is currently the only feature that uses the Siebel Enterprise Cache. For more information about the Siebel Constraint Engine, see *Configuring the Siebel Constraint Engine*.

Note: You must configure SSL security settings the same for both Siebel Enterprise Cache Server and Siebel Enterprise Cache Client.

As of Siebel CRM 19.9 Update, Siebel CRM supports persistence for the caches managed by Siebel Enterprise Cache. For more information, see *About Persistence for Siebel Enterprise Cache*.

For more information about the activities that you can perform in the Siebel Management Console, including viewing configuration log data, see *Supported Activities in Siebel Management Console*.

This task is a step in:

- *Roadmap for Installing Siebel CRM for a New Deployment*
- *Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)*
- *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*

Related Topics

About Configuring Siebel CRM

Running the Siebel Management Console

Configuring the Siebel Constraint Engine

Related Books

Siebel Security Guide

Oracle Coherence documentation

About Persistence for Siebel Enterprise Cache

As of Siebel CRM 19.9 Update, Siebel CRM supports persistence for the caches managed by Siebel Enterprise Cache. You can optionally configure all or any number of your caches to use this feature. When you use cache persistence, the cache data remains intact in cache files. If the Siebel Enterprise Cache server is restarted, it loads the cache from the cache files.

You enable cache persistence in Siebel Management Console by using the Persistence for All Caches and Persistence Directory settings when you configure the Siebel Enterprise Cache Server profile. Settings discussed in this topic are described in *Configuration Settings for a Siebel Enterprise Cache Server Profile*.

For a cache that has been configured to use persistence, the cache data files are located in one of the following locations:

- The home directory of the user account that is running the Siebel Enterprise Cache software on the server.

  The default location is `user_home_dir\coherence\active`. This location is used if you do not specify a custom location using the Persistence Directory setting. Siebel Enterprise Cache creates the subdirectories `coherence\active`, which in turn contain additional subdirectories in which the cache data files are stored for active caches.

- Any other directory location that you specify by using the Persistence Directory setting when you configure the Siebel Enterprise Cache Server profile.

  This location must be local to or available to the server on which you are running Siebel Enterprise Cache Server. Any such directory must already exist and must provide read and write permissions for the user account that is running the Siebel Enterprise Cache software on the server. Siebel Enterprise Cache creates the subdirectories `coherence\active`, which in turn contain additional subdirectories in which the cache data files

are stored for active caches. If you specify the value USER_HOME, specify an invalid location, or do not specify any location, then cache data is stored in the default location instead.

If you specify cache persistence for all caches, then you can optionally disable persistence for any particular caches by unchecking the Persist Cache box for individual caches when you configure the Siebel Enterprise Cache Server profile using Siebel Management Console.

Where you do not specify persistence for all caches or for any particular caches, then this cache data exists in memory only and does not persist in files. In general, it is recommended to use the cache persistence feature, to enhance availability for your data that is managed by Siebel Enterprise Cache and to lessen the impact of a server restart.

You can enable cache persistence for existing caches by removing the Siebel Enterprise Cache Server deployment item, modifying the Siebel Enterprise Cache Server profile to specify cache persistence, and then redeploying the profile.

Related Topics

Configuration Settings for a Siebel Enterprise Cache Server Profile

Creating a Siebel Enterprise Cache Server Profile

This procedure describes how to configure a Siebel Enterprise Cache Server profile. You can create multiple profiles, but you can deploy only one instance of Siebel Enterprise Cache Server in your Siebel deployment. This task is part of *Configuring the Siebel Enterprise Cache*.

Related Topics

Running the Siebel Management Console

Deploying the Siebel Enterprise Cache Server

To create a Siebel Enterprise Cache Server profile

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Profiles in the navigation menu in the left panel, then click Enterprise Cache Server.

   Existing Siebel Enterprise Cache Server profiles are listed, if any.
3. Click the plus sign (+) at the top of the overview section to add a new Siebel Enterprise Cache Server profile, or click the Clone button to clone an existing profile.
4. Specify a name for the profile.
5. Specify additional settings, as shown in the table in *Configuration Settings for a Siebel Enterprise Cache Server Profile*.
6. When you have specified all applicable settings, click Submit to save your changes to the profile.

Configuration Settings for a Siebel Enterprise Cache Server Profile

The following table describes the settings that are requested in the Siebel Management Console for configuring a new Siebel Enterprise Cache Server profile or modifying an existing Siebel Enterprise Cache Server profile. Required fields display an asterisk (*) next to the field label. For most of the options, pointing to the option displays tooltip text that

provides a brief description of the field. Clicking the large plus sign (+) to the right of some options adds a new instance of a configurable item, which is represented in the second column using italics.

Most of the Siebel Enterprise Cache Server settings that you specify here correspond to Oracle Coherence settings. For more information about the Oracle Coherence settings, see Oracle Coherence documentation.

Note: Siebel CRM provides existing configuration settings for Siebel Enterprise Cache Server and Siebel Enterprise Cache Client that work with Siebel Constraint Engine. See also *Configuring the Siebel Constraint Engine*.

Note: You can click the Advanced button next to the Tango Coherence Override or Cache Configuration heading to edit the XML directly. You can use this as an alternative to specifying values for all of the individual fields in these sections.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Log Level	Basic Information	Specify the log level. Select one of the following options: Fatal, Error, Warning, Debug, Trace, Information, All
Security Profile	Basic Information	Specify the security profile that the Siebel Enterprise Cache Server uses to secure any cache operations.
Setup Coherence Server SSL	Tango Coherence Override > Coherence Server SSL	Check this option to enable SSL security settings for Siebel Enterprise Cache Server. **Note:** You must configure SSL security settings the same for both Siebel Enterprise Cache Server and Siebel Enterprise Cache Client.
Key Store	Tango Coherence Override > Coherence Server SSL This option appears if you checked the option Setup Coherence Server SSL.	Provide the location of the keystore file.
Key Store Password	Tango Coherence Override > Coherence Server SSL This option appears if you checked the option Setup Coherence Server SSL.	Provide the password for the keystore file.
Private Key Password	Tango Coherence Override > Coherence Server SSL This option appears if you checked the option Setup Coherence Server SSL.	Provide the private key password.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Key Store Type	Tango Coherence Override > Coherence Server SSL This option appears if you checked the option Setup Coherence Server SSL.	Specify the type of keystore instance you are using, such as a JKS file.
Cache Server TLS Port	Tango Coherence Override > Coherence Server SSL	Specify the TLS port that will be used to access the cache via socket APIs.
Cluster Name	Tango Coherence Override	Provide the Siebel Enterprise Cache Server cluster name, such as SiebelEnterpriseCacheCluster. **Note:** Although Oracle Coherence clusters are not currently used by Siebel Enterprise Cache, it is strongly recommended to specify a cluster name that is unique within your topology. Doing so can help you avoid possible issues where other instances of Oracle Coherence exist in the same network. See also the information about specifying a cluster's name, in *Coherence Developer's Guide*.
Persistence for All Caches	Cache Configuration	Specify whether you plan to use persistence for your caches. • If you specify this option, then you can optionally specify the directory in which cache data will be stored, and you can use persistence for individual caches. • If you do not specify this option, then you cannot use cache persistence. This feature is available as of Siebel CRM 19.9 Update. See also the Persistence Directory and Persist Cache settings. For more information, see *About Persistence for Siebel Enterprise Cache*.
Persistence Directory	Cache Configuration	Provide the location in which the cache data will be stored, if you specified Persistence for All Caches. If you do not provide this value, then cache data is stored in the default location, according to your operating system. For more information, see *About Persistence for Siebel Enterprise Cache*.
Cache Name	Cache Configuration > Cache Scheme Map > Cache Name	Specify the name of this cache.
Scheme Name	Cache Configuration > Cache Scheme Map > Cache Name	Specify the scheme name for this cache.
Service Name	Cache Configuration > Proxy Scheme	Specifies the name of the service.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Maximum Thread Count	Cache Configuration > Proxy Scheme	Specifies the minimum number of daemon threads. Usage of daemon threads varies for different service types. If the value is zero or negative, then the service does not use daemon threads and all relevant tasks are performed on the service thread. Furthermore, if the value is negative, then tasks are performed on the caller's thread where possible. Valid values are integers greater or equal to the Minimum Thread Count value. Default value: 75
Minimum Thread Count	Cache Configuration > Proxy Scheme	Specifies the minimum number of daemon threads. Usage of daemon threads varies for different service types. If the value is zero or negative, then the service does not use daemon threads and all relevant tasks are performed on the service thread. Furthermore, if the value is negative, then tasks are performed on the caller's thread where possible. Valid values are integers less than or equal to the Maximum Thread Count value. Default value: 10
Cache Server Host	Cache Configuration > Proxy Scheme	Provide the Siebel Enterprise Cache Server host name.
Port	Cache Configuration > Proxy Scheme	Provide the Siebel Enterprise Cache Server service port. Default value: 9099
Enable Cache Service Proxy	Cache Configuration > Proxy Scheme	Check this option to enable cache service proxy. If this option is disabled, then clients will not be able to access any proxied caches.
Auto Start Extended Service	Cache Configuration > Proxy Scheme	Check this option to automatically start this service at a cluster node.
Distributed Scheme	Cache Configuration > Scheme Configuration > Distributed Scheme	Specify the scheme name for a distributed scheme.
Type	Cache Configuration > Scheme Configuration > Distributed Scheme	Specify the type of distributed scheme. Specify one of the following: • Reference Scheme • Backup Scheme

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Distributed Reference Scheme	Cache Configuration > Scheme Configuration > Distributed Scheme This option appears if you selected Reference Scheme as the distributed scheme type.	Specify the scheme name that is configured in the distributed scheme section. It should be different from the scheme name provided in the Scheme Name field.
Service Name	Cache Configuration > Scheme Configuration > Distributed Scheme This option appears if you selected Backup Scheme as the distributed scheme type.	Specify the name of the service that will manage caches created from this scheme. This name must be unique.
Auto Start Distributed Service	Cache Configuration > Scheme Configuration > Distributed Scheme This option appears if you selected Backup Scheme as the distributed scheme type.	Check this option to automatically start the cache services associated with this cache scheme at a cluster node.
Backup Scheme Configuration	Cache Configuration > Scheme Configuration > Distributed Scheme This option appears if you selected Backup Scheme as the distributed scheme type.	Specify the scheme name already created in the Local Scheme section.
Persist Cache	Cache Configuration > Scheme Configuration > Distributed Scheme	Specify whether you want to use persistence for this cache. This option is available only when the global setting Persistence for All Caches is specified. In that case, persistence is configured by default for all caches, and you can disable persistence for individual caches by unchecking this option. For more information, see *About Persistence for Siebel Enterprise Cache*.
Local Scheme Name	Cache Configuration > Local Scheme Configuration > Local Scheme Name	Specify the scheme name of the local scheme.
Eviction Policy	Cache Configuration > Local Scheme Configuration > Local Scheme Name	Specify the type of eviction policy to use. Specify one of the following: • **Least Recently Used (LRU).** Chooses which objects to evict based on how recently they were last used, evicting those that were not accessed for the longest period first. • **Least Frequently Used (LFU).** Chooses which objects to evict based on how often they are being accessed, evicting those that are accessed least frequently first.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
		• **Hybrid.** Chooses which objects to evict based on the combination (weighted score) of how often and how recently they were accessed, evicting those that are accessed least frequently and those that were not accessed for the longest period first.
Maximum Cache Size	Cache Configuration > Local Scheme Configuration > Local Scheme Name	Specify the maximum number of units that can be placed in the cache before pruning occurs. Default value: 10
Cache Unit Calculator	Cache Configuration > Local Scheme Configuration > Local Scheme Name	Specify the type of cache unit calculator. The cache unit calculator determines the cost, in units, of a given object. Specify one of the following: • Binary • Fixed
Cache Unit Factor	Cache Configuration > Local Scheme Configuration > Local Scheme Name	Specifies the factor by which the units (low units and high units) are adjusted. Using a cache unit calculator, for example, the factor of 1048576 could be used to count megabytes instead of bytes.
Cache Expiry	Cache Configuration > Local Scheme Configuration > Local Scheme Name	Specifies the amount of time from the last update that entries are kept by the cache before being marked as expired.

Deploying the Siebel Enterprise Cache Server

This procedure describes how to deploy the Siebel Enterprise Cache Server. You can deploy only one instance of Siebel Enterprise Cache Server in your Siebel deployment. This task is part of *Configuring the Siebel Enterprise Cache*.

This task is required for new installations, where you choose to use the Siebel Enterprise Cache. It is also required for the migration installation case, because this module is new in the current release and must be installed as a new installation.

> **Note:** After deployment, the Siebel Enterprise Cache Server profile is in a read-write state. You can update configuration settings and redeploy the profile to propagate the updates to the Siebel Enterprise Cache Server.

Related Topics

About Configuring Siebel CRM

Running the Siebel Management Console

Creating a Siebel Enterprise Cache Server Profile

To deploy the Siebel Enterprise Cache Server

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Siebel Deployment in the navigation menu in the left panel.
3. Above the hierarchical display of deployment items in the overview area, click the plus sign (+) and then select Enterprise Cache Server to add a new instance to your Siebel deployment.

   Siebel Enterprise Cache must already have been installed.
4. For Host Name:HTTPS Port, specify the host name and HTTPS redirect port for this instance of Siebel Enterprise Cache Server. You specified this HTTPS redirect port during Siebel Enterprise Cache installation.
5. For Profile, select the profile to use for this deployment of Siebel Enterprise Cache Server.

   You created this profile in *Creating a Siebel Enterprise Cache Server Profile*.
6. For Action, specify whether you will deploy this Siebel Enterprise Cache Server or stage it for later deployment:
   - If you want to stage this Siebel Enterprise Cache Server for later deployment, then click Staging.
   - If you want to deploy this Siebel Enterprise Cache Server to your Siebel deployment, then click Deploy.
7. For Enterprise Cache Server Agent Node Name, specify the name of this Siebel Enterprise Cache Server node.
8. For Enterprise Cache Server Agent Description, specify an optional description of this Siebel Enterprise Cache Server node.
9. To continue, click Submit. Otherwise, click Cancel.

   After the configuration has been submitted, the state of this Siebel Enterprise Cache Server deployment item changes to one of the following states, based on your selection in Step 6: Staging or Deployment in Progress.
   - If the deployment completes successfully, then the state changes to Deployed. The Siebel Enterprise Cache starts automatically.
   - If the deployment fails, then the state changes to Deployment Failed.
   - For a deployment in the Staging state, you can deploy it by either clicking the Deploy icon or by setting the Action to Deploy and resubmitting the deployment.
10. (Optional) View log data about this Siebel Enterprise Cache Server deployment.

Creating a Siebel Enterprise Cache Client Profile

This procedure describes how to configure a Siebel Enterprise Cache Client profile. You can create multiple profiles. This task is part of *Configuring the Siebel Enterprise Cache*.

> **Note:** Unlike most other types of profiles that you configure using Siebel Management Console, you configure but do not a deploy a Siebel Enterprise Cache Client profile. Instead, you specify a defined profile of this type when you configure a Siebel CRM feature that uses the Siebel Enterprise Cache. The Siebel Constraint Engine is currently the only feature that uses the Siebel Enterprise Cache.

Related Topics

Running the Siebel Management Console

Creating a Siebel Enterprise Cache Client Profile

Configuring the Siebel Constraint Engine

To create a Siebel Enterprise Cache Client profile

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Profiles in the navigation menu in the left panel, then click Enterprise Cache Client.

   Existing Siebel Enterprise Cache Client profiles are listed, if any.
3. Click the plus sign (+) at the top of the overview section to add a new Siebel Enterprise Cache Client profile, or click the Clone button to clone an existing profile.
4. Specify a name for the profile.
5. Specify additional settings, as shown in the table in *Configuration Settings for a Siebel Enterprise Cache Client Profile*.
6. When you have specified all applicable settings, click Submit to save your changes to the profile.

Note: After you create the Siebel Enterprise Cache Client profile, the profile is in a read-write state. You can update configuration settings and save the profile. If you do so, then, to propagate the updates, you might also need to redeploy any dependent deployed entity (such as Siebel Constraint Engine).

Configuration Settings for a Siebel Enterprise Cache Client Profile

The following table describes the settings that are requested in the Siebel Management Console for configuring a new Siebel Enterprise Cache Client profile or modifying an existing Siebel Enterprise Cache Client profile. Required fields display an asterisk (*) next to the field label. For most of the options, pointing to the option displays tooltip text that provides a brief description of the field.

Most of the Siebel Enterprise Cache Client settings that you specify here correspond to Oracle Coherence settings. For more information about Oracle Coherence settings, see Oracle Coherence documentation.

Note: Siebel CRM provides existing configuration settings for Siebel Enterprise Cache Server and Siebel Enterprise Cache Client that work with Siebel Constraint Engine. See also *Configuring the Siebel Constraint Engine*.

Note: You can click the Advanced button next to the Cache Client Configuration heading to edit the XML directly. You can use this as an alternative to specifying values for all of the individual fields in this section.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Log Level	Basic Information	Specify the log level. Select one of the following options: Fatal, Error, Warning, Debug, Trace, Information, All
Cache Name	Cache Client Configuration > Cache Scheme Map	Specify the name of the cache that is used in the currently deployed Siebel Enterprise Cache Server.
Scheme Name	Cache Client Configuration > Cache Scheme Map	Specify the cache scheme name.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Setup Coherence Client SSL	Cache Client Configuration > Coherence Client SSL	Check this option to enable SSL security settings for Siebel Enterprise Cache Client. **Note:** You must configure SSL security settings the same for both Siebel Enterprise Cache Server and Siebel Enterprise Cache Client.
Key Store	Cache Client Configuration > Coherence Client SSL This option appears if you checked the option Setup Coherence Client SSL.	Provide the location of the keystore file.
Key Store Password	Cache Client Configuration > Coherence Client SSL This option appears if you checked the option Setup Coherence Client SSL.	Provide the private key password for the keystore file.
Key Store Type	Cache Client Configuration > Coherence Client SSL This option appears if you checked the option Setup Coherence Client SSL.	Specify the type of keystore instance you are using, such as a JKS file.
Scheme Name	Cache Client Configuration > Scheme Parameters	Specify the cache scheme name.
Service Name	Cache Client Configuration > Scheme Parameters	Specify the name of the service that will manage caches created from this scheme.
Cache Server Host	Cache Client Configuration > TCP Configuration	Specify the Siebel Enterprise Cache Server host name.
Port	Cache Client Configuration > TCP Configuration	Specify the Siebel Enterprise Cache Server service port.
Heartbeat Interval	Cache Client Configuration > Outgoing Message Handling	Specify the interval (in seconds) between ping requests. A ping request is used to ensure the integrity of the connection. Default: 30s
Heartbeat Timeout	Cache Client Configuration > Outgoing Message Handling	Specify the maximum amount of time (in seconds) to wait for a response to a ping request before declaring the underlying connection unusable. Default: 30s
Request Timeout	Cache Client Configuration > Outgoing Message Handling	Specify the maximum amount of time (in seconds) to wait for a response message before

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
		declaring the underlying connection unusable. Default: 30s

Configuring the Siebel Constraint Engine

The Siebel Constraint Engine provides an integration with Oracle Advanced Constraint Technology for Siebel Product Configurator. This integration is available as a developer preview. For more information about the role of the Siebel Constraint Engine in the product configuration process, see *Siebel Product Administration Guide* . For more information about using Oracle Advanced Constraint Technology, see product documentation on the Oracle Help Center.

To configure the Siebel Constraint Engine, perform the following tasks:

1. *Creating a Siebel Constraint Engine Profile*
2. *Deploying the Siebel Constraint Engine*

Note: Before you can configure and deploy an installed instance of the Siebel Constraint Engine, you must have already configured and deployed a Siebel Enterprise Cache Server profile and created a Siebel Enterprise Cache Client profile, as described in *Configuring the Siebel Enterprise Cache*.

For more information about the activities that you can perform in the Siebel Management Console, including viewing configuration log data, see *Supported Activities in Siebel Management Console*.

This task is a step in:

- *Roadmap for Installing Siebel CRM for a New Deployment*
- *Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)*
- *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*

Related Topics

About Configuring Siebel CRM

Running the Siebel Management Console

Configuring the Siebel Enterprise Cache

Related Books

Siebel Security Guide

Siebel Product Administration Guide

Siebel Performance Tuning Guide

Oracle Advanced Constraint Technology documentation

Creating a Siebel Constraint Engine Profile

This procedure describes how to configure a Siebel Constraint Engine profile. You can create multiple profiles. As of Siebel CRM 19.2 Update, you can deploy multiple instances of Siebel Constraint Engine in your Siebel deployment, to support least-loaded load balancing. This task is part of *Configuring the Siebel Constraint Engine*.

Related Topics

Running the Siebel Management Console

Deploying the Siebel Constraint Engine

To create a Siebel Constraint Engine profile

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Profiles in the navigation menu in the left panel, then click Constraint Engine.

   Existing Siebel Constraint Engine profiles are listed, if any.
3. Click the plus sign (+) at the top of the overview section to add a new Siebel Constraint Engine profile, or click the Clone button to clone an existing profile.
4. Specify a name for the profile.
5. Specify additional settings, as shown in the table in *Configuration Settings for a Siebel Constraint Engine Profile*.
6. When you have specified all applicable settings, click Submit to save your changes to the profile.

Configuration Settings for a Siebel Constraint Engine Profile

The following table lists the settings requested in the Siebel Management Console for configuring the Siebel Constraint Engine profile or modifying an existing Siebel Constraint Engine profile. Required fields display an asterisk (*) next to the field label. For most of the options, pointing to the option displays tooltip text that provides a brief description of the field.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Enterprise Cache Client Profile	Constraint Engine Settings	Specify the Siebel Enterprise Cache Client profile for the Siebel Constraint Engine to use.
Security Profile	Constraint Engine Settings	Specify the name of the security profile that the Siebel Constraint Engine uses to pull authentication information from the Gateway.
Default Log Level	Constraint Engine Settings	Specify the log level. Select one of the following options: Fatal, Error, Warning, Debug, Trace, Information, All

Deploying the Siebel Constraint Engine

This procedure describes how to deploy the Siebel Constraint Engine. As of Siebel CRM 19.2 Update, you can deploy multiple instances of Siebel Constraint Engine in your Siebel deployment, to support least-loaded load balancing. This task is part of *Configuring the Siebel Constraint Engine*.

This task is required for new installations, where you choose to use the Siebel Constraint Engine. It is also required for the migration installation case, because this module is new in the current release and must be installed as a new installation.

> **Note:** After deployment, the Siebel Constraint Engine profile is in a read-write state. You can update configuration settings and redeploy the profile to propagate the updates to the Siebel Constraint Engine. If you update the Siebel Enterprise Cache Client profile, then, to propagate the updates, you might also need to redeploy the Siebel Constraint Engine.

Related Topics

About Configuring Siebel CRM

Running the Siebel Management Console

Creating a Siebel Enterprise Cache Client Profile

Creating a Siebel Constraint Engine Profile

To deploy the Siebel Constraint Engine

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Siebel Deployment in the navigation menu in the left panel.
3. Above the hierarchical display of deployment items in the overview area, click the plus sign (+) and then select Constraint Engine to add a new instance to your Siebel deployment.

   The Siebel Constraint Engine must already have been installed.
4. For Host Name:HTTPS Port, specify the host name and HTTPS redirect port for this instance of Siebel Constraint Engine. You specified this HTTPS redirect port during Siebel Constraint Engine installation.
5. For Profile, select the profile to use for this deployment of Siebel Constraint Engine.

   You created this profile in *Creating a Siebel Constraint Engine Profile*.
6. For Action, specify whether you will deploy this Siebel Constraint Engine or stage it for later deployment:
   - If you want to stage this Siebel Constraint Engine for later deployment, then click Staging.
   - If you want to deploy this Siebel Constraint Engine to your Siebel deployment, then click Deploy.
7. For Deployment Name, specify a deployment name for this installed instance of Siebel Constraint Engine.
8. To continue, click Submit. Otherwise, click Cancel.

   After the configuration has been submitted, the state of this Siebel Constraint Engine deployment item changes to one of the following states, based on your selection in Step 6: Staging or Deployment in Progress.
   - If the deployment completes successfully, then, when you refresh the configuration, the state changes to Deployed. The Siebel Constraint Engine starts automatically.

- If the deployment fails, then the state changes to Deployment Failed.
- For a deployment in the Staging state, you can deploy it by either clicking the Deploy icon or by setting the Action to Deploy and resubmitting the deployment.

9. (Optional) View log data about this Siebel Constraint Engine deployment.

Configuring the Siebel Migration Application

The Siebel Migration application, a Web-based tool for migrating Siebel Repositories and seed data and performing related tasks, is provided with the Siebel Application Interface installation. A variety of configuration options are provided to support different ways of using the Siebel Migration application.

To configure the Siebel Migration application, perform the following tasks:

1. *Creating a Siebel Migration Profile*
2. *Deploying the Siebel Migration Application*

For more information about the activities that you can perform in the Siebel Management Console, including viewing configuration log data, see *Supported Activities in Siebel Management Console*. For more information about the role of the Siebel Migration application in the overall deployment process, see *Siebel Database Upgrade Guide* .

This task is a step in:

- *Roadmap for Installing Siebel CRM for a New Deployment*
- *Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)*
- *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*

Related Topics

About Configuring Siebel CRM

Running the Siebel Management Console

Related Books

Siebel Database Upgrade Guide

Siebel Security Guide

Creating a Siebel Migration Profile

This procedure describes how to configure a Siebel Migration profile. You can create multiple profiles. This task is part of *Configuring the Siebel Migration Application*.

For more information about the activities that you can perform in the Siebel Management Console, including viewing configuration log data, see *Supported Activities in Siebel Management Console*.

Related Topics

Running the Siebel Management Console

Deploying the Siebel Migration Application

To create a Siebel Migration profile

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Profiles in the navigation menu in the left panel, then click Migration.

   Existing Siebel Migration profiles are listed, if any.
3. Click the plus sign (+) at the top of the overview section to add a new Siebel Migration profile, or click the Clone button to clone an existing profile.
4. Specify a name for the profile.
5. Specify additional settings, as shown in the table in *Configuration Settings for a Siebel Migration Profile*.
6. When you have specified all applicable settings, click Submit to save your changes to the profile.

Configuration Settings for a Siebel Migration Profile

The following table lists the settings requested in the Siebel Management Console for configuring the Siebel Migration profile or modifying an existing Siebel Migration profile. Required fields display an asterisk (*) next to the field label. For most of the options, pointing to the option displays tooltip text that provides a brief description of the field.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Host Name	Database Information	Specify the host name for the database.
Port Number	Database Information	Specify the port number of the database.
Table Owner	Database Information	Specify the table owner of the database.
User Name	Database Information	Specify the name of the database user account used to connect to the database server. The account name and password must already exist in the database server.
Password	Database Information	Specify the password of the database user account. The account name and password must already exist in the database server.
RDBMS Platform	Database Information	Specify the RDBMS platform for the Siebel database. The options are: • Oracle Database Enterprise Edition • Microsoft SQL Server • DB2 LUW • DB2 z/OS
Service Name	Database Information This option appears if you selected Oracle Database for the RDBMS platform.	Specify the database service name for an Oracle Database.

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Database Instance	Database Information This option appears if you selected Microsoft SQL Server for the RDBMS platform.	Specify the database instance name for an Microsoft SQL Server database.
Database Name	Database Information This option appears if you selected Microsoft SQL Server or DB2 LUW or DB2 z/OS for the RDBMS platform.	Specify the database name.
Authentication Type	Authentication	Specify the authentication type for the Siebel Migration application. Specify one of the following: • Basic Authentication • Single Sign-On
Authentication Host	Authentication	Specify the Siebel authentication host for authenticating the Siebel Migration application user.
User Specification	Authentication This option appears if you selected Single Sign-On Authentication.	Provide the user specification for SSO authentication.
Assertion Specification	Authentication This option appears if you selected Single Sign-On Authentication.	Provide the assertion specification for SSO authentication.
Identity Provider Logoff URL	Authentication This option appears if you selected Single Sign-On Authentication.	Provide the identity provider logoff URL for SSO authentication.
Parameter Name for Identity Provider Logoff Return URL	Authentication This option appears if you selected Single Sign-On Authentication.	Provide the parameter name for identity provider logoff return URL for SSO authentication.
Log Level	Logging Information	Specify the logging level for the Siebel Migration application. Select one of the following options: Fatal, Error, Debug, Trace

Setting in Siebel Management Console	Section (Under Create Profile)	Comment or Description
Timeout	Other Information	Specify the session timeout in seconds for the Siebel Migration application. Default: 30 (seconds)
Sleep Time	Other Information	Specify the sleep time in seconds for the Siebel Migration application. Default: 15 (seconds)
Siebel Application Name for Data Administration	Other Information	Specify the Siebel application name that needs to be embedded in the Siebel Migration application.
Language	Other Information	Specify the language of the Siebel application that needs to be embedded in the Siebel Migration application.
Migration Package Location	Other Information	As of Siebel CRM 18.8 Update, you can optionally specify a single shared migration package location that supports both synchronous and asynchronous migrations in your source and target environments. **Note:** More information about how this setting is used is provided in *About the Migration Package Location*.

About the Migration Package Location

As of Siebel CRM 18.8 Update, you can optionally specify a single shared migration package location that supports both synchronous and asynchronous migrations in your source and target environments. This Network File System (NFS) path must be accessible to all of the connections that are registered in the Siebel Migration application.

The Migration Package Location setting functions as follows:

- **Synchronous migration.** The Siebel Migration application exports source environment data into a file, copies the file into the specified migration package location, and then imports data from this file into the target environment.

  If you do not use this setting, then the Siebel Migration application uses the Migration File Transfer REST service to transfer the file automatically from the Siebel File System on the source environment into the corresponding location on the target.
- **Asynchronous migration.** The Siebel Migration application exports source environment data into a file and copies the file into the specified migration package location. The customer must start the import process to import data from this file into the target environment.

  If you do not use this setting, then you must copy the file manually from the Siebel File System on the source environment into the corresponding location on the target before you can import the data.

In some environments, restrictions might prevent you from using the Migration Package Location setting to specify a shared migration package location. In such cases, you might be required to use asynchronous migration and to copy the export file manually.

Because the Siebel Migration application uses the Siebel File System (`migration` subdirectory), it is strongly recommended to use different file system locations for the source and target environments, to avoid any file conflicts. For more information, see *Creating the Siebel File System*.

Deploying the Siebel Migration Application

This procedure describes the steps for deploying the Siebel Migration application. This task is part of *Configuring the Siebel Migration Application*.

This task is required for new installations where you choose to use the Siebel Migration application. It is also required for migration installations where you choose to use the Siebel Migration application, because this application is new in Siebel CRM 17.0 and there is no prior configuration to migrate.

In order to use the Siebel Migration application, the Remote component group must be enabled in the source environment and the EAI and Workflow component groups must be enabled in both the source and target environments. The workflow named File Transfer Workflow must be active in both the source and target environments. Synchronize the Siebel Server components on both environments and restart the entire Siebel CRM deployment. Before you execute the migration plan, make sure that the relevant server components are active that the Siebel Migration application uses to perform the migration. For more information about using the Siebel Migration application, see *Siebel Database Upgrade Guide* .

> **Note:** After deployment, the Siebel Migration profile is in a read-write state. You can update configuration settings and redeploy the profile to propagate the updates to the Siebel Migration application.

Related Topics

Running the Siebel Management Console

Creating a Siebel Migration Profile

To deploy the Siebel Migration application

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Siebel Deployment in the navigation menu in the left panel.
3. Above the hierarchical display of deployment items in the overview area, click the plus sign (+) and then select Migration to add a new instance to your Siebel deployment.
4. For Host Name:HTTPS Port, specify the host name and HTTPS redirect port for this instance of Siebel Application Interface. You specified this HTTPS redirect port during Siebel Application Interface installation.
5. For Profile, select the profile to use for this deployment of the Siebel Migration application.

   You created this profile in *Creating a Siebel Migration Profile*.
6. For Action, specify whether you will deploy the Siebel Migration application or stage it for later deployment:
   - If you want to stage the Siebel Migration application for later deployment, then click Staging.
   - If you want to deploy the Siebel Migration application to your Siebel deployment, then click Deploy.
7. For Siebel Migration Name, specify a deployment name for this instance of the Siebel Migration application.

8. For Siebel Migration Description, specify an optional description of this instance of the Siebel Migration application.
9. To continue, click Submit. Otherwise, click Cancel.

   After the configuration has been submitted, the state of this Siebel Migration deployment item changes to one of the following states, based on your selection in Step 6: Staging or Deployment in Progress.

   - If the deployment completes successfully, then, when you refresh the configuration, the state changes to Deployed.
   - If the deployment fails, then the state changes to Deployment Failed.
   - For a deployment in the Staging state, you can deploy it by either clicking the Deploy icon or by setting the Action to Deploy and resubmitting the deployment.
10. (Optional) View log data about this Siebel Migration deployment.

Configuring the Siebel Deployment

As of Siebel CRM 18.7 Update, system administrators can configure server elements in the Siebel CRM deployment by using the Configuration screen in the Siebel Management Console. Administrators can perform activities here that are equivalent to some of the activities that you traditionally perform in the Administration - Server Configuration screen in the Siebel application or using the Server Manager command-line utility. This functionality is provided as an alternative to the traditional methods.

The Configuration screen in the Siebel Management Console supports a subset of the functionality from the Administration - Server Configuration screen. For example, Siebel Management Console does not include the Job Templates feature or, under Enterprises, the Synchronize and System Alerts features.

Siebel System Administration Guide describes the existing server configuration functionality and includes information about relevant configuration settings and operations, some of which also apply to what you can do in the Siebel Management Console.

Related Topics

About Configuring Siebel CRM

Running the Siebel Management Console

Managing the Siebel Deployment

Related Books

Siebel System Administration Guide

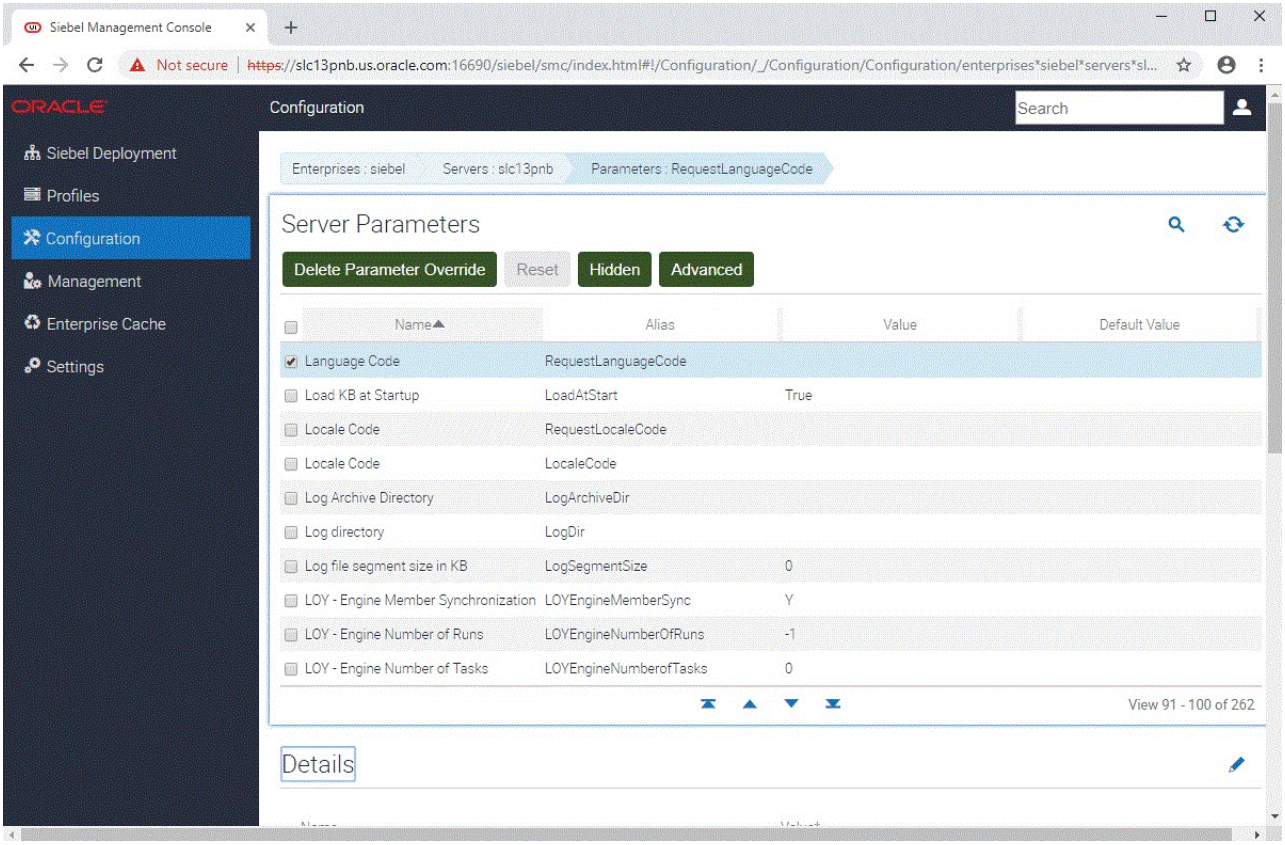
About the Configuration Screen

You can perform activities in the Configuration screen in Siebel Management Console at any time after you complete the required profile configuration and deployment tasks for Siebel deployment elements. The Configuration screen includes views that allow you to configure the Siebel enterprise and its component Siebel Servers, server components, parameters, and so on.

The default view in the Configuration screen identifies the current Siebel enterprise. The navigation bar at the top of each view is a breadcrumb control that lets you navigate within the hierarchical elements of the Siebel enterprise. As shown in the following, you can select Component Definitions, Component Groups, Servers (for configuring a Siebel Server), Profile Configuration (for configuring an enterprise profile), or Parameters (for configuring enterprise parameters). When you have selected one of these options, you can navigate further into the hierarchy, such as to configure parameters for a particular Siebel Server or one of its server components. You can navigate up or down the hierarchy using this navigation bar.

Icons at the top of each view or panel (list or form type) indicate operations that can be performed for the selected element or subelement (for example, Siebel Server parameters), such as to create, delete, or edit an instance of the element, or to query for the element you need. The available options vary by the particular context of the operations you are performing in this screen.

The following figure shows the Configuration screen in Siebel Management Console. You can use this screen to perform configuration tasks for the Siebel Enterprise, Siebel Server, server components, and related areas. The navigation menu is shown at left, which provides access to the Configuration screen and to other functionality of Siebel Management Console.



Activities in the Configuration Screen

The following table lists the primary configurable elements in the Configuration screen in the Siebel Management Console and summarizes some of the available configuration activities.

Configurable Element Under Siebel Enterprise	Available Activities
Component Definitions	Activities for component definitions include creating, deleting, updating, activating, deactivating, or synchronizing a component definition. Child elements: Parameters
Component Groups	Activities for component groups include creating, deleting, updating, enabling, or disabling a component group. Child elements: Component Definitions, Parameters
Servers	Activities for Siebel Servers include configuring parameters and other elements for a Siebel Server. Child elements: Components, Events, Parameters
Profile Configuration	Activities for enterprise profiles (named subsystems) include creating, deleting, updating, or configuring parameters for a profile. Child elements: Parameters
Parameters	Activities for enterprise parameters include configuring parameters or deleting parameter overrides.

Configuring an Element in the Configuration Screen

To configure Siebel enterprise elements in the Configuration screen in the Siebel Management Console, perform the following general steps.

To configure an element in the Configuration screen

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Configuration in the navigation menu in the left panel.
3. For the current Siebel enterprise, navigate to one of the options available from the navigation bar.

   The options under the Siebel enterprise are shown in the table in *Activities in the Configuration Screen*.
4. Select, create, delete, or modify an item (such as an enterprise parameter, or a Siebel Server), as appropriate.
5. Optionally, from the navigation bar, navigate to one of the available child elements for the selected item (such as parameters for a Siebel Server), and perform configuration operations.

   The available child elements depend on the item selected in Step 4, and are also shown in the table in *Activities in the Configuration Screen*.
6. Select, create, delete, or modify an item, as appropriate.

Managing the Siebel Deployment

As of Siebel CRM 18.12 Update, system administrators can manage server modules in the Siebel CRM deployment by using the Management screen in the Siebel Management Console. Administrators can perform activities here that are equivalent to some of the activities that you traditionally perform in the Administration - Server Management screen in the Siebel application or using the Server Manager command-line utility. This functionality is provided as an alternative to the traditional methods.

The Management screen in the Siebel Management Console supports a subset of the functionality from the Administration - Server Management screen.

Siebel System Administration Guide describes the existing server management functionality and includes information about relevant management settings and operations, some of which also apply to what you can do in the Siebel Management Console.

Related Topics

About Configuring Siebel CRM

Running the Siebel Management Console

Configuring the Siebel Deployment

Related Books

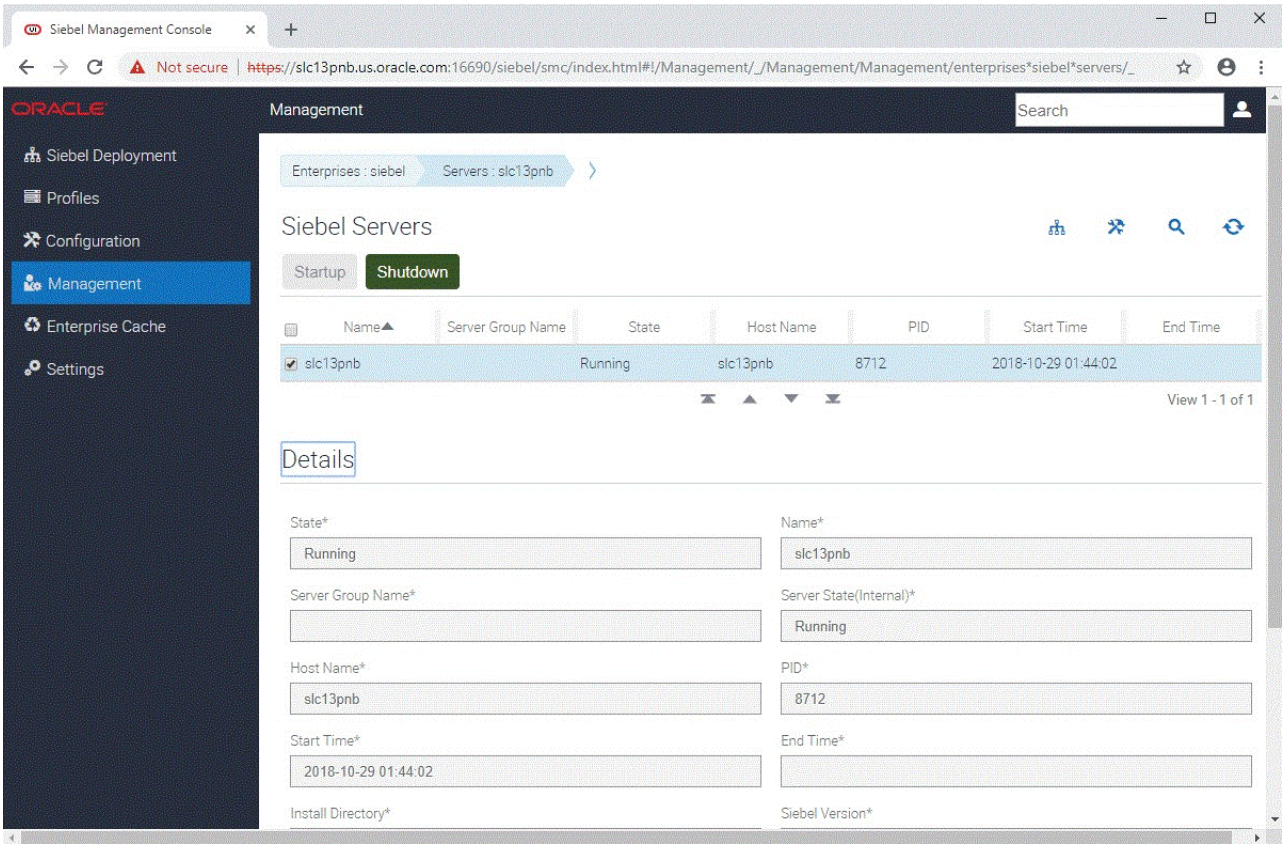
Siebel System Administration Guide

About the Management Screen

You can perform activities in the Management screen in Siebel Management Console at any time after you complete the required profile configuration and deployment tasks for Siebel deployment elements. The Management screen includes views that allow you to manage the Siebel Servers, server components, sessions, and tasks in your Siebel deployment.

The default view in the Management screen identifies the current Siebel enterprise. The navigation bar at the top of each view is a breadcrumb control that lets you navigate within the hierarchical elements of the Siebel enterprise. You can select Servers, Components, Sessions, or Tasks. When you have selected one of these options, you can navigate further into the hierarchy, such as to manage components for a particular Siebel Server, manage tasks for a particular component, and so on. You can navigate up or down the hierarchy using this navigation bar.

The following figure shows the Management screen in Siebel Management Console. The navigation menu is shown at left, which provides access to the Management screen and to other functionality of Siebel Management Console.



Activities in the Management Screen

The following table lists some of the management activities that you can perform using the Management screen in the Siebel Management Console.

Manageable Element Under Siebel Enterprise	Management Activity
Servers	You can do the following: • Review the status of any items in the hierarchy (component groups, components, logs, sessions, statistics, and tasks). • Stop and start a Siebel Server. • Stop, start, pause, and resume a component of the current Siebel Server. • Stop, pause, and resume a task of the current component and Siebel Server.
Components	Review the status of any component running in the Siebel Enterprise.
Sessions	Review the status of any session running in the Siebel Enterprise.
Tasks	Review the status of any task running in the Siebel Enterprise.

Manageable Element Under Siebel Enterprise	Management Activity

Managing an Element in the Management Screen

To manage Siebel enterprise elements in the Management screen in the Siebel Management Console, perform the following general steps. The specific actions you can take depend on the navigation context, and are shown in the table in *Activities in the Management Screen*.

To manage an element in the Management screen

1. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
2. Click Management in the navigation menu in the left panel.
3. For the current Siebel enterprise, use the navigation bar at the top of the screen to navigate to one of the available options: Servers, Components, Sessions, or Tasks. Where appropriate, select a specific instance, such as a specific Siebel Server.
4. Perform one of the actions noted in the table in *Activities in the Management Screen*, whether for the Siebel Server or for a child element of either the Enterprise or the Siebel Server.

Accessibility for Siebel Management Console

As of Siebel CRM 18.7 Update, Siebel Management Console supports enhanced accessibility.

Siebel Management Console Keyboard Shortcuts

The keyboard shortcuts (hotkeys) for regions within the Siebel Management Console user interface are shown in the following table.

Region	Keyboard Shortcut
Navigation menu	Alt+N
Toolbar or view overview level	Alt+O
List view	Alt+L
Details or form view	Alt+C
Navigation bar (breadcrumb)	Alt+M
Global search	Alt+G

Region	Keyboard Shortcut
Copyright	Alt+R

A user can also use various keyboard keys to move the focus through the user interface controls in Siebel Management Console, and to execute functions, as appropriate for the control that has the focus. Try these keys in various contexts to fully understand their actions. The tables that follow provide details about keyboard navigation options in some of these contexts.

For information about accessibility for Siebel CRM applications, see *Siebel Fundamentals Guide* .

Navigation Menu Keyboard Shortcuts

In the Navigation menu (accessible using Alt+N), the following keyboard shortcuts are available, as shown in the following table.

Keyboard Shortcut	Action
Forward Arrow	When focus is on a closed node, opens the node; focus does not move. When focus is on an open node, moves focus to the first child node. When focus is on an end node, does nothing.
Back Arrow	When focus is on an open node, closes the node. When focus is on a child node that is also either an end node or a closed node, moves focus to its parent node. When focus is on a root node that is also either an end node or a closed node, does nothing.
Down Arrow	Moves focus to the next node that is focusable without opening or closing a node.
Up Arrow	Moves focus to the previous node that is focusable without opening or closing a node.
End	Moves focus to the last node in the tree that is focusable without opening a node.
Home	Moves focus to the first node in the tree without opening or closing a node.
Enter	Selects the node. When focus is on a parent node, opens or closes the node.

View Overview Keyboard Shortcuts

In the toolbar or view overview section (accessible using Alt+O), the following keyboard shortcuts are available, as shown in the following table.

Keyboard Shortcut	Action
Forward Arrow Back Arrow	Moves focus between the view title and action buttons.
Enter or Space	Selects the action button with the focus.

List View Keyboard Shortcuts

In a list view (accessible using Alt+L), the following keyboard shortcuts are available, as shown in the following table.

Keyboard Shortcut	Action
Nonquery mode	
Forward Arrow	Moves focus to the cell after the current one (if it exists).
Back Arrow	Moves focus to the cell before the current one (if it exists).
Down Arrow	Moves focus to cell below the current one (if it exists).
Up Arrow	Moves focus to cell above the current one (if it exists).
Page Down	Views the next page (if it exists) and moves focus to form title.
Page Up	Views the previous page (if it exists) and moves focus to form title.
End	Views the last page (if not on last page) and moves focus to form title.
Home	View the first page (if not on first page) and moves focus to form title.
Enter	When focus is on the header, sorts by the column and moves focus to form title.
Tab / Shift+Tab	Moves focus to page status and other areas.
Query mode	
Tab	Moves focus to next focusable control.
Shift+Tab	Moves focus to previous focusable control.
Enter	When focus is on a query operator, opens the dropdown list.

Keyboard Shortcut	Action
	When focus is in a dropdown list, selects the item and moves focus back to query operator. When focus is on input, executes the query.
Escape	When focus is on query option dropdown list, closes it.
Down Arrow	When focus is in dropdown list, moves focus to next item.
Up Arrow	When focus is in dropdown list, moves focus to previous item.
Page Down	View next page (if it exists) and moves focus to form title.
Page Up	View previous page (if it exists) and moves focus to form title.
End	When focus is in dropdown list, moves focus to the last item.
Home	When focus is in dropdown list, moves focus to the first item.

Form View Keyboard Shortcuts

In a details or form view (accessible using Alt+C), the following keyboard shortcuts are available, as shown in the following table.

Keyboard Shortcut	Action
Tab	Moves focus to next item (session, control, error message, buttons, page navigation tabs).
Shift+Tab	Moves focus to previous item (session, control, error message, buttons, page navigation tabs).
Forward Arrow or Back Arrow	When focused on page navigation tabs, moves focus to the next or previous page. When focus is on a radio button, selects the next or previous button. When focus is on a list-box, selects the option.
Space or Enter	When focus is on section header (toggle), expands or collapses the section. When focus is on buttons (Add, Clone, Delete, Previous, Next, Submit, Cancel, Advanced), activates the button. When focus is on a checkbox, checks or unchecks the box. When focus is on a list-box, activates the dropdown list or confirms selected option.

Navigation Bar (Breadcrumb) Keyboard Shortcuts

In the breadcrumb or navigation bar (accessible using Alt+M), which is found in the Configuration screen, the following keyboard shortcuts are available, as shown in the following table.

Keyboard Shortcut	Action
Forward Arrow	When focus is in breadcrumb bar, moves focus to the next item, wrapping from the last to the first if necessary. When focus is in a dropdown menu and on a menu item that has a submenu, moves focus to its first item. When focus is in a dropdown menu and on a menu item that does not have a submenu, moves focus to the next item in the breadcrumb bar.
Back Arrow	When focus is in the breadcrumb bar, moves focus to the previous item, wrapping from the last to the first if necessary. When focus is in a submenu of an item in a dropdown menu, closes the submenu and returns focus to the parent menu item. When focus is in a submenu of a breadcrumb item, moves focus to the previous item in the breadcrumb bar.
Down Arrow	When focus is in the breadcrumb bar, moves focus to the first item in the dropdown menu. When focus is in a dropdown menu, moves focus to the next item, wrapping from the last to the first if necessary.
Up Arrow	When focus is in the breadcrumb bar, moves focus to the last item in the dropdown menu. When focus is in a dropdown menu, moves focus to the previous item, wrapping from the first to the first if necessary.
Space or Enter	When focus is in the breadcrumb bar, moves focus to the corresponding configuration view.
Tab or Shift+Tab	Moves focus to other elements of the page.

Global Search Keyboard Shortcuts

In the global search (accessible using Alt+G), the following keyboard shortcuts are available, as shown in the following table.

Keyboard Shortcut	Action
Down Arrow	When dropdown list is opened and focus is in input, moves focus to the first item in dropdown list. When dropdown list is opened and focus is inside dropdown list, moves focus to next item.
Up Arrow	When dropdown list is opened and focus is inside dropdown list, moves focus to previous item.

Keyboard Shortcut	Action
End	When dropdown list is opened and focus is inside dropdown list, moves focus to the last item.
Home	When dropdown list is opened and focus is inside dropdown list, moves focus to the first item.
Enter or Space	When dropdown list is opened and focus is inside dropdown list, navigates to the focused item.
Escape	When dropdown list is opened and focus is inside dropdown list, closes the dropdown list and moves focus to input.

Related Topics

About Configuring Siebel CRM

Starting the Siebel Management Console

Overview of Siebel Management Console

Supported Activities in Siebel Management Console

Configuring the Siebel Deployment

Managing the Siebel Deployment

5 Installing the Siebel Database on the RDBMS

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). This chapter includes the following topics:

- *About Database Updates for Siebel CRM 20.x Update*
- *About Installing the Siebel Database*
- *Creating Table Owner and Administrator Accounts*
- *Installing the Stored Procedures and User-Defined Functions on IBM DB2*
- *Starting the Siebel Database Configuration Wizard*
- *Installing the Siebel Database*
- *Activating License Keys*
- *Setting Up Your Environment to Support Global Time Zone*
- *Populating the Siebel File System*
- *Importing a Siebel Repository Manually into the Siebel Database*

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*.

About Database Updates for Siebel CRM 20.x Update

Tasks related to the Siebel database vary, according to your installation case, corresponding to the roadmap topics identified in the following paragraphs.

- After performing a new installation of Siebel CRM 17.0 plus Siebel CRM 20.x Update, you use the Database Configuration Wizard task to install a new Siebel database, as described in this chapter. This database contains schema changes, Siebel Repository content, and seed data for Siebel CRM functionality through the current release. The PostInstallDBSetup utility does not have to run this case. The postinstallation task mentioned later in this topic does not apply. See also *Roadmap for Installing Siebel CRM for a New Deployment*.
- After performing a migration installation of Siebel CRM 17.0 plus Siebel CRM 20.x Update, you run Incremental Repository Merge (IRM) to apply the latest database updates. The PostInstallDBSetup utility does not have to run this case. The postinstallation task mentioned later in this topic does not apply. See also *Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)*.
- After performing a new installation of Siebel CRM 17.0 plus Siebel CRM 20.x Update in a full upgrade installation case, you perform a full database upgrade to apply the latest database updates. The PostInstallDBSetup utility does not have to run this case. The postinstallation task mentioned later in this topic does not apply. See also *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*.

- When you install Siebel CRM 20.x Update for an existing deployment of Siebel CRM 17.x or later, the installer runs the Post Install DB Setup (PostInstallDBSetup) utility, as described later in this topic. This utility must run for each subsequent update release you install. You can also optionally run the RepositoryUpgrade utility manually, as described later in this topic. See also *Roadmap for Installing Siebel CRM 20.x Update for an Existing Installation of Siebel CRM 17.x or Later*.

About the PostInstallDBSetup Utility

As of Siebel CRM 20.3 Update, the PostInstallDBSetup utility runs whenever you run the Siebel CRM 20.x Update installer to update the installed Siebel Server and the Database Configuration Utilities. Where applicable, you run PostInstallDBSetup on every Siebel database (that is, both development and runtime repository environments).

PostInstallDBSetup runs several processes to ensure that the customer database schema, manifest, and seed data is up to date for the current monthly update release. The utility might run certain other utilities: as of Siebel CRM 20.8 Update, this guide no longer calls out utilities that are run by PostInstallDBSetup. Some utilities that were formerly required for customers to run are now included in the functionality of PostInstallDBSetup.

You must provide valid values to PostInstallDBSetup. If PostInstallDBSetup does not complete correctly or if you provide invalid values, then the utility exits. Where applicable, you must then run PostInstallDBSetup manually, as described in *Siebel Database Upgrade Guide* .

In the new installation or migration installation cases, or if you want to run the utility manually later, then (as of Siebel CRM 20.7 Update) you can check a box to skip running the utility as part of installation. (After installing a new Siebel database or running Incremental Repository Merge at the latest Siebel CRM 20.x Update release level, you do not need to run PostInstallDBSetup manually.)

About the RepositoryUpgrade Utility

When PostInstallDBSetup is executed, it runs the RepositoryUpgrade utility automatically to apply required framework changes. Optionally, after installing Siebel CRM 20.x Update for an existing deployment of Siebel CRM 17.x or later and allowing PostInstallDBSetup to run, you can also run the RepositoryUpgrade utility manually on the development database to install new features since Siebel CRM 17.0 that require repository updates. This task does not apply in any other installation cases or if you already ran the utility for a prior release. For more information about running this utility and about the new features that require repository updates, see *Siebel CRM Update Guide and Release Notes* on My Oracle Support for your Siebel CRM 20.x Update release.

Related Topics

Installation-Related Changes for Siebel CRM 20.x Update

About Installing the Siebel Database

About Siebel CRM Releases

About Installing in Upgrade Environments

Related Books

Siebel Database Upgrade Guide

Siebel CRM Update Guide and Release Notes on My Oracle Support

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* and *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*.

The *Siebel database* on the RDBMS stores the data used by Siebel CRM. 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* (also 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 for a new deployment 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 modules, see *Installing Siebel CRM Server Modules*.

> **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, typically with the first Siebel Server that you install.

For a new deployment, you must install a Siebel Server and the Database Configuration Utilities on the same computer as the Siebel Gateway. For more information, see *Requirements for Siebel Gateway Authentication*. For information about the tasks that you must perform in the RDBMS before you install the Database Configuration Utilities, see *Configuring the RDBMS*.

The Database Configuration Utilities installed software has no runtime role in managing database operations for users running Siebel CRM. 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* .

> **Note:** After performing a new database installation, you must activate the license keys, as described in *Activating License Keys*. Then run the Siebel Management Console as described in this book.

This topic includes the following information:

- *About Installing a Database*
- *About Adding a Language to an Existing Database*

Related Topics

Installation-Related Changes for Siebel CRM 17.0

Installing Siebel CRM Server Modules

Configuring Siebel CRM Server Modules

About Database Updates for Siebel CRM 20.x Update

Activating License Keys

Configuring the RDBMS

Related Books

Siebel Database Upgrade Guide

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*.

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 CRM, 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 CRM with Multiple Languages*.

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*.

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 CRM, and you must enable individual LOVs associated with the language. For more information, see:

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

This topic is part of *About Installing the Siebel Database*.

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 *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 applications as the Siebel administrator. For information about changing the password for this account, see *Siebel Security Guide* . The password for the SADMIN account must not exceed 18 characters.

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 Application Interface. For more information, see *Requirements for Configuring Anonymous Users for the Siebel Application Interface*.

This topic contains the following information:

- *Running the grantusr.sql Script on an Oracle Database*
- *Running the grantusr.sql Script on IBM DB2*
- *Running the grantusr.sql Script on Microsoft SQL Server*

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*.

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\dbsrvr\oracle\grantusr.sql
   ```

   Note: You must specify the full path to the grantusr.sql file.

2. Enter the tablespace name listed in *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 must 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*.

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 *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*.

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*.

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\SIEBPROC\DBSRVR_OS
   ```

   where:

   - `DBSRVR_ROOT` is the Database Configuration Utilities module subdirectory of your Siebel CRM 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*.

Starting the Siebel Database Configuration Wizard

Use the following procedure to start the Siebel Database Configuration Wizard. You start the wizard by using a Windows shortcut or from the command line. For UNIX-based procedures, see *Siebel Installation Guide for UNIX* .

Starting the Siebel Database Configuration Wizard Using a Windows Shortcut

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

To start the Siebel Database Configuration Wizard using a Windows shortcut

1. On a computer where you installed Siebel Enterprise Server software, choose Start, All Programs, Siebel Enterprise Server 17.0, and then Database Server Configuration. Go to the next step.
2. Respond to each prompt in the Database Configuration Wizard, then click Next to go to the next screen, or to complete the configuration.

   See *Installing the Siebel Database*.

   Note: You can click Cancel to exit the Database Configuration Wizard before you complete the configuration.

   After you specify or confirm all of your selections, the summary screen appears.
3. 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 Database Configuration Wizard without completing configuration.
4. After configuration is complete, click Exit to exit the Database 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 the Siebel Database Configuration Wizard at the Command Line

Use the following procedure to start the Siebel Database Configuration Wizard at the command line on Windows.

To start the Siebel Database Configuration Wizard at the command line

1. Open a DOS command window.
2. Navigate to the `config` subdirectory within your `SIEBEL_ROOT` directory. For Siebel CRM 17.0:

   Navigate to a directory like the following, on the Siebel Server computer: `C:\Siebel\config`.

To start the Database 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.

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

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

In this command, install_path is the installation path for the installed Siebel CRM module, such as in the following example command:

```
C:\Siebel\config\config.bat -mode dbsrvr
```

Additional command-line options that you can use are:

- **-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.

For an unattended configuration, go to the next step. Otherwise, go to Step 5.

4. For an unattended configuration, you save and later execute a response file for configuring the Siebel database. Do one of the following:

- If you are generating a response file, then go to Step 5 and continue the configuration process. In the summary screen, choose the option to save a configuration file, then cancel the Database Configuration Wizard. Then, to perform the unattended configuration of the same module, 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 dbsrvr -responseFile file_name
```

where:

- install_path is the installation path for the installed Siebel CRM module (see example in Step 3)
- file_name is the name of the response file that you are executing

> **Note:** For a command like this, 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.

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

5. Respond to each prompt in the Database Configuration Wizard, then click Next to go to the next screen or to complete the configuration.

See *Installing the Siebel Database*.

> **Note:** You can click Cancel to exit the Database 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 Database Configuration Wizard without completing configuration.
7. After configuration is complete, click Exit to exit the Database Configuration Wizard.

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

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 Siebel CRM for a New Deployment*. (Also perform all of the other applicable tasks in this chapter.)

> **Note:** As of Siebel CRM 17.0, installing a new database creates an ODBC data source name that allows you to use database authentication when you run Siebel Management Console, as described in *Configuring Siebel CRM Server Modules*.

To install Siebel database components

1. Review *About Installing the Siebel Database* and *Starting the Siebel Database Configuration Wizard*.
2. Start the Database Configuration Wizard, as described in *Starting the Siebel Database Configuration Wizard*. Choose Start, All Programs, Siebel Enterprise Server 17.0, and then Database Server Configuration.
3. Specify the following, and click Next:

   Siebel Server Directory. Specify the existing installation location of Siebel Server. This location is also referred to as the `SIEBSRVR_ROOT` directory. For example, this directory might be `c:\Siebel\siebsrvr`.

   Siebel Database Server Directory. Specify the existing installation location of Siebel Database Configuration Utilities. This location is also referred to as the `DBSRVR_ROOT` directory. For example, this directory might be `c:\Siebel\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 15. You must have included the language when you installed the Siebel Server and Database Configuration Utilities. For more information, see *Installing and Deploying Siebel CRM with Multiple Languages*.

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*.

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

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

Oracle SQLNet Connect String. Provide the name of the Oracle schema qualifier or table owner name and the SQLNet connect string for Oracle Database.

10. (Microsoft SQL Server only) Specify the following, and click Next:

Microsoft SQL Server Host Name. Provide the host name of the computer running Microsoft SQL Server. This value must not be left empty.

Microsoft SQL Server Database Name. Provide the name of the Microsoft SQL Server database.

11. (IBM DB2 or IBM DB2 for z/OS only) Specify the following, and click Next:

DB2 Instance Path. Provide the IBM DB2 client installation path, such as `/home/sblqa1`, where `sblqa1` contains the `sqllib` subdirectory.

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

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

IBM DB2 Database Alias. Provide the name of the IBM DB2 UDB schema qualifier or table owner name and the database alias for IBM DB2.

13. (IBM DB2 for z/OS only) Specify the following, and click Next:

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

IBM DB2 Database Alias. Provide the name of the IBM DB2 UDB schema qualifier or table owner name and the database alias for IBM DB2.

Current IBM DB2 SQL ID / Group Name. Provide the name of the IBM DB2 UDB SQL ID or group name.

14. 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*.

15. 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 17.

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 17. (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.

16. (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:** For a new database install case, this screen does not appear. 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*.

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

17. Specify the following, and click Next:

Database User Name. Type the user name of the Siebel administrator; for example, `sadmin`.

Database Password. Type the password for the Siebel administrator.

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

18. 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.

19. (Oracle Database only) On the Register External Oracle DB ODBC Driver screen, specify this option if you will use the Siebel Connector for Oracle Applications to exchange data with your back office system, and your back office system stores data in an Oracle Database.
20. (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.)
21. (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.)
22. (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.
23. (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.

    The license keys for Siebel CRM base applications must be activated using the License Key Activation utility, as described in *Activating License Keys*.
24. (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.
25. Specify the following, and click Next:

    Security Group ID / Grantee. Type the name for your security group. Specify `SSE_ROLE`.
26. 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 `SIEBSRVR_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 $SiebelRoot/siebsrvr/
bin/master_<process>.ucf. Would you like to deploy the process you configured to
the database now or later?
```

> **Note:** Check the *Siebel CRM Update Guide and 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.

27. 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\siebupg.exe /m master_operation.ucf
    ```

    For the purposes of this procedure, operation is either *install* or *install_lang*.
28. 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 27, 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 27, 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.
29. After the Siebel Upgrade Wizard has finished running, click Exit to exit the Database Configuration Wizard.

Related Topics

About Installing the Siebel Database

Verifying Installation for the Siebel Database

Troubleshooting Installation for the Siebel Database

Activating License Keys

License keys for Siebel CRM base applications that are provided in seed data in the Siebel database, or that were provided in prior releases, are inactive by default. License keys entered by customers for previous releases are unchanged. The License Key Activation utility is provided for activating or deactivating the license keys that you require. You run this utility to add any additional license keys after installing a new Siebel database, running Incremental Repository Merge (for migration installations), or completing a full database upgrade.

You can find license key information for Siebel CRM at Oracle's license codes site. For the Siebel license keys, see

http://licensecodes.oracle.com/siebel.html

The License Key Activation utility is supported on all operating systems and databases for Siebel CRM.

This task is a step in *Roadmap for Installing Siebel CRM for a New Deployment*.

To start the License Key Activation utility

1. On the computer where you installed Siebel Server, navigate to the following location:

   ```
   SIEBSRVR_ROOT\bin
   ```

2. Run the following program, according to your operating system:
   - Microsoft Windows: licensekeymodule.bat
   - UNIX: licensekeymodule.sh
3. Enter valid data for the following fields:
   - **Siebel Server Location.** The installation path for this Siebel Server.
   - **ODBC DSN.** The ODBC data source for the Siebel database.
   - **Table Owner.** The table owner for the Siebel database.
   - **Username.** The user name for logging into the Siebel database.
   - **Password.** The password for this user.
   - **DB Platform.** The RDBMS platform, either ORACLE, DB2UDB, DB2390, or MSSQL.
   - **Log folder.** The folder in which the log file licenseKeys.log is created. This log file shows database connection information for troubleshooting purposes, and lists all of the license keys that were activated or deactivated in each session.
4. Click Login.

   The license key activation screen appears, which lists Siebel CRM license keys.
5. For each license key module whose activation status you want to change, click the Active Flag check box to activate or deactivate this license key.
6. To apply your selections to the Siebel database, click Apply. Or, to reset any changes you have made in this screen, or since you last clicked Apply, click Reset.

> **CAUTION:** After you have clicked Apply, the Reset button does not reset activation settings to their original state. However, you can change the activation status and click Apply again.

7. To exit the utility, click the X in the top right corner.

Related Books

Siebel Database Upgrade Guide

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:** Oracle does not support new Siebel CRM deployments that do not use UTC. For existing deployments, if you do not want to deploy with UTC or are not ready to do so, then you must review the documentation for this feature, which is primarily located in *Siebel Global Deployment Guide* .

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.

Related Books

Siebel Global Deployment Guide

Implementing Siebel Business Applications on DB2 for z/OS

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*.

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*, 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 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, you can adjust the commit frequency by including the command-line option `/z size_of_array` when the repimexp.exe utility is invoked. The transaction will not be committed until all of the data in the array has been inserted. (However, if the table contains fewer records than the specified array size would allow, then the transaction is committed after all of the data has been inserted.)

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 CRM 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* and *Installing and Deploying Siebel CRM with Multiple Languages*.

To import the Siebel Repository

1. Start the Database Configuration Wizard, as described in *Installing the Siebel Database*. 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 *Importing a Siebel Repository Manually into the Siebel Database*.

   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 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*. 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 `sieb17_DSN`, and click Next.

   For more information about the ODBC data source, see *Planning RDBMS Installation and Configuration*.
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, `sadmin` for Oracle Database and IBM DB2, or `SADMIN` 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.

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\siebsrvr\bin\siebupg.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

Verifying Installation for the Siebel Database

Troubleshooting Installation for the Siebel Database

Related Books

Using Siebel Tools

Siebel Database Upgrade Guide

6 Additional Postinstallation and Configuration Tasks

Additional Postinstallation and Configuration Tasks

This chapter describes some additional tasks that you might have to perform to complete configuring Siebel CRM. It includes the following topics:

- *Starting the Siebel Gateway*
- *Stopping and Starting the Siebel Application Container*
- *Starting the Siebel Server Service*
- *Preparing to Run Siebel Server Components*
- *Customizing the Application Container for Siebel Application Interface*
- *Installing and Deploying Siebel CRM with Multiple Languages*
- *Configuring Support for CalDAV or CardDAV Publishing*
- *Inactivating Workflow Processes*

Starting the Siebel Gateway

You must make sure that the Siebel Gateway system service is started when you do any of the following:

- Start any application container for Siebel CRM modules
- Start the Siebel Server system service
- Configure the Security profile
- Create and deploy the Siebel Enterprise profile
- Create and deploy a Siebel Server profile
- Create and deploy a Siebel Application Interface profile
- Create and deploy a Siebel Enterprise Cache Server profile
- Create a Siebel Enterprise Cache Client profile
- Create and deploy a Siebel Constraint Engine profile
- Create and deploy a Siebel Migration profile
- Operate any of the Siebel applications
- Remove the configuration for any of the Siebel CRM modules mentioned. (These are tasks that you might perform when you are uninstalling the software.)

Note: It is recommended that you review the Siebel Gateway log files, which are found in the `SIEBEL_GATEWAY_ROOT\LOG` directory.

To start the Siebel Gateway manually on Windows

1. Navigate to Control Panel, Administrative Tools, and then Services.
2. If the Siebel Gateway Name Server system service is not started, then click Action, and then Start.

> **Note:** For compatibility with prior releases, the actual name of the system service is Siebel Gateway Name Server (in contrast to the current usage of the name Siebel Gateway for the module itself).

Related Topics

Installing Siebel CRM

Starting the Siebel Server Service

Verifying Installation for Siebel CRM

Verifying That the Siebel Gateway Has Started

Stopping and Starting the Siebel Application Container

If it is deemed necessary, then you can stop (shut down) and restart the Siebel application container using the methods in this topic. The application container for Siebel Gateway, Siebel Server (for Configuration Agent), Siebel Application Interface, and any other application container hosting Siebel CRM functionality are automatically started after installation. If application containers are not running, then you can perform the manual tasks listed in the troubleshooting sequence shown in this topic.

As of Siebel CRM 18.8 Update, application containers (Apache Tomcat) provided in installations of Siebel Gateway, Siebel Server (Configuration Agent), and Siebel Application Interface run as a service on Microsoft Windows, while the corresponding system process is named tomcat8.exe. On UNIX operating systems, the system process for Apache Tomcat is named javaw.

Note the following behavior for Microsoft Windows and for UNIX operating systems:

- On Microsoft Windows, when the computer restarts, for each applicable Siebel CRM installation, the Siebel Gateway system service (Siebel Gateway Name Server) starts automatically, followed by the application container for all installed Siebel CRM modules, followed by the Siebel Server system service, if also present.
- On UNIX operating systems, you can configure autostart for application containers. You can also configure autostart for Siebel Gateway or Siebel Server system services. These tasks are described in *Siebel Installation Guide for UNIX* .

> **CAUTION:** If you think you might need to shut down and then restart an application container, then, before you attempt to restart it, you must first check that the application container has shut down completely, for example, by using the Service Control Manager or the Task Manager in Windows. Otherwise, a port conflict failure might impede proper startup of the application container. Sometimes, examining logs might be the only way to indicate the nature of the problem.

Note: Recommendations about whether to install Siebel CRM modules together or separately using the Siebel Enterprise installer are based in part on the fact that modules installed together share the application container. Install modules separately to eliminate such dependencies and maintain availability for your Siebel CRM modules. If the Siebel Gateway and Siebel Server are collocated, then they share the same application container and do not require separate operations to stop or start the application container.

Related Topics

Customizing the Application Container for Siebel Application Interface

Troubleshooting Task Sequence When Siebel Application Containers Are Not Running

When any of the application containers are not running, follow all applicable steps as follows:

1. Stop the application container for the Siebel Application Interface.
2. Stop the Siebel Server system service.
3. Stop the application container for the Siebel Server (Configuration Agent), if the Siebel Gateway and the Siebel Server are not collocated.
4. Stop the application container for the Siebel Gateway.
5. Stop the Siebel Gateway system service.
6. Start the Siebel Gateway system service.
7. Start the application container for the Siebel Gateway.
8. Start the application container for the Siebel Server (Configuration Agent), if the Siebel Gateway and the Siebel Server are not collocated.
9. Start the Siebel Server system service.
10. Start the application container for the Siebel Application Interface.

Stopping the Siebel Application Container

To shut down the application container, do one of the following:

- **Microsoft Windows.** Run the Service Control Manager (services.msc), locate the service named like Apache Tomcat 8.5 SiebelApplicationContainer_OracleHome_BuildNumber, and click the Stop button on the toolbar.

  In the preceding service name, OracleHome is the Oracle home for the Siebel CRM installation (such as SES or SIEBEL_AI) and BuildNumber is the software build number. The service name is automatically defined in this format at the time the service is created.
- **UNIX.** Navigate to the directory `$SIEBEL_HOME/applicationcontainer/bin`, and then execute the command `./shutdown.sh`.

  On UNIX operating systems, the shutdown.sh and startup.sh commands are provided in the following locations. (If the Siebel Gateway and Siebel Server are collocated, then they share the same application container and do not require separate operations to stop or start the application container.)
  - **Siebel Gateway.** `SIEBGTWY_ROOT/applicationcontainer/bin`
  - **Siebel Server.** `SIEBSRVR_ROOT/applicationcontainer/bin`
  - **Siebel Application Interface.** `SIEBEL_AI_ROOT/applicationcontainer/bin`

Starting the Siebel Application Container

To start the application container, do one of the following:

- **Microsoft Windows.** Run the Service Control Manager (services.msc), locate the service named like Apache Tomcat 8.5 SiebelApplicationContainer_OracleHome_BuildNumber, and click the Start button on the toolbar.

  In the preceding service name, OracleHome is the Oracle home for the Siebel CRM installation (such as SES or SIEBEL_AI) and BuildNumber is the software build number. The service name is automatically defined in this format at the time the service is created.

  > **Note:** Where you need to manually start any application container in your Siebel CRM deployment, do so only in the manner described here.

- **UNIX.** Navigate to the directory `$SIEBEL_HOME/applicationcontainer/bin`, and then execute the command `./startup.sh`.

  > **Note:** It is strongly recommended to configure all application containers in your Siebel CRM deployment to start automatically, or else configure none of them to start automatically. For more information, see *Siebel Installation Guide for UNIX* .

Related Topics

Starting the Siebel Gateway

Starting the Siebel Server Service

Verifying Installation for Siebel CRM

Troubleshooting Installation and Configuration for Siebel CRM

Related Books

Siebel System Administration Guide

Starting the Siebel Server Service

After you configure the Siebel Server and anytime you have restarted the server computer, the Siebel Server service starts automatically. If you have stopped this service for any reason, then, in order to run the Siebel Server, you must restart it as described in this topic.

If you are clustering a particular server, then you must stop and start it using the Cluster Administrator, rather than by using the following procedure.

Related Topics

Installing Siebel CRM

Starting the Siebel Gateway

Verifying Installation for Siebel CRM

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 siebelenterprise_siebelserver
   ```

   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 the file `log\siebel.SiebelServerName.log`.

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*
- *Enabling and Disabling Language-Specific Application Object Managers and Adding Languages*
- *Synchronizing Batch Components*
- *Migrating Siebel Enterprise Server and Siebel Server Parameter Settings*
- *Performing Additional Tasks to Configure Siebel Servers*
- *Updating the CRC Checksum Setting*
- *About Installing Additional Siebel Servers for an Existing Siebel Enterprise*

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.

> **Note:** For detailed information about enabling and disabling server component groups, synchronizing batch components, creating server component job definitions, using Siebel 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.

As of Siebel CRM 17.0, some new server components are provided. Also, some components have been removed or are no longer used.

For example, additional customer applications for Siebel Open UI are provided that were previously desupported in Siebel CRM 16.0, but were available for standard interactivity in prior releases. As of Siebel CRM 16.0, the Application Object Managers that in previous release were used for Siebel eSales, Siebel eCustomer, and Siebel eMarketing are now used for new customer applications built for Siebel Open UI.

Customers migrating from earlier releases also must consider which product changes are new to them because they were made in intervening releases. For example, in a prior release, some components moved from existing component groups into a new component group, Disconnected Mobile Synchronization (alias MobileSync). Consequently, if your deployment uses Siebel Mobile disconnected applications or uses Siebel Remote or Siebel Replication Manager, then you must enable the MobileSync component group, if you have not already done so, along with the HandheldSync or HandheldSyncSIS component group.

Product changes of these types introduce changed requirements for enabling server components and for deploying applications. The specific requirements that apply to your deployment depend on the products that you are using. Some requirements apply only for migration installations, and vary based on the Siebel CRM release that you are migrating from or the Siebel CRM version in effect when you first configured the software.

For example, for a new installation, you can enable any component groups using the Siebel Management Console. 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. In some cases, however, you might have to run certain scripts on the Siebel Server to make new products available.

Before performing a migration installation, also review parameter settings for server components affected by product changes, in case you need to reapply custom settings to components that moved, for example, or in case you must reconfigure the Siebel Server.

Several requirements apply to all migrations to Siebel CRM 17.0, as *Additional Tasks for Migration Installations*. For example, you must create the Siebel Application Interface profile and apply it to the installed instance of Siebel Application Interface.

For information about the requirements for particular Siebel CRM products, see product documentation on *Siebel Bookshelf* or elsewhere.

This topic is part of *Preparing to Run Siebel Server Components*.

Related Topics

Additional Tasks for Migration Installations

Enabling and Disabling Language-Specific Application Object Managers and Adding Languages

Related Books

Siebel System Administration Guide

Siebel Mobile Guide: Disconnected

Siebel Remote and Replication Manager Administration Guide

Siebel Database Upgrade Guide

Enabling and Disabling Language-Specific Application Object Managers and Adding Languages

When you installed and configured the Siebel CRM software, you would have included one or more languages, as described in *Installing and Deploying Siebel CRM with Multiple Languages*. 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 Siebel 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 configure the Siebel Server using the Siebel Management Console. 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 Application Interface.

For more information about performing tasks in the Siebel Management Console, see *Running the Siebel Management Console*.

This topic is part of *Preparing to Run Siebel Server Components*.

Related Topics

Installing and Deploying Siebel CRM with Multiple Languages

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*.

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*.

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.

You perform these types of configuration tasks with Siebel 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*.

Related Books

Siebel System Administration Guide

Updating the CRC Checksum Setting

If you are using a security adapter, then you might have to update the value of the CRC Checksum setting after installing Siebel CRM 17.0 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 Checksum setting. 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 Checksum setting.

For more information about specifying the CRC Checksum setting as part of configuring a security profile, see *Configuring a Security Profile*. See also *Siebel Security Guide* .

This topic is part of *Preparing to Run Siebel Server Components*.

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 Application Interface.

Run the Siebel Enterprise Server installer to install each additional Siebel Server on another server computer, and run the Siebel Management Console to configure this Siebel Server.

You can also deploy a new Siebel Server based on an existing configured Siebel Server, using an existing Siebel Server profile you defined in Siebel Management Console.

After configuring a new Siebel Server, if this new Siebel Server adds a new component or language that is not available in any of the existing Siebel Servers, then you must perform corresponding Siebel Application Interface configuration tasks to make the applications on this Siebel Server available for Siebel native load balancing. In addition, you might have to modify the Siebel Application Interface profile for the installed instance.

This topic is part of *Preparing to Run Siebel Server Components*.

Related Topics

Installing Siebel CRM Server Modules

Configuring Siebel CRM Server Modules

Customizing the Application Container for Siebel Application Interface

You can perform various configuration steps to customize the application container (Apache Tomcat) for Siebel Application Interface in your Siebel CRM deployment.

These tasks apply only to the application container for a deployed instance of Siebel Application Interface. They do not apply for the application container for any module that uses URLs for internal purposes only, such as Siebel Gateway or Siebel Server.

> **Note:** For each of the customizations described in this section, you must test your applications and verify that your customizations work as expected before you make these changes in your production systems.

This topic contains the following information:

- *Configuring the Common Logger for Siebel Application Interface*

- *Customizing URLs for Siebel CRM Applications*
- *Modifying the HTTPS Redirect Port or HTTP Port for Siebel Application Interface*

Related Topics

Stopping and Starting the Siebel Application Container

Requirements for Installing and Configuring the Siebel Application Interface

Configuring the Common Logger for Siebel Application Interface

As of Siebel CRM 18.9 Update, you can configure the log level for the Siebel Application Interface common logger, which is used for certain common logging tasks. This log cannot be configured using Siebel Management Console, unlike other types of logging for Siebel Application Interface described in *Configuring the Siebel Application Interface*.

To configure the log level for the common logger, you edit the file log4j2-siebel.xml, which is located in the directory **SIEBEL_AI_ROOT\applicationcontainer\webapps\siebel\WEB-INF**.

Modify only the following line, and no other part of the file. For example, you can change the level from ERROR to INFO. You can use the following values: TRACE, DEBUG, INFO, WARN, ERROR, or FATAL. The default log level configured in the file is ERROR.

```
<logger name="CommonLogger" level="ERROR" additivity="false">
```

> **Note:** Settings such as INFO, DEBUG, or TRACE can exponentially increase the size of the log files, consume a large amount of disk space, and reduce performance of the Siebel Application Interface node. Use these settings only when some investigation is needed.

If you plan to configure the log level for the common logger, it is recommended to do so after you finish configuring Siebel Application Interface using Siebel Management Console. After modifying the log4j2-siebel.xml file, you must restart the application container, as described in *Stopping and Starting the Siebel Application Container*.

Related Topics

Stopping and Starting the Siebel Application Container

Related Books

Siebel System Monitoring and Diagnostics Guide

Customizing URLs for Siebel CRM Applications

As of Siebel CRM 19.6 Update, you can perform various configuration steps to customize the URLs you use for Siebel CRM applications. The steps you perform for this task primarily involve editing files on the application container (Apache Tomcat) for Siebel Application Interface.

The keyword *siebel* is present in the Siebel CRM application URLs as a result of your deploying the siebel.war file on the application container, though it also exists in other configuration contexts. The particular customization you can make is to replace the keyword *siebel* in the Siebel URLs with a name suitable for your organization, such as *myorg*. Perform these steps after configuration and deployment tasks using Siebel Management Console. These steps do not involve renaming the siebel.war file.

The existing URL format is as follows:

```
https://host:port/siebel/app/application/lang
```

You can customize the Siebel Application Interface to use a different keyword, so the format would resemble the following:

```
https://host:port/myorg/app/application/lang
```

An example of a customized URL would be as follows:

```
https://server1:9000/myorg/app/callcenter/enu
```

To customize the URLs for Siebel CRM, use the steps in the procedure that follows.

To customize the URLs for Siebel CRM

1. Log in to the computer where you installed Siebel Application Interface.
2. Stop the application container, as described in *Stopping and Starting the Siebel Application Container*.
3. Navigate to the directory `SIEBEL_AI_ROOT\applicationcontainer\conf`.
4. Back up the server.xml file.
5. Open server.xml for editing, using a suitable text editing tool. For example, on Microsoft Windows you might use Notepad.
6. In server.xml, locate the <Host> tag, and modify this line to include the autoDeploy element, as follows:

   ```
   <Host name="localhost" appBase="webapps"
   unpackWARs="true" autoDeploy="true">
   ```

7. Under this <Host> tag, insert <Context> tags in lines like the following, substituting your preferred keyword for *myorg*:

   ```
   <Context docBase="${catalina.base}/webapps/myorg/" path="/myorg" />
   <Context docBase="${catalina.base}/webapps/ROOT/" path="/" />
   <Context path="/manager" docBase="${catalina.base}/webapps/manager" privileged="true" />
   ```

   If the `webapps` directory on the Application Interface also contains the subdirectories `host-manager`, `docs`, or `examples`, then also add <Context> lines like the following:

   ```
   <Context docBase="${catalina.base}/webapps/host-manager/" path="/host-manager" />
   <Context docBase="${catalina.base}/webapps/docs/" path="/docs" />
   <Context docBase="${catalina.base}/webapps/examples/" path="/examples" />
   ```

8. Save your updates to server.xml.
   Next, you will update any referring links to the affected URLs.
9. Run Siebel Management Console. In the Siebel Application Interface profile, under the REST Inbound Defaults section, update the value for the REST Response Base URL to reflect the URL change. For example, change this URL:

   ```
   https://host:port/siebel/v1.0/
   ```

   as follows:

   ```
   https://host:port/myorg/v1.0/
   ```

   For more information, see *Configuring the Siebel Application Interface*.

10. Modify the re-write.config file. Do the following:
    a. Navigate to the directory `SIEBEL_AI_ROOT\applicationcontainer\webapps\ROOT\WEB-INF`.
    b. Back up the re-write.config file.
    c. Open re-write.config for editing using a suitable text editor, such as Notepad in Windows.
    d. Modify the following line, substituting *siebel* with the new keyword *myorg*, as you did in server.xml. For example, change this line:

       ```
       RewriteRule ^/eai_enu/start.swe?(.*)$ /siebel/app/eai/enu/$1 [L]
       ```

       as follows:

       ```
       RewriteRule ^/eai_enu/start.swe?(.*)$ /myorg/app/eai/enu/$1 [L]
       ```

    e. Make the same change in the lines for all other Siebel languages.
    f. Save your updates to re-write.config.
11. Modify the ResourceSequence.txt file, which is used by the Siebel Migration application. Do the following:
    a. Navigate to the directory `SIEBEL_AI_ROOT\applicationcontainer\webapps\siebel\WEB-INF`. Then back up the ResourceSequence.txt file, if it exists.
    b. If ResourceSequence.txt does not exist, then navigate to `SIEBEL_AI_ROOT\applicationcontainer\webapps`, back up the siebel.war file, and extract ResourceSequence.txt into a directory of your choice (for temporary use).
    c. Open ResourceSequence.txt for editing using a suitable text editor, such as Notepad in Windows.
    d. Modify the following lines, substituting *siebel* with the new keyword *myorg*, as you did in server.xml. For example, change these lines:

       ```
       AuthenticationURISuffix=/siebel/v1.0/service/Authentication%20Service%20For%20Migration/
       AuthenticateUser
       RepoUpgradeURISuffix=/siebel/v1.0/service/describe?searchspec=%5BName%5D%20LIKE%20%27Application
       %20Migration%20Utility%20Service%27
       ```

       as follows:

       ```
       AuthenticationURISuffix=/myorg/v1.0/service/Authentication%20Service%20For%20Migration/
       AuthenticateUser
       RepoUpgradeURISuffix=/myorg/v1.0/service/describe?searchspec=%5BName%5D%20LIKE%20%27Application
       %20Migration%20Utility%20Service%27
       ```

    e. Save your updates to ResourceSequence.txt. Then replace this file in siebel.war.

       When the application container is restarted, the updated version of ResourceSequence.txt is extracted into `SIEBEL_AI_ROOT\applicationcontainer\webapps\siebel\WEB-INF`.
12. Restart the application container, as described in *Stopping and Starting the Siebel Application Container*.
13. Perform the same steps for each instance of Siebel Application Interface in your deployment.

Modifying the HTTPS Redirect Port or HTTP Port for Siebel Application Interface

This topic describes the steps you can take to modify the HTTPS redirect port or HTTP port for a deployed instance of Siebel Application Interface.

To modify the HTTPS redirect port or HTTP port for a deployed instance of Siebel Application Interface

1. Using Siebel Management Console, delete the Application Interface deployment for which you are changing the HTTPS redirect port or HTTP port.

   For more information, see *Removing the Siebel Application Interface Configuration*.
2. Perform Steps 1 through 5 in*Customizing URLs for Siebel CRM Applications*.
3. In server.xml, replace all instances (three) of the HTTPS redirect port or HTTP port that you are changing with the new port number, which must be free.
4. Restart the application container, as described in *Stopping and Starting the Siebel Application Container*.
5. Restart Siebel Management Console.
6. In the Siebel Application Interface profile, under the REST Inbound Defaults section, update the value for the HTTPS redirect port or HTTP port.
7. Deploy the Application Interface profile with the new HTTPS redirect port or HTTP port.
8. Start a Siebel application that uses this port.

Installing and Deploying Siebel CRM with Multiple Languages

Multiple Siebel language packs can be installed and deployed as part of Siebel CRM installation and configuration. Review this topic and related topics when planning multilingual deployments. Language installation is part of the installation procedure for each installable Siebel CRM module. The task of adding and deploying new languages is described for Siebel Server, Siebel Application Interface, Siebel Web Client, and Siebel Tools.

Scenarios for deploying Siebel CRM with more than one language pack are described in *Scenarios for Installing and Deploying Multiple Languages*.

See also *General Requirements for Installing and Configuring Siebel Enterprise Server Modules* and other relevant topics.

For a list of the languages supported by Siebel CRM, see 1513102.1 (Article ID) 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, Siebel Application Interface, Siebel Web Client, or Siebel Tools by using unattended mode (silent mode) only. After you install new languages, you must run the Siebel Management Console and perform the tasks to redeploy the Siebel Server. To do this, you create a new profile or clone the existing profile, delete the Siebel Server deployment item, and then deploy the Siebel Server with the new profile, specifying all of the languages to deploy. Finally, add the new languages to the Siebel Application Interface configuration. See also *Scenarios for Installing and Deploying Multiple Languages* and *Limitations for Installing Additional 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*.

> **Note:** Additional tasks in Siebel Tools might be required in order to fully deploy a language you have added. For more information, see the workspaces administration topics in *Using Siebel Tools* .

This topic contains the following information:

- *About Language Deployment and the Siebel Network Image*
- *About Language Deployment and Migration Installations*
- *About Language Deployment on Siebel Server and Siebel Application Interface*
- *About Language Deployment Tasks Using the Database Configuration Wizard*
- *About Language Deployment for Unshipped Languages*
- *Limitations for Installing Additional Languages*
- *Scenarios for Installing and Deploying Multiple Languages*
- *Installing and Deploying All Required Languages Once*
- *Installing All Required Languages but Deploying Some Languages Later*
- *Installing and Deploying Additional Languages*
- *Importing Locale-Specific Data into the Siebel Repository*

About Language Deployment and the Siebel Network Image

This topic is part of *Installing and Deploying Siebel CRM with Multiple Languages*.

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 CRM. This requirement applies to Siebel CRM 17.0 and to Siebel CRM 20.x Update.

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 *Creating the Siebel Installation Image on the Network*.

About Language Deployment and Migration Installations

This topic is part of *Installing and Deploying Siebel CRM with Multiple Languages*.

For Siebel Enterprise Server, Siebel Application Interface, Siebel Web Client, or Siebel Tools, when you perform a migration installation of Siebel CRM 17.0, 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 more information about the types of Siebel releases, see *About Siebel CRM Releases*.

If you plan to perform a migration installation of Siebel CRM 17.0, 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 Siebel CRM.** The installer for Siebel Enterprise Server and Siebel Application Interface supports 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* and *Installing and Deploying Additional Languages*.
- **Add languages before installing Siebel CRM.** Subject to limitations for your existing installed Siebel CRM server and client software, it might be possible or desirable for you to install new languages before you install Siebel CRM. 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 versions of the *Siebel Installation Guide* for prior releases, see 1461732.1 (Article ID) on My Oracle Support. For the *Siebel Patchset Installation Guide for Siebel CRM* for prior releases, see 1614310.1 (Article ID) on My Oracle Support. For the *Siebel Maintenance Release Guide* for prior releases, see 880452.1 (Article ID) on My Oracle Support for Siebel CRM 8.1.1.x or see 1441523.1 (Article ID) for Siebel CRM 8.2.2.x.

  For example, if your current installation is Siebel CRM 8.1.1.10 on Microsoft Windows, see *Siebel Installation Guide for Microsoft Windows* , version 8.1, Rev. D, and see *Siebel Maintenance Release Guide, Version 8.1.1.10*.

For a list of the languages supported by Siebel CRM, see 1513102.1 (Article ID) 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 17.0. For more information, see *Importing Locale-Specific Data into the Siebel Repository*.

Related Topics

Limitations for Installing Additional Languages

Installing and Deploying Additional Languages

Importing Locale-Specific Data into the Siebel Repository

About Siebel CRM Releases

About Language Deployment on Siebel Server and Siebel Application Interface

This topic is part of *Installing and Deploying Siebel CRM with Multiple Languages*.

When you configure each installed instance of Siebel Server and Siebel Application Interface, 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 Siebel Application Interface:

- 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 Siebel Application Interface, 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

Configuring Siebel CRM Server Modules

Scenarios for Installing and Deploying Multiple Languages

About Language Deployment Tasks Using the Database Configuration Wizard

This topic is part of *Installing and Deploying Siebel CRM with Multiple Languages*.

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

Installing the Siebel Database on the RDBMS

Installing the Siebel Database

Importing a Siebel Repository Manually into the Siebel Database

About Language Deployment for Unshipped Languages

This topic is part of *Installing and Deploying Siebel CRM with Multiple Languages*.

If you are localizing Siebel CRM 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 CRM with Multiple Languages*.

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. However, several limitations apply.

> **Note:** If you plan to perform a migration installation of Siebel CRM, and you also want to add languages to your existing deployment, then you might be able to install the languages before you install the software. For more information, see *About Language Deployment and Migration Installations*.

For Siebel Enterprise Server, Siebel Application Interface, Siebel Web Client, and Siebel Tools, the limitations for installing additional languages are as follows:

- You can install additional languages for existing installations by using the installers of the same version only. For example, 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 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, Siebel Application Interface, Siebel Web Client, or Siebel Tools. For the location of these response files, see *Installing and Deploying Additional Languages*.
- You cannot add languages as part of performing a migration installation. 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 Siebel CRM 20.9 Update, if you have installed it onto Siebel CRM 17.x or later. Reinstall Siebel CRM 20.9 Update after completing the steps to add the languages.

Related Topics

About Language Deployment and Migration Installations

Installing and Deploying Additional Languages

Uninstalling Siebel CRM

Scenarios for Installing and Deploying Multiple Languages

This topic is part of *Installing and Deploying Siebel CRM with Multiple Languages*.

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 of these 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

Installing All Required Languages but Deploying Some Languages Later

Installing and Deploying Additional Languages

Installing and Deploying All Required Languages Once

This topic is part of *Installing and Deploying Siebel CRM with Multiple Languages*.

This scenario is intended for customers who are deploying language packs that were provided with Siebel CRM 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 CRM*. Perform all applicable steps that are documented in more detail in these and other topics. These tasks are also part of the roadmap topics in *Overview of Installing Siebel CRM*.

To deploy multiple languages shipped with Siebel CRM

1. Install Siebel Enterprise Server software for Siebel CRM 17.0 on all of the applicable servers, with all of the languages that you will require for the enterprise.
2. Install Siebel Application Interface for Siebel CRM 17.0 on all of the applicable servers, with all of the languages that you will require for the enterprise.
3. Install Siebel CRM 20.x Update on all of the modules in your Siebel CRM deployment.
4. Install the Siebel database. This task installs seed data for the primary language into the Siebel database.
5. Using the Siebel Management Console, create and deploy the Security profile, the Siebel Gateway profile, and the Siebel Enterprise profile.
6. Create and deploy the Siebel Server profile. During Siebel Server configuration, specify to deploy all of the installed languages.
7. Create and deploy the Siebel Application Interface profile. During Siebel Application Interface configuration, specify to deploy all of the installed languages.
8. 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).

Installing All Required Languages but Deploying Some Languages Later

This topic is part of *Installing and Deploying Siebel CRM with Multiple Languages*.

This scenario is intended for customers who are deploying language packs that were provided with Siebel CRM but who plan to deploy some of these language packs at a later date on particular instances of Siebel Server or Siebel Application Interface. 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* for details for some tasks.

> **Note:** You perform the tasks in this topic in conjunction with topics such as *Installing Siebel CRM*. Perform all applicable steps that are documented in more detail in these and other topics. These tasks are also part of the roadmap topics in *Overview of Installing Siebel CRM*.

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. Compare it with 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*.
    - Install Siebel CRM 17.0 with all of the languages that you will deploy now and at a later date.
    - Install Siebel CRM 20.x Update on all of the modules in your Siebel CRM deployment.
    - When you configure each Siebel Server and Siebel Application Interface, 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).

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. Compare it with 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*. In this case, it is assumed that you did not deploy all of the installed languages.
    - Install Siebel CRM 17.0 with all of the languages that you will deploy now and at a later date.
    - Install Siebel CRM 20.x Update on all of the modules in your Siebel CRM deployment.
    - When you configure each Siebel Server or Siebel Application Interface, 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. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
b. Create a new Siebel Server profile or clone the existing profile.
c. Delete the Siebel Server deployment item.
d. Deploy the Siebel Server with the new profile, specifying all of the languages to deploy.

3. Perform the following for each Siebel Application Interface:

a. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
b. Modify the existing Siebel Application Interface profile to add support for required component-language combinations, as described in *Creating a Siebel Application Interface Profile*.
c. Specify the additional languages to deploy.
d. Save the profile.

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).

Installing and Deploying Additional Languages

This topic is part of *Installing and Deploying Siebel CRM with Multiple Languages*.

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 CRM deployment and existing physical resource allocation. As part of expanding language support, you might also install Siebel CRM modules on new servers that include new language packs.

For an existing installation of Siebel Enterprise Server, Siebel Application Interface, 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 Siebel Management Console, see *Requirements for Installing and Configuring Siebel CRM* 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 CRM in Unattended Mode* and *Installing Siebel Web Clients and Siebel Tools in Unattended Mode*.

> **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 installed Siebel CRM version. Use the file whose name best reflects the version, product, and operating system for each installation you are performing, and modify the file as necessary for your installation task.

- 811x_ses_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 CRM 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 CRM 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 module:

- b_isGatewayInstalled (if Siebel Gateway 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* or *Installing All Required Languages but Deploying Some Languages Later*. In this case, it is assumed that you did not install and deploy all of the languages.
2. Review *Limitations for Installing Additional Languages*.
3. Uninstall Siebel CRM 20.x Update, if you have installed it on top of Siebel CRM 17.x or later, for each applicable installed Siebel CRM 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 CRM 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\17.0.0.0`.

6. Edit the response file, as appropriate for the Siebel CRM module for which you are adding languages.

   For example, for Siebel Enterprise Server modules and Siebel Application Interface, 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 a newly generated file or 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 CRM 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 Siebel CRM is already installed.

   For example, for Siebel Enterprise Server, run a command like the following:

   ```
   setup.bat -silent -responseFile C:\811x_ses_addlang_win.rsp
   ```

   For example, for Siebel Tools, run a command like the following:

   ```
   setup.bat -silent -responseFile C:\811x_tools_addlang_win.rsp
   ```

10. Reinstall Siebel CRM 20.x Update, if you previously uninstalled it in Step 3. Then validate the installation again.
11. For each applicable Siebel Server, when you are ready to deploy the newly installed languages, and any other languages that were not previously deployed, do the following:
    a. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
    b. Create a new Siebel Server profile or clone the existing profile.
    c. Delete the Siebel Server deployment item.
    d. Deploy the Siebel Server with the new profile, specifying all of the languages to deploy.
12. For each applicable Siebel Application Interface, do the following:
    a. Run the Siebel Management Console, as described in *Starting the Siebel Management Console*.
    b. Modify the existing Siebel Application Interface profile to add support for required component-language combinations, as described in *Creating a Siebel Application Interface Profile*.
    c. Specify the additional languages to deploy.
    d. Save the profile.
13. 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).
14. Validate the installation after it has completed.

15. Repeat the previous steps, where applicable, to install and deploy the new languages for each applicable installed Siebel CRM module.

> **Note:** Add the languages for all of the applicable server installations before you add the languages for Siebel Web Client and Siebel Tools, where needed.

Related Topics

Installing Siebel CRM

Installing Siebel CRM in Unattended Mode

Limitations for Installing Additional Languages

Installing and Deploying All Required Languages Once

Installing All Required Languages but Deploying Some Languages Later

Installing the Siebel Web Client

Installing Siebel Tools

Installing Siebel Web Clients and Siebel Tools in Unattended Mode

Verifying and Troubleshooting Your Installation

Requirements for Installing and Configuring Siebel CRM

About Siebel CRM Releases

Importing Locale-Specific Data into the Siebel Repository

This topic is part of *Installing and Deploying Siebel CRM with Multiple Languages*.

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 CRM.

> **Note:** These instructions are provided for use with any releases to which they might apply. They might not apply for any particular Siebel CRM 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 Siebel CRM 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, update the repository and deliver the updates, then restart the Application Object Manager component on the Siebel Server to see the results.

Related Books

Using Siebel Tools

Siebel Global Deployment Guide

Configuring Support for CalDAV or CardDAV Publishing

This topic provides information about configuring your Siebel CRM environment to support CalDAV or CardDAV publishing. CalDAV (Calendaring Extensions to WebDAV) is an internet standard designed to allow users to access and share calendar data on a remote server. CardDAV (vCard Extensions to WebDAV) is a client-server protocol designed to allow users to access and share address book or contact data on a server. These standards allow users to view external contact or calendar information in Siebel applications.

To enable CalDAV or CardDAV for your Siebel CRM deployment, the following requirements apply:

- On the computer or operating system instance where you installed Siebel Application Interface, Transport Layer Security (TLS) must be configured. For more information, see *Siebel Security Guide* .
- On the Siebel Server, the EAI component group must be enabled. For more information, see *Configuring the Siebel Server*. See also *Siebel System Administration Guide* and additional documentation on *Siebel Bookshelf* for Siebel Enterprise Application Integration.
- In the Siebel CRM applications, valid email addresses must be associated with all Employees and Contacts. For each mobile user, the email address defined in Siebel CRM must match the user's email address on the mobile device. For more information, see *Siebel Mobile Guide: Connected* or *Siebel Mobile Guide: Disconnected* . See also *Siebel Applications Administration Guide* .

- Users of mobile devices must set up CalDAV or CardDAV publishing on their devices in order to be able to access calendar or contact data. For more information, see *Siebel Mobile Guide: Connected* or *Siebel Mobile Guide: Disconnected* .
- Additional steps must be performed to enable dynamic mapping for CardDAV. Siebel CRM supports dynamic mapping for CardDAV on mobile devices running supported versions of iOS. CardDAV dynamic mapping defines the mapping between Siebel objects and the CardDAV properties. The Siebel CardDAV Sync module synchronizes the defined entities (address book and contact data) accordingly between a user's mobile device and Siebel CRM applications.

Related Books

Siebel Security Guide

Siebel System Administration Guide

Siebel Mobile Guide: Connected

Siebel Mobile Guide: Disconnected

Siebel Applications Administration Guide

Inactivating Workflow Processes

As of Siebel CRM 20.7 Update, you can run the InactivateWFs.exe utility in development (Design Time Repository or DR) environments to inactivate workflow processes that are no longer required. The utility inactivates workflow processes that have not already been deployed or modified and which are not present in S_WFA_DPLOY_DEF (the old workflow deployment table). The InactivateWFs.exe utility inactivates workflow processess by setting the Inactive flag for the workflow processes to True and removes the corresponding compiled runtime object definition records. You might want to do this task after installing the current Siebel CRM 20.x Update release (and after running PostInstallDBSetup and related utilities). For more information about workflow processes, see *Siebel Business Process Framework: Workflow Guide* .

The following procedure describes how to inactivate workflow processes that are no longer required.

To inactivate workflow processes

1. Run the InactivateWFs.exe utility from the command line using values appropriate to your database. This utility is located in the `siebsrvr\bin` or `Tools\bin` directory. The syntax to use is as follows:

   ```
   InactivateWFs.exe -s <InstallationPath> -t <SiebelTableOwner> -u <TableOwnerUsername> -p <Password> -o
    <ODBCDataSource>
   -d <RDBMSPlatform> -r <RepositoryName> -k <LogDirectory>
   ```

   For example, for Oracle Database:

   ```
   InactivateWFs.exe -s "../ses/siebsrvr" -t SIEBEL -u SIEBEL -p ********** -o SIEBEL -d ORACLE -r "Siebel
    Repository" -k "../ses/siebsrvr/log"
   ```

   For example, for Microsoft SQL Server:

```
InactivateWFs.exe -s "..\ses\siebsrvr" -t dbo -u SIEBEL -p ********** -o Siebel_DSN -d MSSQL -r "Siebel
Repository" -k "..\ses\siebsrvr\log"
```

For example, for DB2390:

```
InactivateWFs.exe -s "../ses/siebsrvr" -t SIEBEL -u SIEBEL -p ********** -o SIEBEL -d DB2390 -r "Siebel
 Repository" -k "../ses/siebsrvr/log"
```

2. Output appears that is similar to the following:

```
Stage 1 of 3 : Setting the Repository Id
Stage 2 of 3 : Find the WF data
Stage 3 of 3 : Delete the run time events
Inactivated Workflows : ../ses/siebsrvr/log/InactiveWFs_20200609_003106\InactivateWFs.out
```

If there are other errors, then review the log file(s) indicated in the error messages, resolve any issues, and then rerun the process.

7 Installing Siebel Web Clients and Siebel Tools

Installing Siebel Web Clients and Siebel Tools

This chapter describes the tasks that you must perform to install Siebel Web Clients and Siebel Tools and to start Siebel applications. Both new installations and migration installations are described. Additional tasks for the client computer are also described. This chapter includes the following topics:

- *About Installing the Siebel Web Client or Siebel Tools*
- *Installing the Siebel Web Client*
- *Installing Siebel Tools*
- *Installing and Using Oracle Database SE2 for the Local Database*
- *Installing Siebel Web Clients and Siebel Tools in Unattended Mode*
- *About Workspaces in Siebel Tools and the Siebel Runtime Repository*
- *Installing Desktop Integration Siebel Agent on Client Computers*
- *Installing Outlook to Siebel Drag and Drop on Client Computers*
- *Siebel Client Deployment Requirements When Using Firewalls or Proxy Servers*
- *Configuring Siebel CRM for Pop-Up Blocker Compatibility*
- *Logging in to Your Siebel Application*
- *Siebel Web Client Shortcuts and Startup Options*

About Installing the Siebel Web Client or Siebel Tools

This chapter describes how to install Siebel Web Clients (for Siebel Mobile Web Clients) and Siebel Tools with specified Siebel language packs. Before installing, review all documented requirements.

> **Note:** Siebel Web Tools is now the preferred alternative to the traditional Siebel Tools client. For more information, see *Using Siebel Tools* .

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 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 either or both of these two client types. (Siebel Developer Web Client installation is covered with the Siebel Mobile Web Client.) See also *Deploying Siebel Open UI* .

For the local database on Siebel Mobile Web Client, you also install Oracle Database SE2. For more information, see *Installing and Using Oracle Database SE2 for the Local Database*.

Note the following about Siebel Web Client and Siebel Tools:

- Each Siebel Web Client is designed to be used within a single Siebel Enterprise by a single local user.
- Each Siebel Tools client is designed to be used within a single Siebel Enterprise by a single local developer user.

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) software that you might need to install on client computers running 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.

You perform migration installations using the same Siebel Web Client and Siebel Tools installers (for Siebel CRM 17.0) 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.

> **Note:** For information about additional tasks and considerations for migration installations, see *Additional Tasks for Migration Installations*.

The language that the installer displays is the one that corresponds to the current regional settings on the installation client computer.

This chapter also includes information about installing additional modules on client computers, for use with any Siebel Web Client.

Siebel Web Client and Siebel Tools Installer Flow

In general, the installer for Siebel Web Client or Siebel Tools 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 CRM software and specified Siebel language packs.
4. (Siebel Mobile Web Client) Installs Oracle Database SE2. For more information, see *Installing and Using Oracle Database SE2 for the Local Database*.
5. Creates Siebel shortcuts.
6. Writes data to installation log files.

Related Topics

Installation-Related Changes for Siebel CRM 20.x Update

Installation-Related Changes for Siebel CRM 17.0

Installing the Siebel Web Client

Installing Siebel Tools

Installing and Using Oracle Database SE2 for the Local Database

Requirements for Installing Siebel Web Clients

Requirements for Installing Siebel Tools

About Siebel CRM Releases

Related Books

Siebel Deployment Planning Guide

Deploying Siebel Open UI

Siebel Remote and Replication Manager Administration Guide

Configuring Siebel Business Applications

Using Siebel Tools

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*
- *Installing the Siebel Web Client as a Migration Installation*

Related Topics

About Installing the Siebel Web Client or Siebel Tools

Installing Siebel Web Clients and Siebel Tools in Unattended Mode

Installing and Using Oracle Database SE2 for the Local Database

Verifying Installation for the Siebel Web Client

Verifying Installation for Oracle Database SE2

Uninstalling Siebel Web Clients or Siebel Tools

Uninstalling Oracle Database XE

Requirements for Installing Siebel Web Clients

Related Books

Siebel Remote and Replication Manager Administration Guide

Installing the Siebel Web Client as a New Installation

Use the following procedure to install the Siebel Web Client as a new installation. 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*.

> **Note:** The Siebel Mobile Web Client installer for Siebel CRM 17.0 also installs Oracle Database XE, which is no longer supported and is replaced by Oracle Database SE2 as of Siebel CRM 20.8 Update. You can uninstall Oracle Database XE after installing Siebel CRM 20.8 Update or later. Do not install the sample database, which is no longer supported as of Siebel CRM 20.8 Update. For more information, see *Installing and Using Oracle Database SE2 for the Local Database*.

This topic is part of *Installing the Siebel Web Client*.

This task is a step in:

- *Roadmap for Installing Siebel CRM for a New Deployment*
- *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*

To install the Siebel Web Client as a new installation

1. Review *About Installing the Siebel Web Client or Siebel Tools*. See also *Installing and Using Oracle Database SE2 for the Local Database*.
2. Uninstall your existing sample database from a previous Siebel CRM release, where applicable.

   > **Note:** The *Siebel Installation Guides* for prior releases of Siebel CRM are available on My Oracle Support, at 1461732.1 (Article ID).

3. In Windows Explorer, navigate to the Siebel image location for Siebel CRM 17.0. 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\17.0.0.0`.
4. To start the Siebel Web Client installer, double-click setup.bat.

   The Siebel Web Client installer displays the Welcome screen.
5. Click Next.

   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 a prior release of Siebel CRM 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\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 installation path requirements, see *File and Directory Naming Conventions*.

For a new installation, 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 CRM 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 CRM with Multiple Languages*.

   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. Do one of the following:
   - For Siebel Mobile Web Client, go to the next step.
   - For Siebel Developer Web Client, go to Step 11.
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 19.

    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 CRM. 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:** Depending on 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:
    - 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 *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\siebfile`) or a mapped drive (for example, `K:\siebelFS`). For more information, see *File and Directory Naming Conventions*. See also *Creating the Siebel File System*.

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 and the name of the Siebel Enterprise to which this Siebel Developer Web Client will connect for administration. Then click Next.

    The Gateway Address is the network name or the IP address of the computer on which the Siebel Gateway is installed. To enter a specific port number, append the Gateway 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* .

18. (Siebel Mobile Web Client only) In the Sample DB Selection screen of the Siebel Web Client installer, do not specify that you want to install the sample database, which is no longer supported. You can optionally specify the path to the installed 32-bit Oracle Database Client. (In any case, also specify this path when you install Siebel CRM 20.8 Update or later.)

    For example, if the Oracle Database Client was installed at a location like `c:\app\client\username\product\12.1.0\client_1`, then you would specify that location during Siebel Mobile Web Client installation.
19. In the Summary screen, review the information presented.

    This screen displays the location where the Siebel Web Client will be installed. 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*.

The Installation Progress screen appears. The Siebel Web Client software is installed into the directory that you specified in Step 7.

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. For more information about these shortcuts, see *Siebel Web Client Shortcuts*.
22. After installing the Siebel Web Client software:
    - Verify the Siebel Web Client installation, as described in *Verifying Installation for the Siebel Web Client*.
    - Install Siebel CRM 20.x Update, as described in *Installing and Uninstalling Siebel CRM 20.x Update*. See also *Installing and Using Oracle Database SE2 for the Local Database*. Then verify the installation again.
    - Perform any additional postinstallation steps, as described in *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. The information applies to both the Siebel Mobile Web Client and the Siebel Developer Web Client.

> **Note:** Use this procedure only when Siebel Web Client for a prior release of Siebel CRM is already installed. Otherwise, you must follow the steps in *Installing the Siebel Web Client as a New Installation* instead.

> **Note:** The Siebel Mobile Web Client installer for Siebel CRM 17.0 also installs Oracle Database XE, which is no longer supported and is replaced by Oracle Database SE2 as of Siebel CRM 20.8 Update. You can uninstall Oracle Database XE after installing Siebel CRM 20.8 Update or later. Do not install the sample database, which is no longer supported as of Siebel CRM 20.8 Update. For more information, see *Installing and Using Oracle Database SE2 for the Local Database*.

During a migration installation, the original Siebel Web Client installation directory is renamed from `OriginalName` to `OriginalName_pre17.0`. For example, if the original installation directory name (OriginalName) was `client_1`, then this directory is renamed to `client_1_pre17.0`. The new Siebel Web Client installation directory is named `OriginalName` , 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*.

This topic is part of *Installing the Siebel Web Client*.

This task is a step in *Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)*.

To install the Siebel Web Client as a migration installation

1. Review *About Installing the Siebel Web Client or Siebel Tools*. See also *Installing and Using Oracle Database SE2 for the Local Database*.
2. Perform any premigration tasks that might be necessary, as noted in *Additional Tasks for Migration Installations*.
3. Exit any Siebel software on the client computer where you are installing the Siebel Web Client.

   > **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. Siebel QuickStart is no longer supported, as of Siebel CRM 16.0.

4. Perform any additional premigration tasks that might be necessary. For example, you might need to upgrade the 32-bit Oracle Database Client version installed on your computer.
5. In Windows Explorer, navigate to the Siebel image location for Siebel CRM 17.0, 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\17.0.0.0`.
6. Before you run the installer to perform the migration installation of the Siebel Web Client, run the following command:

   ```
   module.exe -debug -silent -attachhome ORACLE_HOME_NAME=Oracle_Home_Name
   ORACLE_HOME=Oracle_Home
   ```

   For example, you might enter a command like this, depending on the Oracle home name and on the original installation directory:

   ```
   module.exe -debug -silent -attachhome ORACLE_HOME_NAME=CLIENT_HOME
   ORACLE_HOME=c:\Siebel\Client
   ```

7. To start the Siebel Web Client installer, double-click setup.bat.

   The Siebel Web Client installer displays the Welcome screen.
8. Click Next.

   The Select Installation Task screen appears.
9. To perform a migration installation of Siebel Web Client where an existing prior release 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.
    - Confirm the existing installation location, or select it from the drop-down list.

    For more information about installation path requirements, see *File and Directory Naming Conventions*.
11. (Siebel Mobile Web Client only) In the Sample DB Selection screen of the Siebel Web Client installer, do not specify that you want to install the sample database, which is no longer supported. You can optionally specify the path to the installed 32-bit Oracle Database Client. (In any case, also specify this path when you install Siebel CRM 20.8 Update or later.)

For example, if the Oracle Database Client was installed at a location like `c:\app\client\username\product\12.1.0\client_1`, then you would specify that location during Siebel Mobile Web Client installation.

12. In the Summary screen, review the information presented.

    This screen displays the location where the Siebel Web Client will be installed. 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*.

    The Installation Progress screen appears. The Siebel Web Client software is installed into the directory that you specified in Step 10.

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 Web Client installer. As needed, copy any applicable 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\cfgtoollogs\oui` directory (in the new Siebel Web Client installation).

15. To close the installer, click Close.

    The Siebel Web Client installation is now finished. Siebel application shortcuts are created in the program folder. For more information about these shortcuts, see *Siebel Web Client Shortcuts*.

16. After installing the Siebel Web Client software:

    - Verify the Siebel Web Client installation, as described in *Verifying Installation for the Siebel Web Client*.
    - Install Siebel CRM 20.x Update, as described in *Installing and Uninstalling Siebel CRM 20.x Update*. See also *Installing and Using Oracle Database SE2 for the Local Database*. Then verify the installation again.
    - Perform any additional postinstallation steps, as described in *Additional Postinstallation and Configuration Tasks*. See also *Additional Tasks for Migration Installations*.

17. 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 CRM.

> **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*
- *Installing Siebel Tools as a Migration Installation*

Related Topics

About Installing the Siebel Web Client or Siebel Tools

Installing Siebel Web Clients and Siebel Tools in Unattended Mode

About Workspaces in Siebel Tools and the Siebel Runtime Repository

Verifying Installation for Siebel Tools

Uninstalling Siebel Web Clients or Siebel Tools

Requirements for Installing Siebel Tools

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 17.0.

> **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*.

This topic is part of *Installing Siebel Tools*.

This task is a step in:

- *Roadmap for Installing Siebel CRM for a New Deployment*
- *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*

To install Siebel Tools as a new installation

1. Review *About Installing the Siebel Web Client or Siebel Tools*.
2. In Windows Explorer, navigate to the Siebel image location for Siebel CRM 17.0. 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\17.0.0.0`.

3. To start the Siebel Tools installer, double-click setup.bat.

   The Siebel Tools installer displays the Welcome screen.
4. Click Next.

   The Select Installation Task screen appears. The New Installation task is selected by default.
5. To perform a new installation of Siebel Tools software where no prior release of Siebel CRM is present, click Next.

   The New Installation Details screen appears.
6. 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\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 installation path requirements, see *File and Directory Naming Conventions*.

   For a new installation, the Select Languages screen appears. All of the languages that were included in the Siebel network image for Siebel Tools are available for selection.
7. 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 CRM with Multiple Languages*.
8. In the Database Server screen, select the type of database server that you are using for Siebel CRM. 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
9. In the Database Identification screen, enter the following information, and click Next. Specify information for the database that you specified in Step 8:

   - 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 *Siebel Deployment Planning Worksheet*.

10. 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\siebfile`) or a mapped drive (for example, `K:\siebelFS`). For more information, see *File and Directory Naming Conventions*. See also *Creating the Siebel File System*.

11. 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.
12. In the Enterprise Server Information screen, specify the address of the Siebel Gateway and the name of the Siebel Enterprise to which Siebel Tools will connect for administration. Then click Next.

    The Gateway Address is the network name or the IP address of the computer on which the Siebel Gateway is installed. To enter a specific port number, append the Gateway 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.
13. In the Summary screen, review the information presented.

    This screen displays the location where Siebel Tools will be installed. 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*.

    The Installation Progress screen appears. The Siebel Tools software is installed into the directory that you specified in Step 6.
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.

    Siebel Tools installation is now finished. The Siebel Tools shortcut was created in the program folder.
16. After installing the Siebel Tools software:

    - Verify the Siebel Tools installation, as described in *Verifying Installation for Siebel Tools*.
    - Install Siebel CRM 20.x Update, as described in *Installing and Uninstalling Siebel CRM 20.x Update*. Then verify the installation again.
    - Perform any additional postinstallation steps, as described in *Additional Postinstallation and Configuration Tasks*.

17. 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.

> **Note:** Use this procedure only when Siebel Tools for a prior release of Siebel CRM is already installed. Otherwise, you must follow the steps in *Installing Siebel Tools as a New Installation* instead.

During a migration installation, the original Siebel Tools installation directory is renamed from `OriginalName` to `OriginalName_pre17.0`. For example, if the original installation directory name (`OriginalName`) was `Tools_1`, then this directory is renamed to `Tools_1_pre17.0`. The new Siebel Tools installation directory is named `OriginalName` , such as `Tools_1`. Retain the original installation directory, in case you choose to perform a rollback uninstallation later. For more information, see *Rolling Back Siebel Tools*.

This topic is part of *Installing Siebel Tools*.

This task is a step in *Roadmap for Installing Siebel CRM in a Migration Installation Case (Existing Installation of Siebel CRM 16.x or Earlier)*.

To install Siebel Tools as a migration installation

1. Review *About Installing the Siebel Web Client or Siebel Tools*.
2. Perform any premigration tasks that might be necessary, as noted in *Additional Tasks for Migration Installations*.
3. Exit any Siebel software on the developer client computer where you are installing Siebel Tools.
4. Perform any additional premigration tasks that might be necessary. For example, you might need to upgrade the 32-bit Oracle Database Client version installed on your computer.
5. In Windows Explorer, navigate to the Siebel image location for Siebel CRM 17.0, 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\17.0.0.0`.
6. Before you run the installer to perform the migration installation of Siebel Tools, run the following command:

   ```
   module.exe -debug -silent -attachhome ORACLE_HOME_NAME=Oracle_Home_Name
   ORACLE_HOME=Oracle_Home
   ```

   For example, you might enter a command like this, depending on the Oracle home name and on the original installation directory:

   ```
   module.exe -debug -silent -attachhome ORACLE_HOME_NAME=TOOLS_HOME
   ORACLE_HOME=c:\Siebel\Tools
   ```
7. To start the Siebel Tools installer, double-click setup.bat.

   The Siebel Tools installer displays the Welcome screen.
8. Click Next.

   The Select Installation Task screen appears.

9. To perform a migration installation of Siebel Tools where an existing prior release 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.
    - Confirm the existing installation location, or select it from the drop-down list.

    For more information about installation path requirements, see *File and Directory Naming Conventions*.
11. In the Summary screen, review the information presented.

    This screen displays the location where Siebel Tools will be installed. 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*.

    The Installation Progress screen appears. The Siebel Tools software is installed into the directory that you specified in Step 10.
12. 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.
13. 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 applicable 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\cfgtoollogs\oui` directory (in the new Siebel Tools installation).
14. To close the installer, click Close.

    The Siebel Tools installation is now finished. The Siebel Tools shortcut was created in the program folder.
15. After installing the Siebel Tools software:
    - Verify the Siebel Tools installation, as described in *Verifying Installation for Siebel Tools*.
    - Install Siebel CRM 20.x Update, as described in *Installing and Uninstalling Siebel CRM 20.x Update*. Then verify the installation again.
    - Perform any additional postinstallation steps, as described in *Additional Postinstallation and Configuration Tasks*. See also *Additional Tasks for Migration Installations*.
16. Repeat this procedure on each computer with a Siebel Tools installation to be migrated.

Installing and Using Oracle Database SE2 for the Local Database

As of Siebel CRM 20.8 Update, Oracle Database SE2 is provided as the database platform for the local database for Siebel Mobile Web Client. The client installer for Siebel CRM 20.x Update installs Oracle Database SE2 software for Siebel Web Client (Siebel Mobile Web Client only). Oracle Database XE is no longer supported, and the sample database is no longer provided.

After installation, the local database on each remote client is initialized through the Siebel Remote server. This local database is also called the remote database.

Requirements for Installing and Using Oracle Database SE2

For platform requirements for installing and using Siebel Web Clients, see the Certifications tab on My Oracle Support. See also *Requirements for Installing Siebel Web Clients*. See also the documentation for Oracle Database Standard Edition 2 (Oracle Database SE2) on Oracle Help Center. Oracle Database SE2 applies for Siebel CRM 20.8 Update or later, replacing Oracle Database XE.

- **Generate and extract a new local database.** After installing Siebel CRM 20.8 Update or later for the Siebel CRM server modules, you must run the Generate New Database (GenNewDb) and Database Extract (DbXtract) server components to generate and extract a new local database for your remote users. This database uses Oracle Database SE2. For more information, see *Siebel Remote and Replication Manager Administration Guide* .
- **Download Oracle Database SE2.** To be able to install Oracle Database SE2 on client computers, you must download the associated ZIP file from Oracle and specify the file's location when you install Siebel Web Client (Mobile Web Client) for the Siebel CRM 20.x Update release. The ZIP file, named WINDOWS.X64_193000_db_home.zip, is not distributed directly with Siebel CRM releases. Customers who have licensed Siebel Remote functionality for Siebel CRM must file a service request (SR) with Oracle Global Customer Support, which will provide download instructions and access.

  After downloading this file, place it where it can be accessed by the Siebel Web Client installer for the Siebel CRM 20.x Update release when you are updating a Mobile Web Client installation. In the installer, you specify the location of this file in the field named Oracle SE Image Location.

  Obtaining this ZIP file and installing Oracle Database SE2 is a one-time operation. When you install subsequent Siebel CRM 20.x Update releases, and Oracle Database SE2 at the same version is already installed, then it will not be reinstalled. However, updated versions of Oracle Database SE2 might become available in the future and be required for use with Siebel CRM. For the version of Oracle Database SE2 that is installed and used with Siebel Web Client, see the Certifications tab on My Oracle Support.

  As of Siebel CRM 20.8 Update, Oracle Database SE2 must be installed when you update the Siebel Mobile Web Clients, if it was not installed in a previous update. It is not supported to use an existing installation of Oracle Database SE2 outside of the Siebel installation.
- **Oracle Database Client requirement.** For your users to be able to use Oracle Database SE2 on the client computer, the 32-bit Oracle Database Client must be installed. The Siebel Web Client installer for the Siebel CRM 20.x Update release prompts for the installed location of this database client. This client must have been installed at the location you specified in order for the remote user to be able to initialize and access the local database. In the installer, you specify the location of this installed product in the field named Oracle Client Path.

For example, if the Oracle Database Client was installed at a location like `c:\oracle12CR2\product\product\12.2.0\client_1`, then you would specify that location when you install the Siebel Web Client for Siebel CRM 20.8 Update or later.

- **Administrator privileges required.** Installing Oracle Database SE2 with Siebel Web Client requires administrator privileges on the computer on which you are installing.
- **Memory requirement.** Oracle Database SE2 requires at least 2 GB of RAM on the computer on which you are installing.
- **Postinstallation configuration required.** After installing Oracle Database SE2 for Siebel Web Client, you must perform the following configuration task:

  a. Navigate to `SIEBEL_CLIENT_ROOT\oui\bin`.
  b. Open the file UpdateCFG.bat, using an editor like Notepad.
  c. Modify the file to indicate the configuration file for the particular application you are running, such as uagent.cfg for Siebel Call Center. For example, you might update UpdateCFG.bat as follows to specify the uagent.cfg file:

     ```
     c:\Siebel\Client\jre\bin\java.exe -jar c:\Siebel\Client\oui\jlib\UpdateCFG.jar c:\Siebel\Client\BIN\enu\uagent.cfg false
     ```

  d. Run UpdateCFG.bat.
  e. Repeat steps 3 and 4, as needed, for all applications your users will run in this Siebel Mobile Web Client.
- **Configure automated deployment.** You can optionally configure automated deployment for the Siebel Web Client with Oracle Database SE2, using third-party deployment tools. Your automated deployment, for example, would:

  - Log in to the client computer as a user with administrator privileges.
  - Install the Siebel Web Client along with the ZIP file for Oracle Database SE2, with responses needed for the installation. See also *Installing Siebel Web Clients and Siebel Tools in Unattended Mode*.
  - Update the configuration files as a postinstallation step (run UpdateCFG.bat).
  - Do cleanup such as deleting old files, as needed.
- **Installation logging.** For Oracle Database SE2 installation logging details, see the log files for the Siebel Web Client installation. For more information, see *Verifying Installation for the Siebel Web Client*.
- **Verify installation.** After installing Oracle Database SE2 with the Mobile Web Client, verify your installation, as described in *Verifying Installation for the Siebel Web Client* and *Verifying Installation for Oracle Database SE2*.

About the Data Source for the Local Database

When you install Siebel Mobile Web Client for Siebel CRM 20.8 or later, the LOCAL_SE data source is created, which you use for connections to a local database. The corresponding section of the Siebel application configuration file is [LOCAL_SE].

After the local database has been extracted for the user on the Siebel Remote server, then you initialize this database by logging in using the LOCAL_SE data source, as described in *Siebel Remote and Replication Manager Administration Guide* .

About Migration Installations

Before any migration installation tasks are performed, local database users must synchronize any changes that must be preserved. Oracle Database SE2 must then be installed with Siebel CRM 20.8 or later, and a new local database must be initialized after it has been extracted by Siebel Remote administrators, as with a new installation. A new data source is also created.

About the Local Database for Siebel Mobile Web Client

For information about initializing the local database for Siebel Mobile Web Client through Siebel Remote, see *Siebel Remote and Replication Manager Administration Guide* . The data in each local database is a subset of the server database, as determined by each user's visibility rules.

The user connects to the LOCAL_SE data source to initialize the local database. When logging in to a local database for the first time, the user is 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.

About the Sample Database for Prior Versions of Siebel Mobile Web Client

As of Siebel CRM 20.8 Update, Oracle Database SE2 is used for the local database. Oracle Database XE and the sample database are no longer provided or supported for use with the Siebel Mobile Web Client.

To continue to use the sample database, you must install a Siebel Mobile Web Client for Siebel CRM 20.7 Update or earlier and install the sample database with Oracle Database XE. Do not update this client to any later Siebel CRM 20.x Update release. For details, see the version of the *Siebel Installation Guide* for the operating system you are using for Siebel CRM 20.7 Update or earlier. To install the sample database for Siebel Mobile Web Client in a new or migration installation, see the topic "Installing the Siebel Web Client" and refer to any other relevant information about the sample database or Oracle Database XE. Connect to the SAMPLE_XE data source to log in to this sample database.

Where the sample database has been installed on the local computer at Siebel CRM 20.7 Update or earlier, you can log in and connect to the sample database, using predefined demonstration (demo) users. For example, CCHENG is a demo user for Siebel Call Center. Many other demo users are available in the sample database that illustrate a particular Siebel application as it would appear for a user with certain predefined responsibilities. For more information about these users, see *Siebel Demo Users Reference* on the *Siebel Bookshelf* for Siebel CRM 20.7 Update.

Shortcuts for all demo applications for demo users use the sample database. You can also create demo application shortcuts that specify the sample database and user and password information. For this example, you might define a shortcut like Siebel Call Center Demo - ENU as shown in the following:

```
"C:\Siebel\Client\BIN\siebel.exe" /c CFG_FILE_PATH\uagent.cfg /d sample /u CCHENG /p CCHENG
```

Note that the demo application shortcuts specify predefined demo users using `/u` and `/p` options.

About Uninstalling Oracle Database XE

When you install Siebel CRM 20.8 Update or later, Oracle Database XE is shut down automatically and can no longer be used with Siebel CRM. After installation, you can uninstall Oracle Database XE. For information about uninstalling Oracle Database XE, see *Uninstalling Oracle Database XE*. See also *About Uninstalling Earlier Versions of Siebel CRM*.

Oracle Database XE and the local or sample database are not uninstalled when you uninstall the Siebel Web Client software, in either a full uninstallation or a rollback uninstallation.

> **Note:** For Siebel CRM 20.8 Update or later, performing a rollback or full uninstallation of Siebel Mobile Web Client does not uninstall Oracle Database SE2. If you uninstall Siebel Mobile Web Client and also want to uninstall Oracle Database SE2, see the documentation for this product on Oracle Help Center.

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, or to add languages to an existing installation of the same version. 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 CRM 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*
- *Saving an Installation Response File*
- *Editing an Oracle-Provided Installation Response File*
- *Performing an Installation in Unattended Mode*

Related Topics

Installing and Deploying Additional Languages

Installing the Siebel Web Client

Installing Siebel Tools

Installing and Using Oracle Database SE2 for the Local Database

Verifying Installation for the Siebel Web Client

Verifying Installation for Siebel Tools

Requirements for Installing Siebel Web Clients

Requirements for Installing Siebel Tools

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*, 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*. Unattended installations must meet all of the documented requirements, including those described in *Requirements for Installing Siebel Web Clients* and *Requirements for Installing Siebel Tools*. See also *Installing and Using Oracle Database SE2 for the Local Database*.
- **Validate the installation.** Validate each installation after it has completed, as described in *Verifying Installation for the Siebel Web Client* and *Verifying Installation for Siebel Tools*.

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*
- *Editing an Oracle-Provided Installation Response File*
- *Performing an Installation in Unattended Mode*

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 same version, then do not use this procedure. Instead, follow the procedure in *Editing an Oracle-Provided Installation Response File*.

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* and *Installing Siebel Tools*.
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\clientinstall.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\clientinstall.rsp`). Although the Siebel CRM module is not installed (because you clicked Cancel), this directory contains a subdirectory called `inventory`, which includes information about the product inventory.

   See *Performing an Installation in Unattended Mode* 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*.

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* or prepare an installation response file for adding languages as described in *Editing an Oracle-Provided Installation Response File*.

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*.

To perform an installation in unattended mode

1. (For add language operations only) Uninstall the Siebel CRM 20.x Update or earlier release if you have installed it on top of Siebel CRM 17.0, for each installed Siebel CRM 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 CRM 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 editing it or replacing it with a newly generated file or an edited version of the file.

4. Open a DOS command window.
5. Run a command like the following to run the Siebel Web Client or Siebel Tools installer in unattended mode:

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

   where path_to_installation_response_file is the full path and name of a response file to be executed (for example, `c:\temp\clientinstall.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* and *Verifying Installation for Siebel Tools*. See also *Verifying Installation for Oracle Database SE2*.
7. (For add language operations only) Install or reinstall the latest Siebel CRM 20.x Update release. Then validate the installation again.

About Workspaces in Siebel Tools and the Siebel Runtime Repository

Workspaces in Siebel Tools and Siebel Web Tools provide a developer user with a sandbox in which to make and test changes to repository data. This feature allows multiple developers to work against the same repository objects in the Siebel database. The feature makes sure that a developer's work is isolated from that of other developers making changes to either the same objects or other objects of the application. Repository updates made in the developer's environment can be published and tested without affecting other developers, until all updates are coordinated and published and delivered to the runtime repository for all Siebel Servers and Siebel Mobile Web Clients in test and production environments. For more information, see *Using Siebel Tools* .

As of Siebel CRM 17.0, the Siebel Repository File (SRF) is no longer applicable, and is replaced by the Siebel runtime repository in the Siebel database. As of Siebel CRM 20.3 Update, the seamless repository framework also supports nonextensible object files and a hybrid repository type.

> **Note:** Siebel Tools and Siebel Web Tools always use the standard Siebel Repository provided for the current release. You can optionally configure Siebel Application Object Managers and Siebel Mobile Web Client to use the same standard Siebel Repository for troubleshooting purposes. To do so, set the EnableSafeboot parameter to True for Siebel Application Object Managers and Siebel Mobile Web Clients. For Siebel Mobile Web Clients, you set this parameter in the [InfraObjMgr] section of the application configuration file, such as uagent.cfg for Siebel Call Center.

Related Topics

Installing Siebel Tools

About Database Updates for Siebel CRM 20.x Update

Related Books

Configuring Siebel Business Applications

Using Siebel Tools

Installing Desktop Integration Siebel Agent on Client Computers

This topic provides information about installing software on user computers that enables users to use certain features in Siebel applications that formerly were based on Java applets. This software is called Desktop Integration Siebel Agent, which is sometimes called DISA.

Customers can install and deploy Desktop Integration Siebel Agent on user computers for use with employee applications such as Siebel Call Center. Desktop Integration Siebel Agent supports inline editing of attachments, CTI hoteling, Send Email (F9) integration with Microsoft Outlook, and batch fulfillment printing.

For more information about installing and deploying Desktop Integration Siebel Agent, see *Desktop Integration Siebel Agent Guide* . See also 2107511.1 (Article ID) on My Oracle Support. For information about hoteling, see *Siebel CTI Administration Guide* . For more information about using Desktop Integration Siebel Agent for the Send Email (F9) integration with Microsoft Outlook, see 2117013.1 (Article ID) on My Oracle Support.

> **Note:** Future Siebel releases might include an updated version of Desktop Integration Siebel Agent, which might support additional features. If a new version is distributed in a Siebel CRM release, then the new version will be described in *Desktop Integration Siebel Agent Guide* .

Related Books

Desktop Integration Siebel Agent Guide

Siebel CTI Administration Guide

2117011.1 (Article ID) on My Oracle Support (about DISA)

2117013.1 (Article ID) on My Oracle Support (about Send Email integration with DISA)

Siebel CRM Update Guide and Release Notes on My Oracle Support

Installing Outlook to Siebel Drag and Drop on Client Computers

This topic provides information about installing an addin for Microsoft Outlook on user computers that enables users to drag and drop email messages or email attachments into Siebel applications.

Customers can install the addin Outlook to Siebel Drag and Drop on user computers for use with employee applications. Installing this software enables a user to drag one or more email messages or email attachments from a Microsoft Outlook client and drop it onto a Siebel attachment applet. Each item is saved in an attachment record in the Siebel File System. You can then open this attachment like any other similar type of attachment that you have added to Siebel applications. Outlook to Siebel Drag and Drop is sometimes abbreviated as SODD.

For more information about installing and deploying Outlook to Siebel Drag and Drop, see *Desktop Integration Siebel Agent Guide* . See also 2117212.1 (Article ID) on My Oracle Support.

> **Note:** Future Siebel releases might include an updated version of the Outlook to Siebel Drag and Drop addin. If a new version of the addin is distributed in a Siebel CRM release, then the new version will be described in *Desktop Integration Siebel Agent Guide* .

Outlook to Siebel Drag and Drop supports the following use cases:

- Drag one email message from the Microsoft Outlook client and drop it into the Siebel CRM application. The email message is saved in a single attachment record. Or drag multiple email messages, which are saved in multiple attachment records.
- Drag one email attachment from the Microsoft Outlook client and drop it into the Siebel CRM application. The email attachment is saved in a single attachment record. Or drag multiple email attachments, which are saved in multiple attachment records.

Related Books

Desktop Integration Siebel Agent Guide

Siebel Fundamentals Guide

2117212.1 (Article ID) on My Oracle Support (about Outlook to Siebel Drag and Drop)

Siebel CRM Update Guide and Release Notes on My Oracle Support

Siebel Client Deployment Requirements When Using Firewalls or Proxy Servers

This topic describes Siebel client deployment requirements that apply when you use firewalls or proxy servers, such as reverse proxy servers. This topic applies to all Siebel applications that are deployed inside the firewall or using a proxy server.

Deploying Siebel Applications Accessed Through a Firewall

When deploying Siebel applications that are accessed through a firewall, if you are planning to enable compression for traffic between the Siebel Application Interface and the Web browser, then your firewall must support the HTTP 1.1 protocol.

If your firewall does not support HTTP 1.1, then do not set HTTP 1.1-Compliant Firewall / Enable Web Compression to False for the Siebel Application Interface. In addition, disable HTTP 1.1 for proxy connections on each client computer. Follow instructions for your browser for this purpose. For example, for Microsoft Internet Explorer, you uncheck the option Use HTTP 1.1 Through Proxy Connections.

> **Note:** For more information about deploying Siebel CRM with firewalls, and about compression settings for Siebel Application Interface, see *Configuring the Siebel Application Interface*. See also *Siebel Security Guide* and *Siebel System Administration Guide* .

Bypassing the Proxy Server for Local Addresses

If your LAN uses a proxy server, then adjust your browser settings to bypass the proxy server for local (internal) addresses. This setting provides better performance for Siebel employee applications deployed on the LAN, and is required for the Siebel Mobile Web Client.

Follow instructions for your browser for this purpose. For example, for Microsoft Internet Explorer, you check the options Use a Proxy Server for Your LAN and Bypass Proxy Server for Local Addresses. For Siebel Web Clients, you also specify the proxy server address and port number.

> **Note:** For customer applications, this setting does not apply. The proxy server setting applies only on a LAN.

Configuring Siebel CRM for Pop-Up Blocker Compatibility

Pop-up blocking software can sometimes cause Siebel applications not to work, because such software might block required Siebel application functionality. Such blocking software typically blocks processes or pop-up windows that originate from particular computer host names or domain names.

Siebel applications that you run on a LAN (Siebel Web Client) or that run on local client computers (Siebel Mobile Web Client) might be affected by pop-up blockers. Configuring the Siebel application to use a fully qualified domain name (FQDN), as described in this topic, might prevent such problems and allow you to use pop-up blockers safely. See also *Configuring the Siebel Application Interface*. It is strongly recommended to use the fully qualified domain name feature.

For example, the URL http://ebiz.example.com uses FQDN, while http://ebiz does not.

> **Note:** If you have configured FQDN for your Siebel applications, and if conflicts with pop-up blockers persist, then it might be necessary to uninstall the pop-up blocking software or any applications in which such functionality is built in.

Parameters to configure fully qualified domain names are located in multiple places. How you set these parameters depends on the Siebel client that you are using. Specified host names or domain names must meet all of the applicable requirements, for example, underscores cannot be used.

- **Siebel Web Client.** To use FQDN for this client type, set Configure Fully Qualified Domain Name to True when you configure the Siebel Application Interface instance, and set Fully Qualified Domain Name to the fully qualified domain name. For more information, see *Configuring the Siebel Application Interface*.

  For example, you might set the fully qualified domain name to corp.example.com or server1.corp.example.com.

- **Siebel Mobile Web Client.** To use FQDN for this client type, configure the following parameters in the Siebel application configuration file, such as uagent.cfg for Siebel Call Center, on each local client computer.

  ```
  [Siebel]
  EnableFQDN = True
  ```

  EnableFQDN is set to True by default for the Siebel Mobile Web Client.

  If you do not also specify the FQDN parameter, then the URL is constructed automatically. For example, the FQDN for CCHENG might be constructed as ccheng.corp.example.com. Optionally, you can explicitly provide similar information, by using the FQDN parameter, as follows:

  ```
  FQDN = hostname.primaryDNS.domainsuffix
  ```

  where:

  - hostname is the name of the local client computer
  - primaryDNS is the primary part of the domain name (such as example)
  - domainsuffix is the domain type (such as com)

  For example, you might set FQDN to ccheng.corp.example.com.

  > **CAUTION:** When you explicitly configure an FQDN for use with the Siebel Mobile Web Client, you must specify the local computer name. The localhost string from the default Siebel Mobile Web Client URL (which is used when EnableFQDN is False) cannot be used as an element in an FQDN. The localhost string is only functional when used by itself, with no additional qualifying elements.

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*
- *Logging in Using the Siebel Developer Web Client*
- *Logging in Using the Siebel Mobile Web Client*
- *Logging in Using the Siebel Web Client*

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*.

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 *Installing the Siebel Database on the RDBMS* and the server modules have been configured and you activate the license keys, users can access the Siebel CRM applications. For information about activating the license keys in the Siebel database, see *Activating License Keys*.
- The user name and password used to log in to Siebel applications must be those of an employee with a valid position and division defined in the Siebel database.

  You must log in to Siebel 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* .
- 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 ConnectString to the necessary value. For Oracle Database, set it to the alias defined in the tnsnames.ora file.
- 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*.

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 for the language you are using.
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*.

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 for the language you are using.
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, see *Installing and Using Oracle Database SE2 for the Local Database*.

   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*.

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. This topic contains the following information:

- *Siebel Web Client Shortcuts*
- *Utility and Synchronization Program Shortcuts*
- *Siebel Web Client Startup Options*

- *Creating Custom Siebel Application Shortcuts*

Siebel Web Client Shortcuts

The Siebel Web Client installer creates shortcuts in the Siebel program folder for the modules that you have installed. 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.

You can create shortcuts for any valid Siebel application for which no shortcut is created by the installer. For information about customizing the shortcuts or creating new ones, see *Siebel Web Client Startup Options* and *Creating Custom Siebel Application Shortcuts*.

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.

This topic is part of *Siebel Web Client Shortcuts and Startup Options*.

Utility and Synchronization Program Shortcuts

The following are some of the additional shortcuts created in the Siebel Web Client program folder. 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.

This topic is part of *Siebel Web Client Shortcuts and Startup Options*.

Related Book

Siebel Remote and Replication Manager Administration Guide

Siebel Web Client Startup Options

The application shortcuts described in *Siebel Web Client Shortcuts* 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, the only option used is `/c`, to specify the configuration file.

```
"C:\Siebel\Client\BIN\siebel.exe" /c CFG_FILE_PATH\uagent.cfg
```

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:

```
"C:\Siebel\Client\BIN\siebel.exe" /c "C:\Siebel\Client\bin\ENU\uagent.cfg"
```

The siebel.exe program can also be run from a DOS command 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*.

This topic is part of *Siebel Web Client Shortcuts and Startup Options*.

The available startup options are described in the following table.

Startup Option	Description
`/c` config_file	Required. Specifies the path and file name for the configuration file to use, such as siebel.cfg for Siebel Sales or uagent.cfg for Siebel Call Center.
`/d` data_source	Specifies the data source to connect to, as defined in the configuration file: • If you do not use `/u` and `/p` to specify a valid Siebel user and do not use `/d` to specify a valid data source, then you can specify the data source from the login screen. • If you use `/u` and `/p` but do not use `/d`, then the local database is assumed.
`/l` language	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. If you do not use `/l` to specify a valid language, then the language is obtained from the configuration file.
`/u` username	Specifies the user name. If you do not use `/u` and `/p` to specify a valid Siebel user, then you must log in from a login screen. **CAUTION:** Consider the security issues when using `/u` and `/p` options (in particular `/p`) to access a live, production system. These values are not encrypted.
`/p` password	Specifies the password for the user specified using `/u`.
`/b` browser_exe	Specifies the path and file name for the browser executable program to use for the Siebel Web Client session. The `/b` option is used to override the default browser in Microsoft Windows. For more information about the supported browsers for Siebel CRM, see the Certifications tab on My Oracle Support.
`/s` spool_file	Specifies spooling SQL to a specified output file. This option can be useful for troubleshooting purposes. For more information, see *Siebel Performance Tuning Guide* .

Related Books

Siebel Security Guide

Siebel Performance Tuning Guide

Creating Custom Siebel Application Shortcuts

If you want to customize any of the Siebel application shortcuts described in *Siebel Web Client Shortcuts*, 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*.

This topic is part of *Siebel Web Client Shortcuts and Startup Options*.

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.

8 Verifying and Troubleshooting Your Installation

Verifying and Troubleshooting Your Installation

This chapter provides information about verifying and troubleshooting your installation of Siebel CRM. It includes the following topics:

- *Verifying Installation for Siebel CRM*
- *Troubleshooting Installation and Configuration for Siebel CRM*
- *Verifying the ODBC Data Source*
- *Troubleshooting the ODBC Data Source Connection*
- *Verifying Installation for the Siebel Database*
- *Troubleshooting Installation for the Siebel Database*
- *Verifying Installation for Siebel Tools*
- *Verifying Installation for the Siebel Web Client*
- *Verifying Installation for Oracle Database SE2*
- *Verifying Network Connectivity for the Siebel Server Computer*
- *Verifying Network Connectivity for Mobile Users*
- *Configuring the Siebel Mobile Web Client When Neither Siebel VB nor Siebel eScript Is Licensed*

Verifying Installation for Siebel CRM

After installing the Siebel CRM 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 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, Siebel Server, and so on. Among others, these directories include `applicationcontainer` for files related to the application container (which, for example, includes the server.xml file), `cfgtoollogs` for installation log files, `opatch` for files related to the `opatch` utility, and `oui` for files related to Oracle Universal Installer.

In addition to the steps described in this topic and elsewhere, perform any other tasks that might be necessary for verifying that your Siebel CRM software is functioning correctly. At the minimum, first install and configure all of the key components, including the Siebel CRM software and the Siebel database, and perform the basic verification steps for each component.

For full verification that your installed Siebel CRM server environment is working correctly, you must start one of the Siebel CRM applications in a Web browser. Start a suitable browser, specify a valid URL for one of the Siebel applications that your deployment supports, and log in using valid user credentials. Then access various screens and views in the

application and make sure that the application functions properly and that the necessary seed data is present. Try this for all of the Siebel applications and languages that your deployment must support. Additional testing considerations are outside the scope of this document.

The available applications include those for which server component groups were enabled on the Siebel Server and for which Siebel Application Interface configuration was done, using Siebel Management Console. For example, the URL for Siebel Call Center might resemble the following:

https://SiebelApplicationInterfaceHost.FQDN:Port/siebel/app/callcenter/lang

In this URL:

- SiebelApplicationInterfaceHost is the host name for the installed Siebel Application Interface.
- FQDN is the fully qualified domain name for your deployment. An example is example.com.

  > **Note:** It is strongly recommended to use the fully qualified domain name (FQDN) when you enter a URL, because security certificates are generally obtained based on fully qualified domain name.

- Port is the HTTPS redirect port number for the installed Siebel Application Interface. You specified this HTTPS redirect port during Siebel Application Interface installation.
- Lang is the deployed language for the application you are running.

This topic contains the following information:

- *Reviewing the Installation Log Files*
- *Reviewing the Log Files for the Siebel Application Interface*
- *Verifying That the Application Container Is Running*
- *Verifying That the Siebel Gateway Has Started*
- *Verifying the Installation Version Number for Siebel CRM*
- *Reviewing the Installation Directories for Siebel Gateway*
- *Reviewing the Installation Directories for Siebel Server*
- *Reviewing the Installation Directories for Siebel Database Configuration Utilities*
- *Reviewing the Installation Directories for the Siebel Application Interface*

Related Topics

Installing Siebel CRM Server Modules

Configuring Siebel CRM Server Modules

Customizing the Application Container for Siebel Application Interface

Troubleshooting Installation and Configuration for Siebel CRM

Stopping and Starting the Siebel Application Container

Reviewing the Installation Log Files

After installing the Siebel CRM modules, review the installation log files to verify that all of the modules installed successfully, particularly if you experienced any difficulties with the installation. The log files are created in the following directory:

```
SIEBEL_ROOT\cfgtoollogs\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, installActions2017-07-02_10-28-04PM.log. For each set of files created, the oldest and largest log file generally represents the Siebel CRM module being installed.

See also *Troubleshooting Installation and Configuration for Siebel CRM*.

Reviewing the Log Files for the Siebel Application Interface

Siebel Application Interface generates one or more log files as a result of connection attempts with the Siebel Server. These log files reside in `SIEBEL_AI_ROOT\log`.

Depending on the logging level that you choose, these files record errors, warnings, and general information. Events such as invalid configuration of the Siebel Application Interface are captured in these log files. Analyzing the log files can provide clues for troubleshooting Siebel Application Interface problems.

See also *Troubleshooting Installation and Configuration for Siebel CRM*.

Verifying That the Application Container Is Running

After installing one or more Siebel CRM modules using the Siebel Enterprise Server installer, verify that the application container is running. You can also check relevant log files, such as catalina.log, that are created in the following directory:

```
SIEBEL_ROOT\applicationcontainer\logs
```

Also verify information about the application container stored in subdirectories. For example, the server.xml file, located in the `conf` subdirectory, can be checked to validate the HTTPS port number and other information for the installed application container.

See also *Stopping and Starting the Siebel Application Container* and *Troubleshooting Installation and Configuration for Siebel CRM*.

Verifying That the Siebel Gateway Has Started

You must make sure that the Siebel Gateway is started when you do any of the following:

- Configure the Security profile
- Create and deploy the Siebel Enterprise profile
- Create and deploy a Siebel Server profile
- Create and deploy a Siebel Application Interface profile
- Operate any of the Siebel applications
- Remove the configuration of a Siebel Application Interface, Siebel Server or the Siebel Enterprise (task that you might perform when you are uninstalling the software)

Note: It is recommended that you review the Siebel Gateway log files, which are found in the `SIEBEL_GATEWAY_ROOT\LOG` directory.

To start the Siebel Gateway manually on Windows

1. Navigate to Control Panel, Administrative Tools, and then Services.
2. If the Siebel Gateway is not started, then click Action, and then Start.

See also *Troubleshooting Installation and Configuration for Siebel CRM*.

Verifying the Installation Version Number for Siebel CRM

After installing the Siebel CRM modules, verify the version number of the installed software.

To verify the installation version number for Siebel CRM

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`. For example, you might enter a command like this:

   ```
   set ORACLE_HOME=C:\Siebel
   ```

3. Navigate to the `opatch` directory within your installation. For example, you might enter a command like this:

   ```
   cd C:\Siebel\opatch
   ```

4. Enter the following command:

   ```
   opatch lsinventory
   ```

   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 `17.0`.

Reviewing the Installation Directories for Siebel Gateway

After installing the Siebel Gateway, review the directory structure created by the installer.

The Siebel Gateway is installed in the `SIEBEL_GATEWAY_ROOT` directory within the Siebel root directory that you specified during the installation. The installation location is `C:\Siebel\gtwysrvr` or a similar location. Verify that the following Siebel Gateway 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.	
	ADMIN. The template files used for scripts that control the running and configuration of the Siebel Gateway.
	BIN. Siebel Gateway start script, stop script, and executable programs.

	classes. Contains files used in the configuration process.
	EXTCACHE. Contains files used by the Siebel Enterprise Cache. (This directory is not used as of Siebel CRM 17.0, and is included for backward compatibility.)
	LOCALE. Language-specific files and scripts. These are not configurable.
	log. Siebel Gateway log files.
	upgrade.log. File that contains information logged during an upgrade.
	zookeeper. Contains files used by Apache ZooKeeper, which maintains the Siebel Gateway registry.

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 installation location is `c:\Siebel\siebsrvr` or a similar location. 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.

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.
	CLASSES. Contains files used in the configuration process.
	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.
	jre. Contains files for Java Runtime Environment.

	JSON. Contains JSON (JavaScript Object Notation) files.
	LEX. Language-related files.
	LOCALE. Contains language-specific files. These files are not configurable.
	LOG. Contains client and utility log files.
	MSGTEMPL. Stores language-specific files for mail merge.
	OUTPUT. Contains files related to Siebel Remote.
	plugins.
	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 though Oracle's partner initiative.
	SEARCH. Contains the indexes and scripts used to administer and execute searches.
	SMARTANSWER. Contains files related to Siebel Smart Answer.
	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 CRM. Also holds temporary, backup, and state log files used during an upgrade.
	upgrade.log. File that contains information logged during an upgrade.
	XML.
	XMLP.
	xsd.
	XSLT.

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 installation location is `c:\Siebel\dbsrvr` or a similar location. 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.		
	DBSRVR_ROOT (ORACLE, DB2UDB, DB2390, or MSSQL). Contains scripts specific to your database, including upgrade scripts for previous versions of Siebel CRM.		
		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*.	
			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 CRM 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*.		
	LOCALE. Contains translation files (for Oracle use only).		

Reviewing the Installation Directories for the Siebel Application Interface

Review the physical directories created during the installation of the Siebel Application Interface to familiarize yourself with the locations of files relevant to its operation.

The following list shows some of the physical directories and files created after you install the Siebel Application Interface.

Siebel_AI. Top-level directory for Siebel Application Interface (example).		
	applicationcontainer. Contains the file setenv.bat and other files and directories related to the application container for the installed Siebel software. Several of these files are updated by the installer at the end of the installation process and can be examined to help make sure that installation was successful.	
		conf. Contains the file server.xml, which can be examined for information such as the HTTPS port number of the installed application container.
		webapps. Contains files for the Web applications supported by the application container, including properties files. The subdirectory **`webapps\siebel`** contains the default HTML file (default.htm) and also subdirectories such as **`files`**, **`fonts`**, **`htmltemplates`**, **`images`**, **`scripts`**, and **`WEB-INF`**. The **`files`** directory contains CSS files. **`WEB-INF`** contains files such as web.xml and log4j2-siebel.xml.
	applicationinterface.	
	cfgtoollogs. Contains installation log files.	

	config. Contains files related to configuration.
	diagnostics.
	inventory.
	jre. Contains files for Java Runtime Environment.
	manifest.
	OPatch. Contains files related to the `opatch` utility.
	oui. Contains files related to Oracle Universal Installer.

Troubleshooting Installation and Configuration for Siebel CRM

This topic presents troubleshooting information related to installation and configuration of Siebel CRM server modules. Some of the information also applies to additional modules that use the same installer and are also configured using Siebel Management Console, such as Siebel Enterprise Cache and Siebel Constraint Engine.

This topic includes the following information:

- *Troubleshooting Installation and Configuration for the Siebel Gateway*
- *Troubleshooting Installation and Configuration for the Siebel Server*
- *Troubleshooting Installation and Configuration for Siebel Application Interface*

Related Topics

Starting the Siebel Server Service

Verifying Installation for Siebel CRM

Stopping and Starting the Siebel Application Container

Troubleshooting Installation and Configuration for the Siebel Gateway

This topic describes potential errors that can result from a faulty installation or configuration of Siebel Gateway. Such problems can have any of several causes, some of the most common of which are listed in the following table.

Note: If you cannot start the Siebel Gateway, then you will not be able to configure a Siebel Enterprise or configure and start a Siebel Server.

Problem	Cause	Solution
The Siebel Gateway does not start.	You might not have privileges as the Siebel service owner.	Review the instructions in *Creating the Siebel Service Owner Account*.
You cannot start the Siebel Gateway service on \ \COMPUTER_NAME. `Error XXX: The service did not start due to logon failure.`	Login failure	1. Navigate to Control Panel, Administrative Tools, and then Services. 2. Select the Siebel Gateway. 3. Right-click, then choose Properties. 4. In the Log On tab, specify the user name and password to use for this service.
You receive an error at system startup that a driver is missing.	This problem can occur if you uninstall earlier Siebel CRM versions without first stopping the Siebel Server.	Stop the Siebel Server before uninstalling Siebel CRM. If the services are no longer visible within the Services menu, then contact Oracle Global Customer Support for instructions.

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, some of the most common of which are listed in the following table.

Problem	Cause	Solution
The Siebel Server cannot be installed.	Insufficient user privileges	For information about setting up appropriate administrative user privileges to install, see *Creating the Siebel Service Owner Account*.
	Trying to install or configure the Siebel Server out of sequence	For the required installation and configuration sequence, see *Overview of Installing Siebel CRM*.
	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.
The Siebel Server does not start after configuration.	Siebel Gateway not started	Verify that the Siebel Gateway was started. Start it if it was stopped.

Problem	Cause	Solution
	Invalid input values for Siebel Server profile creation and deployment	Verify that the input values were valid.
	Insufficient system privileges	Verify that you have sufficient system privileges to start the service. For more information, see *Creating the Siebel Service Owner Account*.
Cannot save a new profile in Siebel Management Console.	The specified profile name might already exist.	Provide a unique name for the new profile and retry saving the profile.
URL does not bring up Siebel Management Console.	Installations might not have been correctly performed. Security certificates might not be valid, as configured. You might have specified an incorrect port number in the URL. Other causes might apply.	Verify the following: • The installations were correctly performed, • Valid security certificates were used, and the security authentication system is available • The Siebel Application Interface application container is running • The URL is correct and includes the correct HTTP or HTTPS port See also *Troubleshooting Installation and Configuration for Siebel Application Interface*. For security issues, see also *Siebel Security Guide* .
URL does not bring up login page for a Siebel application. Cannot log in to a Siebel application.	Configuration of Siebel Server or Siebel Application Interface might not have been correctly performed or completed. Siebel database information might have been specified incorrectly. The Application Object Manager might not have been enabled on the Siebel Server. You might have specified an incorrect port number in the URL. You might have added components on a new Siebel Server, but neglected to update the Siebel Application Interface profile. Siebel system services might not be running. You might be experiencing problems with the security authentication system you are using. Other causes might apply.	Verify the following: • The installations and configurations were correctly performed, and database information was specified correctly • Security authentication was correctly configured and the security authentication system is available • The Siebel Application Interface application container is running • The Siebel Gateway and Siebel Server services are running • The URL is correct and includes the correct HTTP or HTTPS port See also *Troubleshooting Installation and Configuration for Siebel Application Interface*. For security issues, see also *Siebel Security Guide* .

Troubleshooting Installation and Configuration for Siebel Application Interface

This topic provides suggestions for troubleshooting problems that you might encounter when installing and configuring the Siebel Application Interface.

Typical problems are shown in the following table.

Problem	Cause	Solution
Siebel Application Interface profile deployment fails despite no obviously incorrect profile values.	The application container might not have been available to support the configuration process.	Try the following: 1. Clear the CGHostURI entry in the applicationinterface.properties file, in `SIEBEL_AI_ROOT\applicationcontainer\webapps`. 2. Restart the application container, as described in *Stopping and Starting the Siebel Application Container*. 3. Deploy Siebel Application Interface again.
After installation, when the Siebel Web Client is started, a message appears, stating: `Page Cannot be displayed`	The application container is not running.	Make sure that the application container is running. Refresh the connection between your browser and the Siebel Application Interface.
	The Siebel Application Interface port is incorrectly specified.	Verify that the Siebel Application Interface port information is correct.
	Applications were not configured properly.	Make sure that the Local Path for the configured applications is correct and resembles the following: `SIEBEL_AI_ROOT\applicationcontainer\webapps\siebel`
	Anonymous users have incorrect responsibilities.	Make sure that the specified anonymous users 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: `ConnectString = siebel.TCPIP.none.none://SiebelServerHost:2321/EnterpriseServerName/ProductNameObjMgr_language`
	Siebel Server components or component groups might not be enabled.	Make sure that the necessary Siebel Server components and component groups are enabled.
Your Siebel application stops responding, displays	Appropriate settings are not available within the application	Make sure that the configuration contains valid anonymous user and port number values.

Problem	Cause	Solution
a blank page or page not found, or times out.	configuration defined in the profile for the Siebel Application Interface.	Also make sure that appropriate values were specified for session time-out and guest session timeout. For information about configuring these and other settings, see *Creating a Siebel Application Interface Profile*.
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 user account running the Siebel Application Interface does not have proper permissions to the `SIEBEL_AI_ROOT\application container\webapps\siebel` directory.	Stop the Siebel Application Interface. Make sure that the permissions meet the requirements described in *Requirements for Installing and Configuring the Siebel Application Interface*. Restart the Siebel Application Interface, as described in *Stopping and Starting the Siebel Application Container*.

Verifying the ODBC Data Source

This topic provides information about verifying the ODBC data source for your enterprise database platform. It includes the following information:

- *Verifying the ODBC Data Source for Oracle Database*
- *Verifying the ODBC Data Source for IBM DB2*
- *Verifying the ODBC Data Source for Microsoft SQL Server*

Related Topics

Troubleshooting the ODBC Data Source Connection

Planning RDBMS Installation and Configuration

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 a supported 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.

CAUTION: In general, do not change the default settings that are created automatically with the ODBC data source. However, if you have upgraded from an Oracle Database that does not use CBO, or if you manually created your ODBC, then you must check your ODBC settings, as shown in the following procedure.

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 CRM uses 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 *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* and *Troubleshooting the ODBC Data Source Connection*.
7. In the Windows registry, locate the following registry entry:
   ```
   [HKEY_LOCAL_MACHINE\SOFTWARE\ODBC\ODBC.INI\SiebelEnterpriseName_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.

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 CRM uses 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 *Siebel Deployment Planning Worksheet* if you have not already done so.
5. Select the data source SiebelEnterpriseName_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* and *Troubleshooting the ODBC Data Source Connection*.
8. From the Windows command prompt, navigate to `SIEBEL_ROOT\siebsrvr\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.

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 CRM uses 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 *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* and *Troubleshooting the ODBC Data Source Connection*.

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* .

This topic has the following information:

- *Troubleshooting Connection Problems on Oracle Database*
- *Troubleshooting Connection Problems on IBM DB2*
- *Troubleshooting Connection Problems on Microsoft SQL Server*

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*.

To troubleshoot a failed ODBC connection for Oracle Database (on Windows)

1. Verify that the ODBC driver was correctly installed by reviewing the file structure under `SIEBSRVR_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*.

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 computer 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*.

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.

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*
- *Verifying System Preferences and Settings for the Database Code Page*

Related Topics

Installing the Siebel Database

Verifying Installation for Siebel CRM

Troubleshooting Installation for the Siebel Database

Reviewing the Installation Log Files for the Siebel Database

Installing Siebel database components on the RDBMS creates several log files within the `SIEBEL_ROOT\log` subdirectory. You must review the files in this subdirectory for any errors.

For example, log files created 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 `SIEBSRVR_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*. For Siebel CRM language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) 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*.
- For information about starting Siebel Tools, see *Verifying Successful Installation of Siebel Tools*.

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*).

   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 Database	utf-8 (for Unicode)
All	IBM DB2, Microsoft SQL Server	utf-16 (for Unicode)
Japanese	Oracle Database, 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 Database	8
Unicode	IBM DB2	Y
Unicode	Microsoft SQL Server	Y

Troubleshooting Installation for the Siebel Database

These topics provide suggestions for troubleshooting problems that you might encounter when installing and configuring the Siebel database. This topic contains the following information:

- *Troubleshooting Installation for the Siebel Database*
- *Acceptable Errors for Installation of the Siebel Database*
- *Troubleshooting Siebel Repository Import for the Siebel Database*

Related Topics

Installing the Siebel Database

Verifying Installation for Siebel CRM

Verifying Installation for 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 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 the following table. These errors might appear in the log files produced by the Siebel Repository import process.

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 CRM suggest using only minimum values.

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*
- *Verifying the Installation Version Number for Siebel Tools*
- *Reviewing the Installation Directories for Siebel Tools*
- *Verifying Successful Installation of Siebel Tools*
- *Verifying Directory Permissions for Siebel Tools*
- *Verifying the ODBC Data Sources for Siebel Tools*

Related Topic

Installing Siebel Tools

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\cfgtoollogs\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, installActions2017-07-02_10-28-04PM.log. For each set of files created, the oldest and largest log file generally represents the Siebel CRM module being installed (such as Siebel Tools).

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\Tools`. For example, you might enter a command like this:

   ```
   set ORACLE_HOME=C:\Siebel\Tools
   ```

3. Navigate to the `opatch` directory within your installation. For example, you might enter a command like this:

   ```
   cd C:\Siebel\Tools\opatch
   ```

4. Enter the following command:

   ```
   opatch lsinventory
   ```

   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 17.0 is shown as `17.0`.

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\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.

SIEBEL_TOOLS_ROOT. The directory for the Siebel Tools installation, such as `C:\Siebel\Tools` (or a similar location). 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 Tools*.

bin	All binary files (.exe, .dll, .cfg, .dsn, .enu, .bat), configuration files, and user preference files.	
	lang	Language-specific DLL files.
	dll	Siebel Tools program library files.

	bin	Siebel Tools binary files.
	exe	Siebel Tools executable files.
cfgtoollogs	Contains installation log files.	
classes	Java code files.	
	examples	
	examples\src	
	examples\src\com	
	examples\src\com\siebel	
	examples\src\com\extra	
	examples\src\com\integration	
	examples\src\com\integration\mq	Examples of Java code files.
	examples\src\com\integration\servlet	Examples of Java code files.
help	Siebel Tools help files.	
	lang	Help files for the language that you installed.
locale	Text files for installed languages containing version information.	
log	Log files from Siebel Tools operations.	
msgtempl	Message files.	
opatch	Files used by the **opatch** utility.	
public	Contains the default HTML file (default.htm) and also subdirectories such as **files**, **fonts**, **htmltemplates**, **images**, and **scripts**. CSS files are located in the **files** directory, for example.	
reppatch	Location of the XML files used by the maintenance update wizard. All log files generated by this wizard are also created under **reppatch\log**.	
scripts	Location of Java scripts.	

sqltempl	SQL statement fragments used by certain Siebel Tools operations.
temp	Temporary working area.
upgrade	Not used for Siebel Tools.

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.

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 the following table. 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.

Data Source	Use
SSD default instance	Connects to the Microsoft SQL Server database or the Oracle Database.
SSD	Connects to the IBM DB2 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*. See also *Requirements for Installing Siebel Tools*.

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*
- *Verifying the Installation Version Number for the Siebel Web Client*
- *Reviewing the Installation Directories for the Siebel Web Client*
- *Verifying ODBC Data Sources for the Siebel Developer Web Client*

Related Topics

Installing the Siebel Web Client

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\cfgtoollogs\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, installActions2017-07-02_10-28-04PM.log. For each set of files created, the oldest and largest log file generally represents the Siebel CRM module being installed, such as Siebel Web Client.

This topic applies to the Siebel Web Client installation, optionally with the local database or sample database.

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 Web Client software.

This topic applies to the Siebel Web Client installation, optionally with the local database or sample database.

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\Client`. For example, you might enter a command like this:

   ```
   set ORACLE_HOME=C:\Siebel\Client
   ```

3. Navigate to the `opatch` directory within your installation. For example, you might enter a command like this:

   ```
   cd C:\Siebel\Client\opatch
   ```

4. Enter the following command:

   ```
   opatch lsinventory
   ```

   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 17.0 is shown as `17.0`.

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\Client`. Use Windows Explorer to verify the directory structure on your computer.

SIEBEL_CLIENT_ROOT. The directory for the Siebel Web Client installation, such as `c:\Siebel\Client` (or a similar location). 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*.

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.

fonts. Contains font files.

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.

opatch. Contains files used by the `opatch` utility.

oraclese. The installation path for Oracle Database SE2. This directory is created if you have installed that module for the local database, as described in *Installing and Using Oracle Database SE2 for the Local Database*.

public. Contains the default HTML file (default.htm) and also subdirectories such as `files`, `fonts`, `htmltemplates`, `images`, and `scripts`. CSS files are located in the `files` directory, for example.

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.

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*.

Verifying Installation for Oracle Database SE2

Oracle Database SE2 is installed with Siebel Mobile Web Client. You can verify the existence of or the successful installation of Oracle Database SE2 in multiple ways. This topic includes the following information:

- *Verifying Installation of Oracle Database SE2*
- *Verifying the ODBC Data Source for Oracle Database SE2*
- *Verifying the TNSNAMES.ORA Entry for Oracle Database SE2*

Related Topics

Installing and Using Oracle Database SE2 for the Local Database

Verifying Installation of Oracle Database SE2

Use the following methods to verify the installation of Oracle Database SE2 for Siebel Mobile Web Client. Also perform the other verification steps in this topic. See also the documentation for Oracle Database Standard Edition 2 (Oracle Database SE2) on Oracle Help Center.

To verify installation of Oracle Database SE2

- Do any or all of the following:
  - Open SERVICES.MSC and check for OracleServiceSE.
  - Open Programs and Features and check for Oracle Database SE2 under installed programs.
  - Check for the presence of the `oraclese` directory in the Siebel Mobile Web Client installation.
  - Open the install.log file, which is available under the `%temp%` folder. Make sure that [ResultCode] is set to zero.
  - Run the command below to find the entry for Oracle Database SE2 in the registry:

```
reg query HKLM\SOFTWARE\ORACLE\KEY_SE /v ORACLE_BASE
```

- Start Siebel Mobile Web Client and connect to the LOCAL_SE data source.

Note: Connecting to LOCAL_SE for the first time initializes the local database. Users must attempt this only after a local database has been extracted for them by the system administrator.

Verifying the ODBC Data Source for Oracle Database SE2

Installing Oracle Database SE2 with Siebel Mobile Web Client automatically creates an ODBC system data source name (DSN) that Siebel Mobile Web Client uses to connect to an Oracle Database SE2 installation. The ODBC data source is LOCAL_SE for a Siebel Mobile Web Client installation, with the local database using Oracle Database SE2.

To verify the ODBC data source for Oracle Database SE2

1. Open ODBCAD32.exe, which is available in the `c:\Windows\SysWOW64` directory.
2. Check that one of the following ODBC data sources has been added under the System DSN tab, corresponding to your installation: LOCAL_SE.
3. Make sure that the DSN connects.

Verifying the TNSNAMES.ORA Entry for Oracle Database SE2

Use the following procedure to verify the TNSNAMES.ORA entry for Oracle Database SE2.

To verify the TNSNAMES.ORA entry for Oracle Database SE2

1. Open TNSNAMES.ORA, which is available under `Oracle_DB_Client\network\admin`.
2. Verify that a new entry of LOCAL_SE has been added.

Verifying Network Connectivity for the Siebel Server Computer

The Siebel Server must have network access to other Siebel CRM modules, such as the Siebel Gateway, the Siebel Application Interface, 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 CRM modules.

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, the Siebel Application Interface, 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.

   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, as follows:

   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*.
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 Books

Siebel Remote and Replication Manager Administration Guide

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.

9 Uninstalling Siebel CRM

Uninstalling Siebel CRM

This chapter provides instructions for uninstalling Siebel CRM. It includes the following topics:

- *About Uninstalling Siebel CRM*
- *Process of Removing Configuration Data*
- *Uninstalling Siebel CRM Server Modules*
- *Uninstalling Siebel Web Clients or Siebel Tools*
- *About Uninstalling Earlier Versions of Siebel CRM*

About Uninstalling Siebel CRM

The topics in this chapter describe how to uninstall the current release, Siebel CRM 17.0. Separate instructions are provided for server and client software modules. This chapter describes both full uninstallation and rollback uninstallation.

> **Note:** Siebel Web Server Extension (SWSE) is no longer provided, as of Siebel CRM 17.0. For more information about uninstalling any software for a prior Siebel CRM release, see *About Uninstalling Earlier Versions of Siebel CRM*.

This topic includes the following information:

- *Uninstallation Options for Siebel CRM Modules*
- *Requirements for Uninstalling Siebel CRM*
- *Limitations for Uninstalling Siebel CRM*

Related Topics

Installation-Related Changes for Siebel CRM 20.x Update

Installation-Related Changes for Siebel CRM 17.0

About Uninstalling Earlier Versions of Siebel CRM

Related Books

Siebel Deployment Planning Guide

Siebel System Administration Guide

Siebel Global Deployment Guide

Uninstallation Options for Siebel CRM Modules

This topic summarizes the uninstallation options for the Siebel CRM modules described in this guide. This topic is part of *About Uninstalling Siebel CRM*.

The following uninstallation options apply for Siebel Enterprise Server, Siebel Application Interface, Siebel Web Client, and Siebel Tools:

- *Full uninstallation* removes the installed Siebel CRM software module. If you installed the current release as a new installation, then you can perform a full uninstallation. (Rollback uninstallation is not an option in this case.)
- *Rollback uninstallation* (also referred to as *rollback* or *rolling back*) uninstalls the installed Siebel CRM software module where you had previously installed Siebel CRM 17.0 as a migration installation. Use rollback uninstallation to revert to your previously installed software version of Siebel CRM. (Full uninstallation is also an option in this case.)

  > **CAUTION:** With a rollback uninstallation, the release that you can revert to depends on how you had originally installed the Siebel CRM software modules. Different rollback uninstallation methods are provided for different situations. Make sure to use the correct method for your situation.

- If you have installed a Siebel CRM 20.x Update or earlier release on top of an installation of Siebel CRM 17.0, then you can uninstall the update release. For more information, see *Installing and Uninstalling Siebel CRM 20.x Update*.

Related Topics

Installing and Uninstalling Siebel CRM 20.x Update

Requirements for Uninstalling Siebel CRM

Limitations for Uninstalling Siebel CRM

Requirements for Uninstalling Siebel CRM

Uninstallation of Siebel CRM software is subject to various requirements.

This topic is part of *About Uninstalling Siebel CRM*.

The following requirements apply to uninstalling Siebel CRM 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 CRM server modules, including Siebel Server, Siebel Application Interface, or Siebel Gateway, that were previously configured using Siebel Management Console, you must perform tasks to remove the configuration data before you uninstall the Siebel software. For detailed information, see *Process of Removing Configuration Data*.
- **You must have the required access.** When you uninstall an instance of a Siebel CRM server module, including Siebel Server, Siebel Application Interface, or Siebel Gateway, 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.

- **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. Siebel Gateway clustering includes such requirements, as noted in *Changing the Primary Nodes for a Siebel Gateway Cluster*.
- **Do not delete installation directories until you have performed a full uninstallation.** Do not delete the installation directories for any Siebel CRM 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 CRM modules must use the same version after a rollback uninstallation.** If you roll back to the previously installed version of Siebel Enterprise Server and SWSE, then you must also perform a similar rollback uninstallation for all of the other Siebel CRM modules sharing the same Siebel Enterprise and Siebel database. After performing a rollback, see the documentation that applies to your currently installed Siebel CRM 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 `OriginalName` to `OriginalName_pre17.0`. The new installation directory is named `OriginalName` . Examples follow:

  - If the original installation directory name for Siebel Enterprise Server was `ses`, then this directory is renamed to `ses_pre17.0`. The new installation directory is named `ses`.
  - If the original installation directory name for SWSE (from the installation of a prior version) was `sweapp`, then this directory is renamed to `sweapp_pre17.0`. 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_pre17.0`. 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_pre17.0`. The new installation directory is named `Tools_1`.
- **For Siebel Enterprise Server and Siebel Application Interface, you must use the correct rollback uninstallation method for your situation.** Different rollback uninstallation methods are provided for different situations. You must use the correct method for your situation, as follows:

  - If you had originally installed Siebel CRM 8.1.1 (using the InstallShield installer) and are now rolling back to Siebel CRM 8.1.1 through Siebel CRM 8.1.1.7, then you must use the Oracle Universal Installer uninstallation option to roll back the software. (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 a prior release of Siebel CRM, then you must use the manual steps to roll back the software. (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 might no longer be available after a rollback uninstallation. After you roll back the software, you must remove any configuration changes and restore the Siebel Repository and the Siebel Repository file (SRF) to the state when you first installed the current release. (SRF files are applicable only to releases prior to Siebel CRM 17.0.)

> **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. The steps for doing this are part of the rollback procedure in *Rolling Back the Siebel CRM Server Modules*.
- **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 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 applicable prior releases, see 880452.1 (Article ID) on My Oracle Support for Siebel CRM 8.1.1.x or see 1441523.1 (Article ID) for Siebel CRM 8.2.2.x. For versions of *Siebel Patchset Installation Guide for Siebel CRM* for applicable prior releases (Siebel CRM 17.x and earlier), see 1614310.1 (Article ID) on My Oracle Support.

  For Siebel CRM 20.x, 19.x, and 18.x Update releases, see also *Siebel CRM Update Guide and Release Notes* on My Oracle Support.
- **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 Siebel CRM* and related topics.
- **After a rollback uninstallation, you must revert to previous required versions of third-party software.** After a rollback uninstallation to a version prior to Siebel CRM 17.0, you must revert installed third-party (or non-Siebel Oracle) software to the versions supported for the version of Siebel CRM that you are reverting to, where necessary. For supported versions of third-party software, see the Certifications tab on My Oracle Support.
- **After a rollback uninstallation, you must reconfigure SWSE.** After a rollback uninstallation to a version prior to Siebel CRM 17.0, you must reconfigure the Siebel Web Server Extension (SWSE). For more information, see *Additional Tasks for Migration Installations* and *About Configuring Siebel CRM*.
- **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.

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 the Database Configuration Utilities and the Siebel Server it is installed with, it is strongly recommended that you first remove the Siebel Enterprise configuration or remove both the Enterprise and the Siebel Gateway.

Related Topics

Installing and Deploying Siebel CRM with Multiple Languages

Changing the Primary Nodes for a Siebel Gateway Cluster

Uninstallation Options for Siebel CRM Modules

Limitations for Uninstalling Siebel CRM

Related Books

Siebel Database Upgrade Guide

Limitations for Uninstalling Siebel CRM

Uninstallation of Siebel CRM software is subject to various limitations.

This topic is part of *About Uninstalling Siebel CRM*.

The following limitations apply to uninstalling Siebel CRM software:

- **You cannot selectively uninstall Siebel Enterprise Server modules installed together on the same computer.** For example, if you have installed Siebel Gateway and Siebel Server in the same Siebel CRM installed 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*.
- **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 that you do not need.

  If you have already deployed languages that you do not require, then you can remove and recreate a Siebel Server configuration with fewer deployed languages, or recreate a Siebel Application Interface profile with fewer deployed languages and reapply it to each installed Siebel Application Interface 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 CRM with Multiple Languages* 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 CRM*.
- **This guide describes uninstalling the current release only.** For information about uninstalling any prior release of Siebel CRM, see *About Uninstalling Earlier Versions of Siebel CRM*.
- **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 CRM in Unattended Mode*.

Related Topics

Installing and Deploying Siebel CRM with Multiple Languages

Uninstallation Options for Siebel CRM Modules

Requirements for Uninstalling Siebel CRM

About Uninstalling Earlier Versions of Siebel CRM

Related Books

Siebel System Administration Guide

Siebel Global Deployment Guide

Siebel CRM Update Guide and Release Notes on My Oracle Support

Process of Removing Configuration Data

This topic describes the tasks that you perform for removing the configuration data for Siebel CRM server modules, such as Siebel Server or Siebel Application Interface. You perform these tasks using the Siebel Management Console, which you used for configuration.

Removing configuration data is related to uninstalling the Siebel CRM software, but it is distinct from it. Before you uninstall Siebel CRM server modules, including Siebel Server, Siebel Application Interface, or Siebel Gateway, you must remove configuration data that was previously created and deployed for these modules. In some cases, you might choose to remove configuration data without uninstalling. Removing configuration data does not affect the profiles that you used when deploying the installed modules.

This topic does not describe removing configuration profiles that you have created but have not deployed. For more information, see *Running the Siebel Management Console*.

Perform the tasks for removing configuration data in the following order (the reverse of the normal order of configuration):

1. *Removing the Siebel Application Interface Configuration*
2. *Removing the Siebel Server Configuration*
3. *Removing the Siebel Enterprise*
4. *Removing the Siebel Gateway Cluster*
5. *Removing the Siebel Gateway*

Related Topics

Configuring Siebel CRM Server Modules

Running the Siebel Management Console

Additional Tasks for Migration Installations

About Uninstalling Siebel CRM

Uninstalling Siebel CRM Server Modules

Removing the Siebel Application Interface Configuration

The Siebel Management Console lets you remove the configuration that you deployed for the Siebel Application Interface. This task removes the application configuration data that was created when you deployed the Siebel Application Interface profile.

Note: This task applies only to instances of Siebel Application Interface that are in a deployed state.

This task is a step in *Process of Removing Configuration Data*.

To remove the Siebel Application Interface configuration

1. Run the Siebel Management Console, as described in *Running the Siebel Management Console*.
2. Click Siebel Deployment in the left panel.
3. In the hierarchy shown, click the Application Interface box, under Siebel Deployment.
4. Click to select the box for the deployed instance of Siebel Application Interface for which you want to remove the configuration. Deployed instances show a solid green circle.
5. Click the Delete icon in the top right, whose tooltip text reads Delete Application Interface.

   If the delete step is successful, then the deployment item disappears. If not, then an error message is displayed.

Removing the Siebel Server Configuration

The Siebel Management Console lets you remove Siebel Server configuration data from the Siebel Gateway. This task removes the Siebel Server service from the local server computer.

> **Note:** When removing Siebel Server configuration data using this 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 Siebel Application Interface 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 must be running.

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*.

To remove the Siebel Server configuration

1. Make sure that the Siebel Gateway is running.
2. Run the Siebel Management Console, as described in *Running the Siebel Management Console*.
3. Click Siebel Deployment in the left panel.
4. In the hierarchy shown, click the Siebel Server box, under Siebel Deployment.
5. Click to select the box for the deployed instance of Siebel Server for which you want to remove the configuration. Deployed instances show a solid green circle.
6. Click the Delete icon in the top right, whose tooltip text reads Delete Siebel Server.

   If the delete step is successful, then the deployment item disappears. If not, then an error message is displayed.

Removing the Siebel Enterprise

The Siebel Management Console lets you remove the Siebel Enterprise for a Siebel deployment.

> **Note:** When removing a Siebel Enterprise using this 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 Siebel Application Interface and Siebel Server that depend on this Siebel Enterprise. When you perform this task, the Siebel Gateway must be running.

This task is a step in *Process of Removing Configuration Data*.

To remove the Siebel Enterprise

1. Make sure that the Siebel Gateway is running.
2. Run the Siebel Management Console, as described in *Running the Siebel Management Console*.
3. Click Siebel Deployment in the left panel.
4. In the hierarchy shown, click the Enterprise box, under Siebel Deployment.
5. Click to select the box for the deployed Siebel Enterprise that you want to remove. Deployed instances show a solid green circle.
6. Click the Delete icon in the top right, whose tooltip text reads Delete Enterprise.

   If the delete step is successful, then the deployment item disappears. If not, then an error message is displayed.

Removing the Siebel Gateway Cluster

The Siebel Management Console lets you remove the Siebel Gateway cluster for a Siebel deployment.

> **Note:** When removing a Siebel Gateway cluster using this task, observe all of the documented requirements. When you perform this task, the primary Siebel Gateway must be running.

This task is a step in *Process of Removing Configuration Data*.

Related Topics

Configuring the Siebel Gateway Cluster

Removing the Siebel Gateway

To remove the Siebel Gateway cluster

1. Make sure that the primary Siebel Gateway is running.
2. Run the Siebel Management Console, as described in *Running the Siebel Management Console*.
3. Click Siebel Deployment in the left panel.
4. In the hierarchy shown, click the Gateway Cluster box, under Siebel Deployment.
5. Click to select the box for the deployed Siebel Gateway cluster. Deployed instances show a solid green circle.
6. Click the Delete icon in the top right, whose tooltip text reads Delete Gateway Cluster.

   If the delete step is successful, then the deployment item disappears. If not, then an error message is displayed.

Removing the Siebel Gateway

The Siebel Management Console lets you remove the Siebel Gateway service from the server computer, for a Siebel Gateway that you have installed and configured.

Note: When removing a Siebel Gateway using this 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 Siebel Application Interface and Siebel Server that depend on this Siebel Gateway. Also remove the Siebel Gateway cluster, if configured. Before you uninstall a previously configured instance of Siebel Gateway, you must perform this task. When you perform this task, the Siebel Gateway must be running.

If this Siebel Gateway was not configured, then this task is not necessary before uninstallation.

This task is a step in *Process of Removing Configuration Data*.

To remove the Siebel Gateway

1. Make sure that the Siebel Gateway is running.
2. Run the Siebel Management Console, as described in *Running the Siebel Management Console*.
3. Click Settings in the left panel.

   The Siebel Management Console displays the URL for the physical instance of Siebel Gateway for the Siebel deployment.
4. Check the box labeled *I understand that removing Gateway will remove all profiles and deployments registered with the Gateway and remove the Gateway services.*
5. Click Remove Gateway.

Uninstalling Siebel CRM Server Modules

This topic describes how to uninstall Siebel CRM server modules for the current release. Both full uninstallation and rollback uninstallation are described. Rollback uninstallation rolls back a migration installation of these modules. With a rollback uninstallation, you roll back to the previously installed release of Siebel CRM.

In a full uninstallation, the installed Siebel CRM server modules (Siebel Enterprise Server) are uninstalled, such as Siebel Gateway, Siebel Server, Database Configuration Utilities, EAI Connector, Siebel Enterprise Cache, and Siebel Constraint Engine. Some modules might have been installed on a single computer or operating system instance, or different modules might have been installed on multiple computers or operating system instances. Separate uninstallation tasks are required for each installed instance.

Siebel Application Interface is always uninstalled as a separate task, for either full uninstallation or rollback uninstallation. In the current release, Siebel Application Interface is installed in a different location than the other Siebel CRM server modules, although they use the same installer software. Siebel Application Interface replaces the Siebel Web Server Extension (SWSE), which in prior releases used a separate installer.

CAUTION: Before you proceed with any uninstallation task, review all of the information in *About Uninstalling Siebel CRM*, particularly the requirements and limitations.

This topic includes the following information:

- *Uninstalling the Siebel CRM Server Modules*
- *Rolling Back the Siebel CRM Server Modules*
- *Uninstalling the Siebel Application Interface*
- *Rolling Back the Siebel Application Interface*

Uninstalling the Siebel CRM Server Modules

Use the following procedure to perform a full uninstallation of Siebel Enterprise Server software (Siebel CRM modules, such as Siebel Server or Siebel Gateway) on a single computer or operating system instance.

> **Note:** If you perform a rollback uninstallation rather than a full uninstallation, then you do not remove configuration data first. Use the steps described in *Rolling Back the Siebel CRM Server Modules* instead of those in this topic. Use the uninstallation method described in this topic only when it is appropriate: do not perform a full uninstallation by mistake.

This topic is part of *Uninstalling Siebel CRM Server Modules*.

To uninstall the Siebel CRM server modules

1. Review all of the information in *About Uninstalling Siebel CRM*, 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 installed instance of Siebel CRM server software, particularly one that includes Siebel Gateway, you must perform all of the applicable Siebel Management Console tasks to remove existing configuration data. For more information, see *Process of Removing Configuration Data*.

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 CRM server (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 modules on the same computer.

   The Siebel CRM 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.

Related Topics

Installing Siebel CRM Server Modules

About Uninstalling Siebel CRM

Process of Removing Configuration Data

Rolling Back the Siebel CRM Server Modules

Use the following procedure to roll back the current release of the Siebel Enterprise Server software (Siebel CRM modules, such as Siebel Server or Siebel Gateway) on a single computer or operating system instance and revert to the

previously installed software version. You can do this only when you have installed the current release as a migration installation from an existing installation of a release prior to Siebel CRM 17.0 and need to revert to the prior release, such as Siebel CRM 16.0.

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`, for example, then it was renamed from `ses` to `ses_pre17.0`.

Note: This topic describes only rolling back a migration installation of Siebel CRM 17.0 or later, not rolling back an installation of a Siebel CRM 20.x Update or earlier release that you had installed on top of Siebel CRM 17.0. After you have installed the update release, then you can uninstall it and revert to Siebel CRM 17.0. For more information, see *Installing and Uninstalling Siebel CRM 20.x Update*.

This topic is part of *Uninstalling Siebel CRM Server Modules*.

To roll back the Siebel CRM server modules

1. Review all of the information in *About Uninstalling Siebel CRM*, particularly the requirements and limitations.
2. Verify that the renamed original installation directory, such as `ses_pre17.0`, exists.
3. Stop all the running processes of application containers, which were installed and started during migration installation. You can do so by following the method described for Microsoft Windows or UNIX operating systems.

   For more information, see *Stopping and Starting the Siebel Application Container*.
4. Stop the Siebel services for the Siebel CRM 17.0 or later installation.
5. Use the correct rollback uninstallation method for your situation, as follows. For more information, see *Requirements for Uninstalling Siebel CRM*.
   - If you had originally installed Siebel CRM 8.1.1 (using the InstallShield installer) and are now rolling back to Siebel CRM 8.1.1 through Siebel CRM 8.1.1.7, then use the Oracle Universal Installer uninstallation option to uninstall Siebel CRM 17.0. Follow the procedure described in *Uninstalling the Siebel CRM Server Modules*, but do not remove configuration data. After performing this task, go to Step 13. (Step 7 through Step 10 do not apply in this case.)
   - If you are rolling back to another prior release of Siebel CRM, then use the manual steps that follow. Go to the next step. (Step 7 through Step 10 apply in this case only.)
6. Delete the Siebel Gateway Name Server service by using one of the following commands:
   - **Windows.** `SIEBEL_ROOT\gtwysrvr\bin\siebctl.exe -S gtwyns -d`
   - **UNIX.** `SIEBEL_ROOT/gtwysrvr/bin/siebctl -S gtwyns -d`
7. 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.
8. Delete the program folder that was created for the current release, which contains the shortcut for running the Database Configuration Wizard.

   The program directory was defined based on the installation directory. For example, for an installation directory of `c:\siebel\ses`, the program folder is `Siebel_Home_c_siebel_ses`.
9. 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_pre17.0`, to `ses` (depending on your original installation directory name).

10. If you rolled back to Siebel CRM 16.x, Siebel CRM 15.x, Siebel CRM 8.1.1.8 or later, or Siebel CRM 8.2.2.x, then verify the version number by using the `opatch` command, as described in *Verifying Installation for Siebel CRM*.
11. Open the file `SIEBEL_ROOT\gtwysrvr\bin\gateway.cfg` in any text editor and make a note of the port number mentioned in the value for the GatewayConnect parameter. You will replace the GATEWAYPORT string in the command mentioned in Step 12 with this port number.
12. Create the Siebel Gateway Name Server service for the pre-17.0 release by using one of the following commands:
    - **Windows.** `SIEBEL_ROOT\gtwysrvr\BIN\siebctl.exe -h SIEBEL_ROOT\gtwysrvr -S gtwyns -a -g "/f SIEBEL_ROOT\gtwysrvr\ADMIN\siebns.dat /t GATEWAYPORT /c SIEBEL_ROOT\gtwysrvr\bin\gateway.cfg" -q`
    - **UNIX.** `SIEBEL_ROOT/gtwysrvr/bin/siebctl -r SIEBEL_ROOT/gtwysrvr -S gtwyns -a -g "/f SIEBEL_ROOT/gtwysrvr/sys/siebns.dat /t GATEWAYPORT /c SIEBEL_ROOT/gtwysrvr/bin/gateway.cfg" -q`
13. Restart the Siebel services.
14. Run the Siebel Configuration Wizards, as necessary, to perform any required configuration tasks.

    > **Note:** You must use the Configuration Wizards for the version of the software that you rolled back to. Additional requirements apply to the post-rollback environment.

15. 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

Installing Siebel CRM Server Modules

Verifying Installation for Siebel CRM

About Uninstalling Siebel CRM

Process of Removing Configuration Data

Uninstalling the Siebel Application Interface

Use the following procedure to perform a full uninstallation of Siebel Application Interface software on a single computer. Uninstalling Siebel Application Interface is similar to uninstalling the Siebel Enterprise Server.

> **Note:** If you perform a rollback uninstallation rather than a full uninstallation, then you do not remove configuration data first. Use the steps described in *Rolling Back the Siebel Application Interface* instead of those in this topic. Use the uninstallation method described in this topic only when it is appropriate: do not perform a full uninstallation by mistake.

This topic is part of *Uninstalling Siebel CRM Server Modules*.

To uninstall the Siebel Application Interface

1. Review all of the information in *About Uninstalling Siebel CRM*, 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 Application Interface, you must perform the Siebel Management Console task to remove existing Siebel Application Interface configuration data. For more information, see *Process of Removing Configuration Data*.

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 Application Interface 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 Application Interface software that you want to uninstall.
6. Click Remove.
7. Click Yes to confirm that you want to uninstall this Siebel Application Interface on the same computer.

   The Siebel Application Interface 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.

Related Topics

Installing Siebel CRM Server Modules

About Uninstalling Siebel CRM

Process of Removing Configuration Data

Rolling Back the Siebel Application Interface

Use the following procedure to roll back the current release of the Siebel Application Interface 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 from an existing installation of a release prior to Siebel CRM 17.0 and need to revert to the prior release, such as Siebel CRM 16.0.

> **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_pre17.0`.

> **Note:** This topic describes only rolling back a migration installation of Siebel CRM 17.0 or later, not rolling back an installation of a Siebel CRM 20.x Update or earlier release that you had installed on top of Siebel CRM 17.0. After you have installed the update release, then you can uninstall it and revert to Siebel CRM 17.0. For more information, see *Installing and Uninstalling Siebel CRM 20.x Update*.

This topic is part of *Uninstalling Siebel CRM Server Modules*.

To roll back the Siebel Application Interface

1. Review all of the information in *About Uninstalling Siebel CRM*, particularly the requirements and limitations.

2. Verify that the renamed original installation directory, such as `sweapp_pre17.0`, exists.
3. Stop the Web server.
4. You must use the correct rollback uninstallation method for your situation, as follows. For more information, see *Requirements for Uninstalling Siebel CRM*.
    - If you had originally installed Siebel CRM 8.1.1 (using the InstallShield installer) and are now rolling back to Siebel CRM 8.1.1 through Siebel CRM 8.1.1.7, then use the Oracle Universal Installer uninstallation option to uninstall Siebel CRM 17.0. Follow the procedure described in *Uninstalling the Siebel Application Interface*, but do not remove configuration data. After performing this task, go to Step 9. (Step 5 through Step 8 do not apply in this case.)
    - If you are rolling back to Siebel CRM 16.x, Siebel CRM 15.x, Siebel CRM 8.1.1.8 or later, or Siebel CRM 8.2.2.x, then use the manual steps that follow. Go to the next step. (Step 5 through Step 8 apply in this case only.)
5. Delete the directory representing the current installation of Siebel Application Interface for the current release. For example, if the directory name is `Siebel_AI` or `sweapp`, then delete this directory.
6. 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_pre17.0`, to `sweapp` (depending on your original installation directory name).
7. Delete the program folder that was created for the current release.

   The program directory was defined based on the installation directory. For example, for an installation directory of `c:\siebel\eapps`, the program folder is `Siebel_Home_c_siebel_eapps`.
8. If you rolled back to Siebel CRM 16.x, Siebel CRM 15.x, Siebel CRM 8.1.1.8 or later, or Siebel CRM 8.2.2.x, then verify the version number by using the `opatch` command, as described in *Verifying Installation for Siebel CRM*.
9. Restart the Web server where you had originally installed the SWSE.
10. Run the SWSE Configuration Wizard, as necessary, to perform any required configuration tasks if you had removed the SWSE configuration on the Web server before performing the migration installation.

    > **Note:** You must use the SWSE Configuration Wizard for the version of the software that you rolled back to. Additional requirements apply to the post-rollback environment

11. If Oracle Configuration Manager was not configured before you performed a migration installation of Siebel Application Interface, then, after a rollback to the original installation of SWSE, you must configure this instance of Oracle Configuration Manager manually in order for it to function properly.

Related Topics

Installing Siebel CRM Server Modules

Verifying Installation for Siebel CRM

About Uninstalling Siebel CRM

Process of Removing Configuration Data

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 are described. Rollback uninstallation rolls back a migration installation of these modules. With a rollback uninstallation, you roll back to the previously installed software version (whether Siebel CRM 16.x, Siebel CRM 15.x, Siebel CRM 8.1.1.x, or Siebel CRM 8.2.2.x).

Note: If you installed Oracle Database SE2 for use with Siebel Web Client, and you plan to uninstall or roll back Siebel Web Client, then it is recommended that you first uninstall Oracle Database SE2. For more information, see *Uninstalling Oracle Database XE*.

CAUTION: Before you proceed with any uninstallation task, review all of the information in *About Uninstalling Siebel CRM*, particularly the requirements and limitations.

This topic includes the following information:

- *Uninstalling the Siebel Web Client*
- *Rolling Back the Siebel Web Client*
- *Uninstalling Siebel Tools*
- *Rolling Back Siebel Tools*
- *Uninstalling Oracle Database XE*

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 Oracle Database SE2 for use with Siebel Web Client, and you plan to uninstall Siebel Web Client, then it is recommended that you first uninstall Oracle Database SE2. For more information, see *Uninstalling Oracle Database XE*.

This topic is part of *Uninstalling Siebel Web Clients or Siebel Tools*.

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.

Related Topics

Installing the Siebel Web Client

About Uninstalling Siebel CRM

Uninstalling Oracle Database XE

Rolling Back the Siebel Web Client

Use the following procedure to roll back the installed current release of the Siebel Mobile Web Client or Developer Web Client software and revert to the previously installed software version. You can do this only when you have installed the

current release as a migration installation from an existing installation of a release prior to Siebel CRM 17.0 and need to revert to the prior release, such as Siebel CRM 16.0.

In the procedure below, the example installation paths are those that might apply for previous releases that you subsequently migrated to the current release.

> **Note:** If Oracle Database SE2 was installed for use with Siebel Web Client, and you plan to roll back Siebel Web Client, then it is recommended that you first uninstall Oracle Database SE2. For more information, see *Uninstalling Oracle Database XE*.

> **Note:** This topic describes only rolling back a migration installation of Siebel CRM 17.0 or later, not rolling back an installation of a Siebel CRM 20.x Update or earlier release that you had installed on top of Siebel CRM 17.0. After you have installed the update release, then you can uninstall it and revert to Siebel CRM 17.0. For more information, see *Installing and Uninstalling Siebel CRM 20.x Update*.

This topic is part of *Uninstalling Siebel Web Clients or Siebel Tools*.

To roll back the Siebel Web Client

1. Review all of the information in *About Uninstalling Siebel CRM*, 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_pre17.0`, 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_pre17.0`, 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*.
7. When the rollback process is complete, restart the Siebel Web Client.

Related Topics

Installing the Siebel Web Client

About Uninstalling Siebel CRM

Uninstalling Oracle Database XE

Uninstalling Siebel Tools

Use the following procedure to uninstall Siebel Tools in a full uninstallation.

This topic is part of *Uninstalling Siebel Web Clients or Siebel Tools*.

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.

Related Topics

Installing Siebel Tools

About Uninstalling Siebel CRM

Rolling Back Siebel Tools

Use the following procedure to roll back the installed current release of the Siebel Tools software and revert to the previously installed software version. You can do this only when you have installed the current release as a migration installation from an existing installation of a release prior to Siebel CRM 17.0 and need to revert to the prior release, such as Siebel CRM 16.0.

In the procedure below, the example installation paths are those that might apply for previous releases that you subsequently migrated to the current release.

> **Note:** This topic describes only rolling back a migration installation of Siebel CRM 17.0 or later, not rolling back an installation of a Siebel CRM 20.x Update or earlier release that you had installed on top of Siebel CRM 17.0. After you have installed the update release, then you can uninstall it and revert to Siebel CRM 17.0. For more information, see *Installing and Uninstalling Siebel CRM 20.x Update*.

This topic is part of *Uninstalling Siebel Web Clients or Siebel Tools*.

To roll back Siebel Tools

1. Review all of the information in *About Uninstalling Siebel CRM*, particularly the requirements and limitations.
2. Exit Siebel Tools if it is running.
3. Verify that the renamed original installation directory, such as `Tools_1_pre17.0`, exists.
4. Delete the directory representing the current installation of Siebel Tools for the current release. For example, if the directory name is `Tools_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 `Tools_1_pre17.0`, 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*.
7. When the rollback process is complete, restart Siebel Tools.

Related Topics

Installing Siebel Tools

About Uninstalling Siebel CRM

Uninstalling Oracle Database XE

Oracle Database XE was used for the local or sample database with previous versions of Siebel CRM. It is still installed with the Siebel Web Client installer in Siebel CRM 17.0, and is used through Siebel CRM 20.7 Update. As of Siebel CRM

20.8 Update, the local database now uses Oracle Database SE2 and the sample database is no longer supported. This topic describes how to uninstall Oracle Database XE when it is no longer needed.

> **Note:** For Siebel CRM 20.8 Update or later, performing a rollback or full uninstallation of Siebel Mobile Web Client does not uninstall Oracle Database SE2. If you need to uninstall Oracle Database SE2, see the documentation for this product on Oracle Help Center.

Use the following procedure to uninstall Oracle Database XE. You can use this procedure if you previously installed Oracle Database XE and the local database or sample database with Siebel Web Client. Uninstalling Oracle Database XE also uninstalls the local database or the sample database. (You can also uninstall Oracle Database XE if you installed it for an earlier version of Siebel Tools.)

It is recommended that you uninstall Oracle Database XE if you installed it for use with Siebel Mobile Web Client but then determine that you will not use it. For example, you would uninstall Oracle Database XE if you uninstall Siebel CRM version 17.0 or later and roll back to Siebel CRM version 15.0. Uninstall Oracle Database XE before you uninstall or roll back Siebel Web Client. For full or rollback uninstallation of Siebel Web Client for Siebel CRM 17.0 or later, see *Uninstalling Siebel Web Clients or Siebel Tools*.

For uninstallation (rollback) of Siebel Web Client for your installed Siebel CRM 20.x Update release, see *Installing and Uninstalling Siebel CRM 20.x Update*.

> **Note:** When you uninstall Siebel Web Client, in a full installation or rollback uninstallation (including rollback of your installed Siebel CRM 20.x Update release), Oracle Database XE and the local database or the sample database are not uninstalled. In addition, the ODBC data source created for Oracle Database XE is not deleted in these uninstallation cases.

As an alternative to the procedure below, you can use one of the following methods:

- Uninstall Oracle Database Express Edition from the Windows Control Panel.
- Uninstall Oracle Database Express Edition from Programs and Features.

After uninstalling Oracle Database XE, restart the computer.

This topic is part of *Uninstalling Siebel Web Clients or Siebel Tools*.

To uninstall Oracle Database XE and the local database or sample database

1. In Windows Explorer, navigate to the Siebel image location for the Siebel release from which you installed Oracle Database XE with Siebel Web Client. Then navigate to the directory where the Oracle Database XE installer is located.

   Navigate to the following location, based on the Siebel software for which you are uninstalling Oracle Database XE:

   - `Siebel_Image\Windows\Client\Siebel_Web_Client\Disk1\stage\XE\64\Disk1`

     In this path, `Siebel_Image` is the directory for your version-specific Siebel network image, such as `c:\Siebel_Install_Image\17.0.0.0`, for Siebel CRM 17.0.
2. To start the Oracle Database XE installer, double-click setup.exe.
3. Click Remove.
4. After uninstalling Oracle Database XE, restart the computer.
5. Delete the directory `SIEBEL_CLIENT_ROOT\oraclexe`.

Related Topics

Installing and Using Oracle Database SE2 for the Local Database

Uninstalling the Siebel Web Client

Rolling Back the Siebel Web Client

About Uninstalling Earlier Versions of Siebel CRM

To uninstall an earlier version of Siebel CRM 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 17.x

- For the full uninstallation or rollback uninstallation instructions for Siebel CRM 17.x (Siebel Innovation Pack 2017), see that version of the *Siebel Installation Guide* for the operating system you are using, which is the guide that you used when you installed Siebel CRM 17.0. The most recent applicable guides, including those for this release, are available on My Oracle Support, at 1461732.1 (Article ID).

For Siebel CRM 16.x

- For the full uninstallation or rollback uninstallation instructions for Siebel CRM 16.x (Siebel Innovation Pack 2016), see that version of the *Siebel Installation Guide* for the operating system you are using, which is the guide that you used when you installed Siebel CRM 16.0. The most recent applicable guides, including those for this release, are available on My Oracle Support, at 1461732.1 (Article ID).

For Siebel CRM 15.x

- For the full uninstallation or rollback uninstallation instructions for Siebel CRM 15.x (Siebel Innovation Pack 2015), see that version of the *Siebel Installation Guide* for the operating system you are using, which is the guide that you used when you installed Siebel CRM 15.0. The most recent applicable guides, including those for this release, are available on My Oracle Support, at 1461732.1 (Article ID).

For Siebel CRM 8.1.1.14 or Siebel CRM 8.1.1.11

- For the full uninstallation or rollback uninstallation instructions for Siebel CRM 8.1.1.14 (Siebel Innovation Pack 2014) or Siebel CRM 8.1.1.11 (Siebel Innovation Pack 2013), see the version of the *Siebel Installation Guide* for the operating system you are using, which is the guide that you used when you installed Siebel CRM 8.1.1.14 or 8.1.1.11. The most recent applicable guides, including those for these releases, are available on My Oracle Support, at 1461732.1 (Article ID).

For Siebel CRM 8.1.1 and Siebel CRM 8.1.1.x (through version 8.1.1.10)

- For the full uninstallation instructions for Siebel CRM 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, which is 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 8.1.1.8 through Siebel CRM 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, which is 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 8.1.1.x Fix Pack releases through Siebel CRM 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 8.1.1.8 and later, compared to Siebel CRM 8.1.1.1 through 8.1.1.7.

For Siebel CRM 8.2.2.14 and Siebel CRM 8.2.2.4

- For the full uninstallation or rollback uninstallation instructions for Siebel CRM 8.2.2.14 (Siebel Innovation Pack 2014) or Siebel CRM 8.2.2.4 (Siebel Innovation Pack 2013), see the version of the *Siebel Installation Guide* for the operating system you are using, which is the guide that you used when you installed Siebel CRM 8.2.2.14 or 8.2.2.4. The most recent applicable guides, including those for these releases, are available on My Oracle Support, at 1461732.1 (Article ID).

For Siebel CRM 8.2.2 and Siebel CRM 8.2.2.x (through version 8.2.2.3)

- For the full uninstallation instructions for Siebel CRM 8.2.2, see the version of the *Siebel Installation Guide* for the operating system you are using, which is 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 8.2.2.x Fix Pack releases through Siebel CRM 8.2.2.3, see the applicable *Siebel Maintenance Release Guide* on My Oracle Support, 1441523.1 (Article ID).

For Siebel CRM 8.0, 7.8.x, or 7.7.x

- For the uninstallation instructions for Siebel CRM 8.0, 7.8.x, or 7.7.x, see Siebel CRM 8.0, 7.8, or 7.7 of the *Siebel Installation Guide* for the operating system you are using.

For Siebel CRM 7.5.x, 7.0.x, or 6.x.x

- For the uninstallation instructions for Siebel CRM 7.5.x, 7.0.x, or 6.x.x, see the applicable version of the *Siebel Installation Guide* for the operating system you are using. See also *Siebel Web Client Administration Guide*, *Siebel Tools Reference*, or other applicable documents for these earlier versions.

Related Topics

Installing and Deploying Siebel CRM with Multiple Languages

About Uninstalling Siebel CRM

Related Books

Earlier versions of the *Siebel Installation Guides* on My Oracle Support, 1461732.1 (Article ID)

10 Requirements for Installing and Configuring Siebel CRM

Requirements for Installing and Configuring Siebel CRM

This chapter documents requirements that apply to installing and configuring Siebel CRM software. It includes the following topics:

- *About Installing Siebel CRM*
- *Planning Your Siebel Deployment*
- *Requirements for Installing and Configuring Siebel Enterprise Server Modules*
- *Requirements for Installing and Configuring the Siebel Application Interface*
- *Requirements for Installing and Configuring the Siebel Database*
- *Requirements for Installing Siebel Web Clients*
- *Requirements for Installing Siebel Tools*

About Installing Siebel CRM

Each Siebel CRM software release from Oracle has a specific version level, such as Siebel CRM 20.9 Update. You can install Siebel Enterprise Server components, Siebel Application Interface, Siebel Web Client, or Siebel Tools at the current version. This topic contains the following information:

- *About Documented Requirements*
- *About Siebel CRM Releases*
- *About Installing in Upgrade Environments*
- *About Language Installation*

Related Topics

Installing Siebel CRM Server Modules

Installing Siebel Web Clients and Siebel Tools

Uninstalling Siebel CRM

About Documented Requirements

This topic is part of *About Installing Siebel CRM*.

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 Help Center, Oracle Technology Network, or My Oracle Support. See also *Siebel CRM Update Guide and Release Notes* on My Oracle Support.

Note: All Siebel CRM modules used within a given Siebel Enterprise must share the same release level (version number), such as Siebel CRM 20.9 Update. 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 Siebel CRM 17.0 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 srvrmgr. For *Siebel Installation Guides* for prior releases, see My Oracle Support, at 1461732.1 (Article ID).
- Before installing Siebel CRM 17.0 for Siebel Application Interface (migration installation case), you must stop the Web server used for the previously installed release. For *Siebel Installation Guides* for prior releases, see My Oracle Support, at 1461732.1 (Article ID).

About Siebel CRM Releases

This topic is part of *About Installing Siebel CRM*.

Siebel CRM software releases and their various installation methods have evolved significantly. Some previous types of releases no longer apply. The current release is Siebel CRM 20.9 Update. You install this release on top of Siebel CRM 17.x (Siebel Innovation Pack 2017) or later. This book describes the tasks and requirements that apply for the current release.

This guide, the *Siebel Installation Guide* for the operating system you are using, is for installing the current release. The *Siebel Installation Guides* describe how to perform both new installations and migration installations.

You install Siebel Gateway, Siebel Server, Database Configuration Utilities, Siebel Application Interface, Siebel Web Client, or Siebel Tools as a new installation of the software or as a migration installation. For more information, see *Installation-Related Changes for Siebel CRM 20.x Update*, *Installation-Related Changes for Siebel CRM 17.0*, and related topics.

Note: For an existing installation of a prior version (before Siebel CRM 17.0), running Incremental Repository Merge is required after performing a migration installation. For more information, see *About Database Updates for Siebel CRM 20.x Update*. Other requirements apply. See also *Additional Tasks for Migration Installations*.

The following table lists the major installable Siebel CRM modules for Siebel CRM 17.0 and shows which installation methods are supported in order to install the current release. Both new installations and migration installations of Siebel CRM 17.0 use the same installers.

Siebel CRM Module	Installation Methods for Current Release (Siebel CRM 20.9 Update)
Siebel Gateway Siebel Server Database Configuration Utilities EAI Connector Siebel Application Interface	• New installation of Siebel CRM 17.0, plus Siebel CRM 20.9 Update, as described in *Installing Siebel CRM in a New Installation* • Migration installation of Siebel CRM 17.0, plus Siebel CRM 20.9 Update, as described in *Installing Siebel CRM in a Migration Installation* • Installation of Siebel CRM 20.9 Update on top of an existing installation of Siebel CRM 17.x or later, as described in *Installing Siebel CRM 20.x Update*

Siebel CRM Module	Installation Methods for Current Release (Siebel CRM 20.9 Update)
Siebel Enterprise Cache Siebel Constraint Engine	• New installation of Siebel CRM 17.0, plus Siebel CRM 20.9 Update, as described in *Installing Siebel CRM in a New Installation* • Installation of Siebel CRM 20.9 Update on top of an existing installation of Siebel CRM 17.x or later, as described in *Installing Siebel CRM 20.x Update*
Siebel Web Client	• New installation of Siebel CRM 17.0, plus Siebel CRM 20.9 Update, as described in *Installing the Siebel Web Client as a New Installation* • Migration installation of Siebel CRM 17.0, plus Siebel CRM 20.9 Update, as described in *Installing the Siebel Web Client as a Migration Installation* • Installation of Siebel CRM 20.9 Update on top of an existing installation of Siebel CRM 17.x or later, as described in *Installing Siebel CRM 20.x Update*
Siebel Tools	• New installation of Siebel CRM 17.0, plus Siebel CRM 20.9 Update, as described in *Installing Siebel Tools as a New Installation* • Migration installation of Siebel CRM 17.0, plus Siebel CRM 20.9 Update, as described in *Installing Siebel Tools as a Migration Installation* • Installation of Siebel CRM 20.9 Update on top of an existing installation of Siebel CRM 17.x or later, as described in *Installing Siebel CRM 20.x Update*

Typically, no additional Siebel application configuration tasks are associated with a migration installation. You would not have to run the Siebel Management Console (successor to Siebel Configuration Wizards) to configure a module that was already configured. However, requirements vary for different release, or for using particular functionality. In some cases, for example, you might need to reconfigure a server module after doing a migration installation. In Siebel CRM 17.0, you must configure the Siebel Application Interface after performing migration installations.

Note: The installation tasks and requirements for all future releases are subject to change. You must verify the availability, characteristics, and requirements of any future releases, including any Siebel CRM 20.x Update releases, that might also be covered by this guide (or updated versions of it) or by other documentation.

Related Books

For *Siebel Installation Guides* for prior releases, see My Oracle Support, at 1461732.1 (Article ID).

For Siebel CRM 20.x, 19.x, and 18.x Update releases, see also *Siebel CRM Update Guide and Release Notes* on My Oracle Support.

For the readme documents for individual Siebel Patchset releases for Siebel CRM 17.x and earlier, 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.

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.

About Installing in Upgrade Environments

This topic is part of *About Installing Siebel CRM*.

When you install Siebel CRM, 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 CRM, 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 CRM 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* and see *Siebel Database Upgrade Guide for DB2 for z/OS* .

CAUTION: As part of installing Siebel CRM 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 module called *Database Configuration Utilities* on a Siebel Server, as described in *Installing Siebel CRM Server Modules*.
- You *do not create* the database instance on the RDBMS, as described in *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 *Installing the Siebel Database on the RDBMS*.
- Certain installation and configuration requirements associated with authentication for using Siebel Gateway and Siebel Management Console that apply for new deployments do not apply in this case. For details, see *Requirements for Siebel Gateway Authentication*.

For more information about how to use this guide in an upgrade installation case, see *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*.

After installing and upgrading, you might have to perform additional tasks. Some tasks that might apply are described in *Siebel Application Deployment Manager Guide* , *Siebel System Administration Guide* , or *Siebel Database Upgrade Guide* .

As of Siebel CRM 17.0, the Siebel Migration application, a Web-based tool for migrating Siebel Repositories and seed data and performing related tasks, is provided with the Siebel Application Interface installation. The Siebel Management Console includes tasks for configuring the Siebel Migration application. *Siebel Database Upgrade Guide* describes the Siebel Migration application. See also *Preparing to Run Siebel Server Components*.

When you install Siebel CRM in some upgrade scenarios, you might in some cases be able to install different versions of a Siebel CRM module on the same computer or operating system instance, 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 CRM*.

After you install Siebel CRM 17.0, you install Siebel CRM 20.9 Update. Install Siebel CRM 20.9 Update *before* you initiate the upgrade process. After upgrading, you can install additional Siebel releases as they become available.

CAUTION: Do not install any additional Siebel release until the upgrade is complete.

For information about types of Siebel CRM releases, see *About Siebel CRM Releases*.

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 CRM*.

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 CRM with Multiple Languages*.

Planning Your Siebel Deployment

You must plan where to install the various Siebel CRM modules on your servers. This topic contains the following information:

- *Preparing the Hardware and Planning Topologies*
- *Planning Disk Space and Configuration Requirements*
- *Planning RDBMS Installation and Configuration*
- *Managing Temporary Disk Space Required by Siebel Installers and Wizards*
- *About the Language in Which Siebel Installers and Wizards Run*
- *Planning to Install Multiple Instances of Siebel CRM*
- *Specifying the Locale for Siebel CRM*
- *Restrictions on Host Names for Siebel Gateway and Siebel Server*
- *Restrictions on Names for Siebel Enterprise and Siebel Server*
- *File and Directory Naming Conventions*
- *Creating the Siebel File System*
- *Creating the Siebel Service Owner Account*
- *Installation and Configuration Methods by Deployment Type*

Preparing the Hardware and Planning Topologies

This topic is part of *Planning Your Siebel Deployment*.

Verify that the hardware that you have chosen meets all of the requirements for running your Siebel 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, Siebel Server, Siebel Application Interface, and other Siebel CRM modules. Also plan to support Siebel Tools developer workstation computers and Siebel Mobile Web Client computers, where applicable, as well as mobile devices if you are deploying Siebel Mobile applications.

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 *Siebel Deployment Planning Worksheet*.

Related Topics

Planning to Install Multiple Instances of Siebel CRM

Restrictions on Host Names for Siebel Gateway and Siebel Server

Restrictions on Names for Siebel Enterprise and Siebel Server

File and Directory Naming Conventions

Creating the Siebel File System

About the Siebel Application Interface

Planning the Siebel Application Interface Topology

Related Books

Siebel Deployment Planning Guide

Siebel Performance Tuning Guide

Siebel Security Guide

Certifications tab on My Oracle Support

Planning Disk Space and Configuration Requirements

This topic is part of *Planning Your Siebel Deployment*.

Before you install, you must anticipate your disk space requirements for each installable Siebel CRM 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 *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*.

The Siebel CRM 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 CRM server modules, 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 CRM 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 Siebel CRM deployments, 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 Server computers, Siebel Application Interface computers, and other 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, Siebel Remote servers, and the database server. Clustering is also recommended for any Siebel Server computer that is not load-balanced.

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, see the Certifications tab on My Oracle Support. For more information, see 1492194.1 (Article ID) on My Oracle Support.

It is strongly recommended to configure Siebel Gateway clustering using Siebel Management Console, as described in *Configuring the Siebel Gateway Cluster*.

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*.

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 *Configuring the RDBMS*. For more information about configuring the Siebel database after installing Siebel Enterprise Server, see *Installing the Siebel Database on the RDBMS*.

- Make sure that this release of Siebel CRM 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 database server will hold the database tables containing your business data, such as sales (personnel, territories, opportunities, and activities), marketing, and customer service information. It will also contain Siebel Repository tables, which are used both for developing and for operating Siebel applications.
- Verify that the network name of the server that will support the Siebel database is properly recorded in your copy of the worksheet in *Siebel Deployment Planning Worksheet*.
- Installing the Siebel database, as described in *Installing the Siebel Database*, creates a ODBC data source name, which might be needed to provide authentication for the Siebel Management Console configuration process, as described in *Configuring Siebel CRM Server Modules*.
- When you configure the Siebel Enterprise, the Siebel Management Console creates the ODBC data source name, using the name SiebelEnterpriseName_DSN. For example, if your Siebel Enterprise name is sieb17, then the ODBC data source name will be sieb17_DSN. If a data source using this name exists, then it is overwritten. Using this pattern, determine what your ODBC data source name will be and record it in your copy of the worksheet in *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. For information about verifying the ODBC data source for your RDBMS platform, see *Verifying the ODBC Data Source*. See also *Troubleshooting the ODBC Data Source Connection*.

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 Management Console. For more information, see *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.

In a database environment that is not enabled for Unicode, however, 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 CRM

Configuring the RDBMS

Related Books

Siebel Global Deployment Guide

Certifications tab on My Oracle Support

For Siebel CRM language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) 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 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 CRM 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*.) 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, *Configuring the RDBMS* and *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, see *Requirements for Siebel Gateway Authentication*.

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 CRM, 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*.

Siebel installer programs, the Siebel Image Creator utility, and other programs 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.

The following shows the minimum disk space required by Siebel installers and wizards (by operating system), along with the default temporary directory locations.

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*.

When you start Siebel installer programs, the Siebel Image Creator utility, or the Siebel Database Configuration Wizard, 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 Siebel CRM and for the installer, utility, or 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 Image Creator and the Siebel Database Configuration Wizard 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 CRM, then the program runs in U.S. English.

For the Siebel installers, Database Configuration Wizard, 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 CRM, as described earlier.

For information about installing language packs for Siebel CRM, see the applicable installation task topic and see *Installing and Deploying Siebel CRM with Multiple Languages*.

Planning to Install Multiple Instances of Siebel CRM

This topic is part of *Planning Your Siebel Deployment*.

This topic describes issues in installing multiple instances of similar or dissimilar versions of Siebel CRM on the same computer or operating system instance.

Installing Multiple Instances of the Same Version of Siebel CRM

By default, the Siebel installers automatically install Siebel CRM software in directories with unique names that will not conflict with other Siebel CRM modules that you install on the same computer or operating system instance. To install another instance of the same version of a module on a single computer or operating system instance (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 (or any version) of Siebel Gateway on the same computer or operating system instance. The reason for this is that installing and configuring the Siebel Gateway creates a service which cannot coexist in multiple instances for different installations.
- You must take care to avoid conflicts in port number usage whenever you install or configure multiple Siebel CRM modules or multiple instances on the same computer or operating system instance. You specify multiple port numbers when you install and configure Siebel CRM modules.

- Restrictions apply for installing multiple instances of Siebel Application Interface. You must install them in different locations and assign unique port numbers for the application containers. For details, see *Requirements for Installing and Configuring the Siebel Application Interface*.

For important related considerations, see also *About Installing Siebel CRM* and *Preparing the Hardware and Planning Topologies*.

Note: In this context, *same version* refers to multiple installations of a given release, such as Siebel CRM 20.9 Update.

All Siebel CRM server modules that you install together on the same computer or operating system instance are installed into the same root directory (such as `c:\siebel` on Microsoft Windows or `/siebel` on UNIX), except in the case described in the note that follows. These modules might include Siebel Gateway, Siebel Server, Database Configuration Utilities, EAI Connector, and Siebel Enterprise Cache. Restrictions and guidelines apply to collocating Siebel CRM modules, as noted in *About Installing Siebel CRM*. See also *File and Directory Naming Conventions*.

As an example of restrictions for collocating Siebel CRM modules, you must install Siebel Application Interface in a different directory than other Siebel CRM modules, or on a different computer or operating system instance.

If you have already installed Siebel CRM modules (Siebel Enterprise Server) for the current release, and you require additional Siebel CRM modules (for example, Siebel Gateway is already installed and you want to install a Siebel Server), then you can install a new instance of Siebel Enterprise Server software, with the modules you require. You must install the new instance in a different directory or on a different computer or operating system instance. Then install Siebel CRM 20.9 Update for each installed instance. For more information about options in this situation, see *General Requirements for Installing and Configuring Siebel Enterprise Server Modules* and other relevant topics.

Each installed instance of Siebel CRM software, whether on the same or on a different computer or operating system instance, must be configured in order to operate it in your Siebel deployment. Configuration requirements are different for new installations and migration installations. A new installation must be configured using Siebel Management Console, by configuring and applying profiles for each module. Depending on your existing deployment, in a migration installation case involving multiple instances of a Siebel CRM module, you might have a choice about whether to install and configure each additional instance of a new module as a new installation or as a migration installation. Specific requirements vary by Siebel CRM module and by installation case.

If you install additional instances of Siebel Application Interface (when the primary instance is operational, whether a new or migration installation), then some additional steps might be necessary to deploy these instances. These steps involve editing the applicationinterface.properties file, which is located in `SIEBEL_AI_ROOT/applicationcontainer/webapps`. Copy the following parameters and their values from applicationinterface.properties on the primary instance of Siebel Application Interface into the [Application Interface] section of the corresponding file on the new instance: Password, UserName, and CGHostURI. For each new Siebel Application Interface instance, after you save the updated file, restart the application container. Then you can apply a profile to deploy this instance.

Installing Multiple Instances of Different Versions of Siebel CRM

Multiple versions of some Siebel CRM modules can be installed on the same computer or operating system instance. Sometimes you might have to do this as part of some upgrade scenarios.

- Each instance of Siebel Gateway must be installed on a separate computer or operating system instance, regardless of the version.
- If you install multiple versions of Siebel Server on the same computer or operating system instance, then you must install them in different directories and assign unique port numbers for the application containers.
- Multiple instances of different or dissimilar versions of Siebel Application Interface do not apply in the current release, because it is the first release for this module.

Related Topics

Installing Siebel CRM Server Modules

Requirements for Installing and Configuring the Siebel Application Interface

Related Books

Siebel Database Upgrade Guide

Specifying the Locale for Siebel CRM

This topic is part of *Planning Your Siebel Deployment*.

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 CRM. 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 CRM).

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 CRM 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 CRM).

> **CAUTION:** For development environments, Siebel CRM supports 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

Configuring the RDBMS

Related Books

Siebel Applications Administration Guide

Siebel Global Deployment Guide

Restrictions on Host Names for Siebel Gateway and Siebel Server

This topic is part of *Planning Your Siebel Deployment*.

See also *Restrictions on Names for Siebel Enterprise and Siebel Server*, 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 or Siebel Server.

The Siebel Gateway name is defined automatically based on the host name of the server computer. However, problems might arise during configuration of Siebel CRM modules unless the following requirements are observed:

- Host names for Siebel Gateway 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_sba17 is acceptable, but host-sba17 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*.

- The host name for Siebel Gateway must be no longer than 15 characters.

  The Siebel Management Console task for configuring the Siebel Gateway displays an error if the host name you enter is longer than 15 characters.

  (Siebel Management Console tasks for configuring the Siebel Enterprise and the Siebel Server also validate that the name of the Siebel Gateway, 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 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*.

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 CRM software.

See also *Restrictions on Host Names for Siebel Gateway and Siebel Server*.

Siebel Management Console 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 Siebel Management Console. 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. (A names such as server1 is acceptable.)

File and Directory Naming Conventions

This topic is part of *Planning Your Siebel Deployment*.

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 modules, Siebel Application Interface, Siebel Web Clients, and Siebel Tools are those for new installations of the current release, Siebel CRM 17.0. Alternatively, your products might have been installed in different installation directories, such as if you had originally installed them for a prior release.

SIEBEL_ROOT. Generally, this refers to the main directory in which software for each Siebel Enterprise Server module has been installed. The installers for the Siebel Enterprise Server modules install into the top-level directory, such as `c:\Siebel`, 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 CRM software in general (such as `c:\Siebel`), or of a specific module such as Siebel Gateway or Siebel Server (such as `c:\Siebel\siebsrvr` for Siebel Server), depending on the context. Many scripts contain variables with this name; its meaning is most often derived from the context.

SIEBSRVR_ROOT. The installation or root directory for Siebel Server, such as `c:\Siebel\siebsrvr`.

SIEBEL_GATEWAY_ROOT. The installation or root directory for Siebel Gateway, such as `c:\Siebel\gtwysrvr`.

DBSRVR_ROOT. The directory into which you install Siebel Database Configuration Utilities (also called the *Siebel Database Server*), such as `c:\Siebel\dbsrvr` (on a Siebel Server computer).

SIEBEL_AI_ROOT. The directory into which you install Siebel Application Interface, such as `c:\Siebel_AI`.

SIEBEL_CLIENT_ROOT. The directory into which you install Siebel Mobile Web Client or Siebel Developer Web Client, such as `c:\Siebel\Client` or a similar location.

SIEBEL_TOOLS_ROOT. The directory into which you install Siebel Tools, such as `c:\Siebel\Tools` or a similar location.

Creating the Siebel File System

This topic is part of *Planning Your Siebel Deployment*.

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 CRM. 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 Guide* .

Siebel File System Requirements

The following are requirements for the Siebel File System. Additional requirements are noted later in this topic.

- You specify the Siebel File System directory when you configure and deploy the Siebel Enterprise using Siebel Management Console. Siebel Management Console creates the Siebel File System directory if the directory specified for the File System does not exist. However, t is recommended that you create the primary Siebel File System directory with appropriate permission before you configure the Siebel Enterprise.
- The Siebel File System directory location must be specified using UNC format, such as `\\computer_name\FS`. If this directory is located on the same computer or operating system instance where you are installing and configuring Siebel CRM software, then the directory must be created as a shared directory. The user running the Siebel Management Console must have write permission in the Siebel File System directory.
- It is strongly recommended that you disable short file-name generation on Windows server computers or operating system instances hosting the Siebel File System. Using 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. When you configure the Siebel Enterprise, you specify a value for this parameter, as described in *Creating a Siebel Enterprise Profile*.

For a Siebel Server dedicated for use with Siebel EIM, for example, you might choose to use a Siebel File System location that is not in general use in the Siebel Enterprise. Use Siebel 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 2048 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 *Siebel Deployment Planning Worksheet*. Use the computer names, not the IP addresses, for the Siebel File System names. IP addresses are not supported.

Deployments Using the Siebel Migration Application

Because the Siebel Migration application uses the Siebel File System, it is strongly recommended to use different file system locations for the source and target environments, to avoid any file conflicts. For this type of configuration, use Siebel Server Manager to set the following parameters in the source and target environments:

- Set the parameter DSFileSystem for the server data source (ServerDataSrc) to `*FSM*`.
- Set the parameter FileSystem for the enterprise to specify the file system locations applicable for that environment.

For more information, see the description of the Migration Package Location setting in *Configuring the Siebel Migration Application*. For more information about administering the Siebel File System and setting parameters, see *Siebel System Administration Guide* .

Siebel File System Utilities

The following utilities are available to help you manage your Siebel File System directories: `sfscleanup` and `sfspartition`.

- Use `sfscleanup` to clean up orphan files in the Siebel File System.
- Use `sfspartition` to configure an existing Siebel File System to use multiple partitions or multiple directories.

For information about using these utilities, 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\siebel
```

Such a directory might be referred to using the following notation:

```
\\SiebelFS\siebel17
```

where:

- SiebelFS is the host name of the computer (for example, where a dedicated computer is used for the Siebel File System).
- siebel17 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.

> **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.

As part of the Siebel Server installation, File System Manager automatically generates a set of subdirectories under each Siebel File System root directory. Some of these directories are described in the following table.

Subdirectory	Purpose
`att`	Main subdirectory for file attachments
`atttmp`	Temporary directory for file attachments
`CFGCache`	Files used by Siebel Product Configurator
`CFGDefs`	Files used by Siebel Product Configurator
`cms`	Files used for outbound communication requests

Subdirectory	Purpose
`eim`	Siebel transaction files for Siebel EIM
`ISS_OBrkCache`	Files used by Siebel Product Configurator
`Marketing`	Main subdirectory for Siebel Marketing
`Migration`	Main subdirectory for the Siebel Migration application
`red`	Rule edit cache for Siebel Product Configurator
`ssp`	Session preferences
`userpref`	Siebel user preferences

For a migration installation case, Siebel File System subdirectories from previous releases are retained. Some of these directories might no longer apply in the current release, due to evolving feature support in Siebel CRM.

For more information about some of the Siebel File System subdirectories, see applicable documentation on *Siebel Bookshelf* , including *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 CRM.

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 *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

Related Books

Siebel Deployment Planning Guide

Siebel System Administration Guide

Siebel Security Guide

Creating the Siebel Service Owner Account

This topic is part of *Planning Your Siebel Deployment*.

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, 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 CRM 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 *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

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 CRM 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*
- *Medium-Sized Deployments*
- *Large Deployments*
- *Installation and Configuration Options*

For more information, see *Overview of Installing Siebel CRM* 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 CRM 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). The Siebel database might be located on the same computer as the Siebel Enterprise Server and the Siebel Application Interface, or on a different computer.

In this scenario, you install the Siebel Enterprise Server modules and you install the Siebel Application Interface on the same computer. Siebel Enterprise Server modules include Siebel Gateway, Siebel Server, Database Configuration Utilities, EAI Connector, and Siebel Enterprise Cache.

You use the Siebel Enterprise Server installer to install the Siebel Enterprise Server modules. Then you use the same installer to install the Siebel Application Interface in a different directory on the same computer.

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 run Siebel Management Console to configure the Siebel CRM modules that you installed. You configure Siebel security, the Siebel Gateway, Siebel Enterprise, Siebel Server, Siebel Application Interface, and other modules.

Medium-Sized Deployments

Do you require a medium-sized deployment? Will you install all of the Siebel Enterprise Server modules on the same computer? Siebel Enterprise Server modules include Siebel Gateway, Siebel Server, Database Configuration Utilities, EAI Connector, and Siebel Enterprise Cache.

Verify that you have created the database instance (if you do not already have a Siebel database). 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 modules are to be installed on the same computer, but the Siebel Application Interface is to be installed on a different computer.

You use the Siebel Enterprise Server installer to install the Siebel Enterprise Server modules. Then you use the same installer to install the Siebel Application Interface on a different computer.

You can install in GUI mode or use unattended installation. For more information about unattended installation, see *Large Deployments*.

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 run Siebel Management Console to configure the Siebel CRM modules that you installed. You configure Siebel security, the Siebel Gateway, Siebel Enterprise, Siebel Server, Siebel Application Interface, and other modules.

Large Deployments

Do you require a relatively large deployment? Will you use multiple servers to deploy Siebel CRM modules?

If you must support many users or multiple Siebel applications and have multiple servers available, then you will probably install the Siebel Gateway, Siebel Server, Siebel Application Interface, and the Siebel database on different computers.

A large deployment usually also requires multiple Siebel Servers running on different computers or operating system instances. 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. You might also require multiple instances of Siebel Application Interface running on different computers or operating system instances.

Follow the same steps as for a medium-sized deployment. Then install and configure each additional instance of Siebel Server and Siebel Application Interface.

Installation and Configuration Options

This topic is part of *Installation and Configuration Methods by Deployment Type*.

Options that can help you install and configure Siebel CRM 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 CRM. Such specialized administrators might perform all of the tasks in the Siebel Database Configuration Wizard and the Siebel Management Console.

- 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 Siebel CRM module manually.
  - For information about unattended installation, see *Installing Siebel CRM in Unattended Mode*.
  - For information about unattended configuration, see *Installing Siebel CRM Server Modules*.

Requirements for Installing and Configuring Siebel Enterprise Server Modules

Review the requirements and guidelines in the following topics before installing and configuring the Siebel Enterprise Server modules:

- *General Requirements for Installing and Configuring Siebel Enterprise Server Modules*
- *Requirements for Siebel Gateway Authentication*
- *Requirements for Installing and Configuring the Siebel Gateway*
- *Requirements for Installing and Configuring the Siebel Server*
- *Requirements for Installing the Siebel EAI Connector*

For requirements specific to the Siebel database, see *Requirements for Installing and Configuring the Siebel Database*.

General Requirements for Installing and Configuring Siebel Enterprise Server Modules

This topic is part of *Requirements for Installing and Configuring Siebel Enterprise Server Modules*.

Review this topic before installing and configuring Siebel Enterprise Server modules. See also the topics about individual modules.

- Before installing Siebel CRM 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 CRM* and *Planning Your Siebel Deployment*.
- All computers or operating system instances 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 CRM software. Such products are listed in the Certifications tab on My Oracle Support.
- You must have created a Siebel CRM 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 *Creating the Siebel Installation Image on the Network*.

- If you install multiple Siebel Enterprise Server modules, such as Siebel Gateway and Siebel Server, on the same computer, then they are installed into a common root directory, such as `c:\siebel`. Installing Siebel CRM modules in certain combinations is not recommended. For more information, see *About Installing Siebel CRM* and *About Installation Tasks for Siebel CRM*.
- Installation directories must meet the requirements described in *File and Directory Naming Conventions*.
- If you will be clustering the Siebel Gateway or Siebel Server, then plan your use of clustering or redundant disk arrays (RAID) to configure against a single point of failure. For information about an optional native clustering feature for Siebel Gateway, see *Configuring the Siebel Gateway Cluster*. See also *Siebel Deployment Planning Guide* .
- Each computer or operating system instance 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 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*.
- Before running any of the Siebel Management Console tasks 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 Siebel Management Console 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 and all of the Siebel Servers are recorded in *Siebel Deployment Planning Worksheet*. You need this information when configuring the Siebel Servers.
- It is strongly recommended to review all applicable security information before you configure Siebel CRM, which uses Transport Layer Security (TLS).
- When data encryption is enabled, make a backup copy of the key file before you start a migration installation for Siebel Enterprise Server. Copy back this file after the migration.

  > **CAUTION:** When data encryption is enabled, a migration installation for Siebel Enterprise Server creates a new key file (keyfile.bin), overwriting your existing key file. If this happens, the encrypted columns will be inaccessible. To prevent this result, you must make a backup copy of the key file before starting the migration installation. After the migration installation, copy back the original key file. For more information about data encryption, see *Siebel Security Guide* .

- Review the issues described in *Managing Temporary Disk Space Required by Siebel Installers and Wizards*. 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 CRM with Multiple Languages*.

  For more information, see additional relevant topics, including:
  - *About Installing Siebel CRM*
  - *Planning RDBMS Installation and Configuration*
  - *Siebel Installation Media Contents*
  - *About Configuring Siebel CRM* and following topics
  - *Preparing to Run Siebel Server Components*
- You cannot install new Siebel Enterprise Server modules 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*.

- Before you configure Siebel Enterprise Server modules, you must have created the Siebel File System. It must meet all of the criteria described in *Creating the Siebel File System*.
- Before you install Siebel CRM, 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.
- For existing deployments, all Siebel Server component jobs must complete before:
    - You perform any Siebel CRM installations in a migration installation case.
    - You perform any upgrade tasks in a full database upgrade case.

      After you perform all installation and upgrade tasks, recreate any component job definitions that you require for your deployment.
- Antivirus software, firewalls, and other security software can interfere with installation and operation of software if they are not properly configured. In some cases, you might need to disable antivirus software while installing Siebel CRM software. In addition, you might need to disable the Windows feature User Account Control while installing Siebel CRM software. Follow these guidelines for using antivirus software:
    - Run virus scans on Siebel Enterprise Servers during maintenance windows, if possible, not when they are online. Scans can then be performed on all files at that time.
    - You can run regular virus scans for the Siebel File System. It is recommended to perform these scans during off-peak hours.
- For a migration installation case, you must perform the migration installation for Siebel Application Interface before you perform the migration installations for any other Siebel CRM server modules. When you do the migration installations for other Siebel Enterprise Server modules, the installer prompts you to provide the host name and installation location for the migrated installation of Siebel Application Interface. Without this information, the migration installations of Siebel Gateway, Siebel Server, or other modules cannot complete successfully.
- Additional requirements apply for migration installations of the current release. For more information, see *Additional Tasks for Migration Installations*.

Related Topics

Overview of Installing Siebel CRM

About Installing Siebel CRM

About Installation Tasks for Siebel CRM

Additional Tasks for Migration Installations

About Configuring Siebel CRM and following topics

Installation and Configuration Methods by Deployment Type

Related Books

Siebel Security Guide

Siebel Deployment Planning Guide

Requirements for Siebel Gateway Authentication

This topic is part of *Requirements for Installing and Configuring Siebel Enterprise Server Modules*.

Before you configure any Siebel Enterprise Server software, review the requirements associated with authentication for access to the Siebel Gateway. Authentication applies to access using Siebel Management Console or Siebel Server Manager.

Note the following requirements:

- Supported Siebel Gateway authentication methods include database authentication, LDAP, and custom methods. Additional configuration is required. You can use the same authentication method as for your Siebel enterprise connections, or use different methods.
- When you initially configure the Siebel Enterprise (after installing and configuring the Siebel Gateway), you propagate settings to the Siebel Gateway that specify authentication settings. Siebel Gateway authentication uses Siebel security adapters, which are discussed in detail in *Siebel Security Guide* .
- The user account that you use for Siebel Gateway 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. You can choose to use the Siebel administrator account for Siebel Gateway 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, if you will use database authentication, you must install it before you can configure the Siebel CRM software using the Siebel Management Console.
- After you configure the Siebel Gateway, users doing subsequent Siebel Management Console tasks that require Siebel Gateway authentication, or using Siebel Server Manager, must enter Siebel administrator user credentials that are valid for the authentication method in use.

  All Siebel Management Console tasks are subject to Siebel Gateway authentication.

  For more information about using Server Manager, see *Siebel System Administration Guide* .
- If you want to use LDAP or a custom authentication method for the Siebel Gateway, then you can configure this method as part of the Siebel Management Console tasks for creating or modifying the Siebel Enterprise. The Siebel Management Console both configures and enables the security adapters (for the Siebel Enterprise or for the Siebel Gateway).
- When you configure the Siebel Gateway using Siebel Management Console, the Authorization Roles setting defines the role that is required to access the Siebel Gateway. This setting includes the Siebel Administrator, which is provided by Oracle and cannot be modified. Optionally, you can add more comma-separated roles, specifying other roles that can access the Siebel Gateway.
- If you want to configure a second Siebel Enterprise on the same Siebel Gateway, then do not check the option to propagate authentication settings to the Siebel Gateway when prompted. Otherwise, your settings will overwrite the existing settings.

Related Topics

Configuring the Siebel Gateway and Security

Configuring the Siebel Enterprise

Requirements for Installing and Configuring the Siebel Gateway

This topic is part of *Requirements for Installing and Configuring Siebel Enterprise Server Modules*.

Review this topic before installing and configuring the Siebel Gateway. See also *General Requirements for Installing and Configuring Siebel Enterprise Server Modules*.

- Install the Siebel Gateway at least once for each Siebel Enterprise. If necessary, multiple Siebel Enterprises can be supported by a single Siebel Gateway. Installing multiple instances of the same version of Siebel Gateway on the same computer is not supported.

  For more information, see *Planning to Install Multiple Instances of Siebel CRM*. See also 477770.1 (Article ID) on My Oracle Support. This document was previously published as Siebel Technical Note 531.
- Optionally install multiple instances of Siebel Gateway on different nodes in order to configure and deploy clustering. For more information, see *Configuring the Siebel Gateway Cluster*.
- The default port number for Siebel Gateway is 2320. If necessary, you can select any port number (32767 or lower) that is free on the computer where the Siebel Gateway 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 that is already in use on the server.

Related Topics

Configuring the Siebel Gateway and Security

Configuring the Siebel Gateway Cluster

Requirements for Installing and Configuring the Siebel Server

This topic is part of *Requirements for Installing and Configuring Siebel Enterprise Server Modules*.

Review this topic before installing and configuring the Siebel Server. See also *General Requirements for Installing and Configuring Siebel Enterprise Server Modules*.

- To configure a Siebel Server, a Siebel Gateway must be installed and running, and the Siebel Enterprise must be configured.
- After you install the Siebel Gateway, you run the Siebel Management Console 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 Management Console.
- When you run the Siebel Management Console to configure 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 Siebel 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*.
- 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 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 and the Siebel Server on separate resource groups. For information about clustering, see *Siebel Deployment Planning Guide* .

For information about configuring Siebel Gateway clustering using Siebel Management Console, see *Configuring the Siebel Gateway Cluster*.

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 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 when you configure the Siebel Server, language-specific Application Object Manager components are created.

  For more information about scenarios for multilingual deployments, see *Installing and Deploying Siebel CRM with Multiple Languages* and related topics. See also *Siebel Global Deployment Guide* .
- If multiple languages are installed on a Siebel Gateway 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

Configuring the RDBMS, including *Configuring Siebel Server Connectivity to the Siebel Database*. See also *Planning RDBMS Installation and Configuration*.

The RDBMS that you are using must support the same languages and code pages that you install on the Siebel Servers. For Siebel CRM language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) 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 Siebel CRM 20.x Update*.

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*. 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 Modules*.

You can install EAI Connector with other Siebel Enterprise Server modules or install it a separate location.

For a list of supported operating systems for EAI Connector, see the Certifications tab on My Oracle Support. See also *General Requirements for Installing and Configuring Siebel Enterprise Server Modules*.

Requirements for Installing and Configuring the Siebel Application Interface

Before installing and configuring the Siebel Application Interface, review the requirements described in the following information:

- *About the Siebel Application Interface*
- *Planning the Siebel Application Interface Topology*
- *General Requirements for Installing and Configuring the Siebel Application Interface*
- *Requirements for User Permissions for the Siebel Application Interface*
- *Requirements for Configuring Anonymous Users for the Siebel Application Interface*

About the Siebel Application Interface

Siebel Application Interface enables communication between Siebel Web Clients and Siebel Servers. Siebel 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 CRM client that runs in the browser on the end user's computer and connects to the Siebel Application Interface.

  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* .

- **Siebel Application Interface.** A program 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 and with browsers run by users of Siebel CRM.

  For Siebel Application Interface installation instructions, see *Installing Siebel CRM*. For configuration instructions, see *Configuring the Siebel Application Interface*. See also *Planning the Siebel Application Interface Topology*.

- **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 CRM data and logic.

For information about the hardware and operating systems supported for Siebel CRM, see the Certifications tab on My Oracle Support.

Planning the Siebel Application Interface Topology

Before you install the Siebel Application Interface for your Siebel deployment, as described in *Installing Siebel CRM Server Modules*, you must decide how you will distribute instances of Siebel Application Interface and other Siebel CRM modules. For the best performance and scalability, you might choose to install the Siebel Application Interface onto one or more dedicated computers.

This topic is part of *Requirements for Installing and Configuring the Siebel Application Interface*.

Two basic methods are as follows:

- **Single-node.** Installing Siebel Enterprise Server modules and Siebel Application Interface on a single computer node, or operating system instance. Install Siebel Application Interface in the secured application intranet zone, in a different location on the same computer as the other Siebel CRM modules, or on a different computer. If you install all Siebel CRM modules on a single node, then you must use a separate installation directory for Siebel Application Interface.

  You can use existing Web servers to host reverse proxy or authentication, where these products support jsessionid cookies and the mod_jk module. All instances of Siebel Application Interface must be protected by a reverse proxy.

- **Distributed.** Distributing Siebel CRM modules, where instances of Siebel Application Interface on one or more dedicated computers or operating system instances connect to multiple Siebel Servers in the Siebel Enterprise. These Siebel Application Interface instances can be dynamically balanced for Application Object Manager components on different Siebel Server computers.

You can distribute incoming network traffic over multiple Siebel Application Interface instances by using third-party HTTP load balancers that support jsession-based load balancing in front of a reverse proxy Web server. You can use existing Web servers to host reverse proxy, authentication, or load balancing, where these products support jsessionid cookies and the mod_jk module. All instances of Siebel Application Interface must be protected by a reverse proxy.

> **Note:** As of Siebel CRM version 17.5, application containers for Siebel Application Interface instances on multiple nodes can be load balanced using products such as Apache HTTP Server (httpd) with the mod_jk module. The products you use must provide reverse proxy services and support load balancing based on jsessionid cookies. All instances of Siebel Application Interface must be protected by a reverse proxy. For more information about these or other products that meet these requirements, refer to vendor documentation. If you configure load balancing for application containers in this way, then, whenever an application container fails for a Siebel Application Interface node, the active sessions handled by that node transparently failover to another available healthy application container node.

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 Siebel Application Interfaces 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.
- **High availability.** A multinode configuration is required for deployments that support large numbers of concurrent users or where high availability is an operating requirement.

Related Topics

About the Siebel Application Interface

Installing Siebel CRM in a Migration Installation

Configuring the Siebel Application Interface

Customizing the Application Container for Siebel Application Interface

Installing Multiple Instances of the Same Version of Siebel CRM

Related Books

Siebel Deployment Planning Guide

Siebel Security Guide

General Requirements for Installing and Configuring the Siebel Application Interface

This topic lists general requirements for installing and configuring the Siebel Application Interface.

This topic is part of *Requirements for Installing and Configuring the Siebel Application Interface*.

- Before installing Siebel CRM 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*. For example, make sure that you have adequate disk space.
- Make sure that the computers on which you install the Siebel Application Interface meet 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 modules, including the Siebel Gateway, at least one Siebel Server, and the Database Configuration Utilities.

  Before you can configure Siebel Application Interface using Siebel Management Console, you must have configured the Siebel Gateway, the Siebel Enterprise, and 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 Siebel Server Manager, see *Siebel System Administration Guide* .

  > **Note:** Wait to install additional Siebel Servers until after you have completed installation of the Siebel Application Interface software and verified the connection from the Siebel Application Interface to the initial Siebel Server.

- You must perform the migration installation for Siebel Application Interface before you perform the migration installations for any other Siebel CRM server modules. When you do the migration installations for other Siebel Enterprise Server modules, the installer prompts you to provide the host name and installation location for the migrated installation of Siebel Application Interface. Without this information, the migration installations of Siebel Gateway, Siebel Server, or other modules cannot complete successfully.
- You can deploy multiple language packs on one Siebel Application Interface instance. The Siebel Server and the Siebel Application Interface do not have to be operated in the same language. However, the Siebel Server, the Siebel Application Interface, 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 CRM with Multiple Languages*.
- At least one Siebel Application Interface is required for each Siebel Enterprise.
- Note that uninstalling a Siebel Application Interface instance that you have configured removes the associated Siebel application configuration. See also *Uninstalling the Siebel Application Interface*.
- Note that the user interface of the Siebel Enterprise Server installer, which you use to install Siebel Application Interface, can run in the supported languages described in *About the Language in Which Siebel Installers and Wizards Run*.

Requirements for User Permissions for the Siebel Application Interface

This topic describes some requirements for permissions that affect installation or operation of the Siebel Application Interface and the Siebel application configurations that are associated with it.

This topic is part of *Requirements for Installing and Configuring the Siebel Application Interface*.

The user who will run the Siebel Application Interface must have read, write, and execute permissions on the `SIEBEL_AI_ROOT\applicationcontainer\webapps\siebel` directory and subdirectories (in this path, `SIEBEL_AI_ROOT` is the

directory in which the Siebel Application Interface is installed). These permissions allow static public files to be cached on the Siebel Application Interface. These directories are created during Siebel Application Interface installation and configuration. In general, Siebel administrators require full access to `SIEBEL_AI_ROOT` and all of its subdirectories.

Requirements for Configuring Anonymous Users for the Siebel Application Interface

As noted in *Creating a Siebel Application Interface Profile*, when you configure profiles for Siebel CRM using Siebel Management Console, you are prompted for user names and passwords of Siebel users who will serve as anonymous users for Siebel applications. Provide the anonymous user credentials, as appropriate for your deployment.

This topic is part of *Requirements for Installing and Configuring the Siebel Application Interface*.

The anonymous user has functions that include the following:

- Starting the anonymous session that displays the login page to an end user for an application. This function applies to both employee applications and customer applications.
- Allowing anonymous browsing and navigation within the application. In this case, usually applicable to customer applications only, the anonymous user must have access to any public view in the application.

You can define as many different anonymous users as you require for your deployment, each with the appropriate permissions, according to your needs. During Siebel software configuration, using Siebel Management Console, you can specify an anonymous user name and associated password when you:

- Configure the Siebel Server profile, as described in *Configuring the Siebel Server*. You can specify the anonymous user to serve as a default for that Siebel Server.
- Configure the Siebel Application Interface profile, as described in *Configuring the Siebel Application Interface*:
  - An anonymous user that will serve as a global default for all applications, unless overridden by the corresponding Siebel Server profile setting or by the corresponding setting for an individual application.
  - An anonymous user that will override the default for an individual application, unless overridden by the corresponding Siebel Server profile setting.
  - An anonymous user that will be used for REST inbound authentication. The password for this anonymous user is used for REST requests that are sent without a user name and password.

If, after performing the 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 modify the configuration to provide the updated password or to specify a different anonymous user for this application.

Record the credentials for each anonymous user in your deployment in the worksheet provided in *Siebel Deployment Planning Worksheet*.

Note the following guidelines and requirements:

- For more information about configuring anonymous users, see *Siebel Security Guide* .
- 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. The Siebel Management Console does not allow the Siebel administrator user, SADMIN, to be specified as an anonymous user.
- You can create new database users that will serve as anonymous users through editing the grantusr.sql script. You review, modify, and execute this script before you install the Siebel database and configure the Siebel deployment. GUESTCST is an example of an anonymous user account that you would create in the grantusr.sql

script. After you install the Siebel database and configure the Siebel deployment, then you still also add corresponding Siebel users. For more information, see *Creating Table Owner and Administrator Accounts*.

- The anonymous user for employee applications must be defined as an employee and must be associated with an appropriate position and responsibility.
- 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 component to False. If anonymous browsing must be enabled, then you set AllowAnonUsers to True.
- Anonymous users are used by applications that allow anonymous browsing by unregistered users, that display a Siebel login page, that support self-registration, or that support external authentication such as LDAP. The anonymous user and password are used for serving the login page.
- To use nondefault or application-specific anonymous users, you must specify the anonymous user and passwords for each application, in the Siebel Application Interface profile. You can also specify the anonymous user in the Siebel Server profile.

Related Topics

Creating a Siebel Application Interface Profile

Creating Table Owner and Administrator Accounts

Related Books

Siebel Security Guide

Siebel System Administration Guide

Deploying Siebel Open UI

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 CRM language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) on My Oracle Support.
- For new installations, make sure that the Siebel database instance has been created and is properly configured, as documented in *Configuring the RDBMS*.
- Review *Installing the Siebel Database on the RDBMS*, including *About Installing the Siebel Database*, 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 *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 authentication, which are noted in *General Requirements for Installing and Configuring Siebel Enterprise Server Modules*.

Oracle Database

For Oracle Database, make sure that the following elements are defined for your Siebel database:

- **Oracle SQLNet alias connect string.** Provide the name of the Oracle schema qualifier or table owner name and the SQLNet connect string for Oracle. 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*.
- **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.

  > **Note:** Make sure that the Oracle Database Client and Oracle Database versions are compatible, 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*.
- **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 Microsoft SQL Server database that you created for Siebel CRM.
- **Table owner account user name and password.** Microsoft 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*.

Requirements for Installing Siebel Web Clients

Review the issues and tasks in this topic before installing the Siebel Web Client, as described in *Installing the Siebel Web Client*.

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*.

Directory Naming Conventions

By default, the Siebel Web Client installer assumes an installation directory of `c:\Siebel\Client` or a similar location. You can specify to install in a different location.

If you must change the installation location to use a nondefault path, then use installation directory names that describe the Siebel CRM module 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`.

CAUTION: Do not install other Siebel CRM modules, such as Siebel Tools, into the same directory where you have installed the Siebel Web Client, such as `c:\Siebel\Client`. Install each module into a separate directory. 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 CRM modules on the same computer (that will access different data sources), then determine your directory-naming convention before you begin installing.

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*.

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 *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 CRM*. See also *Configuring an Oracle Database for Siebel CRM* 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 *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, valid versions of SQL Server Native Client and Microsoft Data Access Components (MDAC) must reside on the computer where you install the Siebel Web 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 *Siebel Deployment Planning Worksheet*.

Requirements for Oracle Database SE2 and the Local Database

In the current release, Oracle Database SE2 is used for the local database, and the sample database is no longer supported. For information about the requirements for installing and using Oracle Database SE2 for Siebel Mobile Web Client, see *Installing and Using Oracle Database SE2 for the Local Database*.

Security-Related Software

Antivirus software, firewalls, and other security software can interfere with installation and operation of software if they are not properly configured. In some cases, you might need to disable antivirus software while installing Siebel CRM software, including Oracle Database SE2 for the local database for Siebel Mobile Web Client on Microsoft Windows. It is also recommended to exclude certain types of files from virus scanning. In addition, you might need to disable the Windows feature User Account Control while installing Siebel CRM software.

Other Oracle or Third-Party Software

Your Siebel application might require some other Oracle software products or 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.

> **Note:** Remember to install on the client computers all of the software required to view any standard attachment types your Siebel CRM deployment might use.

For information about requirements for the Web browser environment for running Siebel Web Clients, see *Deploying Siebel Open UI* and see the Certifications tab on My Oracle Support. See also topics such as the following:

- *About Installing the Siebel Web Client or Siebel Tools*
- *Installing and Using Oracle Database SE2 for the Local Database*
- *Installing Desktop Integration Siebel Agent on Client Computers*
- *Installing Outlook to Siebel Drag and Drop on Client Computers*
- *Siebel Client Deployment Requirements When Using Firewalls or Proxy Servers*
- *Configuring Siebel CRM for Pop-Up Blocker Compatibility*

Chrome Browser Users

When using Siebel Mobile Web Client or Developer Web Client with Google Chrome as the default browser, make sure that no other instances of Chrome are running prior to starting the Siebel client.

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 *Deploying Siebel Open UI* .

Migration Installations

Additional requirements apply for migration installations of the current release. For more information, see *Additional Tasks for Migration Installations*.

Requirements for Installing Siebel Tools

Review the requirements in this topic before installing Siebel Tools, as described in *Installing Siebel Tools*.

- 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 *Configuring Siebel CRM Server Modules* and *Configuring Siebel CRM Server Modules*.
- You must have created the Siebel database and installed the Siebel schema and seed data, as described in *Configuring the RDBMS* and *Installing the Siebel Database on the RDBMS*. This database stores the Siebel Tools project repositories.
- For Microsoft SQL Server deployments, valid versions of SQL Server Native Client and Microsoft Data Access Components (MDAC) must reside on the computer where you install the Siebel Tools 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 *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.
- Antivirus software, firewalls, and other security software can interfere with installation and operation of software if they are not properly configured. In some cases, you might need to disable antivirus software while installing Siebel CRM software. It is also recommended to exclude certain types of files from virus scanning.

In addition, you might need to disable the Windows feature User Account Control while installing Siebel CRM software.

- 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.
- Before performing a migration installation of Siebel Tools in a deployment with multiple languages, you must make sure that the current language mode for Siebel Tools corresponds to the primary language of the Siebel database.

  > **CAUTION:** If the current language mode for Siebel Tools, before the migration installation, was not the same as the primary language, then failures will occur during the execution of Incremental Repository Merge after the migration installation. For more information about setting the language mode, see *Using Siebel Tools* . For more information about running Incremental Repository Merge, see *Siebel Database Upgrade Guide* .

- Additional requirements apply for migration installations of the current release. For more information, see *Additional Tasks for Migration Installations*.

Related Topics

Additional Tasks for Migration Installations

Installing Siebel Tools

Uninstalling Siebel Web Clients or Siebel Tools

11 Configuring the RDBMS

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*
- *Configuring an Oracle Database for Siebel CRM*
- *Configuring an IBM DB2 Database for Siebel CRM*
- *Configuring a Microsoft SQL Server Database for Siebel CRM*
- *Configuring Siebel Server Connectivity to the Siebel Database*

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 CRM, see the Certifications tab on My Oracle Support.

For Siebel CRM language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) 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* and *Roadmap for Installing Siebel CRM in an Upgrade Case (Existing Database)*.

For nonupgrade deployments (where there is no existing Siebel database), after creating the database instance and installing Siebel CRM 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 *Installing the Siebel Database on the RDBMS*.

See also *Planning RDBMS Installation and Configuration*.

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*.

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:

- *Installing Siebel CRM Server Modules*
- *Configuring Siebel CRM Server Modules*
- *Installing the Siebel Database on the RDBMS*
- *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, 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; it is optional to configure and deploy this installed Siebel Server. Then you configure the Siebel Gateway, the Siebel Enterprise, and the Siebel Application Interface 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 *Installing the Siebel Database on the RDBMS*.

    Note: After you perform these tasks, you configure the Siebel Server, install and configure the Siebel Application Interface, 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, but omit Step 4 and Step 5.

Related Topics

Guidelines for Creating Oracle Database Objects

Guidelines for Creating IBM DB2 Database Objects

Guidelines for Creating Microsoft SQL Server Database Objects

Configuring an Oracle Database for Siebel CRM

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*.

> **Note:** When scripts from the Siebel Database Configuration Utilities installation are executed in an Oracle Database, as described in *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 Database 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*
- *Guidelines for Configuring Settings in the init.ora File*
- *Guidelines for Sizing Redo Logs for an Oracle Database*
- *Guidelines for Creating Oracle Database Tablespaces*
- *Guidelines for Sizing the Oracle Database*
- *Guidelines for Creating Temporary Oracle Database Tablespaces*

- *Guidelines for Overriding Oracle Database Default Tablespaces for Database Objects*
- *Guidelines for Creating Oracle Database Objects*
- *Guidelines for Ongoing Oracle Database Administration*
- *Guidelines for Using Real Application Clusters for an Oracle Database*
- *Guidelines for Installing the Siebel Database in a Pluggable Database*

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 CRM*.

Related Topics

Planning RDBMS Installation and Configuration

Specifying the Locale for Siebel CRM

Verifying Installation for the Siebel Database

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 CRM does 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 CRM 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 CRM*.

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 Database 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.
- **FILESYSTEMIO_OPTION.** It is recommended to set this parameter to `SETALL`, for all operating systems. Performance issues have been observed with other settings.
- **MEMORY_TARGET.** This parameter specifies the Oracle Database 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 CRM*.
- **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 CRM*.
  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. Customers are responsible for making sure their data is backed up and restored correctly.
    > **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.
  - **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 Database 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 recreate 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 CRM*.

Guidelines for Creating Oracle Database 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 CRM 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 CRM*.

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 CRM*.

Guidelines for Creating Temporary Oracle Database 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 CRM*.

Guidelines for Overriding Oracle Database Default Tablespaces for Database Objects

Siebel CRM provides 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 Database Tablespaces*. 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 CRM*.

As provided by Siebel CRM, 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 recreated.

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*.

Guidelines for Creating Oracle Database Objects

Siebel CRM provides 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*.

After you install the Database Configuration Utilities on the Siebel Server computer, as described in *Installing Siebel CRM Server Modules*, 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 Database Default Tablespaces for Database Objects*.

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 CRM*.

Guidelines for Ongoing Oracle Database Administration

After your Siebel CRM 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 CRM*.

Guidelines for Using Real Application Clusters for an Oracle Database

Siebel CRM supports 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 CRM*.

Guidelines for Installing the Siebel Database in a Pluggable Database

You can install the Siebel database in a multitenant environment with versions of Oracle Database that support this feature. To do so, first create a pluggable database within the container database. Then create a corresponding entry for the pluggable database in tnsnames.ora. This entry must specify the service you will use to connect to the pluggable database.

When you run grantusr.sql, you do so in the pluggable database rather than in the container database. Database settings you specify in the Siebel Management Console must be those for the pluggable database and you must create the Siebel schema within the pluggable database.

For more information about creating a pluggable database and about managing a multitenant environment, see Oracle Database documentation on Oracle Help Center, particularly the guides listed.

This topic is part of *Configuring an Oracle Database for Siebel CRM*.

Related Books

Oracle Database SQL Language Reference

Oracle Database Administrator's Guide

Configuring an IBM DB2 Database for Siebel CRM

This topic contains guidelines for obtaining optimal performance from an IBM DB2 Database for use with Siebel CRM. 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*.

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 in *Planning RDBMS Installation and Configuration*.

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*
- *Guidelines for Selecting a Language for IBM DB2*
- *Guidelines for Creating the IBM DB2 Database*
- *Guidelines for Setting IBM DB2 Configuration Parameters*
- *Guidelines for Setting Up IBM DB2 Buffer Pools*
- *Guidelines for Creating IBM DB2 Tablespaces*
- *Guidelines for Overriding IBM DB2 Default Tablespaces for Database Objects*
- *Guidelines for Preventing IBM DB2 from Running Out of ODBC Statement Handles*
- *Guidelines for Determining IBM DB2 Log Space*
- *Guidelines for Creating IBM DB2 Database Objects*
- *Guidelines for Managing IBM DB2 Fragmentation*

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.

The following table 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 the following table 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 CRM*.

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`
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 recreation time	`RESTART`
INTRA_PARALLEL	Enable intra-partition parallelism	`NO`

Parameter	Explanation	Setting or Comment
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 the following table. On Windows, you access this command through the DB2 command prompt (db2cmd).

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.	`YES`

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 CRM language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) on My Oracle Support.

See also *Planning RDBMS Installation and Configuration* and *Specifying the Locale for Siebel CRM*.

See also *Verifying Installation for the Siebel Database*.

This topic is part of *Configuring an IBM DB2 Database for Siebel CRM*.

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 CRM language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) on My Oracle Support.

This topic is part of *Configuring an IBM DB2 Database for Siebel CRM*.

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 CRM*.

The following table 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.

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).	Automatic.
CATALOGCACHE_SZ	Catalog cache size (4 KB).	`10000`
LOGBUFSZ	Log buffer size (4 KB).	`512`

Parameter	Explanation	Setting
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 of 4 KB.	Automatic or a fixed value. For example, you might update the parameter setting using a command like this: `DB2 UPDATE DB CFG FOR SAMPLE USING STMTHEAP 8192 AUTOMATIC` This value specifies 8192 times 4 KB (or 32 MB) for dynamic join enumeration and unlimited for greedy join enumeration.
STAT_HEAP_SZ	Statistics heap size (4 KB).	Automatic.
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`
MAXAPPLS	Maximum number of active applications.	Automatic.
AVG_APPLS	Average number of active applications.	Automatic.
MAXFILOP	Maximum DB files open for each application.	`500`

Parameter	Explanation	Setting
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).	Automatic.
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 the following table.

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 CRM*.

About Buffer Pools and the Full Publish Process

When the Full Publish process runs to generate Siebel Runtime Repository data from the Design Repository (including during the upgrade process for the development database), it makes intensive use of workspace queries, which results in a higher usage of buffer pools. If you encounter errors similar to the following during the Full Publish process, increase the buffer pool sizes above the values shown in the preceding table and try again.

```
DBCLog DBCLogError 1 000000025c1eca2c:0 2018-12-22 04:50:04 SQLError:
sqlstate 57011: [IBM][CLI Driver][DB2/AIX64] SQL1218N There are no pages
currently available in bufferpool "4". SQLSTATE=57011
```

For more information about the Full Publish process, see *Using Siebel Tools* and *Siebel Database Upgrade Guide* .

Guidelines for Creating IBM DB2 Tablespaces

The Siebel database installation process described in *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 CRM*.

Observe the following guidelines when creating tablespaces:

- Create at least three IBM DB2 tablespaces for tables of various sizes, as shown in the table that follows this list. Using the default tablespace names is recommended.
- 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*.
- Record the tablespace names in *Siebel Deployment Planning Worksheet*.

DB2 Tablespace Name	Buffer Pool Name	Recommended Value	Description
Non-Unicode Database			
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.
Unicode-Enabled Database			
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.

Guidelines for Overriding IBM DB2 Default Tablespaces for Database Objects

Siebel CRM provides 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*. 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 recreated.

This topic is part of *Configuring an IBM DB2 Database for Siebel CRM*.

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 `CLIPKG` option for the `bind` command.

This topic is part of *Configuring an IBM DB2 Database for Siebel CRM*.

To rebind the CLI packages

1. Navigate to `sqllib\bnd` (`C:\sqllib\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 `CLIPKG` that is sufficient to run your applications. For more information about the DB2 `bind` command and the `CLIPKG` 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 CRM. 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 CRM*.

Guidelines for Creating IBM DB2 Database Objects

Siebel CRM provides 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*.

After you install the Database Configuration Utilities on the Siebel Server computer, as described in *Installing Siebel CRM Server Modules*, 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*.

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 CRM*.

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 CRM*.

Use the following strategy to manage table fragmentation:

- 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 CRM. 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 CRM

This topic contains guidelines for obtaining optimal performance from the Microsoft SQL Server database for use with Siebel CRM. 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*.

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*
- *Guidelines for Selecting a Language for Microsoft SQL Server*
- *Guidelines for Creating the Microsoft SQL Server Database*
- *Guidelines for Allocating Microsoft SQL Server Database Log Space*
- *Guidelines for Overriding Microsoft SQL Server Default Tablespaces for Database Objects*
- *Guidelines for Creating Microsoft SQL Server Database Objects*
- *Guidelines for Ongoing Microsoft SQL Server Administration*

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 CRM*.

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*.
- **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* and *Specifying the Locale for Siebel CRM*.

See also *Verifying Installation for the Siebel Database*.

This topic is part of *Configuring a Microsoft SQL Server Database for Siebel CRM*.

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 CRM 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 *Installing Siebel CRM Server Modules*, 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*.

For Siebel CRM language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) on My Oracle Support.

This topic is part of *Configuring a Microsoft SQL Server Database for Siebel CRM*.

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 CRM*.

Guidelines for Overriding Microsoft SQL Server Default Tablespaces for Database Objects

Siebel CRM provides 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 CRM*.

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 Tablespaces for Database Objects*.

Guidelines for Creating Microsoft SQL Server Database Objects

Siebel CRM provides 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*.

After you install the Database Configuration Utilities on the Siebel Server computer, as described in *Installing Siebel CRM Server Modules*, 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*.

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 CRM*.

Guidelines for Ongoing Microsoft SQL Server Administration

After you have installed Siebel CRM 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 CRM*.

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 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 CRM*. 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 *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 *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 CRM automatically creates an ODBC data source using connectivity parameters that you specify when configuring the Siebel Enterprise. Record this data source in *Siebel Deployment Planning Worksheet*.

Note: For Microsoft SQL Server deployments, valid versions of SQL Server Native Client and Microsoft Data Access Components (MDAC) must reside on the server computer where you will install the Siebel Server. For more information, see the Certifications tab on My Oracle Support.

12 Creating the Siebel Installation Image on the Network

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 CRM software. It includes the following topics:

- *About the Siebel Network Image*
- *Obtaining Siebel Installation Media Files*
- *Siebel Installation Media Contents*
- *Preparing to Create a Siebel Installation Image*
- *Creating a Siebel Installation Image*
- *Troubleshooting Siebel Image Creation*

About the Siebel Network Image

For each Siebel CRM 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 CRM modules must be performed from a Siebel image. 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. The Siebel Image Creator is also called the Network Image Creator.

To install all of the Siebel CRM software for the current release, you require an image of two versions: Siebel CRM 17.0 and Siebel CRM 20.9 Update. You must create any network image as described in this chapter. For Siebel Enterprise Server (including Siebel Application Interface), Siebel Web Client, Siebel Tools, and any other modules you require, you create one network image for Siebel CRM 17.0 and another one for Siebel CRM 20.9 Update.

Also obtain and install the ZIP file for Oracle Database SE2 for Siebel Web Client installations of Siebel CRM 20.8 Update or later, as described in *Installing and Using Oracle Database SE2 for the Local Database*.

For more information, see *Installation-Related Changes for Siebel CRM 20.x Update* and relevant topics.

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.

Related Topics

Installation-Related Changes for Siebel CRM 20.x Update

Installation-Related Changes for Siebel CRM 17.0

Installing and Using Oracle Database SE2 for the Local Database

About Siebel CRM Releases

General Requirements for Installing and Configuring Siebel Enterprise Server Modules

Obtaining Siebel Installation Media Files

In general, Oracle distributes the media files for Siebel CRM to customers as follows:

- The media files for Siebel CRM base releases, including Siebel CRM 17.0, are provided as ZIP files on Oracle Software Delivery Cloud.

  https://edelivery.oracle.com

- The media files for Siebel CRM 20.9 Update 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 CRM Update Guide and Release Notes* on My Oracle Support 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 CRM releases are also available on DVD.

> **Note:** Siebel CRM 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 CRM 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. You run Siebel Image Creator from the JAR files directory. All of the JAR file names include the designation *SBA* (for Siebel Business Applications). For the full requirements for running Siebel Image Creator, see *Preparing to Create a Siebel Installation Image*.

> **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 CRM. All installations for Siebel CRM modules must be performed from the Siebel image, for Siebel CRM 17.0 and Siebel CRM 20.9 Update. The installation process is described in *Installing Siebel CRM Server Modules* and other chapters for installing particular Siebel CRM modules.

For more information about the contents and organization of the Siebel media files, see *Siebel Installation Media Contents*.

Before you download the ZIP files to your network, see *Preparing to Create a Siebel Installation Image*.

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 CRM 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*.

Before you copy the ZIP files to your network, see *Preparing to Create a Siebel Installation Image*.

Related Topics

Siebel Installation Media Contents

Preparing to Create a Siebel Installation Image

Related Books

For more information about finding and downloading 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 CRM release, the software is provided through the base media for individual installable Siebel CRM modules and media for associated Siebel language packs, for all of the applicable languages. Most Siebel CRM modules require one or more language packs for successful installation. Siebel CRM 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 CRM *modules* to mean the same thing as the items selectable as *products* in Siebel Image Creator, and might sometimes be called *components*.

See also *Obtaining Siebel Installation Media Files*.

Siebel Installation Base Media

The base media for Siebel CRM software are organized by operating system, product category, version number, and product (module) name. For most of the Siebel CRM 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*. Note the following points regarding the organization of the base media files:

- For Siebel Enterprise Server, Siebel Application Interface, Siebel Web Client, and Siebel Tools, the network image for Siebel CRM 17.0 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*.

- 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.

Third-party media files provide separately installable third-party software modules that work with Siebel CRM. 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) or in other books on the *Siebel Bookshelf* . See also the Certifications tab on My Oracle Support.

Language Media

The language media, also known as language extension packs or language packs, provide language support for Siebel CRM.

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 CRM 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 CRM with Multiple Languages*
- For Siebel CRM language support, Unicode support, and legacy code page support for supported databases, see 1513102.1 (Article ID) 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 Locations for the Siebel Media Files and the Siebel Image*
- *Requirements for the Siebel Image Directories*
- *Cross-Platform Issues When Creating Siebel Image Directories*
- *Requirements for Running Siebel Image Creator*

Determining the Locations for the Siebel Media Files and the Siebel Image

This topic is part of *Preparing to Create a Siebel Installation Image*.

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. Typically, this location would not be the same location where you will create your Siebel image. For example, for Siebel CRM 17.0, you might create the directory `Siebel_media_17.0`, and then create subdirectories `ZIP_17.0` and `JAR_17.0`, in which you would store the ZIP files and JAR files that you use to create the Siebel image for files of Siebel CRM 17.0. Also place the Siebel Image Creator files in the JAR files directory and run the utility from there.

The default top-level names used by Siebel Image Creator for the Siebel image directory are `C:\Siebel_Install_Image` on Windows or `/Siebel_Install_Image` on UNIX. For example, if you are creating a Siebel image for Siebel CRM 17.0 on a Windows computer, then you might create a directory `C:\Siebel_Install_Image`, in which you store your Siebel images. In this example, when you run Siebel Image Creator, specify `C:\Siebel_Install_Image` as the top-level directory.

Siebel Image Creator automatically creates a subdirectory (such as `17.0.0.0`) under the specified top-level directory. This version-specific directory contains the installable Siebel CRM modules, organized by operating system, that you choose to include in the Siebel image.

Your directories for the Siebel image, the ZIP files, and the JAR files might be as shown in the following table. For other Siebel CRM releases, substitute the appropriate version numbers. You can create similar directories later for ZIP files and JAR files for subsequent Siebel CRM 20.x Update releases.

Directory Function	Example Directory Locations	Comments
ZIP files directory	`C:\Siebel_media_17.0\ZIP_17.0` `C:\Siebel_media_17.0\ZIP_20.9`	Before you run Siebel Image Creator, it is recommended to create a version-specific subdirectory like this example, to contain the ZIP files that you obtain from Oracle.
JAR files directory	`C:\Siebel_media_17.0\JAR_17.0` `C:\Siebel_media_17.0\JAR_20.9`	Before you run Siebel Image Creator, it is recommended to create a version-specific subdirectory like this example, to contain the JAR files and the Siebel Image Creator files. (You must extract the JAR files from the ZIP files.) **Note:** You will run Siebel Image Creator from the JAR files directory. For the full requirements for running Siebel Image Creator, see *Preparing to Create a Siebel Installation Image*.
Siebel image directory	`C:\Siebel_Install_Image\17.0.0.0` `C:\Siebel_Install_Image\20.9.0.0`	When you run Siebel Image Creator, the utility creates a version-specific subdirectory like this, which contains the Siebel image: the installer files for each applicable module.

Note: Optionally, after you create the Siebel 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 Application Interface. For additional recommendations or requirements for installers, see Oracle Universal Installer documentation on Oracle Technology Network. See also *Requirements for Installing and Configuring Siebel CRM*.

Requirements for the Siebel Image Directories

This topic is part of *Preparing to Create a Siebel Installation Image*.

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*.

- Any directory that you specify for creating a Siebel image must contain sufficient disk space for all of the Siebel CRM modules and languages that you include in the Siebel image.
- When you specify an existing network image directory into which you will add modules or languages, you must specify a top-level directory that contains a valid network image for the JAR files that you are using. For example, if you are adding languages to a Siebel image for Siebel CRM 17.0, then the top-level directory that you specify, such as `c:\Siebel_Install_Image`, must contain a subdirectory `17.0.0.0`, which must contain an existing Siebel image for the corresponding release. Siebel Image Creator cannot add modules or languages to the network image unless you specify a valid top-level directory.
- Any directory that you specify for creating a Siebel image must follow the conventions described in *File and Directory Naming Conventions*. 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 move or rename 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*.

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*.

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 Locations for the Siebel Media Files and the Siebel Image*. 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, you might run Siebel Image Creator on Windows and include only the Windows operating system and the modules that will be installed on Windows. Then you might run Siebel Image Creator on Oracle Solaris 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 obtained the JAR files for the applicable operating system, as described in *Determining the Locations for the Siebel Media Files and the Siebel Image*. In order to install the Siebel CRM modules (in this example), 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*.

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 CRM module JAR files and the Siebel Image Creator files in the appropriate directory or directories, as described in *Determining the Locations for the Siebel Media Files and the Siebel Image*.

  You must place at least one JAR file representing a Siebel CRM 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, run Siebel Image Creator in the JAR files directory for Siebel CRM 17.0 to create a Siebel image for that version. If the directory from which you run Siebel Image Creator 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 CRM 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="17.0.0.0"
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\jre8` on Windows or `/usr/java8_64` on AIX). For supported version information, see the Certifications tab on My Oracle Support.
- 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*, see *Troubleshooting Siebel Image Creation*.

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*.

See also *Troubleshooting Siebel Image Creation*.

To create a Siebel installation image

1. Review the information that is presented in *Obtaining Siebel Installation Media Files* and *Siebel Installation Media Contents*.
2. Review the issues that are described in *Preparing to Create a Siebel Installation Image*. In particular, determine where the Siebel JAR 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*. 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 version-specific directories that you created for the purpose.

   For example, for Siebel CRM 17.0, you might place the Siebel CRM 17.0 JAR files into a directory like `JAR_17.0`. Also place the files for Siebel Image Creator in this directory. For more information, see *Determining the Locations for the Siebel Media Files and the Siebel Image*.
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 17.0, navigate to a directory like `c:\Siebel_Install_Image\JAR_17.0`.
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:

   ```
   snic.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*. Go to the last step.
9. To run Siebel Image Creator in GUI mode from the JAR files directory, run the following command:

   ```
   snic.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:\Siebel_Install_Image`. 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*.

    For guidelines for creating the directories for Siebel images, see *Preparing to Create a Siebel Installation Image*.
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 CRM modules in the directory from which you are running Siebel Image Creator. If JAR files exist for multiple versions, such as Siebel CRM 17.0 and Siebel CRM 20.9 Update, then specify one of the versions shown.

    The version determines the version-specific subdirectory in which the Siebel image is created, such as `17.0.0.0`. 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 the next step.

    If you are adding languages to an existing Siebel image, then go to Step 16.
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 CRM 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*.

    For more information about the contents of the Siebel media, see *Siebel Installation Media Contents*.
15. Specify the Siebel CRM 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. 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*.

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*.

    > **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. 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.
    - 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.

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 17.0 Siebel image, assume that you selected Windows and Siebel Tools, but Siebel Image Creator could not locate the file SBA_17.0.0.0_Base_Windows_Siebel_Tools.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 Siebel CRM 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*.

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_Install_Image\17.0.0.0`.

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 CRM modules, then run Siebel Image Creator again to recreate 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 CRM 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 recreate the Siebel image for this module.

> **Tip:** Keep track of the operating systems, Siebel CRM 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 CRM modules that you require and have to process the JAR files in multiple batches.

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_17.0.0.0_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 recreate the Siebel image for that module.

For installation instructions, see *Installing Siebel CRM Server Modules* and other chapters for installing particular Siebel CRM modules.

For installation requirements, see *Requirements for Installing and Configuring Siebel CRM*.

For installation troubleshooting information, see *Verifying and Troubleshooting Your Installation*.

13 Siebel Deployment Planning Worksheet

Siebel Deployment Planning Worksheet

This chapter provides the Deployment Planning Worksheet. It includes the following topics:

- *About the Deployment Planning Worksheet*
- *Team Lead Summary*
- *Siebel Enterprise Server Names and Installation Directories*
- *Siebel Accounts, Host Names, and Static IP Addresses*
- *Cluster Deployment Data*
- *Ports and RDBMS Details Data*

About the Deployment Planning Worksheet

The topics that follow provide the Deployment Planning Worksheet for installing Oracle's Siebel CRM 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, or create your own worksheet to capture all of the data that you need to record. Record all instances of any modules for which you install multiple instances. For example, Siebel Gateway multiple nodes can participate in a cluster and multiple Siebel Application Interface or Siebel Server instances can provide different Siebel CRM applications or functions or can support load balancing and high availability). 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 CRM.

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 new Siebel CRM software in your deployment, record the relevant data in your Deployment Planning Worksheet. Use a new worksheet for each Siebel CRM environment or Siebel CRM deployment.

> **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 by 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 Gateway					
Siebel Server					
Siebel Application Interface					
Siebel Enterprise Cache					
Siebel Constraint Engine					

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*.

Section 3: Server Names

Siebel Enterprise Name		
ODBC Data Source Name		
Primary Language		
Other Deployed Languages	**Note:** Different languages might be deployed on different servers. Keep track of all of the languages deployed and the servers on which they are deployed.	
Component Name	**Network Host Name**	**Installation Directory**
Siebel Gateway		
Siebel Server		
Database Configuration Utilities		
Siebel Application Interface		
Siebel File System Directories		
Siebel Enterprise Cache		
Siebel Constraint Engine		

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 anonymous user for employee applications must be defined as an employee within the Siebel database. For more information, see *Requirements for Configuring Anonymous Users for the Siebel Application Interface*.

Section 4: Siebel Account Information

	Login or User ID	Password
Siebel Service Owner		
Siebel Administrator	SADMIN	
Employee 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		
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.)

> **Note:** You can optionally configure Siebel Gateway clustering using Siebel Management Console, as described in *Configuring the Siebel Gateway Cluster*.

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 or File Share
Siebel Gateway Group				
Siebel File System Group				
Siebel Server Group				
Siebel Application Interface 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* .

	Other Ports	Application Container Ports		
Siebel Component		**HTTPS Redirect Port**	**HTTP Connection Port**	**Shutdown Port**
Siebel Gateway				
Siebel Gateway Registry	(Registry Client Port)	Not applicable	Not applicable	Not applicable

	Other Ports	Application Container Ports		
Siebel Component		**HTTPS Redirect Port**	**HTTP Connection Port**	**Shutdown Port**
Siebel Server	Not applicable			
Siebel Application Interface	Not applicable			
Siebel Enterprise Cache	Not applicable			
Siebel Constraint Engine				
Siebel Server: Synchronization Manager (for Siebel Remote users)		Not applicable	Not applicable	Not applicable
Siebel Server: Server Request Processor		Not applicable	Not applicable	Not applicable
Siebel Server: Siebel Connection Broker		Not applicable	Not applicable	Not applicable

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	