

Siebel Server Support & Maintenance Plan

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The purpose of this document is to provide the hardware, software and connectivity requirements for the Ombudsman case tracking system.

Technical Requirements:

Server

Supported Database Server Platforms

Siebel 99 version 5.6 supports the **Oracle8 Enterprise Server version 8.0.5** relational database management system.

Siebel 2000 supports the **Oracle8 Enterprise Server version 8.1.5** relational database management system.

The databases may be operated on any hardware and operating system platform supported by the vendors. Database servers must be sized appropriately for the number of users and Siebel components supported. Your hardware and database vendor and Siebel Worldwide Services can provide assistance with database server sizing and capacity planning.

Chosen platform: **HP UNIX**

Supported Siebel Enterprise Server Platforms

Siebel 99 version 5.6 and Siebel 2000 support the **Microsoft Windows NT 4.0 with Service Pack 5** operating on Intel-compatible servers of software and hardware platforms for the Siebel Enterprise Server:

The *minimum* hardware configuration for a Siebel Server is for Windows NT, a dual Pentium machine with at least 256 MB of RAM. 2 – 4 G RAM highly recommend.

Both CPU and memory requirements increase with the number of users and the number of Siebel Server components deployed. The Siebel Enterprise Server architecture is expressly designed to scale across multiple servers to support the needs of the largest deployments. Siebel Server components exploit the benefits of faster CPUs and more memory; more powerful machines—with four or more Xeon or equivalent processors and 1 GB or more of memory—are highly recommended.

Approximately **150 MB of disk space** is required on each application server for the installation of all Siebel Server components. In addition, A RAID level 1 or 5 or comparable fault-tolerant disk configuration is recommended for all Siebel Servers.

In addition to the space needed for Siebel Web Engine, Siebel Gateway Server, and Siebel Server requires **20 megabytes** of disk space on the machine that holds your Web server and **20 megabytes** of disk space on the machine that holds Siebel Object Manager.

Siebel Enterprise Server machines require a LAN connection to the Siebel Database Server, with Fast Ethernet, FDDI, or other high-speed, high-bandwidth LAN connection highly recommended. Siebel Enterprise Server machines must also support TCP/IP connectivity to Siebel Thin Client, and Siebel Connected Client users using interactive components. These users may connect over a LAN, WAN, dial-up, Internet, or other network, provided it supports TCP/IP connectivity to the Siebel Enterprise Server machines.

Supported Web Servers

Please note that eChannel and eService have been certified only where the Object Manager and the Web Server are running on the same platform. Siebel Web Server Extension running on NT connecting to the Siebel Object Manager on NT. Configurations with the Siebel Web Server Extension and the Siebel Object Manager running on different operating systems are not supported in this release.

Supported Siebel File System Platforms

The Siebel File System is a network shared directory structure that must be accessible as a network shared drive from the Siebel Servers and Siebel Dedicated Clients. The Siebel File System can be deployed on any operating system that meets the following requirements:

- Is accessible from Siebel Servers and Siebel Dedicated Clients as a network shared or locally mounted drive
- Supports long filenames
- Supports case-sensitive filenames

Client

Supported Siebel Client and Siebel Tools Platforms

Siebel 99 version 5.6 supports Intel-compatible personal computers using the Microsoft Windows 95, Windows 98, or Windows NT Workstation 4.0 operating systems. Siebel 2000 will in addition support Windows 2000. The minimum and recommended hardware configurations for the Siebel Client, Siebel Thin Client, and Siebel Tools platforms are listed in below. Additional Memory and faster processors are highly recommended, particularly for Siebel Tools PCs or for client environments where users commonly run multiple applications simultaneously.

For end-users, the Siebel Dedicated Client and Siebel Thin Client for Windows require a minimum screen resolution of 800x600. Administration views in the Siebel Dedicated Client, as well as Siebel Tools, require a minimum screen resolution of 1024x768 for proper display.

Client Network Requirements

Siebel Client PCs that operate in client/server mode directly against the server database require a LAN or WAN connection to the Siebel Database Server and the Siebel File System, using a network protocol supported by your chosen database and Siebel File System platforms. Siebel Clients that use interactive components on the Siebel Server, including the Siebel Server Manager, Assignment Manager, or Request Manager, require TCP/IP connectivity to the Siebel Server. Siebel Thin Client requires TCP/IP connectivity to the Siebel Server. If Siebel Thin Client connectivity is provided via dial-in, a 28.8 KB or faster modem is required.

Required Third-Party Software

Siebel Client and Siebel Tools PCs require that the third-party software components listed in [Table 1-3](#) be installed *before* you install Siebel Client software.

Required Siebel Thin Client Third-Party Software

Each Siebel Thin Client PC requires that the specific third-party software components listed in [Table 1-4](#) be installed.

Supported Personal Information Managers

Siebel 99 version 5.6 supports synchronization with the personal information managers listed in [Table 1-6](#).

Supported Siebel InterActive Web Browsers

Siebel InterActive 99 is certified for use with the Web browsers listed in [Table 1-9](#).

Tables

Server

Table 1-1. Required Siebel Server Software Siebel 99.6

Software	Version	Notes
Microsoft Windows NT Server Operating System	4.0 Service Pack 4 or 5 must be installed.	NT V4 SP 5 chosen
Oracle SQL*Net	V8 (Oracle 8.0.5, NT)	For use with the Oracle database.
Ils	4.0	Web Server
Microsoft Outlook	97 or 98	

Configure multiple drives

Table 1-1a. Required Siebel Server Software Siebel 2000

Software	Version	Notes
Microsoft Windows NT Server Operating System	4.0 Service Pack 4 , 4.0EE , 5 or 6a must be installed.	NT V4 SP 5 chosen
Oracle SQL*Net	V8 (Oracle 8.1.5, NT)	For use with the Oracle database.
Ils		Web Server
Microsoft Outlook	97 or 98	

Client

Table 1-2 Siebel Client and Siebel Tools Hardware Configuration

Platform	Minimum Recommended
Siebel Dedicated Client	Intel compatible 266MHz, 64 MB of RAM, or better
Siebel Thin Client	Intel compatible PC 133MHz, 32 MB of RAM or better; 48 MB RAM or better for NT
Siebel Tools	Intel compatible 266MHz, 128 MB RAM

For end-users, the Siebel Dedicated Client and Siebel Thin Client for Windows require a minimum screen resolution of 800x600. Administration views in the Siebel Dedicated Client, as well as Siebel Tools, require a minimum screen resolution of 1024x768 for proper display.

Table 1-3. Siebel 99.6 Client and Siebel Tools Required Third-Party Software

Application	Version	Notes
Operating System	Windows 95 OSR2, Windows 98, or Windows NT Workstation 4.0 Service Pack 4 or 5 for Windows NT 4.0 is required.	
Microsoft Data Access Components	2.1	Required for Siebel Marketing Enterprise clients.
Microsoft Access and Text ODBC Drivers	3.5 or higher	Using the 3.0 or higher ODBC engine.
Microsoft Word for Windows Word	97	Required on the Siebel Client for Siebel Office and the Siebel Proposal Generator.
Microsoft PowerPoint	97	Required on the Siebel Client for the Siebel Presentation Generator.
Oracle SQL*Net	2.3.4.x (Oracle 7.3.4) v8 (Oracle 8.0.5)	For use on connected clients and Siebel Tools PCs that use an Oracle database.

Table 1-3a. Siebel 2000 Client and Siebel Tools Required Third-Party Software

Application	Version	Notes
Operating System	Windows 95 OSR2, Windows 98, or Windows NT Workstation 4.0 Service Pack 4 or 5 for Windows NT 4.0 is required.	
Microsoft Access and Text ODBC Drivers	3.5 or higher	Using the 3.0 or higher ODBC engine.
Microsoft Word for Windows Word	97 or above	Required on the Siebel Client for Siebel Office and the Siebel Proposal Generator.
Microsoft PowerPoint	97 or above	Required on the Siebel Client for the Siebel Presentation Generator.
Oracle Net8 Client	8.1.5	Required on Siebel Dedicated Client, Siebel Tools clients for Oracle deployments.

Table 1-4. Siebel Thin Client Third-Party Software

Application	Version	Notes
Operating System	Windows 95 OSR2, Windows 98, or Windows NT Workstation 4.0	Service Pack 4 or 5 for Windows NT 4.0 is required.
Microsoft Internet Explorer	4.01 or 5.01	Supported web browser for Thin Client for Windows
Netscape Navigator	4.6 4.7	Required for the Netscape Navigator version of the Thin Client for Windows

Supported Auxiliary Programs

Table 1-6. Supported E-mail Applications

Vendor	Application	Version
Microsoft	Outlook	97 or 98
Novell	GroupWise	5.5

Table 1-9. Supported Siebel Interactive Web Browsers

Vendor	Product	Version
Microsoft	Internet Explorer	4.01 or 5.0
Netscape	Navigator	4.6

Production Support Plan

System Administrator/Oracle DBA – Monitor Production System
Review System Usage and Problem Reports
Review DBA usage
Monitor selected Siebel tables

Siebel Administrator
Install Client Software
Add new users
Add new positions
Add new responsibilities
Update picklists

Designated User
Contact to Siebel technical Assistance
Has completed Siebel required training

Help Desk –
Support End Users
Research /resolve end user problems

Maintenance/Development
Support team
Setup/maintain a Development Environment
Make System Changes as Required
Make Application changes as required

Call Center Administrators	Persons responsible for setting up and maintaining a call center; duties include designing and managing Computer Telephony Integration, SmartScripts, and message broadcasts.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel products.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality. A developer is typically someone from the Information Services department.
Configurators	Persons responsible for planning, implementing, and configuring Siebel applications. A configurator is typically a consultant or someone from the Information Systems department.

Production Setup Checklist	Yes	No
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Hardware & Software		
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- All hardware should fit capacity plan specifics
- All third party software s hould be installed
- Siebel installation guide and procedures followed
- Topology of physical environment should be documented and kept up to date

Siebel Procedures Documented		
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- Siebel configuration changes/updates
 - Seed data
 - Scripts and VB modules
 - Software updates/patches
- Workflow policies and associated data
- Assignment Manager Rules

Network		
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- Network specifications need to match technical requirements
- Network should be tested for faults, etc.
- All network specific specifications should be documented

Backup & Recovery		
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- Document backup and recovery procedures
- Document disaster plan with escalation process

Production Processes	Checked	Date	Problem Found	Initials
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Availability and General Performance Metrics

- Required/assigned processes are up and running
 - Siebel Gateway Name Server Service
 - Siebel Server Service
- Detect and correct
 - CPU utilization
 - Memory utilization
 - Disk I/O traffic
 - Network traffic

Siebel Workflow Manager

- Document workflow policies
- Ensure that the appropriate processes/tasks for each of the policies are configured, assigned and running on the appropriate servers
 - Monitor S_ESCL_REC Table
 - Monitor S_ESCL_ACTN_REC Table

Other Metrics

- Database/System Throughput or Response Time
- Uptime of the Siebel Server Processes
- Server Uptime $[(\text{Scheduled Uptime} - \text{Unscheduled Downtime}) / \text{Scheduled Uptime}] \times 100$

Customer:
Update Date:
Updated By:

Location	Ombudsman Specialist	Intake Specialist	IT	Other	Total
Washington, DC	X	x	0	0	0
Atlanta, GA	X	0	0	0	0
Lawrence, KS	X	X	0	0	0
Iowa City, IO	X	0	0	0	0
Chicago, IL	x	0	0	0	0
Bakersfield, CA		X			
TOTAL	0	0	0	0	0

User Group	Responsibilities	Location	Number of Users
Intake Specialists	<ul style="list-style-type: none"> Receive calls from customers via the Ombudsman 800 number Attempt to answer customers' questions and resolve issues Transfer customers to appropriate entity, if necessary Create cases as necessary and record as much customer information as possible (to be sent to Ombudsman Specialists for further handling) 	Bakersfield, CA Iowa City, IA Lawrence, KS TOTAL:	10 11 8 29
Intake Specialist Team Leads	<ul style="list-style-type: none"> Manage a team of Intake Specialists in a call center Perform quality checks on the intake of calls and the entry of cases Take complex calls from customers, if necessary Create and analyze reports with which to manage the team and make improvements 	Bakersfield, CA Iowa City, IA Lawrence, KS TOTAL:	2 2 2 6
Ombudsman Specialists	<ul style="list-style-type: none"> Receive calls or correspondence from customers needing to open case Create new cases as necessary Work cases that are assigned to them (e.g. perform research, interact with appropriate contacts, record all actions in OCTS 2.0) Create and link results to assigned cases Close assigned cases 	Chicago, IL D.C. Iowa City, IA Lawrence, KS Utica, NY TOTAL:	6 8 6 4 1 25
Ombudsman Specialist Team Leads	<ul style="list-style-type: none"> Manage a team of Ombudsman Specialists Perform quality checks on Ombudsman Specialists Work and close cases with complex issues, if necessary Create and analyze reports with which to manage the team and make improvements 	D.C. TOTAL:	2 2
Program Managers	<ul style="list-style-type: none"> Monitor all teams' cases Reassign cases if necessary Create and analyze reports Make operational changes for improvement Report data to Congress and SFA management Perform quality checks on Team Leads Work with System Administrator to make changes to OCTS 2.0 	D.C. TOTAL:	2 2

User Group	Responsibilities	Location	Number of Users
System Administrator	<ul style="list-style-type: none"> • Make updates to OCTS 2.0 (e.g. changes to scripts, picklists, user profiles, user access) • Coordinate with the Virtual Data Center (VDC), security, and other entities to run OCTS 2.0 • Oversee all systemic changes to OCTS 2.0 	D.C. TOTAL:	1 1
	TOTAL OCTS 2.0 USERS:		65

The table below outlines the same user group information as listed above, but in a different format: it shows each location and the users within that location.

Location	User Group	Number of Users
Bakersfield, California	Intake Specialists	10
	Intake Specialist Team Leads	2
	Bakersfield Total	12
Iowa City, Iowa	Intake Specialists	11
	Intake Specialist Team Leads	2
	Ombudsman Specialists	6
	Iowa City Total	19
Lawrence, Kansas	Intake Specialists	8
	Intake Specialist Team Leads	2
	Ombudsman Specialists	4
	Lawrence Total	14
Chicago, Illinois	Ombudsman Specialists	6
	Chicago Total	6
Washington, D.C.	Ombudsman Specialists	8
	Ombudsman Specialist Team Leads	2
	Program Manager	2
	System Administrator	1
	D.C. Total	13
Utica, New York	Ombudsman Specialist	1
**Note: This user should have access to the system, although he will not receive formal training.	Utica Total	1
TOTAL OCTS 2.0 USERS:		65