

**Ombudsman**

**Siebel**

**Environment**

**Report**

## Document History

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<b>ENVIRONMENT MANAGEMENT .....</b>	<b>4</b>
INTRODUCTION .....	4
PLANNING SIEBEL ENVIRONMENTS .....	4
<i>Development Environment</i> .....	4
<i>Test Environment</i> .....	5
<i>Production Environment</i> .....	6
<b>ARCHITECTURAL SPECIFICATIONS.....</b>	<b>7</b>
VDC ENVIRONMENT.....	7
<i>Development and Test</i> .....	7
<i>Production</i> .....	8
<i>Application Server Setup</i> .....	10
VDC INSTALLATION PROCEDURES .....	13
<i>Prerequisites:</i> .....	13
<i>Before you Begin</i> .....	13
1. <i>INSTALLING THE GATEWAY SERVER V99.6</i> .....	14
2. <i>INSTALL THE SIEBEL SERVER</i> .....	15
<i>Thin Client Install</i> .....	18
<i>To edit the Internet Explorer Client start-up file</i> .....	18
<i>To edit the Netscape Communicator Client start-up file</i> .....	20
<i>Sharing Thin Client Start-up Files</i> .....	20
<i>The Siebel Web engine is currently not needed.</i> .....	21
<i>Siebel Web Engine Extension</i> .....	21
<i>Single-Node Installation (Development Server)</i> .....	21
<i>Distributed Installation</i> .....	22
<i>To install the Siebel Web Server Extension</i> .....	22
<i>Siebel Object Manager / eServiceWeb Installation</i> .....	23
<i>Installing Application Components on the Web Server</i> .....	23
DATABASE CONVERSION / DATA LOAD PROCEDURES .....	26
<i>Import</i> .....	26
<i>Export</i> .....	28
TNSNAMES FILE .....	30
SIEBEL CONFIGURATION FILE .....	30
DEDICATED CLIENT CONFIGURATION .....	30
THIN CLIENT CONFIGURATION FILE .....	31
THIN CLIENT HTML.....	31
<i>Test</i> .....	31
<i>Production</i> .....	31

## *Environment Management*

### *Introduction*

The purpose of this document is to give the team some familiarity with the various components of the Siebel environments. It should be noted that based on the complexity of each implementation, the environment strategies will change; however the basic framework will remain the same.

### *Planning Siebel environments*

The fundamentals of planning for your environments should include these basic considerations\*:

- How many environments does this project require? (Usually 3 dev, test, and prod).
- Will there be physical separation of machines in each environment?
- What will the topology look like for each environment?
- How many people will each environment support?

## **Development Environment**

The development environment should serve as the working area of the implementation. This is the proving ground for the work produced in the design stage of the project. The development environment should also serve as the area for conducting unit testing of the application.

Development rules will have to be developed for how the application is configured, including items such as the checking in of objects, etc.

The development environment can share the physical resources with the test environment however this will depend on the size and complexity of every project.

Make sure that Siebel application software administration team and the development team read and understand “Managing The Siebel Development Environment”. Ensure that there is a consistent, well-defined naming convention for all repository objects and repositories.

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\* Additional information can also be found in the installation guide.

Establish a procedure/process/schedule for developers to regularly check-in their completed (and tested) projects. This will ensure that all developers are using the same “version” of new and/or modified objects.

Ensure that the developers also maintain a regular schedule for export of their local repositories – which can be stored on a central server and backed-up as part of the organization’s backup process.

In order to undo any changes on the local database, a developer has to perform another checkout on the server to “overwrite” a developer’s changes. This can be avoided if the developer exports/archives the project (or project components) locally. In the event the developer wishes to undo any changes, he/she can import from the locally copy.

## **Test Environment**

The Siebel test environment serves as the area for execution of system test plans and procedures, including acceptance testing. Validation of user requirements will take place in this environment; therefore it should mimic the production environment as much as possible. The training team can also use the test environment to author materials and practice the training sessions.

Specifically test environment will help accomplish the following:

- Testing functionality, usability, scalability, reliability and performance of Siebel configuration changes
- VBScript, SmartScript, ActiveX, CORBA and other programs and code
- Assignment Manager rules
- Workflow Manager policies and programs
- EIM loads
- Testing the parameters for the following tasks for optimal performance, throughput and load-balancing
- Siebel Workflow processes (viz. Generate Triggers, Workflow Monitor Agent, Workflow Action Agent, Email Manager, Page Manager)
- Assignment Manager (Batch mode, Dynamic mode, Interactive mode)
- Remote Users (Transaction Processor, Transaction Router, Transaction Merger and Synchronization Manager)

In particular, the testing environment should be used to determine the optimal number of tasks (processes) and the concurrency (MTS value) for the various server processes. The “load” or resource consumption by each of the server processes (e.g. Workflow Monitor Agent, Assignment Manager, Transaction Router etc.) should also be determined. This will help in load balancing across all the Siebel application servers in the production environment. For example, determining the number of users that a Siebel Object Manager can support and the number of such tasks that can be sustained on a Siebel Application server will help in capacity planning/sizing

## **Production Environment**

The production environment is the final platform for the Siebel implementation project. The delivery of the production environment instantiates the requirement captured during the discovery stage.

The production environment should be setup to reflect the requirements coming from the capacity plan, and other technical reviews.

The production environment should be monitored very carefully to pick up on problems before they happen. The Production Environment Worksheet in *eRoadmap* will help the Siebel team with managing the environment.

Ensure that you have a formal, documented procedure for migrating the following into the Production Environment:

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

### *architecural Specifications*

The following segment is to help the Siebel team plan for development and management of each environment:

### *VDC Environment*

#### **Development and Test**

Environment Component	Specification	Amount	Comments
Hardware	Family 6 Model 5 Stepping 2	1M RAM C:3.98GB D: 12.9GB	MRDDOENT001
Software	<ul style="list-style-type: none"><li>• Siebel Service Enterprise</li><li>• Advanced Search</li><li>• Calender</li><li>• Email Agent</li><li>• Encyclopedia</li><li>• Office</li><li>• Service Assistance</li><li>• Smart Script</li><li>• Workflow</li><li>• External Calendar/PIM Synchronization</li><li>• Assignment Manager</li><li>• Contracts</li></ul>		

	<ul style="list-style-type: none"> <li>• EIS</li> <li>• Reports</li> <li>• Tools – Enterprise</li> </ul>		
Network	Ethernet		

## Production

Environment Component	Specification	Amount	Comments
Hardware	Family 6 Model 8 Stepping 3	2M RAM	SFANT005
Software	<ul style="list-style-type: none"> <li>• Siebel Service Enterprise</li> <li>• Advanced Search</li> <li>• Calendar</li> <li>• Email Agent</li> <li>• Encyclopedia</li> <li>• Office</li> <li>• Service Assistance</li> <li>• Smart Script</li> <li>• Workflow</li> <li>• External Calendar/PI M Synchronization</li> <li>• Assignment Manager</li> </ul>		

	<ul style="list-style-type: none"><li>• Contracts</li><li>• EIS</li><li>• Reports</li></ul> Tools – Enterprise		
Network	Ethernet		

## Application Server Setup

The following table will collect the information needed to setup the application server in the various environments, not all environments will have the same requirements.

Information Needed	Value at Your Site		Comments
Server Names and IP Addresses	SFANT0005	4.20.15.247	<p>Network host names and IP addresses of the following servers:</p> <ul style="list-style-type: none"> <li>• Siebel Database Server</li> <li>• File System Server</li> <li>• Gateway Server</li> <li>• Siebel Servers</li> <li>• Primary and secondary Resonate Central Dispatch Schedulers (if Resonate is being used)</li> <li>• Siebel Enterprise Server (This is a virtual server – not a physical server)</li> </ul> <p>Note that the Siebel Gateway Server, Siebel Servers and the Siebel Enterprise Server should be on the same subnet.</p> <p>It is recommended that the above servers should have two network interfaces – one on a private network segment that contains only the above Siebel servers and the second network interface should be on a network segment which connects the Siebel servers to the users.</p>
	MRDDOENT001	4.20.3.242	
Installation Directory Names	D:\siebsvr D:\gtwysrvr HP D:\siebel D:\siebdev		<p>The names of the installation directories for the following:</p> <ul style="list-style-type: none"> <li>• Siebel Server</li> <li>• Siebel Gateway Server</li> <li>• SIEBEL_ROOT directory on UNIX</li> <li>• Database Server software</li> <li>• Client</li> <li>• Tools</li> <li>• CORBA Object Manager</li> <li>• Remote Server</li> </ul>
File system path	\\<server name>\siebfile		This is the path from the Siebel Server to the

Information Needed	Value at Your Site		Comments
			<p>Siebel File System that may use a share name or drive mapping, depending on your configuration.</p> <p>Note that all connected users also require direct access to the Siebel File System through their Siebel client software</p>
Siebel Administrator User Group	SADMIN		<p>Create a separate group in the Windows NT Domain or UNIX NIS, whose members will be the Siebel Service Owner Account and Siebel Administrators (see below). Note that this group has to be a member of the Administrators group that can administer all the Siebel Servers (Windows NT). Note that on Windows NT, this group requires the following advanced user rights – “Log on as a service” and “Act as part of the operating system”.</p> <p>For consistency, ease of administration, use global accounts (Windows NT) or NIS accounts (UNIX) so that the same group can be shared across all Siebel Servers.</p>
Siebel Service Owner Account (name and password)	SADMIN		<p>This is the account under which all Enterprise Server processes and components operate. On UNIX platforms, this account should be used to stop and start the Enterprise server processes.</p> <p>For consistency, ease of administration, use global accounts (Windows NT) or NIS accounts (UNIX) so that the same Siebel Service owner account can be used across all Siebel Servers.</p>
Siebel Administrator Account(s)	SADMIN		<p>Create an account for each Siebel application administrator that will manage and configure the Enterprise Server components</p> <p>For consistency, ease of administration, use global accounts (Windows NT) or NIS accounts (UNIX) so that the same Siebel Service owner account can be used across all Siebel Servers.</p>
Siebel Monitoring Account (name and password)	N/A		It is an ordinary user-level account that is used by Resonate Central Dispatch for machine status and load.
TCP/IP Ports	TCP/IP Ports  Oracle SEBLDEV Siebel Server	1522	<p>These are the port numbers that you will be using for the following Siebel server components</p> <ul style="list-style-type: none"> <li>• Synch Manager</li> <li>• Request Manager</li> <li>• Object Manager</li> </ul>

Information Needed	Value at Your Site		Comments
	Oracle SEBLPROD Siebel Server	1622	These ports will be required to configure the client machines.
	HTTP	80	
	Gateway Server	2320	
	Synch Manager	40400	
	Object Manager	40414	
	Server Manager	1433	
	Siebel Server Components	40401 – 40420	
	Server Request Manager	40410	
	Siebel Field Service	40411	
	Siebel Service Enterprise	40412	
	Siebel eService	40413	
	Siebel Object Manager	40414	
	Siebel Call Center	40415	
	Workflow Action Mgr	40417	
	Workflow Monitor Agent	40418	
	Assignment Mgr	40416	
	Web Obj Manager	49152-49200	
SQL*NET Connect String		1522	This is the identifier in the Oracle network configuration file (tnsnames.ora) that points to the database server. For consistency and ease of administration, use the same tnsnames.ora file for all Siebel servers and client machines.
	SEBLPROD	1622	
Server Name and Database	MRDDOENT0 01	SEBLPROD	Oracle 8.0.5
	SFANT005	SEBLDEV	8.0.5
	MRDDOENT0 01	SEBL	8.0.5
Siebel table owner/schema account username and password (Oracle)	SIEBEL		This is the name of the database account that owns all the Siebel database objects.  Note that the default username and password is SIEBEL.
Siebel Application Administrator	SADMIN		This is a valid database username and password that will be assigned to the Siebel Application

<b>Information Needed</b>	<b>Value at Your Site</b>	<b>Comments</b>
database username and password		Administrator. There may be more than one such account. The account(s) can be set up as Siebel employee(s) with the "Siebel Administrator" responsibility.
ODBC data (for Windows NT Siebel Servers)		This is the name of the ODBC data source used on the Siebel Servers to connect to the database server. The data source is created automatically during installation of the Siebel Server software, in the format <i>SiebSrvr_enterprisename</i>
Siebel Data Tablespace (Oracle)	SBLDATADEV	This is the name of logical database container (i.e. tablespace, file group or segment) that will contain all the Siebel tables.
Siebel Index Tablespace (Oracle)	SBLINDEXDEV	This is the name of logical database container (i.e. tablespace, file group or segment) that will contain all the Siebel indexes.
Search Hostname, Search Port Number, and Search Definition	N/A	This is only required if you are using Fulcrum

## ***VDC Installation Procedures***

<b>Parameters:</b>	<b>Vaules</b>
<User Id>	<machine name>\SADMIN
<Siebel File System>	\\<machine name>\siebfile
<Gateway Server>	<Machine Name>
<Enterprise Server>	Siebel
<Siebel Server>	<machine name>

### **Prerequisites:**

Verify Oracle SQL\*Net database connectivity software is installed  
 Verify Oracle Client is installed

See Siebel Installation Guide Siebel 99 Version 5.6 and Patch 5.6.0.14. After each core product is installed you must install the Siebel Patch..

### **Before you Begin**

Create the Siebel Service Owner Account **SADMIN**

Set up as: login as Service; Act as part of the operating system;  
Member of Administrators group  
Password never expires

## 1. INSTALLING THE GATEWAY SERVER V99.6

- a. Insert the Siebel Server CD-ORM
- b. Navigate to the directory that contains the Gateway Server <>\gtwysrvr
- c. Double click **Setup.exe**
- d. Click **Next**
- e. Click **Yes** to continue installing without Resonate
- f. Set Destination Directory to <**Installation Drive**>\gtwysrvr
- g. Click “**OK**”
- h. Click “**Y**”
- i. Click **Next** (if prompted to create new directory, click yes)
- j. Enter the Gateway Server NT Account Information  
Account = <**Machine Name**>\<**User ID**>  
Password = <**User ID**>
- k. Click **Next**
- l. Click **Next** to accept the Default of Start Automatically
- m. Review the settings and click **Next**
- n. Review the contents of the Event Log (look for Service successfully installed)
- o. Click **Next**
- p. Click **Finish**

*Start the Siebel Gateway Server NT service  
(Settings>Control Panel>Services)*

(THIS MUST BE DONE BEFORE INSTALLING SIEBEL SERVER)

### ***Siebel Gateway Server NT Service Must be running***

Prior to installing Siebel Server use the Oracle SQL\*Net Easy Configuration utility to define a database alias with the proper connection information for the Siebel Database Server.

## **2. INSTALL THE SIEBEL SERVER**

- a. Insert the CD ROM
- b. Navigate to the directory that contains the Seibel Server <>\siebsrvr
- c. Double click **Setup.exe**
- d. Click **Next**
- e. Click **Yes** to continue installing without Resonate Support
- f. Click **Next**
- g. In the Setup Type dialog box specify the destination directory <>\siebsrvr
- h. Click “Y”
- i. Click “OK”
- j. Click **Next** to accept the typical Installation
- k. Enter the following parameter in the Enterprise Server Information dialog box  
Gateway Server address: <**Machine Name**>  
Enterprise Server            **siebel**
- l. Click **Next**
- m. Click “**YES**”
- n. Parameters for Enterprise Server Information  
Name: ***Siebel***  
Description: ***Siebel Enterprise Server***
- o. Click **Yes**

- p. Click **Browse**, select **<Siebel File System>**
- q. Click **Next**
- r. Complete the Server Database Dialog Box  
Select Oracle 8 **SQL\*Net 8.x** to specify the RDBMS server platform
- s. Click **Next**
- t. Enter the Identification to specify the Database Server to connect to  
Connect String: **sebl**  
Table Owner **siebel**
- u. Click **Next**
- v. Enter Server Database Account Login Information  
User Name: **<User ID>**  
Password: **<User ID>**
- w. Click **Next**
- x. Enter the Component Port Selection dialog box  
Select: **static**
- y. Click **Next**
- z. Fill out the TCP/IP ports  
Synch Manager Port 40400  
Request Manager Port 40410  
Object Manager Port 40414
- aa. Click **Next**
- bb. Click **OK**
- cc. Enter the Server Information  
Siebel File System Name: **<Machine Name>\siebfile**  
Siebel Filesystem Description: **Siebel Server Filesystem**

**dd. Click Next**

ee. HelpFile URL accept the default

**ff. Click Next**

gg. Review the log

**hh. Click Next**

**ii. Click Finish**

**jj. Start the Siebel Server NT Service**

Logon to the Siebel dedicated Client

Choose Server Administration > Component>Component Parameters>

Choose the Server Manager component; change the static port address

Choose the Siebel Field Service component; change the static port address

Choose the Siebel Service Enterprise component; change the static port address

Choose the Siebel eService Manager component; change the static port address

Choose the Siebel Call Manager component; change the static port address

Choose the Assignment Manager component; change the static port address

Choose the Workflow Action Mgr component; change the static port address

Choose the Workflow Monitor Mgr component; change the static port address

Choose the Object Manager component;

Set the following values

Configuration file	octstclient
Data Source	Service
Load Balance	False
Maximum MT Services	120
Maximum Tasks	60

Enter the command in a DOS prompt

```
srvredit /g <gateway server> /e <enterprise server> /s <Siebel server> /r
```

```
“$server.UseIPAddress=false” /f
```

Stop and restart the Gateway and Siebel services

## Thin Client Install

### To edit the Internet Explorer Client start-up file

1. Using a text or HTML editor, open the `tclient.htm` file from the `\tclient` subdirectory on the Siebel Server.

Go to <installation directory>\siebsrvr\bin\  
Edit `tclient.cfg`  
Save as `octstclient.cfg`

2. Find the line that uses this syntax:

```
SiebelApplicationControll.Login('host=" <GatewayServer>,  
SiebelEnterprise, ObjectManager, <SiebelServer>"  
lang="ENU"', ' login', ' password')
```

The italicized strings shown are place holders where you will insert the correct values for your Siebel environment as described below. Note that the default values in the actual file may be different from these strings, but the location and meaning of the values remains the same.

- a. Replace *GatewayServer* with the name of the machine on which the Siebel Gateway Server is installed, using one of the following values:
  - o If you are using Central Dispatch, the Gateway Server address is the Gateway VIP that you assigned in [“Assigning Static IP Addresses” on page 3-5](#).
  - o If you are not using Central Dispatch, enter either the network name or IP address of the application server on which the Gateway Server is installed. Make sure that the parameter you add starts with a double quote, as shown in the example above.
- b. Replace *SiebelEnterprise* with the name of the Siebel Enterprise Server.  
Caution: Do not change the order of the parameters in this file. If you do, the Thin Client will not start up.
- c. Replace *ObjectManager* with the name of the defined Object Manager component that you want the Thin Client for Windows to access. There are seven predefined components: `SCCObjMgr`, `SSEObjMgr`, `SFSObjMgr`, `SSVObjMgr`, `Siebel Web Engine DemoObjMgr`, `eChannelObjMgr`, and `ObjMgr`. You can also define your own components. See the *Siebel System Administration Guide* for information on defining and assigning Object Manager services.
- d. The *SiebelServer* parameter determines the Siebel Server on which the Thin Client will access the Object Manager-defined component. You will specify a Siebel Server only if you are not using Central Dispatch.

- If you are not using Central Dispatch, replace *SiebelServer* with the name of a Siebel Server to which the defined component identified by the *ObjectManager* parameter is assigned. The *SiebelServer* value must be followed by double quotes, as shown in the example in [Step 2](#).
  - If you are using Central Dispatch, the Gateway Server automatically determines the Siebel Server to which the Thin Client will connect. There will be no entry for the *SiebelServerName* value; instead, put double quotes immediately after value specified for *ObjectManager*.
- e. ENU specifies the language parameter used by the Object Manager component defined by *ObjectManager*. This parameter is part of the Object Manager component definition; refer to the *Siebel System Administration Guide* for more information on component parameters. This value is specified using the three-letter code for the language: ENU for English, JPN for Japanese, and so forth. Make sure to put double quotes around this value and a single quote immediately following it, as shown above.
- f. *Login* and *Password* specify the username and password used by the Thin Client to log in to the Siebel Database Server. If desired, enter a valid username and password that will automatically be used by all Thin Client users. Each value must be enclosed by single quotes, as shown in the example in [Step 2](#).
- If you leave these values blank, each Thin Client user will be prompted to enter a login name and password at start-up. Enter two single quotes for each value to indicate a null value for the username and password:

```
SiebelApplicationControl1.Login('host=" <GatewayServerAddress>,
SiebelEnterpriseName, ObjectManagerComponentName,
<SiebelServerName>" Lang="ENU"',',')
```

3. Find the line that uses this syntax:

```
<OBJECT ID="SiebelApplicationControl1" WIDTH= Xvalue HEIGHT= Yvalue
```

Using the following guidelines, replace *Xvalue* and *Yvalue* with appropriate values:

The **WIDTH** and **HEIGHT** attributes specify the width and height of the screen area in which the ActiveX Thin Client will be displayed. You can specify this area in pixels, for example 800 by 600 pixels, by entering a number for each value. Alternatively, you can specify the width and height as a percentage of the Web browser display area, for example, 100% by 100%, by entering a number followed by the % sign. A setting of 100% by 100% will cause the ActiveX Thin Client to occupy the entire Web browser display area, for example:

```
<OBJECT ID="SiebelApplicationControl1" WIDTH=100% HEIGHT=100%
```

## To edit the Netscape Communicator Client start-up file

1. Using a text editor, open the `tclient.stc` file from the `\tclient` subdirectory on the Siebel Server.

2. The structure of the `tclient.stc` file is as follows:

```
[Login]
host = " GatewayServer,SiebelEnterprise,
ObjectManager,SiebelServer"
lang = " ENU"
userName = ""
passWord = ""
```

Caution: Do not change the order of the parameters in this file. If you do, the Thin Client will not start up.

3. The italicized strings are place holders where you will insert the correct values for your Siebel environment. These values are exactly as described for the Internet Explorer start-up file in the previous section; refer to that section for a description of the values.

NOTE: The default values in the actual file may be different from these strings, but the location and meaning of the values remain the same.

4. Ensure that each string of values is enclosed in double quotes, as shown in the example above.

## Sharing Thin Client Start-up Files

Once you have edited one or both of the Thin Client for Windows startup files, they must be made available to the Thin Client users. While you can include one or both of the start-up files in the custom installer that you will create in the next section, for ease of maintenance it is strongly recommended that you share the start-up files from a network shared drive or a Web Server. This allows you to easily distribute changes in the event that your Siebel Enterprise Server configuration is altered. You may elect to use a combination of these two methods to serve different user communities. Whichever sharing mechanisms you elect to deploy, distribute the Thin Client start-up files now and ensure that the Thin Client machines have read access to them.

**The Siebel Web engine is currently not needed.**

## Siebel Web Engine Extension

The Siebel Web Server Extension operates on a standard Web Server to support the Siebel HTML Thin Client and eBusiness applications. The Siebel Web Server Extension connects to the Siebel Web Engine, which is installed as part of the Siebel Server software. This section provides instructions for installing and configuring only the Siebel Web Server Extension.

The Siebel Web Server Extension will be installed on the same application server that supports Microsoft IIS. The Siebel Web Server Extension installation program sets up the Siebel directory structures, copies required files and components to the target disk, and configures the host environment as needed to operate properly.

***You must have installed and configured the Siebel Gateway Server and an Enterprise Server containing at least one Siebel Server before installing the Siebel Web Server Extension.***

NOTE: Notice that in either configuration (single-node or distributed), the database server resides on a separate node.

## Single-Node Installation (Development Server)

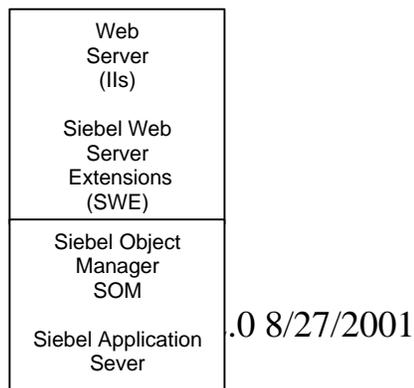
In a single-node installation, all of the server-side components are installed on one machine (or node). These are:

- The Web server (Microsoft IIS for Windows NT installations)
- Siebel Web Server Extension
- Siebel Object Manager and Siebel Web Engine

Of course, each client's browser (in which the Web application appears at run time) would be installed on a separate node, such as on each user's laptop or other personal computer.

Figure 13-2 shows a single-node configuration.

Figure 13-1. Single-Node Configuration of HTML Thin Client



## Distributed Installation

The alternative to installing all the software on one machine is, of course, to distribute it among two or more machines. The recommended distributed configuration has each component (Web server and Siebel Object Manager) on a separate machine, as shown in [Figure 13-2](#).

Figure 13-2. Distributed Configuration of HTML Thin Client



### To install the Siebel Web Server Extension

1. Start the Siebel Web Server Extension installation program.
  - a. Insert the Siebel Enterprise Applications Windows Server CD-ROM into the CD-ROM drive of the Web Server. (In these instructions this is assumed to be D:\.)
  - b. In the Windows NT Explorer, navigate to D:\swe and double-click setup.exe to start the Siebel Web Engine installation program.
2. From the Welcome dialog box, click **Next**.
3. In the Installation Directory dialog box, specify the installation directory. The default directory for the Siebel Web Server Extension (as well as for the Siebel Web Engine) is C:\siebswe.
  - a. Click **Browse** to specify a different destination directory.  
<destination web directory> :\siebswe
  - b. Click **Next**.

4. In the Select Virtual Directory dialog, specify the name of the virtual directory to be created and click **Next**.

The virtual directory is the Web Server alias for the Siebel Web Server Extension public directory. Specify the SWE (Siebel Web Engine) virtual directory name. By default, the setup program sets this name to SWE.

## Siebel Object Manager / eServiceWeb Installation

### Installing Application Components on the Web Server

You **MUST** install Web Engine Extension from \SWE directory on CD first.

1. Run one Siebel eService installer to install and configure components related to the Web server.
2. Run a second Siebel eService installer to install and configure components related to Siebel Object Manager and Siebel Web Engine (SOM/SWE).

The Web server and SOM/SWE can be installed on different machines or the same machine. However, in either case you must perform both steps (in either order).

To install application components on the Web server, run the eService web installer and then the eService SOM installer to install and configure components related to Siebel Object Manager and Siebel Web Engine (SOM/SWE).

1. Insert the product CD into the CD-ROM drive of the machine on which the Web server is installed.
  - a. Open the Siebel folder to see the list of installable products, one folder per product.
  - b. Open the eserviceweb folder.
  - c. Double-click the Setup.exe icon.
2. Click **Next** in the Welcome dialog box.
3. A Private Destination Directory dialog box appears. In the Private Destination Directory dialog box, **accept the default**. The private directory, which will be protected from Internet access, will contain the wwwapp.cfg file and several sub-directories.

Click **Next**.

4. In the Public Destination Directory dialog box that appears, **accept the default**. The public directory contains files and directories that are accessible from the Internet. The Installer will later copy some of these files into this directory.

Click **Next**.

5. In the Virtual Directory dialog box, enter a value or accept the default. The virtual directory is the alias of the public directory for Siebel eService and will appear in the URL field of the user's browser. For example, if your site is `mysite.com` and the virtual directory you specify is `Service`, the URL for the application will be

`http://mysite.com/Service`.

Click **Next**.

6. In the Gateway Server dialog box that appears, enter the appropriate value or accept the default:
  - If you are using Central Dispatch, the Gateway Server address is the Gateway VIP.
  - If you are *not* using Central Dispatch, the correct value can be either the network name or the IP address of the application server on which the Gateway Server is installed.

Click **Next**.

7. In the Enterprise and Service dialog box that appears, enter the following information or accept the default:

**Enterprise Server Name.** <machine name>

**Service Name.** Use the default

Click **Next**.

8. Respond to the Yes/No dialog box that appears.

Click **No**

9. Change the value that appears in the Siebel Object Manager dialog box: **Siebel**

NOTE: In rare cases, you may want to change the default value of the SOM field. Keep in mind, though, that any value you enter will nullify the effect of having Central Dispatch installed because all connection requests will go to the one SOM you enter here.

Click **Next**.

In the Anonymous Username and Password dialog box, **ANON ANON**

Click **Next**.

10. In the Authenticated Username and Password dialog box, specify a valid Siebel username and password.

Click **Next**

11. In the Program Folder dialog box, take the default

Click **Next**

the installer copies the necessary files and makes changes to the configuration files.

12. When the Setup Complete dialog box appears, click Finish to exit the installer.

NOTE: Remember, you still need to run the second installer, as described in the next section, to install the rest of the application.

## ***Database Conversion / Data Load procedures***

See “*SIEBEL ENTERPRISE INTEGRATION MANAGER ADMINISTRATION GUIDE*” Siebel 99 Version 5.6

Siebel Enterprise Integration Manager (EIM) manages the exchange of data between Siebel database tables and other corporate databases.

*NOTE: Loading data directly into Siebel base tables is not supported. Due to the complexity of table relationships, you must use EIM to import data into Siebel base tables. Do not attempt to modify data directly in the physical tables.*

Use EIM to perform bulk imports, exports, merges, and deletes. Examples of these functions include:

- When initially implementing a Siebel application, you can load the Siebel database tables with data and file attachments created by external applications. For example, you might import information about product lines and products from an Inventory Control database into the Siebel database.
- As part of maintaining the database, you can update it with information created by external applications. For example, Inventory Control might add a product line using another application, and you might import the information into the Siebel database.
- When initially implementing a non-Siebel application, you can export data from the Siebel database tables for use by that application. For example, you might export employee information to a corporate sales commission application.
- As part of maintaining a non-Siebel database, you can update it with information from the Siebel database. For example, you might add new customers to an accounting database from the Siebel databases.
- In response to such external events as corporate mergers, you can merge two or more database rows into a single row. For example, you might merge the “Frame, Inc.” account information into the “Adobe Corp.” account.
- As part of maintaining the Siebel database, you can identify rows to be deleted from a table and its associated child and intersection tables. For example, you might delete an obsolete product line and its associated products.

### **Import**

Importing data into Siebel base tables is a multi-step process that requires significant effort to:

- Identify the data to be imported

- Verify the completeness of data
- Load data into the interface tables
- Edit the EIM configuration file
- Run the import processes
- Validate results

To accomplish this, your database administrator must first load data from an external database into the interface tables. Subsequently, you need to run an EIM process to read the data in these interface tables and import them into the appropriate Siebel base tables.

*NOTE: This effort may require the time of key personnel, as well as system time and resources. You should allow a month or more in your implementation schedule to import your initial data.*

### **Import Process**

To import tables of data, EIM performs a sequence of tasks. Each task involves multiple passes; at least one pass is required for each interface table included in the process. Depending on the type of import process, EIM may repeat several tasks. All tasks are performed for each column in the interface table.

To import data from interface tables, EIM performs the following steps:

1. Initializes any temporary columns:
  - Compares values in IF\_ROW\_BATCH\_NUM with the batch number provided by the Component task that initiated this import process.
  - Sets all temporary columns to NULL and counts the rows to be processed.
2. Applies any DEFAULT\_COLUMN and FIXED\_COLUMN values defined for this import process.
3. Applies any filter queries defined for this import process. If a row fails the filter query, EIM eliminates the row from further processing.
4. Generates foreign key references for rows with corresponding existing rows in the Siebel base tables; writes these foreign key values into interface table temporary columns.
  - If foreign keys fail for required columns, EIM eliminates these rows from further processing. It also validates bounded picklist values against the List of Values table (S\_LST\_OF\_VAL).
5. Writes the appropriate ROW\_ID values in the interface table rows' temporary columns, for rows with corresponding base table rows.
6. Creates a ROW\_ID with a unique value in the base table, for interface table rows without corresponding rows in the base tables.

Eliminates rows with invalid values for user keys from further processing. Generates foreign key references for rows without corresponding rows in the Siebel database tables, and writes these foreign key values into interface table temporary columns:

- \_ If foreign keys fail for required columns, EIM eliminates these rows from further processing.
- \_ For interface table rows with data that will reside in multiple destination tables, EIM fails rows with foreign keys that cannot be generated.

Updates contents of existing base table rows with contents from corresponding interface table rows that have successfully passed all earlier steps:

- \_ If any rows contain content that differs from the existing base table row, EIM writes these rows to the Master Transaction Log (if Docking Transaction Logging is enabled).
- \_ If multiple interface table rows have the same user primary key for a base table, EIM uses only the first interface table row to update the base table, and ignores the data in other rows.

Inserts any new interface table rows that successfully passed all earlier steps in the Siebel database tables:

- \_ Writes new rows to the Master Transaction Log (if Docking Transaction Logging is enabled).
- \_ If multiple interface table rows use the same user primary key for a base table, EIM uses only the first interface table row to update the base table, and ignores the data in other rows.

Updates primary child relationships in the Siebel database tables as necessary. EIM will populate all primary child relationship columns that set both:

- \_ Primary child column to TRUE
- \_ Primary interface table name to the name of the corresponding intersection table

Otherwise, the primary child relationship columns will not be populated.

## **Export**

This chapter explains how to export data from the Siebel base tables into the interface tables. Upon completion of the EIM process, your DBA can access the interface tables and extract the data for use in a non-Siebel application.

To export data, EIM reads the data in the Siebel database tables and places the information in the appropriate interface tables. You can then copy data from the interface tables into another database.

During its multiple passes through the interface tables, EIM will:

- \_ Initialize the interface tables for export
- \_ Apply filter logic to select rows for exporting
- \_ Update interface table rows to indicate the export status

EIM then provides comprehensive status information about each export process. When the process ends, you should review this information.

### **Export Process**

To export tables of data, EIM performs a sequence of tasks. Each task involves multiple passes; at least one pass is required for each interface table included in the process.

To export data to interface tables, EIM performs the following steps:

Initialize interface tables for export.

1. If CLEAR INTERFACE TABLE in the configuration file is TRUE, all rows with the specified batch number are deleted. Otherwise, a warning is issued if rows already exist with the specified batch number. The default configuration file is default.ifb.
2. Use EXPORT parameter expressions in the configuration file to locate and export table rows:
  - If EXPORT ALL ROWS is TRUE, ignore any EXPORT MATCHES parameters and export all rows.
  - If EXPORT ALL ROWS is FALSE, use EXPORT MATCHES parameters to locate specific rows.
  - If EXPORT ALL COLUMNS is TRUE, ignore any ONLY BASE COLUMNS parameter and export all columns.
  - If ONLY BASE COLUMNS is TRUE, export only the named columns for each row. Set IF\_ROW\_STAT to EXPORTED for rows that are successfully exported.
3. For parent tables, locate and export child table rows to their corresponding interface tables.

NOTE: Transaction logging does not occur during export operations because Siebel base table values are not modified.

Appendix:

## ***Tnsnames File***

```
# C:\ORAWIN95\NET80\ADMIN\TNSNAMES.ORA Configuration
File:C:\ORAWIN95\net80\admin\tnsnames.ora
# Generated by Oracle Net8 Assistant
```

```
SEBL.WORLD =
  (DESCRIPTION =
    (ADDRESS_LIST =
      (ADDRESS = (PROTOCOL = TCP)(HOST = 4.20.3.243)(PORT = 1600))
      (ADDRESS = (PROTOCOL = TCP)(HOST = 4.20.2.242)(PORT = 1521))
    )
    (CONNECT_DATA = (SID = SEBL))
    (SOURCE_ROUTE = YES)
  )

SEBLDEV.WORLD =
  (DESCRIPTION =
    (ADDRESS = (PROTOCOL = TCP)(HOST = HPV1.ED.GOV)(PORT = 1522))
    (CONNECT_DATA = (SID = SEBLDEV))
  )

SEBLPROD.WORLD =
  (DESCRIPTION =
    (ADDRESS = (PROTOCOL = TCP)(HOST = HPV2.ED.GOV)(PORT = 1622))
    (CONNECT_DATA = (SID = SEBL))
  )

SEBL_RESTON.WORLD =
  (DESCRIPTION =
    (ADDRESS = (PROTOCOL = TCP)(HOST = DOESERVER1)(PORT = 1521))
    (CONNECT_DATA = (SID = SEBLDEV))
  )
```

## ***Siebel Configuration File***

## ***Dedicated Client Configuration***

## ***Thin Client Configuration File***

### ***Thin Client HTML***

#### **Test**

```
HTML>
<HEAD>
<SCRIPT language="JavaScript">
<!--
function wndLoad()
{

SiebelApplicationControll1.Login('host="MRDDOENT001,siebel,objmgr,MRDDOE
NT001" lang="ENU"', '', '')
}
-->
</SCRIPT>
<TITLE>Siebel Thin Client</TITLE>
</HEAD>
<BODY onLoad="wndLoad()" TOPMARGIN=0 LEFTMARGIN=0>
<OBJECT ID="SiebelApplicationControll1" WIDTH=100% HEIGHT=100%
CLASSID="CLSID:38E95018-1EBB-11d3-A22C-00508B347441">
</OBJECT>
</BODY>
</HTML>
```

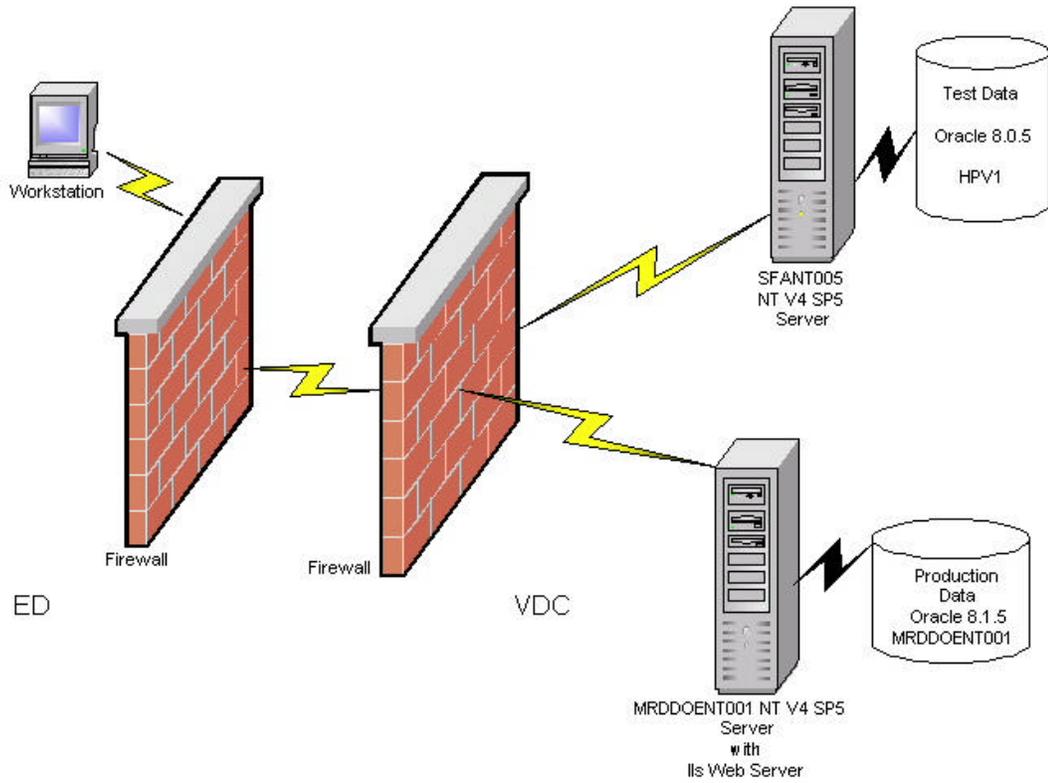
#### **Production**

```
HTML>
<HEAD>
<SCRIPT language="JavaScript">
<!--
function wndLoad()
{

SiebelApplicationControll1.Login('host="SFANT005,siebel,objmgr,SFANT005"
lang="ENU"', '', '')
}
-->
</SCRIPT>
<TITLE>Siebel Thin Client</TITLE>
</HEAD>
<BODY onLoad="wndLoad()" TOPMARGIN=0 LEFTMARGIN=0>
<OBJECT ID="SiebelApplicationControll1" WIDTH=100% HEIGHT=100%
CLASSID="CLSID:38E95018-1EBB-11d3-A22C-00508B347441">
```

</OBJECT>  
</BODY>  
</HTML>

**OCTS II - Pre Production**



**OCTS II - Production**

