



Siebel Incentive Compensation Management Installation Guide for UNIX

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1

Overview of Siebel Incentive Compensation Management

Thank you for selecting Siebel Incentive Compensation Management, the premier system for designing and administering incentive compensation plans. Siebel Incentive Compensation Management provides financial administrators a powerful, one-stop system for managing and reporting multilevel compensation schemas. Siebel Incentive Compensation Management is typically used by financial administrators and corporate managers to provide a company's employees with bonuses, commissions, and other incentives based on individual or group performance benchmarks. Siebel Incentive Compensation Management can also manage incentive plans for channel partners, value-added resellers, or any group or person for whom commissions and rewards are an essential part of the business relationship.

Access to data, reports, and metrics is through a zero-footprint, Web browser-based client. No additional client-side software is required to use Siebel Incentive Compensation Management.

Who Should Read This Manual

This guide is for system administrators and database administrators responsible for the installation, configuration, and maintenance of Siebel Incentive Compensation Management host servers and databases. This guide contains technical information on the planning and implementation of Siebel Incentive Compensation Management, and does *not* address advanced database configuration, Siebel Incentive Compensation Management customization, or user-level features.

This document assumes a basic familiarity with Solaris, or AIX administration. While important commands and steps related to Siebel Incentive Compensation Management installation are described in detail, some commands may not be familiar to junior administrators. In addition, Siebel Incentive Compensation Management contains additional database and server components that require advanced technical setup.

The Siebel Incentive Compensation Management Implementation Process

As is the case with any business-critical enterprise application, installing Siebel Incentive Compensation Management requires a protracted and considered process of planning and implementation. Important decisions must be made at each step, and each decision is based on several variables. Siebel Incentive Compensation Management has developed a five-step rollout process that considers each aspect of an enterprise implementation, from budget to support.

Each phase of this process is just as crucial as the next. [Table 1](#) briefly examines each phase.

Table 1. Implementation Process for Installing Siebel Incentive Compensation Management

Project Phase	Actions	Siebel Incentive Compensation Management Deliverables
Mobilize	<ul style="list-style-type: none"> ■ Ascertain objectives ■ Ascertain budget ■ Align objectives and expectations ■ Create and train project team ■ Determine infrastructure requirements ■ Determine hardware requirements ■ Determine software requirements ■ Ascertain metrics and reporting requirements ■ Solicit feedback from potential users ■ Understand and determine Siebel Incentive Compensation Management configuration options 	<ul style="list-style-type: none"> ■ Engagement Letter ■ Statement of Work ■ Sales Turnover Checklist ■ Project Proposal and Charter ■ Preliminary Project Plan
Discover	<ul style="list-style-type: none"> ■ Evaluate current (as-is) processes ■ Carefully read and understand Siebel Incentive Compensation Management documentation ■ Procure and install adjunctive software (databases, Java support) ■ Procure and prepare server and network hardware 	<ul style="list-style-type: none"> ■ Business requirements definition ■ Integration/Reporting definition ■ Environment specification ■ Risk assessment worksheet ■ Project scope definition ■ Detailed project plan

Table 1. Implementation Process for Installing Siebel Incentive Compensation Management

Project Phase	Actions	Siebel Incentive Compensation Management Deliverables
Design	<ul style="list-style-type: none"> ■ Develop and prepare backup schema ■ Prepare legacy data for import and transfer ■ Prepare operating systems ■ Prepare internal support for end-users ■ Develop process for post-install maintenance ■ Install and configure Siebel Incentive Compensation Management software 	<ul style="list-style-type: none"> ■ Gap solution assessment ■ Configuration design ■ Interface and report designs ■ Installation checklist ■ Unit test scripts ■ Solution acceptance criteria
Configure	<ul style="list-style-type: none"> ■ System adjustments ■ Diligent monitoring of Siebel Incentive Compensation Management systems for potential problems 	<ul style="list-style-type: none"> ■ Configuration specification ■ Integration specifications ■ Reporting specifications ■ Environment management policy ■ System test scripts
Confirm	<ul style="list-style-type: none"> ■ Postmortem of installation ■ Test initial installation ■ Test installation against performance benchmarks with select control group ■ Test client-server relationship from different locations with varying intensity ■ Daily backup of database ■ Support of end-users ■ Develop custom policies and procedures 	<ul style="list-style-type: none"> ■ Acceptance test scripts ■ System policies and procedures ■ Training documentation ■ Support transition checklist ■ Go-live criteria ■ Project summary report

Related Documents

Occasionally, this document will reference other Siebel Incentive Compensation Management manuals and documentation. In addition to the Siebel Incentive Compensation Management's online help, these documents that describe the various aspects of Siebel Incentive Compensation Management, from implementation to every day use, are also included with Siebel Incentive Compensation Management.

- *Siebel Incentive Compensation Management Configuration Guide*: This is a guide for system administrators or financial planners responsible for configuring the Siebel Incentive Compensation Management environment for a group or company after a successful installation.
- *Siebel Incentive Compensation Management Administration Guide*: This guide details Siebel Incentive Compensation Management's essential functionality, and is designed for financial planners, payroll staff, or anyone needing client-level access to Siebel Incentive Compensation Management.

2

Understanding Siebel Incentive Compensation Management

The Siebel Incentive Compensation Management system is comprised of three tiers of integrated components, self-contained for adaptability and scalability. In a *stand-alone configuration*, all three tiers are hosted on the same server. As needs grow, any tier can be migrated to a dedicated server or upgraded without affecting other aspects of the system. A Siebel Incentive Compensation Management system with one or more tiers on its own dedicated server is called an *enterprise configuration*.

Siebel Incentive Compensation Management uses the Java 2 Enterprise Edition (J2EE) platform and Enterprise JavaBeans (EJB) to promote maximum flexibility during initial rollout and upgrading. This method enables any company to leverage its unique performance requirements and IT infrastructure when implementing Siebel Incentive Compensation Management.

Siebel Incentive Compensation Management supports Microsoft Windows 2000 Server (Standard, Advanced, and Datacenter), Sun Microsystems Solaris 8 or later, and IBM AIX 4.3.3 or later.

Siebel Incentive Compensation Management Architecture

The *Web Tier* serves as the portal to Siebel Incentive Compensation Management, providing individuals with proper access, and the ability to obtain and add information through the use of Microsoft Internet Explorer. The *Application Tier* is home to the software that processes business logic and transaction rules. The Application Tier is able to interface with many external legacy systems, including Enterprise Resource Planning (ERP) and Contact Relationship Management (CRM) software. Finally, the *Data Tier* contains Siebel Incentive Compensation Management's database and all related raw data.

Web and Application Tier

The *Web Tier* provides access to the information contained in Siebel Incentive Compensation Management through a combination of a Web server, Java *servlets*, and Java *Server Pages* (JSP). The Web Tier utilizes the Tomcat 4.1.12 Web server to process JSPs and to send rich, formatted data to client browsers.

The *Application Tier* makes up the bulk of Siebel Incentive Compensation Management, and includes the analytical engine, security features, the user management interface, the transaction rules engine, and other components that process the raw data and statistics. This tier uses the JBoss application server. JBoss uses Enterprise JavaBeans to process Siebel Incentive Compensation Management's business logic and to interact with legacy systems.

Data Tier

The *Data Tier* is home to Siebel Incentive Compensation Management's transactional and analytics databases. The data schema operates under an Oracle 8i, Oracle 9i relational database instance. These components are not bundled with Siebel Incentive Compensation Management and must be procured and licensed separately.

NOTE: It is recommended that Siebel Incentive Compensation Management and its adjunctive applications be installed on a disk partition separate from the partition that hosts the operating system and system logs. It is not necessary to place tiers on individual partitions.

3

Siebel Incentive Compensation Management Installation

This section provides instructions for installing a stand-alone configuration of Siebel Incentive Compensation Management. All three tiers, including the application servers and databases, are hosted on the same machine.

Siebel ICM Platform Deployment Overview

Siebel ICM is a n-tier J2EE based platform. The Following tiers need to be installed and configured; Web Server, Application Server, and Database Server. All tiers can be deployed on a single machine, or on multiple machines.

For a complete list of supported platforms, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

Post-Database-Installation Instructions for Oracle 8i Users

After the Oracle instance is installed and verified, you must run a script before moving on to install the Siebel ICM software. This script populates the Product user Profile information required by SQL*Plus. Instructions are as follows.

To run the Product User Profile population script

- 1** On the transaction database host, launch SQL*Plus.
- 2** Log in with the "system" username and password.
- 3** Execute `$ORACLE_HOME/sqlplus/admin/pupbld.sql`.

Example: `sqlplus system/manager @$ORACLE_HOME/sqlplus/admin/pupbld.sql`

Post-Database-Installation Instructions for Oracle 9i Users

After the Oracle instance is installed and verified, you must run a script before moving on to install the Siebel ICM software. This script populates the Product user Profile information required by SQL*Plus. Instructions are as follows.

After the Oracle instance is installed and verified, you must run a script before moving on to install the Siebel ICM software. This script populates the Product User Profile information required by SQL*Plus.

To run the Product User Profile population script

- 1** On the transaction database host, launch SQL*Plus.
- 2** Log in with the "system" username and password.
- 3** Execute \$ORACLE_HOME/sqlplus/admin/pupbld.sql. Example: sqlplus system/manager @\$ORACLE_HOME/sqlplus/admin/pupbld.sql

Process for Installing Siebel ICM

It is recommended that you create a separate user to run Siebel ICM. This user should have a home directory with sufficient space for the installation. This documentation will assume that such a user has been created, and that it is named 'siebelic'.

Once the user has been created as per local user creation procedures, installing Siebel ICM consists of unzipping three files, configuring your application server properties, either Oracle or SQL Server properties, and then running a shell script to configure the installation.

The following installation tasks are included in this section:

- "Unpacking the Software" on page 12
- "Configuring the Server Properties Files" on page 14
- "Configuring the Oracle 8i/9i Database Properties Files" on page 16
- "Installing Siebel ICM Application Server and Web Server" on page 17
- "Installing the Siebel ICM Database Tier" on page 18
- "Distributed Processing Mode" on page 20
- "Configuring Authentication Modes" on page 23
- "Netegrity Siteminder" on page 24

Unpacking the Software

The following software needs to be downloaded, installed, and unpacked in the order listed below:

- 1** Download JBoss 3.0.3_tomcat 4.1.12 from http://prdownloads.sourceforge.net/bulldog/jboss3.0.3_tomcat4.1.12-MOD.zip?download.
- 2** Unzip the JBoss3.0.3_tomcat 4.1.12 zip file to a location of your choice, for example: /home/siebelic/. This location will be known as INSTALLATION_ROOT.
- 3** Extract the Siebel_ICM-Main.zip file to INSTALLATION_ROOT.
- 4** When prompted to overwrite files, select **yes**.

- **Oracle users:** If you are using Oracle as the RDBMS, place the Oracle Driver zip file in `INSTALLATION_ROOT/etc/jboss/dist/oracle9i` for Oracle 9i and `INSTALLATION_ROOT/etc/jboss/dist/oracle8i` for Oracle 8i.

NOTE: Siebel Systems does not provide the Oracle Driver zip file; you must acquire it yourself either from your Oracle installation, or via the Oracle TechNet web site.

- 5 Overwrite existing files.

To install Mozilla Rhino

- 1 Download Mozilla Rhino from: [ftp://ftp.mozilla.org/pub/mozilla.org/js/older-packages/rhino15R2.zip](http://ftp.mozilla.org/pub/mozilla.org/js/older-packages/rhino15R2.zip)
- 2 Place this unzipped zip file in `<INSTALLATION_ROOT>\jboss-3.0.3_tomcat-4.1.12\server\default\lib`

To install iText

- 1 Download iText from <http://prdownloads.sourceforge.net/itext/itext-0.96.jar?download>
- 2 Put it in `<INSTALLATION_ROOT>\jboss-3.0.3_tomcat-4.1.12\server\default\lib`

To install x11 Server

- 1 The first step in installing the X virtual frame buffer server is to verify that the two required packages, `X11.vfb` and `X11.apps.clients` are installed.
This can be checked with `lspp`:
`lspp -l X11.vfb` and **`lspp -l X11.apps`** clients
For both, the 'Status' field should read '**Committed**'.
- 2 If they are not installed, the following commands, run from directories containing their respective filesets, will install them:
`installp -gac -d. X11.vfb` and **`installp -gac -d. X11.apps`**
- 3 Choose a display number.
Every X installation needs to run on its own display. By default, an X server runs on display `:0`. For the VFB Xserver, display `:1` should generally be used, unless another X server is running there.
- 4 To set the display in Bourne style shell (`sh`, `bash`, `zsh`, `ksh`), you should enter the following:
`DISPLAY=:1 ; export DISPLAY`
whereas in a C-style shell (`csh`, `tcsh`) you will need to enter:
`setenv DISPLAY :1`
- 5 To start the VFB X server, the following command is recommended:

```
/usr/bin/X11/X -force -vfb $DISPLAY & xhost +
```

This will start the server, and allow all clients to connect.

Configuring the Server Properties Files

Edit install.properties as follows:

- 1 Set your java.home path. For example: /usr/lib/j2sdk1.4.0_04.

NOTE: When you set the "java.home" property, the path must be specified using forward slashes "/" for the directory separators. This is because a back-slash is treated as a character in Java and in Java properties files.

- 2 Specify the database you are using. For example, db = oracle.

No matter which database you specify, for instance Oracle, or SQL Server, you must configure that properties file, either oracle.properties, or sqlserver.properties respectively.

- 3 Make sure the app.host, transactionDB.host, and analyticsDB.host fields point to the location of your Application Tier, Database Tier, and Analytics DB tier respectively.

Definitions of these values are as follows:

- **app.host.** The name of the machine running your application server, for example, JBoss.
- **transactionDB.host.** The name of the machine running your transaction database.
- **analyticsDB.host.** The name the machine running your analytics database.

- 4 If you want to run the Tomcat/JBoss integrated stack, uncomment the next line. If you are running Tomcat and JBoss on separate machines, comment it out by putting a "#" at the beginning of the line.

integrated.stack=true.

- 5 Specify the JDK version you want Siebel ICM to use. For example, jdk.version = jdk1.3

- 6 Set Java Memory tuning setting.

Definitions of these settings are as follows:

- **jvm.memory.init.** Set to the initial size of the Java heap. For example:
jvm.memory.init=128m
- **jvm.memory.max.** Set to the maximum size of the Java heap. For example:
jvm.memory.max=512m.

NOTE: Never exceed the total amount of physical memory on your machine, or your performance will suffer.

- 7 Locate the Application Network Port Configuration section of the file and adjust the port settings as appropriate. You must change these settings if you are using multiple application servers and web servers on the same server, otherwise, there will be a conflict between the ports.

AJP13 is used by tomcat4

AJP12 is used by tomcat3

- `jboss.port.NamingService=1099`
- `jboss.port.WebService=8083`
- `jboss.port.RMI=4444`
- `tomcat.port.HttpConnector=8080`
- `tomcat.port.AJP13Connector=8009`
- `tomcat.port.AJP12Connector=8007`
- `jboss.port.HtmlAdaptorServer=8082`

8 Set your application thread control setting.

For example: `jboss.mdb.pool.size=2`

9 Locate the `dashboard.customization` property.

Set this value to true to allow dashboard customization via Jetspeed. (`dashboard.customization`)

Set this value to false to disable the automatic Jetspeed set up and user creation for dashboards when an OU is created. (`dashboard.create.ou.portal`)

The global setting, if set to true, will cause the default dashboard configurations to be used. This setting does not change the behavior of per-OU dashboard configuration creation through the bootstrap URL or the regular UI, only `dashboard.create.ou.portal` controls that. It does mean that the create-on-demand on first-time login feature for populated/migrated OUs will be disabled, however. (`dashboard.test.mode`)

Recommended values are as follows:

- `dashboard.customization=true`
- `dashboard.create.ou.portal=true`
- `dashboard.test.mode=false`

10 Locate the `dashboard.test.mode` property. Make sure the value of this property is false.

11 Locate the `dashboard.create.ou.portal` property. Make sure the value of this property is true.

NOTE: This setting will create unique dashboard layouts per Operating Unit. The remaining parameters in the `install.properties` are advanced in nature. It is recommended you not change any other parameters.

12 Set the parameters for Performance tuning. Accept the default value of, **1**.

`service.extract.newline.numberchars=1`

13 Complete the Service Distribution related configuration. For example, **`unix.virtual.display-127.0.0.1:0`**

14 Save `install.properties`.

Configuring the Oracle 8i/9i Database Properties Files

Edit oracle.properties as follows:

- 1** Adjust the transaction database variables as follows:
 - transactionDB.SID=SIEBELICM
 - transactionDB.user=siebelicm
 - transactionDB.password=siebel2003
 - transactionDB.data_tablespace=siebelicm_data
 - transactionDB.data_dir=/oradata/Siebel/data
 - transactionDB.index_tablespace=siebelicm_indexes
 - transactionDB.index_dir=/oradata/Siebel/indexes
 - transactionDB.temp_tablespace=temp
 - transactionDB.ltable_size=2500k
 - transactionDB.mtable_size=1000k
- 2** Set the transaction database jdbc connection information as follows:
 - jdbc.url.port=1521
- 3** Adjust the analytics database variables as follows:
 - analyticsDB.SID=SIEBELICM
 - analyticsDB.user= siebelicm_dw
 - analyticsDB.password= siebel2003
 - analyticsDB.data_tablespace=siebelicm_data_analytics
 - analyticsDB.data_dir=/oradata/SiebelICM/data
 - analyticsDB.index_tablespace=siebelicm_indexes_analytics
 - analyticsDB.index_dir=/oradata/SiebelICM/indexes
 - analyticsDB.temp_tablespace=temp
 - analyticsDB.ltable_size=2500k
 - analyticsDB.mtable_size=1000k
- 4** Set analytics database jdbc connection information as follows:
 - dwJdbc.url.port=1521
- 5** Adjust the database variables for the analytics stored procedures to match those set above:
 - DW_PREFIX= siebelicm_dw.
 - DW_SUFFIX=

- TX_PREFIX= siebelicm.

- TX_SUFFIX=

- 6 Adjust the analyticsService.readingCommitSize parameter to improve performance when running the UpdateAnalytics service.

This parameter size is calculated by finding the record type with the most number of custom fields and multiplying the number of fields by the number of records in the system.

For example: The combined number of custom fields on a transaction header and transaction line profile is 5, and the anticipated number of transactions to be processed in a single batch is 50,000. Multiply 5 X 50,000 and set this parameter to a value of 250000. This value (250000) requires that you have a large enough rollback segment and tablespace in Oracle or transaction log in SQL to support this parameter. If the rollback segment/tablespace or transaction log are limited by available hardware space, reduce the value of this parameter as appropriate.

- 7 Adjust the analyticsService.commitSize parameter. This parameter size is calculated as follows:

Identify the one entity that will have the most number of records from the following tables in the transaction database:

- SALESTRANS_LINE
- ATTRIBUTE_DEF_EFDT
- SALESTRANS_SALESREP

For example:

- SALESTRANS_LINE - 50000 records
- ATTRIBUTE_DEF_EFDT - 20000 records
- SALESTRANS_SALESREP - 25000 records

The optimal value for this attribute is a number greater than 50000 as the SALESTRANS_LINE table has the most number of records. This value (50000) requires that you have a large enough rollback segment and tablespace in Oracle or transaction log in SQL to support this parameter. If the rollback segment/tablespace or transaction log are limited by available hardware space, reduce the value of this parameter as appropriate.

- 8 Save oracle.properties.

Installing Siebel ICM Application Server and Web Server

- 1 Login to the application server as your siebel ICM user (siebelic)
- 2 cd to <INSTALLATION_ROOT>
- 3 To set up the web tier, type **sh ./setup.sh** - This will bring up a menu presenting an option for each possible tier of the installation. Not all of these tiers will be used.

- 4 The first command you want to run is **'tomcat'**.
This will build and copy the Tomcat configuration information to the proper location.
- 5 Next, run the **jboss** command.
This will build and copy the relevant jboss configuration to the proper location.

Installing the Siebel ICM Database Tier

You can remotely install the database tier. You must have the Oracle client tools installed on the application server to do this.

- 1 Login to the application server as your siebel ICM user (siebelic)
- 2 cd to <INSTALLATION_ROOT>
- 3 To set up the database tier, type **sh ./setup.sh** - This will bring up a menu presenting an option for each possible tier of the installation.
NOTE: All of these tiers will be used.
- 4 The first tier you will want to run is the **transactionDB** tier.
You will be presented with the configured values for verification. Once you are satisfied with the configuration as shown, you can proceed to database initialization.
- 5 To set up analytic and reporting functions, run the **analyticsDB** tier in the same way.
- 6 Link the transaction and analytic databases by running the **finishDB** tier.

Completing the Siebel ICM Server Installation

For instructions on setting up System Administrator, Enterprise Units, and Operation Units with a working instance of Siebel ICM, see *Siebel Incentive Compensation Management Configuration Guide*.

Starting the Siebel ICM Server

- 1 Make sure the transaction database and analytical database are running.
- 2 Login as the Siebel user (siebelic)
- 3 cd to <INSTALLATION_ROOT>/jboss-3.0.3_tomcat-4.1.12/bin
- 4 Run the **'run.sh'** script to start all Siebel ICM services. (sh ./run.sh). It is recommended that you run this process and fork it into the background when run. You can do this by appending an ampersand in a bourne-compatible shell. For example,

```
siebelic:/home/siebelic$ sh ./run.sh &  
siebelic:/home/siebelic$
```

The console output will consist startup messages and errors. Important messages are archived in INSTALLATION_ROOT/Jboss-3.0.3_tomcat-4.1.12/server/default/log.

- 5 Once Siebel ICM is started up, go back to <INSTALLATION_ROOT> and populate the system tier.
- 6 Populate the database by running the **populateSystem** tier. This step seeds the Siebel ICM instance with language/locale information as well as the symbol table.

NOTE: All lingual dictionaries are populated in this step.

At this point you will have a working Siebel ICM server accessible via a browser at: <http://<HOSTMACHINENAME>:8080/Siebel>

Now that the software is installed and the system is started up proceed to detailed configuration of the environment. Environment configuration is explained in Siebel ICM Advanced Setup.

You will now need to access the bootstrap files. For more information, see the *Siebel Incentive Compensation Management Configuration Guide*

Stopping the Siebel ICM Server

- 1 Login as the Siebel user (siebelic)
- 2 cd to <INSTALLATION_ROOT>/jboss-3.0.3_tomcat-4.1.12/bin.
- 3 Run the **shutdown.sh** script to stop the Siebel ICM services. (**sh ./shutdown.sh**).

Jasper Reports Target Configuration and Execution

The Jasper files, **Configure report_groups** and **report_acl.txt** are located in following directories:

- {Siebel ICM Install Directory} \jboss-3.0.3_tomcat-4.1.12\reports\security\report_groups.txt
- {Siebel ICM Install Directory} \jboss-3.0.3_tomcat-4.1.12\reports\security\reports_acl.txt

The report_groups.txt defines groups of reports for display in the report menu. The file is a set of comma-separated lists with the following format:

- <OUCode>.<Group Name>, <ReportName1>, <ReportName2>, <ReportNameN>

The Group Names for a given OU will always appear in alphabetical order in the UI. The Report Names will always appear in alphabetical order in the UI, as follows:

```
mainOU.Payout, CommissionDetailsByCustomer, PayoutStatement, PlanParticipantPayout  
mainOU.ParticipantPerformance, ParticipantCumulatedPerformance,  
ParticipantPerformanceCurrentPeriod  
mainOU.Performance, ParticipantCreditRankingByOrganization,  
ParticipantCumulatedPerformance, ParticipantPerformanceCurrentPeriod  
mainOU.Transaction, TransactionSumForEventByProduct, ParticipantTransactionsByPeriod  
mainOU.Modeling, CommissionDetailsByCustomer, RevenuePayoutAllPeriods  
mainOU.ParticipantTransaction, ParticipantTransactionsByPeriod,  
TransactionSumForEventByProduct
```

The **report_acl.txt** file relates the report groups defined in report_groups.txt to Operating Unit-specific security roles. The file appears in the following format:

■ <OUCode>.<SiebelICM Security Role Code>, <GroupName1>, <GroupName2>,
<GroupNameN>

The Group Names for a given OU and Role will always appear in alphabetical order in the UI, as follows:

mainOU.Participant, Payout, ParticipantPerformance, ParticipantTransaction

mainOU.Manager, Payout, Performance, Transaction

mainOU.Executive, Payout, Performance, Transaction

mainOU.ADMIN ROLE: mainOU, Payout, Performance, Transaction

To run configureAllReports command

- 1 Run the setup.sh sep up step and select '**configureAllReports**' under the JASPER REPORTING FRAMEWORK - REPORT INSTALLATION.

This will allow you to compile and publish all reports.

Distributed Processing Mode

Siebel ICM provides the ability to install the application on multiple servers used to distribute the services processing. These servers are called "Processors." These processors are grouped together by one central controller application server called "Service Controller" that can act as a processor as well. The configuration is the heterogeneous distribution system in which the Service Controller maintains the processors service state information and each service run's context information, and functions as Trace/Log master.

Node Specific Installation Instructions

For a Service Controller installation

- 1 Follow the instructions for a standard Siebel ICM installation, but during the “Configuring the Server Properties Files” step, uncomment (by removing the leading #) and change the following properties in install.properties:

Parameter	Setting	Comments
app.service.isSingleServer	false	Setting to false tells the Service Controller that distributed processors exist.
app.service.controller.host	MACHINE_NAME	This is the machine name for the Service Controller.
app.service.controller.port	1099	The JNDI port.
app.service.controller.isProcessor	True	If you want the Service Controller to also process, set this to true.
service.jms.queueConnectionFactory.jndiName	RMIXAConnectionFactory	Do Not Change.
app.cluster.url	PROCESSOR1:JNDI_PORT, PROCESSOR2:JNDI_PORT, PROCESSOR3:JNDI_PORT	A comma delimited list of Processor Machines. Each Processor must use the same port as the controller.
app.service.isAutoRecoverable	True	Leave this variable value set to true to active the fail over mechanism used by the Service Controller.

Parameter	Setting	Comments
mail.smtp.host	mail.MYCOMPANY.com	If you want the Service Controller to notify an administrator via email when a processor is down, uncomment this parameter and set it to the email address you want notified in the email related configuration section of this file.
app.admin.email	info@MYCOMPANY.com	If you want the Service Controller to notify an administrator via email when a processor is down, uncomment this parameter and set it to the email address you want notified in the email related configuration section of this file.

- 2 Create <MACHINENAME>.properties file and put it in INSTALLATION_ROOT
- 3 In the <MACHINENAME>.properties file, add the following line: app.service.isController=true
- 4 Save and close the install.properties file, then continue with the standard installation instructions.

For each Processor machine

- 1 Follow the instructions for a standard Siebel ICM installation, but after the “Configuring the Server Properties Files” step create a <MACHINENAME>.properties file and put it in INSTALLATION_ROOT
- 2 In the <MACHINENAME>.properties file, add the following line: #app.service.isController=true
If you want to change the node-specific settings for this machine, you can override settings in install.properties by including one or more of the following overridden properties. These properties would be overridden to accommodate for differences in the machine’s resources (CPU, RAM, Port number allocation and etc).
 - jboss.mdb.pool.size=2

- `jvm.memory.init=128`
- `jvm.memory.max=516`
- `jboss.mdb.pool.size=2`
- `jboss.port.NamingService=1099`

- 3 Save and close the `<MACHINENAME>.properties` file, then continue with the standard installation instructions.

To install a Processor follow the standard instructions for installation, with the following additional `install.properties` changes:

Configuring Authentication Modes

Siebel ICM supports four different Authentication and single sign on modes. To configure authentication modes, edit:

```
<INSTALLATION_ROOT>/jboss-3.0.3_tomcat-4.1.12/server/default/conf/login-config.xml
```

Native

Native Authentication mode ships out of the box. No changes are required to make this work. All user account authentication information is stored in the Siebel ICM database.

Siebel Database

This allows users to be authenticated against an instance of Siebel Enterprise Server. The options here are used to build the connect string needed by the Siebel Data Bean login method.

Connect String syntax:

```
siebel[[:transport]][[:encryption]][[:compression]]://host[:port]/  
EnterpriseServer/AppObjMgr[/SiebelServer]
```

Naming conventions:

- `siebelProtocol = siebel[[:transport]][[:encryption]][[:compression]]` where `transport = {tcpip|http}` (default = `tcpip`)
- `encryption = {none | rsa}` (default = `none`)
- `compression = {none | zlib}` (default = `zlib`)
- `gatewayServer = hostname:port` where server is installed; aka "plwrk247:2320"
- `enterpriseServer = "Siebel"`
- `appObjManager = the object manager for the application group you are authenticating against.` Example is `FinsObjMgr`
- `siebelServer = hostname`

- language = Siebel language code. Example = "ENU"

Example XML config for Siebel Database Authentication

```
<login-module code = "com.motiva.ce.security.spi.SiebelLoginModule" flag =
"sufficient">

  <module-option name = "unauthenticatedIdentity">nobody</module-option>

  <module-option name = "multi-threaded">true</module-option>

  <module-option name="connectString">siebel.TCPIP.none.NONE://<hostname>:2320/siebel/
FINSObjMgr_enu/<hostname></module-option>

  <module-option name="language">ENU</module-option>

</login-module>
```

Netegrity Siteminder

This module allows users to be authenticated against Netegrity Siteminder.

- 1 Put the login module XML snippet in place of the CastorLoginModule.
- 2 Put the Netegrity SDK jar files in the /jboss-3.0.3_tomcat4.1.12/server/default/lib. These files are
 - a netegrity.jar
 - b smjavaagentapi.jar
 - c smjavasdk2.jar
- 3 Put the Netegrity SDK dll files are in the Jboss/bin directory. These files are:
 - a SmAgentAPI.dll
 - b smjavaagentapi.dll
- 4 Put your siteminder.properties in INSTALLATION_ROOT \Jboss-3.0.3_tomcat-4.1.12\bin directory.

Example XML Config for Siteminder

```
<login-module code = "com.motiva.ce.security.spi.NetegrityLoginModule" flag =
"sufficient">

  <module-option name = "unauthenticatedIdentity">nobody</module-option>

  <module-option name = "multi-threaded">true</module-option>

</login-module>
```


4

Glossary

This is a list of important terms used in this manual.

Application Tier

The “logic” tier of the Siebel Incentive Compensation Management system, containing the analytical engine, security features, user management interface, and transaction rules engine. The application tier uses the JBoss application server.

Data Tier

The largest tier of the system that houses the Oracle or Microsoft SQL database.

Enterprise Configuration

A distributed configuration of Siebel Incentive Compensation Management that houses one or more tiers on its own dedicated server.

Java Server Pages (JSP)

A technology that uses Java to modify Web pages before it is sent to a user. JSP technology configures Web page layout through Java servlets.

P.D.I.O.

A four-step plan for enterprise application deployment that stands for Planning, Development, Implementation, and Operation.

Servlet

A small, Java-based program that configures the layout or content of a Java Server Page (JSP).

Snapshot

A method of data backup that makes a full copy of a file system or directory and stores it to a separate file system, typically for a limited period of time. Snapshots are an excellent method of retrieving recently deleted or changed data without the effort and downtime associated with tape backups.

Stand-alone Configuration

A unified configuration of Siebel Incentive Compensation Management that houses all tiers on a single system. Stand-alone configurations are ideal for small groups or companies.

UNC Path

Short for Universal Naming Convention, a method of identifying shared files or directories in a networked environment. Typically takes the format of

```
\\servername\sharename\path\file
```

Web Tier

The tier of Siebel Incentive Compensation Management that serves the processed information from the data and application tiers and sends it to the Siebel Incentive Compensation Management client at the desktop.