Siebel Analytics Platform Upgrade Guide

Version 7.8.2

November 2005

Contents

Contents

1 What's New in This Release

What's New in Siebel Analytics Platform Upgrade Guide, Version 7.8.2

This book describes the decisions to make or tasks to perform when upgrading the Siebel Analytics platform.

Platform upgrades of the following Siebel Analytics software releases are supported in the *Siebel Analytics Platform Upgrade Guide*:

- 7.0.x
- 7.5.x
- 7.7
- 7.7.1.x
- 7.8
- 7.8.1

Table 1 lists the changes described in this version of the documentation.

Table 1.   New Product Features in Siebel Analytics Platform Upgrade Guide, Version 7.8.2

Topic	Description
Creation of this document from material formerly in the appendix on upgrading Siebel Analytics platform in the *Siebel Analytics Platform Installation and Configuration Guide*: - Chapter 3, "Upgrading the Siebel Analytics Platform" - Chapter 4, "Performing a Siebel Analytics Platform Upgrade"	*Siebel Analytics Platform Upgrade Guide* is for organizations that are upgrading their Siebel Business Analytics platform to a newer version. The previous platform upgrade material has been expanded and clarified.

2 Analytics Platform Upgrade Topic Areas

This area contains topics relating to the scope and use of *Siebel Analytics Platform Upgrade Guide*, including the following topics:

- Types of upgrades documented
- Organization of topics
- Conventions used throughout *Siebel Analytics Platform Upgrade Guide*

Scope of Analytics Platform Upgrade Topic Areas

This topic is part of *"Analytics Platform Upgrade Topic Areas."*

There are three possible types of upgrade of Siebel Business Applications software, based on the components involved:

■ Siebel Analytics platform

■ Siebel Analytics applications data

■ Siebel CRM applications and data

NOTE: The terms "Siebel Analytics" and "Siebel Business Analytics" are used interchangeably in this book, and mean the same thing.

This book describes the decisions to make or tasks to perform when upgrading only the Siebel Analytics platform:

■ *"Deciding to Upgrade the Siebel Analytics Platform" on page 18*

■ *"Performing a Siebel Analytics Platform Upgrade" on page 29*

The following topic areas are not covered by *Siebel Analytics Platform Upgrade Guide*:

■ Planning or performing an upgrade for the Siebel Analytics repository and Siebel Analytics Web catalog.

　■ See the *Siebel Analytics Server Administration Guide*.

　■ See the *Siebel Analytics Web Administration Guide*.

■ Planning or performing an upgrade for the Siebel Data Warehouse.

　See the *Siebel Analytics Applications Installation and Administration Guide*.

　NOTE: For upgrading Siebel Analytics applications, there is no single document. Consult with Siebel Professional Services before beginning this type of upgrade.

■ Upgrading Siebel CRM applications.

　See the *Siebel Upgrade Guide*.

■ Release 7.7.x of Siebel Disconnected Client.

　This component can be upgraded without user interaction (the component name has changed to Mobile Client). See the topic about silently upgrading the Mobile Client in the ancillary client programs appendix of the *Siebel Analytics Platform Installation and Configuration Guide*.

TIP: A list of all the books you may need for a full enterprise installation is shown in *"Accessing Related Siebel Analytics Documentation" on page 13* and in *"Important Planning Resources for Upgrade Processes" on page 15*.

Organization of Topic Areas for Platform Upgrade

This topic is part of *"Analytics Platform Upgrade Topic Areas."*

Use the process and task topics in the "Deciding …" and "Performing …" areas to guide you through the upgrade process.

NOTE: Topics in the chapters may not follow the order you perform them during the upgrade.

The types of topics in a chapter are as follows:

■ **Process topics**. A process topic consists of a number of tasks with a common result. Process topics provide a checklist of the steps required to complete an installation. If you must perform them in a particular order, each process step includes a link to a task topic.

   For example, *"Deciding to Upgrade the Siebel Analytics Platform" on page 18* lists the tasks required to upgrade the Siebel Analytics platform. Sometimes, not all tasks are necessary for a particular deployment. These topic headings frequently (but not always) begin with "Process of…".

■ **Task topics**. Task topics explain how to do each step in an installation or configuration process, and typically include a procedure.

   Task topics begin with a gerund. For example, *"Accessing Related Siebel Analytics Documentation" on page 13*.

■ **Concept topics**. Concept topics explain key concepts required to perform groups of tasks, or background material.

   These topic headings usually begin with "About…". For example, *"About File Path and Command Conventions" on page 11*. Concept topic headings do not begin with a gerund or "Process of".

Version Applicability Tags

This topic is part of *"Analytics Platform Upgrade Topic Areas."*

The number of tasks you need to perform for an upgrade often depends on the version number of the Siebel Analytics software that you are upgrading from. This book uses version applicability tags for topics that apply only to specific versions but not others. Version applicability tags are listed at the beginning of each topic. Table 2 lists the applicability tags and their meaning.

NOTE: If a topic has no applicability tag beginning it, then this topic applies to all versions of Siebel Analytics software.

Table 2.   Topic Applicability Versions

Version Tag	Applicability
Releases: Releases 7.0.x, 7.5.x, 7.7.x.	Applies to all versions of Siebel Analytics prior to 7.8: ■ 7.0.x ■ 7.5.x ■ 7.7 ■ 7.7.1.x
Releases: 7.8.2 release only.	Applies only to Siebel Analytics 7.8.2.

About File Path and Command Conventions

This topic is part of *"Analytics Platform Upgrade Topic Areas."*

Environment variables and path placeholders for both Windows and UNIX paths are used throughout *Siebel Analytics Platform Upgrade Guide*.

Table 3 on page 11 shows the format conventions for paths, navigation, and command execution used in this book.

TIP: All versions of the UNIX operating system are case-sensitive. If you are running Siebel Analytics under UNIX, treat all filenames, directory names, path names, parameters, flags, and command-line commands as lowercase, unless you are instructed otherwise in the product. If your deployment currently runs under Windows, but you might switch to a UNIX environment or deploy UNIX servers in the future, follow this same practice to avoid having to rename everything later.

Table 3.   Conventions Used in Siebel Analytics Platform Upgrade Guide

Reference Category	Windows Platforms	UNIX Platforms
Paths	$INSTALLDIR is the absolute path of the Analytics Server installation directory. When you install Siebel Analytics, the installation script queries for the drive and path to the installation directory. The script then installs the Siebel Analytics Servers on that drive and path. For example, if you specified drive D: as the installation drive, then $INSTALLDIR is D:\SiebelAnalytics.	$INSTALLDIR is an environment variable that defines the absolute path of the Analytics Server installation directory. When you install Siebel Analytics, the installation script queries for the path to the installation directory. The script then installs Siebel Analytics in a subdirectory of this path. For example, if you specified /usr/local as the installation directory, then $INSTALLDIR is /usr/local/SiebelAnalytics. The definition of $INSTALLDIR and other environment variables required for doing an installation are located in /sa.sh. The Siebel Analytics installation script sets environment variable definitions in this shell script. Do not edit or delete this file.

Table 3.   Conventions Used in Siebel Analytics Platform Upgrade Guide

Reference Category	Windows Platforms	UNIX Platforms
Path Navigation (Procedural steps that ask you to navigate to a specified directory.)	Open a Command Prompt window and use the cd command to make the specified directory the current directory. **NOTE:** Do not use the Windows File Explorer to navigate to the directory. For help with the cd command, enter the word help in the Command Prompt window and click Enter.	In a shell window, make the specified directory the current directory.
Command Execution (Procedural steps that ask you to execute a command, unless specified otherwise.)	In a Command Prompt window, verify the current directory is correct and enter the command. Do not run the command by entering it in the Run window in the Start Menu.	**TIP:** Before performing command line procedures, source sa.csh first. This refreshes the environment variables required to run commands. **NOTE:** Under UNIX, run .csh scripts in a C shell, and run .sh script in Korn, Bourne, or bash shell. In a shell window, perform the following steps: ■ Verify the current directory is correct. ■ Source the siebenv script. ■ Enter the command.

Accessing Related Siebel Analytics Documentation

This topic is part of *"Analytics Platform Upgrade Topic Areas."*

This topic lists the books that are cross-referenced from *Siebel Analytics Platform Upgrade Guide*. Books that apply in general to installation, configuration, and use of Siebel Business Applications are listed in the topic *"Important Planning Resources for Upgrade Processes" on page 15*.

Related Siebel Analytics book titles:

■ *Siebel Analytics Applications Installation and Administration Guide*

■ *Siebel Analytics Platform Installation and Configuration Guide*

■ *Siebel Analytics Server Administration Guide*

■ *Siebel Analytics Web Administration Guide*

■ *Siebel Customer-Centric Enterprise Warehouse Installation and Configuration Guide*

■ *Siebel System Requirements and Supported Platforms for Siebel Analytics*

Accessing Siebel Analytics Documentation

The books listed in this topic are available on Siebel SupportWeb Knowledge Base. The following procedure explains how to access Siebel documentation.

To access Siebel Analytics documentation

1   Log onto SupportWeb.

2   In the Self Service area, click the link *Browse/Search Knowledge Base (English)*.

3   In the left browser pane, click the link *Product Documentation*.

4   Under Product Documentation, click the *Siebel Bookshelf* link.

5   In the Siebel Business Analytics Applications area, click the applicable Siebel Bookshelf version, and then click the All Product Lines link.

In addition, third-party documentation, such as that for Informatica, is provided on the Siebel Business Third-Party Bookshelf CD-ROM (shipped with the Siebel Bookshelf CD-ROM).

Accessing Siebel Analytics System Requirements Documentation

Use the following procedure to locate *Siebel System Requirements and Supported Platforms*.

To access Siebel Analytics System Requirements documentation

1   Log onto SupportWeb.

2   In the Self Service area, click the link *Browse/Search Knowledge Base (English)*.

3   In the left browser pane, click the link *Product Documentation*.

4   Under Product Documentation, click the link *Siebel System Requirements and Supported
Platforms.*

5   In the Siebel Business Analytics area, click the applicable version.

Important Planning Resources for Upgrade Processes

This topic is part of *"Analytics Platform Upgrade Topic Areas."*

Your Siebel implementation team performs a number of actions to upgrade and implement Siebel Business Applications that are described in several Siebel publications on the Siebel Bookshelf. The following list describes Siebel applications documentation. Book specific to Siebel Business Analytics (or Siebel Analytics) are listed in the topic *"Accessing Related Siebel Analytics Documentation" on page 13*.

- *Siebel Deployment Documentation Suite*

    - *Upgrade Guide*

    - *Deployment Planning Guide*

    - *Siebel Installation Guide for Microsoft Windows: Servers, Mobile Web Clients, Tools*

    - *Siebel Installation Guide for UNIX: Servers, Mobile Web Clients, Tools*

    - *Going Live with Siebel Business Applications* for information about how to migrate customizations from the development environment to the production environment

    - *Siebel System Administration Guide* for details on how to administer, maintain, and expand your Siebel Servers

    - *Performance Tuning Guide*

    - *Configuring Siebel Business Applications* for information about configuring Siebel Business Applications in Siebel Tools

- **Product Documentation**. Product documentation is collectively called the Siebel Bookshelf. The Siebel Bookshelf is available on CD-ROM. It is also available on SupportWeb under Product Documentation. See the topic *"Accessing Related Siebel Analytics Documentation" on page 13*.

- **Siebel SupportWeb**. This is the Siebel technical support Web site. It provides search engine access to the Siebel Bookshelf, Technical Notes, Siebel Alerts, troubleshooting information and other important information.
  SupportWeb is located at https://ebusiness.siebel.com/supportweb/.

    - *Release Notes.* Release Notes contain late-breaking information that the *Siebel Analytics Platform Installation and Configuration Guide* does not yet include. Release Notes regarding installation are located on SupportWeb at Product Documentation > Release Notes.

    - *Maintenance Release Guides*. Maintenance Release Guides contain important information about updates to applications in maintenance releases. Maintenance Release Guides are located on SupportWeb at Product Documentation > Maintenance Release Guides.

    - *Documentation Updates*. Typically, the Bookshelf is updated monthly. During the month, PDF updates are posted to SupportWeb > Product Documentation > Documentation Updates.

    - *Technical Notes*. Technical notes provide important information on specific installation issues. Technical Notes related to installation are located on SupportWeb at Technical Notes > Product Areas > Siebel Analytics.

■ *Siebel Alerts*. Alerts provide time-critical information on key product behaviors and issues. Siebel Alerts about installation issues are located on SupportWeb at Siebel Alerts > Product Areas > Siebel Analytics.

■ *Troubleshooting Steps*. Troubleshooting Steps contain information about how to troubleshoot common error messages and unwanted behavior in Siebel applications. Troubleshooting Steps are for installation list error messages found in installation logs and describe how to resolve them. Troubleshooting Steps are located on SupportWeb at Troubleshooting Steps > Product Areas > Siebel Analytics.

■ *Siebel Weekly Content Notification Service*. This service notifies you weekly by email of important content changes on SupportWeb. This includes new product documentation, technical notes, alerts, and troubleshooting steps. To subscribe, see the Siebel Weekly Content Notification banner on the SupportWeb search page.

■ **Technical Account Manager.** If you need assistance planning your installation or encounter problems during the installation, your Technical Account Manager can advise you on how best to use available Siebel resources.

■ **Siebel Expert Services**. Siebel Expert Services offers detailed implementation planning and technical consulting services. They also provide rapid response and resolution for critical technical issues affecting Siebel deployments.

3 Upgrading the Siebel Analytics Platform

Upgrading a Siebel Analytics platform is a two-step process:

1 Deciding to Upgrade the Siebel Analytics Platform.

2 Performing a Siebel Analytics Platform Upgrade.

NOTE: A platform upgrade does not necessarily require upgrading the applications also. It may be sufficient to upgrade only the Siebel Analytics platform, while keeping the Siebel Analytics Applications on a previous version, repository, and set of schema.

The Siebel Analytics platform product consists of servers, programs, and tools used to build business intelligence applications. Using the Siebel Analytics platform, you can develop your own integrated analytical application solution.

NOTE: Deploying the Siebel Analytics platform without other Siebel applications is also called Siebel Analytics Stand-Alone.

In general, the Siebel Analytics platform is compatible with older versions of Siebel Analytics applications, and Siebel Analytics applications are compatible with new versions of Siebel Analytics platforms.

Siebel Analytics Platform Components

The following are the Siebel Analytics platform components:

- Siebel Analytics Server

- Siebel Analytics Web Server

- Siebel Analytics Scheduler Server

- Siebel Data Warehouse Administration Console (Client and Server)

- Related component programs:

    - Chart image server

    - Siebel Analytics Catalog Manager

    - Siebel Analytics Client Tools

    - Siebel Analytics ODBC Client

    - Siebel Analytics Server Administration Tool

TIP: Several product licensing considerations are related to your particular deployment of Siebel Analytics. See the chapter on Siebel Analytics licensing and installation options in the *Siebel Analytics Platform Installation and Configuration Guide.*

Deciding to Upgrade the Siebel Analytics Platform

This topic is part of "Upgrading the Siebel Analytics Platform."

The decision to upgrade the Siebel Analytics platform should be based on specific business requirements to take advantage of new platform functionality, or because an upgrade is planned for Siebel CRM Applications.

TIP: In general, Siebel Systems recommends that customers upgrade to the latest available version of the Siebel Analytics platform, in order to take advantage of new or enhanced platform functionality. The Siebel Analytics platform is compatible with older versions of Siebel Analytics applications.

The following decisions must be made before upgrading the Siebel Analytics platform:

■ "Is it Necessary to Uninstall Earlier Versions of Siebel Analytics?" on page 19

■ "Should an Incremental Platform Upgrade be Performed?" on page 20

■ "Checking the Analytics Component Version Number" on page 21

■ "Which Analytics Folders and Files Should be Backed Up?" on page 22

■ "Removing the Siebel Analytics Server Query Results Cache" on page 24

■ "Do Other Deployment Components Need Upgrading?" on page 25

Is it Necessary to Uninstall Earlier Versions of Siebel Analytics?

Releases: Releases 7.0.x, 7.5.x, 7.7.x.

This topic is part of the process "Deciding to Upgrade the Siebel Analytics Platform."

Releases of Siebel Analytics prior to version 7.8.2 required that you uninstall your currently-installed version first, before proceeding with the upgrade or reinstallation. As of release 7.8.2, it is no longer necessary to uninstall Siebel Analytics before upgrading the platform software. Table 4 shows the platform upgrades that require uninstallation and those that do not.

If you are upgrading from a version of Siebel Analytics that must be uninstalled, see the topic "Uninstalling Previous Versions of Siebel Analytics" on page 26.

Table 4.   Siebel Analytics Platform Versions and Uninstallation

From Version	To Version	Uninstall Analytics?
7.5.x	7.8.2	**Yes**
7.7	7.8.2	**Yes**
7.7.1	7.8.2	No
7.7.1.1	7.8.2	No
7.7.1.2	7.8.2	No
7.7.1.3	7.8.2	No
7.7.1.4	7.8.2	No
7.7.1.5	7.8.2	No
7.7.1.9	7.8.2	No

Should an Incremental Platform Upgrade be Performed?

Releases: 7.8.2 release only.

This topic is part of the process *"Deciding to Upgrade the Siebel Analytics Platform."*

Siebel Analytics version 7.8.2 allows incremental additions of individual components of the platform to an existing installation. Users can add new components, without having to uninstall and reinstall the entire platform.

For example, if you buy Siebel Delivers, then you receive a new license key for that component. The incremental feature of the installer creates a new AnalyticsWebLicense.xml file that includes this new license.

Each of the following components can be added to an existing installation of Siebel Analytics 7.8.2:

■ Siebel Analytics Web and its sub-components (Delivers, Answers)

■ Siebel Analytics Web Plug-In

■ Client tools (drivers, Server Administration Tool, Catalog Manager)

   Siebel Analytics client environments run the Server Administration Tool must be of the same version as the Server Administration Tool itself. The Siebel Analytics client environments are:

   ■ Server Administration Tool

   NOTE: You cannot open a newer version of the repository on an older version of the Server Administration Tool; that is, a repository saved under 7.8 cannot be opened on 7.7.1.

   ■ ODBC client

   These client environments are upgraded when you upgrade the platform using the option Complete. If you installed the newer Siebel Analytics software using an incremental upgrade, however, you may need to also install the Siebel Analytics Server or Siebel Analytics ODBC Client. See *"Checking the Analytics Component Version Number" on page 21.*

■ Siebel Data Warehouse Administration Console (DAC)

■ Siebel Analytics Server (and its sub-components, such as Data Mining Engine)

   CAUTION: It is the responsibility of the Siebel Analytics Administrator to make sure that the versions of major Siebel Analytics components installed on the same machine are from the same release. For example, if only the Siebel Analytics Web Server is upgraded to 7.8.2 on a system, but the 7.7.1 release of Siebel Analytics Server remains installed, then the two servers will not work together properly. See *"Checking the Analytics Component Version Number" on page 21.*

Checking the Analytics Component Version Number

This topic is part of the process "Deciding to Upgrade the Siebel Analytics Platform."

The versions of major Siebel Analytics components installed on the same machine must belong to the same release, or they may not function properly together. The release number is of the format

   7.8.*x.yyyy*

where *yyyy* is the build number.

Use Table 5 to check the version number of a particular component.

Table 5.   Checking the Analytics Component Version Numbers

Component	Path to Version Number
Analytics Server	Open the file $INSTALLDIR\Document\version.txt (Windows).
	Open the file $INSTALLDIR/Document/version.txt (UNIX).
	Open the file $INSTALLDIR\Document\apps_version.txt (Windows).
	Open the file $INSTALLDIR/Document/version_apps.txt (UNIX).
Analytics Web	Click the Admin link.
Catalog Manager	(Toolbar) Help > About Catalog Manager
Job Manager	(Toolbar) Help > About Job Manager
ODBC Client	(Toolbar) Help > About Siebel Analytics ODBC Client
Server Administration Tool	(Toolbar) Help > About Administration Tool

Which Analytics Folders and Files Should be Backed Up?

This topic is part of the process "Deciding to Upgrade the Siebel Analytics Platform."

Before uninstalling or upgrading any Siebel Analytics software, it is recommended that backups of key configuration files be made, and the files moved to a temporary location. The following sections show the locations of the configuration files under Windows and UNIX platforms.

Windows Platforms

The installer automatically backs up the Windows files shown in Table 6. The backup files are saved to the directory $INSTALLDIR\Install_Backup\<installation_date>.

Table 6.   Locations of Configuration Files Backed Up Under Windows

File or Folder Name	Location
\SiebelAnalyticsData\Web\catalog\Deliveries folder	Siebel Analytics Web Server machine
DBFeatures.INI file	$INSTALLDIR\Config
Instanceconfig.xml file	SiebelAnalyticsData\Web\config
NQClusterConfig.INI file	$INSTALLDIR\Config
NQSConfig.INI file	$INSTALLDIR\Config
Repository (.rpd) file	$INSTALLDIR\Repository
Web Catalog (.webcat) file	See the Note following this table

NOTE: The Siebel Analytics Web Catalog stores the application dashboards and report definitions and contains information regarding permissions and accessibility of the dashboards by groups. If you are upgrading a Siebel Analytics Web Catalog from an earlier version, be sure to shut down the Web server first. Also see the *Siebel Analytics Web Administration Guide* before installing Siebel Analytics.

UNIX Platforms

The installer automatically backs up the UNIX files shown in Table 7. The backup files are saved to the directory $INSTALLDIR/Install_Backup/<installation_date>. (For example, SiebelAnalytics/Install_Backup/05.13.2005_16.40.20.)

Table 7.   Locations of Configuration Files Backed Up Under UNIX

File or Folder Name	Location
\SiebelAnalyticsData\Web\catalog\Deliveries folder	Siebel Analytics Web Server machine
DBFeatures.INI file	$INSTALLDIR\Config
Instanceconfig.xml file	SiebelAnalyticsData\Web\config
NQClusterConfig.INI file	$INSTALLDIR\Config
NQSConfig.INI file	$INSTALLDIR\Config
odbc.ini file	$INSTALLDIR/setup
Repository (.rpd) file	$INSTALLDIR\Repository
user.csh file	$INSTALLDIR/setup
user.sh file	$INSTALLDIR/setup
Web Catalog (.webcat) file	See the Note following this table

NOTE: The Siebel Analytics Web Catalog stores the application dashboards and report definitions and contains information regarding permissions and accessibility of the dashboards by groups. If you are upgrading a Siebel Analytics Web Catalog from an earlier version, be sure to shut down the Web server first. Also see the *Siebel Analytics Web Administration Guide* before installing Siebel Analytics.

Removing the Siebel Analytics Server Query Results Cache

Operating System: All.

Releases: All upgrades between releases, including minor releases such as 7.7.1.5 and 7.7.1.6.

This topic is part of the process *"Deciding to Upgrade the Siebel Analytics Platform."*

NOTE: This topic does not apply to an incremental component installation. For example, if you have 7.8.2.3 Siebel Analytics Server running with a cache, and then incrementally upgrade to version 7.8.2.3 of the Analytics Web server on the same machine, you do not need to delete the Siebel Analytics Server cache. See the topic *"Should an Incremental Platform Upgrade be Performed?"* on page 20.

As part of the upgrade process, the Siebel Analytics Server query results cache must be removed. For example, a query cache created in version 7.7.1.9 cannot be used in a version 7.8.2.3 Analytics server.

The files to be deleted include the metadata file and all cache files created by the Siebel Analytics Server.

■ The metadata file location is specified in the NQSConfig.INI file parameter METADATA_FILE.

Example:

    METADATA_FILE = "<$INSTALLDIR>\SiebelAnalyticsData\nQSCache\metadatafile.dat";

There is also a .bak copy of the metadata file that should be removed as well:

    $INSTALLDIR\SiebelAnalyticsData\nQSCache\metadatafile.dat.bak

■ The cache file locations are specified in the NQSConfig.INI parameter DATA_STORAGE_PATHS. Each individual cache file is has a common prefix NQS_ and a common suffix .TBL. All files that match this naming template should be removed.

Example of file location:

    DATA_STORAGE_PATHS = "<$INSTALLDIR>\SiebelAnalyticsData\nQSCache" 500 MB;

Examples of names of files located in $INSTALLDIR\SiebelAnalyticsData\nQSCache:

    NQS_732200_58578_00000000.TBL

    NQS_732200_58631_00000018.TBL

Do Other Deployment Components Need Upgrading?

This topic is part of the process "Deciding to Upgrade the Siebel Analytics Platform."

A Siebel Analytics platform upgrade is independent of the following deployment components:

■ Data

■ Database management systems

■ Databases and database tablespaces

■ File systems

■ Load balancing software

■ Remote clusters

■ Web servers

However, you may also need to upgrade some of these components. Examples of possible component upgrades include the Web server, the database software, and ODBC drivers. The components needing to be upgraded depend on the version of Siebel Analytics you are upgrading from, the version you are upgrading to, and your deployment environment. Before beginning any platform upgrade process, see the *Siebel System Requirements and Supported Platforms.*

NOTE: If an upgrade of an environment component is required, then that component upgrade must be performed before the Analytics platform upgrade.

Uninstalling Previous Versions of Siebel Analytics

This topic is a part of the "Deciding to Upgrade the Siebel Analytics Platform."

The following tasks show how to uninstall an earlier version of Siebel Analytics:

- "Uninstalling Siebel Analytics Under Windows" on page 26
- "About Uninstalling the Image Server" on page 27
- "Uninstalling Siebel Analytics Under UNIX" on page 27

Uninstalling Siebel Analytics Under Windows

Releases: Releases 7.0.x, 7.5.x, 7.7.x.

Operating System: Windows only.

The following procedure describes how to uninstall an earlier version of Siebel Analytics installed under Windows.

To uninstall an existing installation of Siebel Analytics under Windows

1 Stop the following services (from Start > Settings > Control Panel > Services):

- Siebel Analytics Server
- Siebel Analytics Scheduler
- Siebel Analytics Cluster Server
- IIS Admin Service (Microsoft Internet Information Server) and any additional services it stops
- World Wide Web Publishing Service

2 Using the Windows Add or Remove Programs utility, uninstall Siebel Analytics.

You are asked if you want to keep your existing .rpd and .INI files.

- Choosing Yes keeps the existing .rpd files (repository) and .INI files (configuration) and appends the extension *.old* to them.
- Choosing No causes the existing files to be replaced.

About Uninstalling the Image Server

Releases: Releases 7.0.x, 7.5.x, 7.7.x.

Operating System: Windows only.

If you uninstall Siebel Analytics, you also uninstall the chart image server product. However, not all of the image server files are removed, and the directory structure is left behind.

NOTE: When uninstalling chart image server, do not use the Windows Add or Remove Programs utility. Manually delete the remaining image server files and directories.

TIP: For Siebel Analytics versions after 7.5.x, the following changes in the image server apply:

■ The location, structure, and content of the chart image server directory have changed.

   The image server is now installed in the main installation directory.

■ The file key.txt is no longer required.

Uninstalling Siebel Analytics Under UNIX

Releases: Releases 7.0.x, 7.5.x, 7.7.x.

Operating System: UNIX only.

The following procedure describes how to uninstall an earlier version of Siebel Analytics installed under UNIX.

To uninstall an existing installation of Siebel Analytics under UNIX

1 Make sure none of the Siebel Analytics processes is running.

   NOTE: The uninstaller runs the command run-*.sh -forcestop to stop the servers before removing the files, but it is recommended that you stop all the processes before running the uninstaller.

2 Go to the directory $INSTALLDIR/Uninstall.

3 Run the command for the operating system you are using, as shown in the following table:

Operating System	Command
HP-UX	setupHPUX.bin
IBM AIX	setupAIX.bin
Sun Solaris	setupSolaris.bin

4 Performing a Siebel Analytics Platform Upgrade

Before performing any Analytics platform upgrade, see "Deciding to Upgrade the Siebel Analytics Platform" on page 18.

A platform upgrade is simply the process of installing the new Siebel Analytics software version in the same locations as an earlier version of Siebel Analytics.

TIP: The platform can be upgraded from Siebel Analytics 7.5.x to 7.8 directly. You do not need to upgrade from Siebel Analytics 7.5.x to 7.7.

NOTE: If you are upgrading the platform as part of a larger system upgrade, you must upgrade the platform before upgrading the Siebel Analytics applications components.

Upgrading Siebel Analytics Platform Components

This topic is a part of "Performing a Siebel Analytics Platform Upgrade."

Use the following procedure to upgrade the Siebel Analytics platform.

To upgrade the Siebel Analytics platform

1 Back up the Siebel Analytics repository, Web catalog, NQSConfig.INI and license files. See the topic "Which Analytics Folders and Files Should be Backed Up?" on page 22.

   NOTE: If either the instanceconfig.xml file or Analytics Windows registry strings have been customized, these should be backed up for comparison to the new installation's instanceconfig.xml file or Analytics Windows registry strings. If the customizations are still viable in the new release, they should be applied accordingly.

2 For Siebel Analytics software versions 7.5.x and 7.7, uninstall the older software before installing newer versions. See the topic "Uninstalling Previous Versions of Siebel Analytics" on page 26.

3 Install the Siebel Analytics software for the desired upgrade version.

   See the topic about installing the Siebel Analytics platform in the *Siebel Analytics Platform Installation and Configuration Guide*.

4 Copy the files backed up in Step 1 back to the appropriate directories.

5 From the following appropriate directory, delete the file SiebelAnalytics.webcat.version:

   ■ Under Windows: $INSTALLDIR\SiebelAnalyticsData\Web\catalog

   ■ Under UNIX: $INSTALLDIR/SiebelAnalyticsData/web/catalog

6 Proceed to "Reconfiguring Siebel Analytics After an Upgrade" on page 31.

Related Topic

Reconfiguring Siebel Analytics After an Upgrade

This topic is a part of *"Performing a Siebel Analytics Platform Upgrade."*

After upgrading Siebel Analytics software, you should note the following changes in your deployment:

■ **Configuration File.** Use the newer version's configuration file. The upgraded version of Siebel Analytics does not start using the older version's configuration file.

■ **Repository Size.** For Siebel Analytics upgrades from version 7.5 to version 7.7 or later versions, you may notice that the size of the RPD (Analytics Repository) file is reduced. This behavior is expected, and is due to a different method of UDML compression, not to data loss.

■ **Style Sheets.** Versions of Siebel Analytics after version 7.7 have different style sheets (.css files) from earlier versions of Siebel Analytics. See the topic *"Reapplying Customized Style Sheets" on page 32*.

Reapplying Customized Style Sheets

Releases: Releases 7.7 and later.

This topic is a part of "Performing a Siebel Analytics Platform Upgrade."

The style sheets affect the look and performance of your Siebel Business Analytics deployment, including Action Link behavior and Siebel Answers column formatting. Because of the changes to style sheets, review your deployment's customizations manually, reapply them, and test them thoroughly to ensure that there are no problems.

For Siebel Analytics versions 7.7 and later, new styles have been appended to the following style sheets:

■ Go.css

■ PortalBanner.css

■ PortalContent.css

■ Views.css

■ Dialog.css

In addition to style changes, some files have been have been added to the s_ directory, such as views2.css.

For custom column formatting to work properly, references to font sizes and font families should also be removed from the TD styles in Dialog.css, PortalBanner.css, PortalContent.css, and Views.css.

The new styles and files must be added to the underlying style sheet (for example, to s_Siebel7). For complete functionality, any custom styles must also be updated.

Keep a backup of your customized style sheets and incorporate necessary modifications during upgrades. In addition, make sure the style sheets shown in the following table are backed up:

Style Sheet Name	Style Sheet Location
Dialog.css	$INSTALLDIR\Web\App\Res\sk_Siebel77\b_mozilla_4 (Windows)
	$INSTALLDIR/web/app/Res/sk_Siebel77/b_mozilla_4 (UNIX)
Go.css	$INSTALLDIR\Web\App\Res\s_Siebel77\b_mozilla_4 (Windows)
PortalBanner.css	$INSTALLDIR/web/app/Res/s_Siebel77/b_mozilla_4 (UNIX)
PortalContent.css	
Views.css	

About Dialog.css

The style sheet Dialog.css includes the following classes:

■ A:link

■ A:visited

■   A:hover

The Dialog.css style sheet is loaded last and overrides the customizations done in PortalContent.css for the preceding three classes. Any differences in these classes between Dialog.css and PortalContent.css must be resolved. Modify the Dialog.css definitions for the three classes in accordance with the PortalContent.css class definitions.

Clearing the Server Cache

After you have tested the customized style sheets, but before you copy the default views.css files back to the implementation server, perform the following task on the server to clear the server caches.

To clear the server caches and restore your default views

1   Shut down Siebel Analytics Server, Siebel Analytics Web and IIS.

2   Remove your custom views.css from the directory where it has been installed. For example:

   $INSTALL\Web\App\Res\s_Siebel7\b_mozilla_4

or

   $INSTALL\SiebelAnalyticsData\Web.

3   Clear Siebel Analytics Web Server Cache.

   In the C:\WINNT\Temp directory, delete the nQs_*.temp files.

4   Clear the Browser Cache.

   From the Internet Explorer menu, navigate to Tools > Internet Options > Settings > View Files, and delete all the files in these folder.

5   Restore the default views.css files to the appropriate folder.

6   Restart the Siebel Analytics Server, Siebel Analytics Web and IIS.

Using an Upgraded Siebel Analytics Platform and an Older Repository

Releases: Releases 7.0.x, 7.5.x, 7.7.x.

Analytics License: Analytics Applications only.

This topic is a part of "Performing a Siebel Analytics Platform Upgrade."

You can upgrade to a later version of the Siebel Analytics platform only while keeping your current version of the Siebel Analytics Web Catalog and repository and current Siebel operational application with its existing repository and schema.

Upgrade only the Siebel Analytics platform components (Siebel Analytics Server and Analytics Web Server) to the later version, as shown in the topics "Deciding to Upgrade the Siebel Analytics Platform" and "Upgrading Siebel Analytics Platform Components." The Siebel Analytics Web Catalog and repository remain that of the earlier version.

To upgrade a Siebel Analytics Platform while keeping an older repository, use the following procedure.

To convert the older repository to the new platform format

1 Make sure that the Siebel Analytics Server is running.

2 Using the Server Administration Tool, open the repository file in online mode.

3 Save the repository file.

NOTE: If this step is not performed, then, when the upgraded Siebel Analytics Server uses the old repository file, the repository is converted to the new format in memory for use by Siebel Analytics Server, but is not saved.

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