



Accessibility Guide for Siebel Business Applications

Version 7.8

June 2005

Siebel Systems, Inc., 2207 Bridgepointe Parkway, San Mateo, CA 94404

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Printed in the United States of America

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1

What's New in This Release

What's New in Accessibility Guide for Siebel Business Applications, Version 7.8

Table 1 lists the changes in this version of the documentation to support release 7.8 of the software.

Table 1. New Product Features in Accessibility Guide for Siebel Business Applications, Version 7.8

Topic	Description
Siebel Analytics Configuration See Configuring Analytics for Accessibility on page 15 .	New topic. Provides accessibility setup recommendations for Siebel Analytics dashboards.
Screen Readers See About Support for Screen Readers on page 18 .	New topic. Describes accessibility support for screen readers.
Siebel Analytics Keyboard Accelerators See Keyboard Accelerators for Siebel Analytics on page 19 .	New topic. Describes the keyboard accelerators for accessibility that are specific to Siebel Analytics.
Siebel Analytics Dashboards See Navigating Siebel Analytics Dashboards on page 20 .	New topic. Describes how to navigate the Siebel Analytics dashboards using keyboard accelerators.

2

Getting Started

This chapter provides information on the accessibility features available for Siebel applications. It includes the following topics:

- [Accessibility and Siebel Applications on page 8](#)
- [About Standard Interactivity on page 8](#)
- [Deployment of Accessibility Features in Standard Interactivity Mode on page 9](#)
- [Customizing This Guide on page 9](#)
- [Finding More Information on page 9](#)

Accessibility and Siebel Applications

Siebel Business employee applications include accessibility enhancements that allow the use of assistive technology hardware and software. These accessibility enhancements are available only in standard interactivity mode.

The topics in this guide describe:

- Differences in standard interactivity and high interactivity functionality
- Additional keyboard accelerators that are helpful when implementing the accessibility enhancements, including accelerators that allow the user to navigate Siebel Analytics dashboards

NOTE: Keyboard accelerators are available in both high interactivity and standard interactivity mode. However, accessibility features are available only in standard interactivity.

- How to enable Siebel accessibility features, including:
 - Deployment options
 - Creating a second application Object Manager on the same Siebel Server for use with standard interactivity mode
 - Creating a virtual directory for use with standard interactivity mode
 - Editing an application's configuration file for accessibility in standard interactivity mode
 - Setting up Siebel Analytics dashboards for accessibility

About Standard Interactivity

Siebel Business Applications accessibility enhancements are available in standard interactivity mode only. The standard interactive client is based on the industry standard HTML tags. These standard HTML tags can be used with both Microsoft and non-Microsoft browsers and Web server technology and on various Windows-based platforms. See *System Requirements and Supported Platforms* on Siebel SupportWeb for specific information on which browsers, Web servers, and platforms are supported for use with standard interactivity mode.

There are some differences in functionality between high interactivity mode and standard interactivity mode. The following functionality is not available in standard interactivity mode:

- Dynamic editing
- Auto complete
- Drag-and-drop function for attachments
- Implicit save
- Client-side validation
- Extensible client framework
- Graphical flow designer

NOTE: Graphical flow designer is not available, but the workflow for a business process can be created in standard interactivity mode using standard list and form applets.

Deployment of Accessibility Features in Standard Interactivity Mode

The most convenient way for most customers to deploy accessibility enhancements is to implement a mixed environment, where standard interactivity and high interactivity modes both reside on the same Siebel Server. A mixed-environment deployment on the same Siebel Server requires creation of a separate instance of the Application Object Manager. The procedures for setting up separate instances of the Application Object Manager and the Siebel application are included in this guide.

If only a small number of users require accessibility enhancements, an alternative to creating a separate instance of the Application Object Manager is to install either a Dedicated Web Client or a Mobile Web Client and then distribute updates to those users. For procedures on installing a Dedicated Web Client or Mobile Web Client, see *Siebel Installation Guide for Microsoft Windows: Servers, Mobile Web Clients, Tools*.

Customizing This Guide

This guide is available in Microsoft Word format, to allow your organization to customize it as necessary for users with disabilities.

To request a copy of *Accessibility Guide for Siebel Business Applications* in Microsoft Word format, please contact us either by email or postal mail.

- Contact us using postal mail at following address:

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- Contact us using email at the following address:

doc@siebel.com.

Finding More Information

The following sources provide additional information related to accessibility enhancements.

Siebel SupportWeb

Siebel SupportWeb provides access to the most-recent update of the *Siebel Bookshelf*. Additional information about how to use Siebel Business Applications accessibility enhancements may also be available on Siebel SupportWeb through Release Notes or Technical Notes.

To access additional information on SupportWeb

- 1 Go to <http://supportweb.siebel.com>, and log in using the email address and password given to you by Siebel Support Services.
- 2 In the Support Search pane, click the appropriate check boxes in the Content Types & Product Versions category.

This category allows searches for information in *Siebel Bookshelf*, Release Notes, Technical Notes, and other documentation.

Siebel Bookshelf

The following documents on *Siebel Bookshelf* provide additional useful information for implementing accessibility enhancements:

- *Configuring Siebel Business Applications*
- *Deployment Planning Guide*
- *Fundamentals*

Fundamentals includes a list of basic keyboard accelerators. These keyboard accelerators are available for general use in either high interactivity or standard interactivity mode and can be used with accessibility features in addition to those described in [Keyboard Accelerators for Application Accessibility on page 18](#).

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

System Requirements and Supported Platforms

System Requirements and Supported Platforms on Siebel SupportWeb describes the hardware and software requirements for Siebel Business Applications, Siebel Tools, Siebel Server, and ancillary and supported third-party software.

Technical Notes

Technical Notes include information about specific topics related to implementation, configuration and usage of Siebel Applications. Siebel support staff continues to revise and expand this collection of notes to include new information that is of use to you.

Release Notes

Release Notes address known product issues so that the latest, highest quality software is available to Siebel customers.

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Setting Up Siebel Accessibility Features

This chapter provides information on how to set up and configure accessibility features for Siebel applications. It includes the following topics:

- [Best Practices for Customization on page 12](#)
- [Process of Setting Up Accessibility Features on page 12](#)
- [Creating a Second Application Object Manager for Accessibility on page 13](#)
- [Adding a Virtual Directory on page 14](#)
- [Configuring an Employee Application CFG File for Accessibility on page 14](#)
- [Configuring Analytics for Accessibility on page 15](#)

Best Practices for Customization

When customizing screens, views, and applets for accessibility, it is important to understand the differences between standard interactivity and high interactivity functionality and to also avoid conflicts between the code and assistive technology applications. For a description of differences between standard interactivity and high interactivity modes, see [About Standard Interactivity on page 8](#).

To create customizations that support accessibility features, consider the following best-practice guidelines:

- **Define Edit Mode.** For custom list applets, make sure to define an Edit Mode for each applet Web template, because the standard HTML document is not editable. A customer cannot perform an edit or query unless the Edit Mode template is included in the repository.
- **Register custom bitmaps and add alternative text.** Register any custom bitmaps in Siebel Tools and add alternative text (Alt Text). For example, the Company Information bitmap on the screen should have alternative text associated with the bitmap so that screen readers can identify and read appropriate text for bitmaps or icons.
- **Do not use the hard wrap HTML attribute.** Do not use wrap=hard as the value for the HTML Attribute property of the Control object type, because the wrap=hard attribute causes problems with screen readers.
- **Avoid creating DHTML, HTML image maps, and Java applets.** DHTML, HTML image maps, and Java applets can be misread by screen readers and other assistive technology software. Use standard HTML, if possible. If DHTML is necessary, full testing should be performed.

For further information on configuration requirements and options, see *Configuring Siebel Business Applications*.

Process of Setting Up Accessibility Features

Enabling accessibility features requires completion of the following tasks:

- 1 **Determine which deployment approach to use.** This guide assumes that most customer implementations will deploy high and standard interactivity in a mixed environment on the same Siebel Server.
- 2 **Perform deployment tasks, based on deployment approach selected.** Unless a high number of users require accessibility enhancements, customer sites typically deploy both high interactivity applications and standard interactivity accessibility enhancements on the same Siebel Server.

If you are deploying high and standard interactivity on the same Siebel Server, you must perform the following tasks:

- a Define the second instance of the Application Object Manager.

See [Creating a Second Application Object Manager for Accessibility on page 13](#).

- b Set up a virtual directory on the Web Server (or SWSE).

See [Adding a Virtual Directory on page 14](#).

The Application Object Manager can support only one instance of the CFG file. If you are deploying a separate instance of the Application Object Manager to support accessibility, then define the instance and set up a virtual directory on SWSE.

NOTE: It is not necessary to define a second instance of the Application Object Manager for Dedicated or Mobile Web Client deployments or for mixed-environment deployments where high and standard interactivity do not reside on the same Siebel Server.

- 3 **Modify the application CFG file.** The application CFG file must be modified to set accessibility and standard interactivity parameters, regardless of the deployment option chosen.
 - If you are deploying standard interactivity on the same Siebel Server where high interactivity mode is deployed, modify the CFG file associated with the Application Object Manager set up in Task 2.
 - If you are deploying standard interactivity through a Dedicated or Mobile Web Client, perform this task in a client-side file associated with the appropriate application (such as Call Center), and then distribute that CFG file to the Siebel installations on the client machines.

For the procedure that applies to all deployment options, see [Configuring an Employee Application CFG File for Accessibility on page 14](#).

- 4 **(Optional) Configure Siebel Analytics Dashboards.** If you are deploying Siebel Analytics with assistive technology, modify the instanceconfig.xml file to facilitate dashboard navigation. Best practice recommendations are also provided if you plan to create or modify dashboards. See [Configuring Analytics for Accessibility on page 15](#).

Creating a Second Application Object Manager for Accessibility

After successfully installing the Siebel Server and Web server, system administrators can configure a new Application Object Manager so that an employee application with accessibility enhancements can be tested and deployed in standard interactivity mode.

CAUTION: It is recommended that you contact Siebel Technical Support when creating a second instance of the Application Object Manager on the same Siebel Server.

To create a second application Object Manager

- 1 Using Siebel Server Manager, copy an existing Application Object Manager.
- 2 Rename the copy.

For example, rename the copy CallCenter_2.

See *Siebel System Administration Guide* for best practice recommendations when creating defined components.

Adding a Virtual Directory

Siebel Installation Guide for Microsoft Windows: Servers, Mobile Web Clients, Tools includes in-depth information on how to add a virtual directory.

To set up an accessibility configuration

- Add a virtual directory named *application name_si* in the Web server.

Configuring an Employee Application CFG File for Accessibility

Enabling accessibility features requires setting up a separate CFG file for use with standard interactivity.

To configure an employee application for accessibility

- 1 Set up a Siebel Server following standard procedures.
See *Siebel System Administration Guide* for additional instructions.
- 2 Navigate to `siebsrvr\bin\language\` and create a new CFG file (for example, the `uagent.cfg` file for Siebel Call Center) by copying an existing one.
- 3 Modify the new CFG file.
 - a Rename the copy (for example, `uagent_2.cfg`).
 - b Change the following parameters in your configuration file in the SWE section:

`HighInteractivity = FALSE`

`ExtendedKeyboard = TRUE`
 - c Add the following additional lines in your configuration file in the SWE section:

`ApplicationStyle = EmployeeFacing`

`AccessibleEnhanced = TRUE`

`DisableSITabIndex = TRUE`
- 4 If you are deploying standard interactivity and high interactivity on the same Siebel Server, modify the `eapps.cfg` to add application `name_si` as the Web server directory. You can copy the `[/application name_language]` section and make changes in it.

`[/application name_si]`

`ConnectionString = siebel://GATEWAY_NAME:2320/siebel/SCCObjMgr_si/SIEBEL_SERVER_NAME`
- 5 Restart the Siebel Server and Gateway Server.

Configuring Analytics for Accessibility

If you have a preconfigured Webcat for Analytics, it is recommended that you set up the dashboards so that they are organized in a less visual manner to make navigation easier for the visually impaired. Administrators may want to consider creating separate dashboards for use with assistive technology such as JAWS, rather than using preconfigured dashboards.

Best Practice Recommendations

When configuring or creating dashboards, consider the following best-practice recommendations:

- Refrain from using charts and tickers, because they are not supported.
- Reduce the interactivity and the complexity of reports. For example, restrict the number of prompts and drop-down menus, do not use the drill-inline feature for sections, and configure tables to show as many rows as possible.
- Remove report links that are not useful for the visually impaired. This includes links such as Modify the Report, and Add to Briefing Book, and might also include the Printing and Downloading options.
- Restrict access to Analytics Administration screens, as they are not supported.

Optional Analytics Settings

The following settings are not required, but are recommended for accessibility.

- **DashboardMaxBeforeMenu.** When more than 15 dashboard names are available for display, Siebel Analytics creates a drop-down list of the dashboards from which users can choose. By modifying the Siebel Analytics Web configuration file `instanceconfig.xml` file, you can change the number of dashboard names to show before a drop-down list appears. This modification makes it easier for users of assistive technology to navigate the dashboard list.

Modify the following entry in the `instanceconfig.xml` file. The minimum value is 1.

```
<DashboardMaxBeforeMenu>1000</DashboardMaxBeforeMenu>
```

The `instanceconfig.xml` file can be found in the following location:

```
\SiebelAnalyticsData\Web\config\instanceconfig.xml
```

- **DashboardInlineLoad.** Setting `DashboardInlineLoad` to `false` turns off *inline* loading of content on dashboards, and facilitates screen reading by assistive technology. When this value is set in the `instanceconfig.xml` file, whenever an action is performed on the dashboard, the entire page is refreshed rather than the content changing dynamically.

Modify the following entry in the `instanceconfig.xml` file. The default is `true`.

```
<DashboardInlineLoad>false</DashboardInlineLoad>
```

The `instanceconfig.xml` file can be found in the following location:

```
\SiebelAnalyticsData\Web\config\instanceconfig.xml
```

For more information on editing the `instanceconfig.xml` file, see *Siebel Analytics Web Administration Guide*.

4

Using Siebel Accessibility Features

This chapter provides information on using the accessibility features with for Siebel Business Applications. It includes the following topics:

- [About Support for Screen Readers on page 18](#)
- [Keyboard Accelerators for Application Accessibility on page 18](#)
- [Keyboard Accelerators for Siebel Analytics on page 19](#)
- [Navigating Siebel Analytics Dashboards on page 20](#)

About Support for Screen Readers

Siebel Accessibility allows screen reader programs such as JAWS to read fields, articulate messages and alerts, provide query results and describe the options in drop-down lists in Siebel Business Applications and Siebel Analytics.

In addition, the user can edit the fields in application form, and navigate the sections and tables in the Siebel Analytics Dashboards. If the user just wants to read the contents of fields in the application, the user can manipulate the computer's arrow keys to navigate from field to field, and the screen reader provides an audible description the field's contents. If the user wants to read and edit the contents of a form's fields, the tab key is used for navigation, because screen readers support edits in tab mode. The screen reader provides an audible message when a blank or read-only data field is encountered.

A message window also appears after each page refresh is complete. When a message occurs, the focus of the application changes to the message, and the message is automatically read by the screen reader. When the user acknowledges the message by pressing ENTER, the application's focus returns to the last active screen or view.

Using a the standard keyboard shortcut (CTRL+SHIFT+3), users can ascertain the number of records returned by a query, or navigate the menu drop-down list to access the Record Count option. For more information on using queries and keyboard shortcuts, see *Fundamentals*.

Keyboard Accelerators for Application Accessibility

The keyboard shortcuts in [Table 2](#), which are available in both high interactivity and standard interactivity mode, provide additional functionality beyond the shortcuts listed in *Fundamentals*. These shortcuts can be used with the accessibility enhancements that are available only in standard interactivity mode.

Some commands may be available through more than one shortcut, depending on your configuration.

NOTE: The Go to CTI toolbar and Go to Message Broadcast Bar shortcuts work in standard interactivity mode only if the parameter `Accessibl eEnhanced = TRUE` is set in the SWE section of the configuration file.

Table 2. Additional Keyboard Accelerators

Action	Accelerator	Comment
Go To Next Applet	CTRL+SHIFT+]]	Shifts focus to the first anchor of the next applet
Go To Previous Applet	CTRL+SHIFT+[[Shifts focus to the first anchor of the previous applet
Go to Next Frame	CTRL+SHIFT+= =	Shifts focus to the next frame in the screen
Go To Previous Frame	CTRL+SHIFT++ ++	Shifts focus to the previous frame in the screen

Table 2. Additional Keyboard Accelerators

Action	Accelerator	Comment
Go To Show Menu	CTRL+SHIFT+V	Places focus on the Show menu
Go to CTI toolbar	SHIFT+F2	Sets focus to the CTI toolbar frame
Go to Message Broadcast Bar	SHIFT+F3	Sets focus to the Message Broadcast Bar frame
Siebel Back	ALT+LEFT ARROW	Executes the Siebel back function
Siebel Forward	ALT+RIGHT ARROW	Executes the Siebel forward function

Keyboard Accelerators for Siebel Analytics

The keyboard shortcuts in [Table 3](#) can be used to navigate Siebel Analytics dashboards. See [Navigating Siebel Analytics Dashboards on page 20](#) for step-by-step navigation procedures.

NOTE: Before using the key combinations to navigate the dashboard, you must first disable the virtual PC cursor. The virtual PC cursor should be enabled at other times.

Table 3. Siebel Analytics Keyboard Accelerators

Action	Accelerator	Comments
Focus on the page tabs	CTRL+SHIFT+F2	Navigates to the first dashboard listed on the page, typically the user's personal dashboard (My Dashboard).
Focus on the first dashboard link	CTRL+SHIFT+F3	Navigates to the first page in the current dashboard.
Move backward through sections on dashboard page	CTRL+SHIFT+U	Navigates to the previous section of content in the dashboard. Navigation is from right to left, and then up.
Move forward through sections on dashboard page	CTRL+SHIFT+I	Navigates to the next section of content in the dashboard. Navigation is from left to right, and then down.
Move backward through elements of section	CTRL+SHIFT+F7	Navigates to the previous item within a section of content. If the section is aligned horizontally, navigation is from right to left.
Move forward through elements of a section	CTRL+SHIFT+F8	Navigates to the next item within a section of content. If the section is aligned horizontally, navigation is from left to right.

Navigating Siebel Analytics Dashboards

The following procedures describe how to navigate the Siebel Analytics dashboard using keyboard shortcuts. When Forms mode is turned on, dashboards in Analytics are displayed in a table for reading. Before you begin, make sure your screen reader is in Forms (edit) mode, or the TAB key is enabled.

To navigate through a Siebel Analytics dashboard using keyboard accelerators

- 1 Use the Web browser to navigate to Siebel Analytics.
- 2 At the Login screen, turn on Forms Mode, and log in.
The user is navigated to the first dashboard.
- 3 Navigate to the desired dashboard.
 - a Press CTRL+SHIFT+F3 to move the focus to the first dashboard link.
 - b Press TAB until the application is focused on the desired dashboard.
 - c Press ENTER.
The browser changes to the selected dashboard. Verify that Forms mode is on.
- 4 Navigate to desired page.
 - a Press CTRL+SHIFT+F2 to move the focus to the page tabs.
 - b Press TAB until you are focused on the desired dashboard page.
 - c Press ENTER.
The browser changes to the selected page. Verify that Forms mode is on.
- 5 Press CTRL+SHIFT+I to move forward through the dashboard sections until the focus is on the desired dashboard section.
- 6 Navigate to the desired table within the section, by pressing CTRL+SHIFT+F8, until the focus is on the desired table.

To navigate within a table

- 1 Turn Forms mode off.
- 2 Navigate using the table navigation keys in your assistive technology application.
- 3 Use ALT+CTRL+ up arrow, down arrow, and left and right arrow to navigate within a table.

For more information on setting up and using Siebel Intelligent Dashboards, see *Siebel Analytics User Guide*.

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