



Applications Administration Guide

Version 7.7, Rev. B
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What's New in This Release

What's New in Applications Administration Guide, Version 7.7, Rev. B

Table 1 lists changes in this version of the documentation to support Release 7.7 of the software.

Table 1. What's New in Applications Administration Guide, Version 7.7, Rev. B

Topic	Description
<i>Improvements to the documentation</i>	
Using Keyboard Accelerators	The topic about using keyboard accelerators has been deleted from the book because keyboard accelerators are obsolete in the Release 7.7 of the software.
"Enabling AOM Case Insensitivity" on page 69	Case sensitivity can be set on the Application Object Manager and server component levels.
About LOV Caching on Screen Home Page See "Clearing the Cache" on page 79 .	LOV caching behaves slightly differently on screen home pages than on other views.
To clear the cache (from the Server Manager command-line interface) See "Clearing the Cache" on page 79 .	The procedure for clearing the cache from the Server Manager command-line interface has been deleted from the book because it obsolete in the Release 7.7 of the software.
"Configuring Audit Trail in Siebel Tools" on page 91	In workflow processes, the Audit Trail function does not work unless the Start Method of the Audit Trail Engine Business Service is included as a first step.
"Creating iHelp Item Records" on page 102	In order to open iHelp, users need access to the Task Assistant Player View.
"About Message Broadcasting" on page 113	Message Broadcasting is only available for employee applications.
"Creating Inbox Types" on page 139	Corrected an error in the action type example, UINBOX_STATUS_TYPE.
"Setting Up Inbox Actions" on page 142	Listed the arguments that are always passed with actions.
"Changing Controls in the Calendar Detail View" on page 281	The names of the applets invoked by the three buttons (Add Employee, Add Contact, Add Resource) in the Calendar Detail view are listed in this topic. The names of these specialized applets are not found in Siebel Tools.

Table 1. What's New in Applications Administration Guide, Version 7.7, Rev. B

Topic	Description
"Showing or Hiding Side Applets on the Life Sciences Calendar" on page 281	User property for hiding the side applet on Siebel Life Sciences calendar.
"Creating State Models and State Transitions" on page 286	MLOV (multilingual lists of values) fields are supported with state models.

What's New in Applications Administration Guide, Version 7.7, Rev. A

Table 2 lists changes in version 7.7 Rev. A of the documentation to support Release 7.7 of the software.

Table 2. What's New in Applications Administration Guide, Version 7.7, Rev. A

Topic	Description
<i>New features described</i>	
Configuring the Calendar See "About Configuring the Calendar" on page 274.	New user properties for configuring these calendar features: <ul style="list-style-type: none"> ■ Calendar activity description ■ ToolTip text ■ Start and end times for calendar activity display ■ Calendar drilldown ■ Drag-and-drop onto the calendar applet
Simplified List Management See Chapter 29, "Global Target List Management."	Create and apply targeted lists of accounts, contacts, employees, positions, and prospects. The feature is only available in Siebel Industry Applications (SIA) such as Siebel Financial Services and Siebel Life Sciences.
<i>Improvements to the documentation</i>	
Content Center See Chapter 13, "Content Center" and Chapter 14, "Content Asset Management."	The Content Center chapter has been updated and divided into two smaller chapters.
State Models See Chapter 21, "State Models."	This chapter has been reorganized and corrected.
Siebel Correspondence See Chapter 23, "Correspondence."	This chapter has been reorganized and corrected.

Table 2. What's New in Applications Administration Guide, Version 7.7, Rev. A

Topic	Description
Siebel eDocument functionality See Chapter 26, "Fulfillment Centers" and Chapter 27, "Batch Printing."	These chapters have been broken out from the Correspondence chapter.
System Preferences See Appendix A, "System Preferences."	More system preferences are documented, including those for SIA (Siebel Industry Applications).
Alerts Online	Alerts Online are documented as part of setting up the Siebel HelpDesk in the <i>Siebel Employee Relationship Management Administration Guide</i> .

What's New in Applications Administration Guide, Version 7.7

[Table 3](#) lists changes described in version 7.7 of the documentation to support Release 7.7 of the software.

Table 3. New Product Features in Applications Administration Guide, Version 7.7

Topic	Description
Quick Fill See "Administering Quick Fill Templates" on page 74.	Templates for filling in records.
Screen Home Pages See "Setting Up Default View Links for Screen Home Pages" on page 75.	View links on screen home pages can be set up by the administrator.
Audit Trail See "Specifying Parent–Child Associations for Audit" on page 94.	Parent–child associations made in MVG (multi-value group) fields and parent–child applets can be audited.
iHelp See Chapter 7, "Creating and Administering iHelp."	Real-time step-by-step instruction that helps users complete tasks within the application.
Message Broadcasting See Chapter 8, "Message Broadcasting."	Messages can be cached in the Object Manager.

Table 3. New Product Features in Applications Administration Guide, Version 7.7

Topic	Description
Inbox See Chapter 10, "Administering and Using Inbox" and Chapter 11, "Configuring the Inbox."	A single screen consolidating all approval and notification items assigned to a user.
Content Asset Management See Chapter 14, "Content Asset Management."	Various enhancements to Content Asset Management including: Allowing hierarchies (nesting) for content sets Ability to preview all versions Advanced options for adding content assets to the Content Center repository
Microsite Management See Chapter 15, "Microsite Management."	Enhancements to Microsite Management: Redesigned Page Designer, including the new Menu tool Enhanced Page Administration Template administration One-click publishing Symbolic URL links Page caching set through CFG file (not the mmlayout.txt file)
Usage Collection See Chapter 16, "Usage Collection."	Collect usage statistics about site traffic. Log files list who is accessing which pages and views and when.

2 Getting Started

This chapter includes the following topics:

- “Getting Started Prerequisites” on page 27
- “Starting the Application for the First Time” on page 28
- “Entering License Keys” on page 29
- “Selecting a Data Source” on page 33
- “About Seed Data” on page 33
- “Summary of Applications Administration Tasks” on page 34

Getting Started Prerequisites

Once the Siebel system is successfully installed, you need to enter license keys so that you and your organization can access the Siebel products that your organization has purchased. After the license keys have been entered, you are ready to set up your Siebel applications.

Before you can begin to use your Siebel applications, the software listed in [Table 4](#) must be correctly installed.

Table 4. Required Software

Software	For Information, See
Siebel Gateway Name Server	<i>Siebel Installation Guide</i> for the operating system you are using
Siebel Server	
Siebel Database Server	
Siebel Tools or Siebel Dedicated Web Client	
Siebel eBusiness Applications	Application-specific administration guide and this guide

Once these Siebel servers and applications are successfully installed, you can proceed to enter license keys for specific Siebel applications.

Starting the Application for the First Time

In order to begin setting up your Siebel application, you must log in with administrative responsibilities. The Siebel database server installation script creates a Siebel administrator account that you can use to perform administrative tasks. The default user ID and password are SADMIN and SADMIN (case-sensitive). Your database administrator may also have created a user ID and password that allows you to access the Siebel Server and perform the required setup. To set up entities in the Group Administration view, you must be connected to the Siebel Server; you do not have full administrative capabilities for this view if you are connected to the local database or working in a mobile Web client.

NOTE: The responsibility for the SADMIN ID that comes with Siebel applications cannot be modified. However, you can copy this responsibility and modify the copy. For more information, see *Security Guide for Siebel eBusiness Applications*.

You can start Siebel applications from the Siebel Dedicated Web Client or from the Siebel Web Client. Instructions for both are described below.

TIP: If you have not yet entered any license keys, you must enter the first license key from the Siebel Dedicated Web Client or from Siebel Tools. For more information, see *"Entering License Keys" on page 29*.

To start a Siebel application from the Siebel Dedicated Web Client for the first time

- 1** From the Start menu, choose Programs and then choose your Siebel application.
- 2** Enter SADMIN in the User ID and Password fields.
- 3** In the Connect to field, choose the server database from the drop-down list and click OK.
For information about the other databases available in the Connect to drop-down list, see *"Selecting a Data Source" on page 33*.
- 4** If a message tells you that there is no valid license key, click OK.
- 5** In the License Key dialog box, enter the Siebel eBusiness base application license key and click OK.

For more information about license keys, see *"Entering License Keys" on page 29*. If you need to enter additional license keys, see *"Entering an Additional License Key" on page 31*.

To start a Siebel application from the Siebel Web Client for the first time

- 1** Open your Web browser.
- 2** Go to the URL for your Siebel Web Client.

The login screen appears.

- 3 Enter ADMIN in the User ID and Password fields and click OK.

NOTE: If a message tells you that you have not been licensed for this feature, you must enter a valid license key, using either Siebel Tools or the Siebel Dedicated Web Client, before you can access the application. For more information, see [“Entering License Keys” on page 29](#).

Entering License Keys

The Siebel license key is generated so that your organization's users can access the Siebel products that your organization has purchased. The license key is a series of numbers (up to 54 digits). Your organization's specific license key is included in the Welcome Package. You must enter this license key before you begin to use the Siebel product, products, or optional modules that your organization has purchased. Because the license key resides in the database and not on the client machine, everyone who accesses the Siebel database uses the same license key.

Your license key activates the screens and views associated with the applications and modules that your organization has purchased. If you have been assigned multiple license keys, their effect is cumulative, as you enter them.

Customers upgrading from earlier versions of Siebel software may notice differences between the Siebel product and the products listed in the Welcome Package. These generally reflect changes in naming and bundling of Siebel products. For example, a functionality that was previously sold separately might now be bundled into a single product, or included in a base application, or simply have been renamed. It is recommended that you run the application itself to verify that all of the functionality that you expected is there.

Customers using Siebel products which are upgrades from earlier versions may notice differences between the views in the previous product and the views in the upgraded product. Reasons for this may include the following:

- The view you are looking for is not available from the application that you have launched.
- You logged in as a user who does not have responsibilities for the view. In order to evaluate all of the views available in the product, log in as a Siebel administrator.
- The method of accessing the functionality may have changed, or the functionality may have been replaced by more comprehensive features that work differently. Consult the *Siebel Bookshelf* for information on functionality changes in the latest release.
- The location or name of the screen or view may have changed. You can review the Site Map or consult the *Siebel Bookshelf* for information on current view locations.

However, if you do not see views that you expected, or if you see views that you did not expect, and feel that it impacts the functionality you have purchased, contact Siebel Technical Support as soon as possible. If your license key has expired, contact Siebel Technical Support.

Entering the First License Key

Before you enter the first license key, the following software must be correctly installed: Gateway Name Server, Siebel Server, Siebel Database Server, Siebel eBusiness Applications, and one of the following: Siebel Dedicated Web Client or Siebel Tools. After the first Siebel Dedicated Web Client or Siebel Tools installation, the first user to connect to the Siebel database is required to enter a license key in order to use the product.

To enter the first license key

- 1 Start either Siebel Dedicated Web Client or Siebel Tools.

NOTE: You have the choice of entering the first license key in either Siebel Dedicated Web Client or Siebel Tools. You can enter any Siebel license key in either Siebel Dedicated Web Client or Siebel Tools.

- 2 Log in as the system administrator and connect to the server database.

Use SADMIN as the login name and SADMIN as the password, and choose Server in the Connect to drop-down list.

NOTE: If you are the first to log in to Siebel Dedicated Web Client after a new Siebel installation, you get the error message "There is no valid license key in the database." If you are the first to log in to Siebel Tools after a new Siebel installation, you get the error message "No valid license keys were found in the database."

- 3 If you are logged in to Siebel Dedicated Web Client, click OK. If you are logged in to Siebel Tools, click Add Key.
- 4 In the License Key dialog box, enter the Siebel eBusiness base application license key or the Siebel Tools license key, and then click OK.

CAUTION: Enter only a Siebel eBusiness base application license key or the Siebel Tools license key. If you enter an optional-module license key without having a Siebel eBusiness base application license key already entered, an error message appears. The error occurs because the Home Page view is required to start Siebel eBusiness base applications, and Home Page views are not included in optional module license keys.

- 5 Close Siebel Dedicated Web Client or Siebel Tools, whichever you started in [Step 1 on page 30](#).
- 6 Restart the Siebel Server System Service. (For more information, see *Siebel System Administration Guide*.)
- 7 Start the Siebel application associated with the license key that you entered.

For example, if your license key is for Siebel Sales, start Siebel Sales; if your license key is for Siebel Tools, start Siebel Tools.

NOTE: After entering the initial license key, if you discover that you made an error when entering the license key, you can correct the license key in the Key Value field in the Application Administration screen, License Key view.

Entering an Additional License Key

After entering the initial key, you can add or delete license keys through Siebel eBusiness Applications as long as your Siebel user responsibility includes the Siebel License Key view. You can do this immediately if your purchase included more than one license key, or you can add license keys as your organization purchases more Siebel applications or optional modules.

To enter an additional license key using a Siebel application

- 1 Start the Siebel application—for example, Siebel Call Center. You can use Siebel Web Client or Siebel Dedicated Web Client.
- 2 Log in as the system administrator and connect to the server database.
Use SADMIN as the login name and SADMIN as the password, and choose Server in the Connect to drop-down list. If the system administrator's password has been changed, use the current password.
- 3 Navigate to the Administration - Application screen > License Keys view.
- 4 Add the new license key:
 - a In the License Keys list, create a new record.
 - b In the new record, enter one license key in the Key Value field.
 - c Repeat [Step a](#) and [Step b](#) for each license key to be entered.
- 5 Close the application.
- 6 Restart the Siebel Server System Service. (For more information, see *Siebel System Administration Guide*.)

Start any Siebel application or module associated with a license key you have entered.

If you have any problems installing your license keys, contact Siebel Technical Support.

To enter an additional license key using Siebel Tools

- 1 Start Siebel Tools.
NOTE: To enter additional license keys in Siebel Tools, you must have first entered the Siebel Tools license key.
- 2 Log in as the system administrator and connect to the server database.
Use SADMIN as the login name and SADMIN as the password, and choose Server in the Connect to drop-down list. If the system administrator's password has been changed, use the current password.
- 3 Choose Help > Technical Support from the menu bar.
- 4 In the Technical Support Information dialog box, click License Key.
- 5 Add a license key:
 - a In the License Keys dialog box, click Add Key.
 - b In the new record, type in one license key and then click OK.

- c Repeat Steps a and b for each license key to be entered.
- 6 Close Siebel Tools.
- 7 Restart the Siebel Server System Service. (For more information, see *Siebel System Administration Guide*.)

Start any Siebel application or module associated with a license key you have entered.

License Key Fields

Table 5 describes the fields in the license key record.

Table 5. Fields in the License Key Record

Field	Description
Key Value	The license key from your Welcome Package. Create a new record for each license key.
Status	Automatically entered based on the license key. OK means the license key has not expired. Expired means the license key has expired.
MaxUsers	Automatically entered based on the license key. The maximum number of concurrent users allowed in your license agreement with Siebel Systems.
Expires	Automatically entered based on the license key. The expiration date for the license key in your license agreement with Siebel Systems.

Hiding Access to License Keys

There are two ways that you can hide access to license keys: hiding the License Keys administrative view within Siebel applications and hiding the License Key button within Siebel Tools.

- **Within Siebel Applications.** You may want to hide the License Keys view in the Application Administration screen, in order to discourage unauthorized users from attempting to change license keys. To hide the License Keys view, remove it from the responsibility associated with the users who should not have access to it. Responsibilities control the views to which users have access. For more information about creating and modifying responsibilities, see *Security Guide for Siebel eBusiness Applications*.
- **Within Siebel Tools.** You may want to disable the License Key button, found in the Technical Support Information dialog box (available from the Siebel Tools Help menu), in order to discourage unauthorized users from attempting to change license keys. You can disable the License Key button by selecting the Siebel Administrator responsibility and deleting the Edit License Key view.

Selecting a Data Source

When you start a Siebel application from the Siebel Dedicated Web Client, you specify the data source to which you want to connect.

The following databases are potentially available to administrators and end users:

- **Local.** Resides on your local computer. Can be synchronized with the corporate database. Typically stored on a laptop computer and used by mobile users who are not connected to a server when working.
- **Server.** This is your enterprise server database.
- **Sample.** A database of sample data, stored on your workstation. Using this database, you can experiment with a Siebel application without risk of damaging actual organizational data.

You should always perform system administration tasks against the server database. Although you can perform these tasks against your local database and synchronize, doing so has the potential to cause errors, including data conflicts. In addition, performance problems can result from a large local database, and from routing large numbers of transactions.

About the Sample Database

Siebel eBusiness Applications include a sample database to use in demonstrating, evaluating, or experimenting with the Siebel client and Siebel Tools. (For more information, see *Siebel Installation Guide* for the operating system you are using.)

The sample database includes a number of demo user accounts (SADMIN is one of these). Each of these has a predefined responsibility that reflects the demo user's position within the sample organization. If you log in to the sample database as a demo user, you can access certain views within Siebel eBusiness Applications based on the demo user's responsibility.

You do not need to install server components to run the Siebel sample database. However, you cannot access the Administration - Server Management screen if the server component is not running. The sample database cannot be copied to the server data sources.

To log on as a demo user, double-click the icon for the listed application in the Siebel client program group. Applications listed as "Demo" automatically log the indicated user into the sample database. For the other applications, enter the user ID and password in the logon dialog box and choose Connect to: Sample. For more information about the sample database, including a list of demo users, see *Release Notes* on Siebel SupportWeb.

The sample database that ships with the Siebel system has a built-in license key that includes access to all views and modules for a period of a year from the initial ship date of the product.

About Seed Data

The enterprise database of your default Siebel application contains some built-in *seed data*, such as organization, division, position, responsibility, and employee records. You can use this seed data for training or testing, or as templates for the real data that you enter. For more information on seed data, including descriptions of seed data records, see *Security Guide for Siebel eBusiness Applications*.

Summary of Applications Administration Tasks

Table 6 summarizes the additional application administration tasks necessary to set up various Siebel eBusiness applications and optional modules.

Table 6. Application Administration Tasks

If You Want to	You (May) Need to Perform	For More Information, See
Use any base application (for example, Siebel Sales or Siebel Call Center)	Initial Setup tasks.	Chapter 3, "Initial Setup"
	Ongoing administration tasks.	Chapter 4, "Ongoing Application Administration Tasks"
Control access to views or data	Establish a strategy for controlling access to views and data: <ul style="list-style-type: none"> ■ Establish the business environment (such as organizations, divisions, territories) ■ Add employees ■ Assign responsibilities to employees 	<i>Security Guide for Siebel eBusiness Applications</i>
Launch a global deployment	Locale and language administration tasks.	"Setting Up Locales" on page 41 "Setting Up Languages" on page 67 <i>Global Deployment Guide</i>
Manage global accounts	Account administration tasks: Set up global account hierarchies.	Chapter 36, "Global Accounts"
Use Application Services Interfaces (ASIs) for accounts, contacts, or households	Set up Web services and activate workflows for the ASIs.	Chapter 32, "Integration Using ASIs"
Create catalogs for data, including products	Create catalogs for products, literature, solutions and auctions.	<i>Siebel eSales Administration Guide</i>

Table 6. Application Administration Tasks

If You Want to	You (May) Need to Perform	For More Information, See
Use Correspondence, Presentations, and Proposals functionality	Set up the Siebel Document Server, and create templates.	Chapter 22, “Document Server” Chapter 23, “Correspondence” Chapter 24, “Presentations” Chapter 25, “Proposals”
Manage content with Content Center	Set up a staging environment, set up content objects and workflows, and set up content types.	Chapter 13, “Content Center”
Manage a microsite	Microsite administration tasks.	Chapter 15, “Microsite Management”
Use the calendar to set up resources, such as conference rooms, equipment, and projectors	Calendar administration tasks.	Chapter 20, “Calendar”
Use Assignment Manager to automatically assign tasks to appropriate users	Create skills and other criteria.	<i>Siebel Assignment Manager Administration Guide</i>
Use Siebel Marketing	Marketing administration tasks.	<i>Siebel Marketing Installation and Administration Guide</i>
Manage lists of prospects, contacts, accounts, positions, and employees	List Management tasks.	<i>Siebel Marketing User Guide</i> and Chapter 29, “Global Target List Management”
Use Competency Management System	Skills and competencies administration tasks NOTE: These are different skills than those used by Assignment Manager.	<i>Siebel Employee Relationship Management Administration Guide</i>
Use Time Sheets and Expense Reports	Time Sheet and Expense Report setup tasks, such as creating work types.	<i>Siebel Professional Services Automation Guide</i>
Manage Service schedules, Service Assets, Warranties	Service administration tasks.	<i>Siebel Field Service Guide</i>

Table 6. Application Administration Tasks

If You Want to	You (May) Need to Perform	For More Information, See
Manage quotas and employee or partner incentive compensation	Incentive compensation administration tasks.	<i>Siebel Incentive Compensation Administration Guide</i>
Manage orders and the order process	Order administration tasks.	<i>Siebel Order Management Guide</i>

3 Initial Setup

This chapter is about initial setup tasks. It includes the following topics:

- [“About Initial Setup” on page 37](#)
- [“Summary of Initial Setup Tasks” on page 38](#)
- [“Adding Views to the Application” on page 39](#)
- [“Completing Employee Setup” on page 39](#)
- [“Assigning Skills” on page 41](#)
- [“Setting Up Locales” on page 41](#)
- [“Setting Up Satmetrix Survey Reports” on page 45](#)

About Initial Setup

Once your Siebel products are successfully installed, you need to perform a number of tasks to set up and administer the application.

Initial setup tasks are those which must be completed in order for your Siebel applications to work correctly, and then may be done infrequently, for instance, as your company grows.

Ongoing tasks are done on an occasional or ongoing basis, and are described in [Chapter 4, “Ongoing Application Administration Tasks.”](#)

Summary of Initial Setup Tasks

Table 7 summarizes the initial setup tasks and the order in which you should perform them.

Table 7. Required Tasks During Setup

Task	Comments
Add any custom views.	Custom views are created in Siebel Tools and must be added to your Siebel application. Custom views should be added to the Views view before you define responsibilities. For information about adding views, see “Adding Views to the Application” on page 39 .
Determine access control strategy and define business environment structure.	<p>Siebel applications can be set up to support many strategies for your company to control access to views and data. These strategies include methods such as defining your business environment structure (organizations, internal and external divisions, and so on), defining employee positions, and creating access groups so that specific groups of people have access to specific views and data.</p> <p>These decisions should be made early in the deployment process, so that the strategy can be implemented during the initial setup.</p> <p>For more information about controlling access to views and data, and the procedures for implementing access control, see <i>Security Guide for Siebel eBusiness Applications</i>.</p>
Enter employee records into system (database and application) and determine employee access to views and data.	<p>Enter employee records after you have defined your business environment structure. You need to assign at least one responsibility to each employee, and you may also assign organizations, positions, or other access control parameters.</p> <p>For more information about entering or deactivating employee records, see <i>Security Guide for Siebel eBusiness Applications</i>.</p>
Complete employee setup.	For information about associating additional information to an employee record, see “Completing Employee Setup” on page 39 .
Set up locales.	Locale Codes and parameters are necessary for a global deployment. For more information, see “Setting Up Locales” on page 41 .

Adding Views to the Application

Developers create new views through Siebel Tools. In order for the views to become available for administrators to work with, you must add them to the Views screen in the application before you define your business environment.

Example: You want to add an Opportunities view in the Reference screen. In Siebel Tools, you create the view and name it Reference Opportunities. (For details on creating views, see *Configuring Siebel eBusiness Applications*.) In your Siebel application, you follow the steps below and add the Reference Opportunities view in the View Administration view. After it has been added in both places, the view can be made accessible to the appropriate users. For details about controlling visibility to views, see *Security Guide for Siebel eBusiness Applications*.

To add customized views to the Siebel application

- 1 Navigate to the Administration - Application screen > Views view.
- 2 In the Views list, create a new record and complete the necessary fields.

You generally do not need to modify or delete views that are already listed. You would only need to modify a view if its name was changed in Siebel Tools. A view would need to be deleted only if it no longer existed in the data model schema, or if you did not want anyone to have access to it. Instead of deleting views, administrators should remove the views from responsibilities and keep them in the database.

NOTE: Only visibility-level views can be configured to appear in the Site Map.

Completing Employee Setup

After completing the employee setup procedures described in the *Security Guide for Siebel eBusiness Applications*, which are required to allow employee access to the Siebel application, views and data, you complete employee setup by providing additional information. This can include the following:

- **Assignment Rules.** Allows you to see and administer the assignment rules for an employee. For more information on assignment rules, see *Siebel Assignment Manager Administration Guide*.

NOTE: You must be logged on to a server database to use the Employee Assignment Rules view.

- **Availability.** Used for Siebel Professional Services Automation. Lists the projects for which an employee is on staff, or for which an employee has been requested. For more information, see *Siebel Professional Services Automation Guide*.

NOTE: Employees can also change their availability in the Availability view on the User Preferences screen.

- **Exception Hours.** Specifies what days and hours an employee is not available.
- **Utilization.** Displays a chart with the monthly and quarterly utilization of the currently selected employee. Managers use this chart for monitoring professional services projects and employees. For more information about professional services, see *Siebel Professional Services Automation Guide*.

- **Tools.** Defines the tools that field service engineers carry with them or have access to. It allows a call center person to check whether the engineers have the correct tools for the jobs they are assigned to.
- **Job Information.** Specifies the job profile, salary, compensation ratio, pay currency, and location of employee.
- **Calendar administration.** Defines the calendar properties and access for an employee. For more information about Calendar administration, see [Chapter 20, "Calendar."](#)
- **Assignment Skills.** Defines an employee's skills and skill items, along with their level of expertise. Skills can be used as assignment criteria in Siebel Assignment Manager. For more information about how the Siebel application uses skills, see *Siebel Assignment Manager Administration Guide*.

Skills can also be used in the Professional Service Automation product for managing resources. For information about these types of skills, see *Siebel Professional Services Automation Guide*.
- **Employee Query.** Allows queries to identify employees with particular skills and expertise.
- **Service Details.** Provides details about the shift start and end locations, hourly costs, overtime availability and other details for a service employee.
- **Competency.** Provides a list of areas in which the employee has some demonstrated level of knowledge or accomplishment.
- **Education.** Provides details of an employee's education history.
- **Past Work Experience.** Provides details of an employee's work history.
- **Honor/Award.** Provides list of honors and awards earned by an employee.
- **Membership.** Provides details of an employee's memberships in various organizations.
- **Certification.** Provides details of an employee's certification.

To complete the employee setup

- 1 Navigate to the Administration - User screen > Employees view.
- 2 In the Employees list, drill down on the employee for whom you want to add additional information.
- 3 Click the More Info view tab.

- 4 In the form, complete any necessary fields.

Some of the fields are described in the following table.

Field	Description
Configuration	Specifies which Siebel product or group of software components to associate with the currently selected employee. For more information, see <i>Siebel Anywhere Administration Guide</i> .
Available Until	May be used to indicate the active period of an employee. Used in conjunction with the Availability, Overtime Availability, and Next Available fields.

- 5 Click any other appropriate view tab.
- 6 Create a new record, if needed.
- 7 Enter the appropriate information.

Assigning Skills

At the levels of organizations, positions, and employees, you can add skills. Skills are used for assigning employees to certain projects, service requests, and so on. Skills added to an organization apply to all employees assigned to that organization. Skills assigned to a position apply only to the employee assigned to that position. You create skills with Siebel Tools.

Employees can track and update their own skill profiles in the User Preferences Profile view.

For more information about how your Siebel application uses skills, see *Siebel Assignment Manager Administration Guide*.

Setting Up Locales

A locale is a set of rules guiding how common data is displayed to the user or received from the user. These rules are used to format data from a database before displaying the resulting information in output fields on the user interface. Siebel applications support language and geographical conventions for the display language of picklists, and formatting of data such as dates, time, numbers, and currency based on locale settings.

The Locale information is stored in the Locale Table (S_LOCALE). The data in this table is maintained by the administrator using the Locale Administration view.

The locale with which the Component Object Manager processes are initialized is determined by the value of the parameter Locale Code. Although this is set during installation, it may be changed to the locale code of any locale that is preconfigured with the Siebel application or added by the administrator. The Locale Code parameter can be set at the Enterprise, Server, or Component level.

A number of locales and their parameters come prebuilt with the standard Siebel application. You can also create and revise locales in the Locale Administration view.

After a locale and its parameters are defined, you can create translations for locale names that display in the locale pick applet, rather than the three letter acronym locale code. For example, instead of showing ENU as locale name, the administrator provides *English–United States* as a translation for English speakers and *Inglese–Stati Uniti d’America* for Italian speakers. Only translated locale names are exposed to end-users on locale pick applets.

NOTE: Whereas the Siebel Web Clients use the locale settings specified in the Locale Administration view, the Siebel Mobile Web Client and the Siebel Dedicated Web Client use the locale settings defined in the client operating system’s regional settings.

Setting up a Server Object Manager includes assigning a locale to the Object Manager. Because the locale directs how locale sensitive information, such as date, time, and numbers are different from country to country, customers must complete an Object Manager for each country in which they have users in order to provide the users with correct looking data. (This does not apply to Siebel Dedicated Web Clients, because dedicated clients use the regional settings of the dedicated client machine.)

To create a locale

- 1 Navigate to the Administration - Data screen > Locale view.
- 2 In the Locale list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Description
Date Separator	Designates the symbol used to separate the components of the date. This symbol replaces the forward slash (/) in the date format.
International Dialing Code	<p>Designates the country codes to display in phone numbers, suppressing the country code for phone numbers that are in the user’s locale. For example, if the phone numbers for two accounts are the following:</p> <ul style="list-style-type: none"> ■ +33 1-23 42 34 56, for an account based in France (+33 is the country code for France) ■ +1 6502955000, for an account based in the U.S. (+1 is the country code for the U.S.) <p>To a user based in the U.S. (locale ENU) the International Dialing Code value is “USA and Canada (1)”, and the above phone numbers displays as:</p> <ul style="list-style-type: none"> ■ +33 1-23 42 34 56 ■ (650) 295-5000

Field	Description
List Separator	<p>Designates the symbol used to separate consecutive numbers in a list.</p> <p>For example:</p> <ul style="list-style-type: none"> ■ In the U.S., consecutive numbers are separated by a comma: 1.23,3.57,4.01 ■ In France, consecutive numbers are separated by a semi-colon: 1,23;3,57;4,01
Locale Code	<p>Siebel applications use the three letter acronym (TLA) code conventions of Microsoft for locale name. In most cases, the TLA is created by taking the two-letter language abbreviation from the ISO Standard 639 and adding a third letter as appropriate to form a unique identifier.</p> <p>For information on Microsoft codes, see your Microsoft documentation.</p>
Locale Name	<p>The naming convention is generally <i>Language Name–Territory</i>, for example, English–United States, English–United Kingdom, or French–France.</p>
Long Date Format	<p>Specifies the appropriate long date format, using spaces, commas, or periods as separators. Long date formats contain day and month names.</p> <p>For example: dddd, MMMM dd, yyyy as in Friday, June 21, 2004</p> <p>A forward slash (/) in the format acts as a placeholder for the Date Separator symbol.</p> <p>NOTE: Long dates are only supported for the calendar, the Gantt chart, salutation text on the home page, and balloon text in some charts.</p>
Negative Currency Format	<p>Specifies the location of the negative sign (-) with respect to the currency symbols and digits (100).</p> <p>For example:</p> <ul style="list-style-type: none"> ■ For U.S. format, (\$32.45), select (s100) ■ For British format, -£32.40, select -s100
Number Decimal Separator	<p>Specifies the symbol used to indicate the decimal place.</p> <p>For example:</p> <ul style="list-style-type: none"> ■ French format: 1 234,34 (comma as decimal symbol) ■ U.S. format: 1,234.34 (period as decimal symbol)

Field	Description
Number Fractional Digits	Designates the number of digits after the decimal separator. For example, the number 12.340 has a number fractional of 3. This applies to data fields of type DTYPE_NUMBER.
Number Grouping Separator	Designates the symbol used to group numbers. For example: ■ French format: 1 234 (space as number grouping separator) ■ German format: 1.234 (period as number grouping separator) ■ U.S. format: 1,234 (comma as number grouping separator)
Number Leading Zero	Designates whether to display a leading zero in numbers less than one. For example, .7 or 0.7.
Positive Currency Format	Specifies the location of the currency symbols with respect to the digits (100). For example: for U.S. format, \$32.45, select s100.
Short Date Format	Specifies the appropriate shortened date format. For example: ■ International format: yymmdd ■ U.S. format: mm/dd/yy ■ German format: dd.mm.yy The forward slash in the string mm/dd/yy is actually a placeholder. It is replaced with the symbol specified in the Date Separator field. For example, if the Date Separator value is a dash, -, then April 10, 2002 displays as 04-10-2002. NOTE: If you enter a month number greater than 12, it defaults to 12. If you enter a day number greater than the number of days in the month, it defaults to the last day of the month. For example, if you enter 42/99/03 (U.S. format), the date defaults to 12/31/03.
Time AM Designator	Specifies the symbol for designating time between 00:00 and 12:00. For example: AM, a.m., am
Time Leading Zero	Designates whether to display a leading zero in time fields. For example: 12 hour clock with leading zero: 01:03 AM, 01:03 PM 12 hour clock without leading zero: 1:03 AM, 1:03 PM 24 hour clock with leading zero: 01:03, 13:03 24 hour clock without leading zero: 1:03, 13:03

Field	Description
Time PM Designator	Specifies the symbol for designating time between 12:00 and 24:00. For example: PM, p.m., or pm
Time Separator	Specifies the symbol used to separate the hours from the minutes.
UI Directionality	Designates the direction of the text displayed.

To create a translation for a locale name

- 1 Navigate to the Administration - Data screen > Locale view.
- 2 Select the appropriate record.
- 3 Click the Locale Name Translation view tab.
- 4 On the Locale Name Translation list, create a new record and complete the necessary fields.
Some fields are described in the following table.

Field	Description
Language	Designates the language code of the translation of the locale name. For examples of language codes, see <i>Global Deployment Guide</i> .
Translated Name	The exact translation of the locale name to appear in the picklist for users with the designated language code. For example, for the locale English–United States: ■ With ENU language code, the locale name is English–United States. ■ With ITA language code, the locale name is Inglese–Stati Uniti d’America.
Description	Translated description of this locale.

To edit the current locale

- 1 Edit the locale record. (See [“To create a locale” on page 42.](#))
- 2 To have the edits take effect, restart the application’s Object Manager.
(For information about shutting down and starting Siebel Server components such as an Object Manager, see the *Siebel System Administration Guide*.)

Setting Up Satmetrix Survey Reports

NOTE: This section only applies to those who have purchased Siebel Satmetrix Surveys or who have purchased surveys directly from Satmetrix Systems.

In order to view Satmetrix survey reports through your Siebel application, you need to:

- Add the Account Satmetrix Survey View view to the appropriate user responsibilities. For information about how to add views to responsibilities, see *Security Guide for Siebel eBusiness Applications*.
- Enter the secret key string provided by Satmetrix Systems into the Satmetrix Key Value system preference. For information about how to change system preferences, see [“Setting System Preferences” on page 50](#).
- Extend the List of Values for WI_ARG_TYPE as described in [“To extend the List of Values for WI_ARG_TYPE” on page 46](#).
- Set up the symbolic URL for access to the Satmetrix reports server, as described in [“To set up the symbolic URL for access to Satmetrix Reports” on page 46](#).

To extend the List of Values for WI_ARG_TYPE

- 1 Navigate to Administration - Data > List of Values.
- 2 Create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Value
Type	WI_ARG_TYPE
Display Value	Satmetrix
Language-Independent Code	Satmetrix
Active	Yes
Translate	Yes
Replication Level	All

For more information about creating List of Values records, see [Chapter 5, “Working with Lists of Values.”](#)

To set up the symbolic URL for access to Satmetrix Reports

- 1 Navigate to the Administration - Integration screen > WI Symbolic URL List view.
- 2 From the Show drop-down list, select Symbolic URL Application.
- 3 In the Symbolic URL list, select SatmetrixSurvey.
- 4 Make sure the URL is the URL for the reports server provided by Satmetrix Systems.

- 5 In the Symbolic URL Arguments list, complete the fields, using the following table as a guide.

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Sequence
EncodeUrl	Yes	Command	FALSE	Yes	1
version	Yes	Constant	<i>Obtain from Satmetrix</i>	Yes	2
windowSize	Yes	Command	WebControl width=1000 height=500 border=1	Yes	3
type	Yes	Constant	acct	Yes	4
acctid	Yes	Field	Id	Yes	5
acctname	Yes	Field	Name	Yes	6
contactid	Yes	Constant	*	Yes	7
contactname	Yes	Constant	*	Yes	8
user	Yes	Profile Attribute	Login Name	Yes	9
domain	Yes	Constant	<i>Obtain from Satmetrix</i>	Yes	10
model	Yes	Constant	<i>Obtain from Satmetrix</i>	Yes	11
created	Yes	Field	Timestamp	Yes	12
token	No	Satmetrix	Satmetrix Surveys, CalculateToken	Yes	13

4

Ongoing Application Administration Tasks

This chapter assumes that you have successfully installed your Siebel product and have completed the tasks in [Chapter 3, “Initial Setup.”](#)

The tasks described in this chapter set up defaults that are used throughout your Siebel application. For some implementations, the default settings provided through the seed data meet a company's needs without customization. In other cases, administrators find it useful to make adjustments to these defaults.

This chapter includes the following topics:

- [“Setting System Preferences” on page 50](#)
- [“Setting Up Predefined Queries” on page 50](#)
- [“Setting Up Currencies” on page 52](#)
- [“Setting Up Currency Conversion” on page 53](#)
- [“Setting Up Expense Types” on page 56](#)
- [“Setting Up Payment Terms” on page 57](#)
- [“Setting Up Periods” on page 58](#)
- [“Specifying Telephone Formats” on page 58](#)
- [“Setting Up Pager Companies” on page 63](#)
- [“About Date Formats” on page 63](#)
- [“Setting Up ZIP Codes” on page 64](#)
- [“Administering Global Time Zone Support” on page 64](#)
- [“Setting Up Email, Fax, and Mail Accounts \(Contact Us\)” on page 66](#)
- [“Setting Up Industries” on page 66](#)
- [“Setting Up Languages” on page 67](#)
- [“About Case Sensitivity” on page 67](#)
- [“Enabling Application-Wide Case Insensitivity” on page 68](#)
- [“Enabling AOM Case Insensitivity” on page 69](#)
- [“Enabling Field-Specific Case Insensitivity” on page 70](#)
- [“Adding Web Browser Capabilities” on page 71](#)
- [“Adding Additional Web Browsers” on page 72](#)
- [“Administering Quick Fill Templates” on page 74](#)
- [“Setting Up Default View Links for Screen Home Pages” on page 75](#)

Setting System Preferences

System preferences control how Siebel applications operate in your environment. You need to review default settings and modify these as appropriate for your environment.

For a list of the system preferences in Siebel applications, see [Appendix A, “System Preferences.”](#)

To set system preferences

- 1 Navigate to Administration - Application screen > System Preferences view.
- 2 Check that the default System Preference Values are correct in your environment, or change values for system preferences as needed.

Some system preferences may not take effect until the affected components are restarted. (For information about shutting down and starting Siebel Server components such as an Object Manager, see the *Siebel System Administration Guide*.)

Setting Up Predefined Queries

About Setting Up Predefined Queries

Predefined queries (PDQ) automate queries that a user can perform online. Rather than creating a query, entering criteria, and running the query, the user selects a PDQ from the Queries drop-down list.

Predefined queries can be private (available only to the person who created them) or they can be public (available to all the users of the application).

There are two ways to set up predefined queries:

- Create and execute a query in the usual way, and then save the query.
- Create or modify a predefined query in the Predefined Query screen.

Things to Remember

When setting up queries, remember:

- The Administrator can define a PDQ using both displayed and nondisplayed fields.
- You can reference only fields from the current applet's business component in your query.
- On occasion, using the wildcard * to find all entries in a field may cause a performance problem. If it does, use IS NOT NULL instead. For more information about query operators, see *Fundamentals*.

Predefined queries are defined on a business object. All screens based on the same business object display all the predefined queries created for that business object.

- Querying on fields of data type DTYPE_NOTE is not supported on some database platforms.

Procedures

To create a predefined query by saving a query

- 1 Navigate to the screen where you want to run the query.
- 2 Create and execute a query.
- 3 From the application-level menu, choose Query > Save Query As.
- 4 In the Save Query As dialog box, enter a name for the query.
The query is added to your list of predefined queries. This query is private, and only you can view it.
- 5 If you want to make the query public:
 - a Navigate to the Administration - Application screen > Predefined Queries view.
 - b In the Predefined Queries list, deselect the Private field in the record for the query you just created.

To set up a predefined query in the Predefined Query view

- 1 Navigate to the Administration - Application screen > Predefined Queries view.
- 2 In the Predefined Queries list, create a new record and complete the necessary fields.
Some fields are described in the following table.

Field	Comments
Name	This is the name that appears in the predefined query drop-down list.
Object	The object upon which the query is performed.
Private	Marked if the query is available only to the person who created it. When you unmark a query to make it public, the other users must first exit the application and reenter before they can see the newly public query.
Query	The SQL code for the query. When you create a query for a field that is a multi-value group, you can use the EXISTS operator to query nonprimary child records. For more information about the syntax, see about operators, expressions, and conditions in <i>Siebel Developer's Reference</i> .
Cache Result	If this is Y, the query returns all rows up to the value of the DSMaxFetchArraySize parameter set for the data source. For information about setting DSMaxFetchArraySize, see about modifying Named Subsystems in the <i>Siebel System Administration Guide</i> . NOTE: Setting DSMaxFetchArraySize to -1 and Cache Result to Y may cause memory problems for queries returning many rows.

Setting Up Currencies

You specify the currencies your company uses by:

- **Making Currencies Active.** If the application includes the currency definitions you need, you make these currencies active.
- **Defining Currencies.** If you need additional currencies whose definitions the application does not include, you must also define these currencies.

NOTE: If you use multiple currencies, you must also set up exchange rates before you import data that contains foreign currencies and before you use any of the Siebel currency features.

Making Currencies Active

The application includes more than 30 currency definitions. If your currency is one of these, you need only mark it as active.

To make currencies active

- 1 Navigate to Administration - Data screen > Currencies view.
- 2 For any currency that you want to make active, click the Active column in the Currencies list.
- 3 (Optional) Enter the Start Date and End Date in the form to specify the date when this currency becomes active and the date when it is no longer active.

Defining Currencies

If your company uses any currencies that the application does not include, you must define them and mark them as active.

If you modify the definition of currencies, you must clear the cache or log out and back in to the application before the modification becomes visible. For more information about clearing the cache, see ["Clearing the Cache" on page 79](#).

You cannot delete a currency once you have defined it. If you no longer use it, you can mark it as inactive.

To define a currency

- 1 Navigate to Administration - Data screen > Currencies view.
- 2 Create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Code	A three-letter code for the currency.
Name	The name of the currency.

Field	Comments
Issuing Country	The country that issues the currency.
Symbol	The symbol for the currency, such as \$.
Scale	The number of places after the decimal used for displaying currency in the interface. For example, U.S. Dollars has a scale of 2 to accommodate the cents, so an amount would be displayed as \$10.50. If the scale were 1, this same amount would be displayed as \$10.5.
Smallest Denomination	The smallest unit of currency available. For instance, the smallest unit of currency for the U.S. Dollar is one cent, or .01 dollars. If there were no cents, the scale would still be 2, but the smallest denomination would be \$0.05.
EMU Triangulation	Check to indicate that this currency must be converted to other checked currencies using the EMU Triangulation method.
Active	Indicates whether or not the currency can be chosen by the end user.
Start Date	The date when the currency becomes active.
End Date	The date when the currency is no longer active.
Extended Scale	The number of places after the decimal used for storing currency data in the database. If the values in the Extended Scale and Scale fields are different, results of currency calculations, for instance conversions or discounts, may be different than expected. This is because the currency values that are stored in the database are used for these calculations, rather than the displayed values.

Setting Up Currency Conversion

This section discusses how to set up exchange rates and includes related background information. It includes the following topics:

- **Setting Up Exchange Rates.** You must set up exchange rates used to convert currencies.
- **Understanding the Euro and Triangulation.** If a currency is part of the European Monetary Union, you convert it to other currencies through the Euro.
- **Currency Conversion Functionality.** The currency conversion rates that you set up are used by a number of features of Siebel applications.

Setting Up Exchange Rates

After you have set up your currencies, but before you use any currency features or import data with foreign currencies, you must set up exchange rates that are used to convert currencies.

If you fail to set up an exchange rate, currency is converted on a 1:1 basis. This means that the amount stays the same but the currency symbol changes.

NOTE: To calculate exchanges between currencies, you must set up an exchange rate twice—one for each currency. For instance, if you want to calculate exchange rates between U.S. dollars and Japanese yen, you must set up an exchange rate for yen to dollars, and set up another rate for dollars to yen.

To set up exchange rates

- 1 Navigate to Administration - Data screen > Currencies view.
- 2 In the Currencies list, select the currency for which you want to establish exchange rates.
- 3 Click the Exchange Rates view tab.
- 4 In the Exchange Rates list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Type	Currently, Daily is the only type used.
To Currency	The currency to which you are converting the currency selected in the currencies list.
Exchange Rate	The conversion rate.
Exchange Date	<p>The date of this conversion rate. When converting currencies, Siebel applications use the exchange rate whose date is closest to, but not past, the date of the transaction. Depending on the accuracy that you need and on how much currency values are fluctuating, you may want to enter a new exchange rate every week, month, quarter, or year.</p> <p>Siebel applications use the Exchange Date only to convert currencies in transactions in which money has been or will be received. For example, Quote Item Price has an Exchange Date field, because it represents money that your company will receive, and your sales representatives should enter the date when the money will be received.</p>

- 5 Repeat this process to add additional exchange rates.

You must restart the Siebel client or use the clear cache command before any changes to exchange rates can be seen in your Siebel application. For more information about clearing the cache, see [“Clearing the Cache” on page 79](#).

The Euro and Triangulation

NOTE: As of January 2002, the Euro Triangulation method for converting between currencies belonging to EMU members is not needed for present and future currency exchanges. However, the method is still available in Siebel applications, as are the old currencies, so that historical data can be maintained accurately. The following description applies only to historical data needing conversion prior to the 2002 switch to the Euro for the EMU member countries.

If a country is a member of the European Monetary Union (EMU), you should convert its currency to other currencies through the Euro. This is called triangulation, and it is used whenever either currency being converted has EMU Triangulation checked.

For example, if you are converting from USD to DEM and DEM has EMU Triangulation checked, you must set up the conversion rates between US dollars and the Euro and between the Euro and US dollars. You do not have to check the EMU Triangulation field for USD. The DEM is converted to EUR according to the fixed exchange rate set by the European Monetary Union, and then the amount in EUR is converted to USD according the exchange rate you set up.

The EMU Triangulation field is already checked for the following European Monetary Union member nations: Germany (DEM), Belgium (BEF), Spain (ESP), France (FRF), Ireland (IEP), Italy (ITL), Netherlands (NLG), Austria (ATS), Portugal (PTE), Finland (FIM), and Luxembourg (LUF). However, you can check or clear this field. For instance, if the United Kingdom or Sweden joins the EMU, then you can check the field for that currency.

To calculate triangulation conversion, the conversion rate is always expressed to six significant figures. Conversions from one national currency unit into another are made by:

- 1 Converting the monetary amount from the national currency unit into the Euro.
- 2 Rounding the result to not less than three decimal places.
- 3 Converting the result to the target national currency.
- 4 Rounding the result to the lowest subunit of the target national currency, such as pfennig for the German mark or centime for the French franc.

NOTE: The EMU Triangulation field should be checked only for currencies that are subdivisions of the Euro.

Currency Conversion Functionality

Currency conversions currently occur in your Siebel application in various features. Some examples follow:

- **Price lists.** When you change the currency code of a price list, it prompts you for an exchange date and converts the prices of all of the price list items.
- **Quotes.** When you change the currency code of a quote, it will convert the discount amounts and discount prices.
- **Forecasting.** When you update forecast information from the opportunity, it will do a currency conversion from the opportunity currency to the forecast currency if the currencies are different. When you roll up the forecast lines, it will do a conversion from the forecast line currency to the rollup forecast currency if the currencies are different.

- **Projects.** When you create expenses in a currency different from the project's currency and submit the expenses to the project, the expense amount will be converted from the expense currency to the project currency in the Project Time Expenses Summary and Project Time Expenses Adjustments views.
- **Rate lists.** When you change the currency code of a rate list, it will prompt you for an exchange date and convert the prices of all of the price list items.
- **Expense reports.** When you prepare expense reports, you can perform currency conversion between the expense currency and your default currency.
- **Reports.** The following reports support currency conversion:
 - **Opportunity Pipeline Report by Rep.** Opportunity revenues created in different currencies will be converted in the Total and Subtotal fields to the user's default currency.
 - **Euro Expense Report.** If expenses have been created in an EMU currency, all expenses will be displayed in dual currencies.
 - **Project Limit Summary Report.**
 - **Forecasting Reports.**
 - **Current Quotes Report.**
- **Charts.** The following charts support currency conversion:
 - **Opportunity Current Opportunity Analysis.** Opportunity revenue will be converted to the user's default currency if both the opportunity currency and the revenue currency are different from the user's default currency.
 - **Forecast Analysis.**

Setting Up Expense Types

When employees create expense reports, they choose an expense type for each line item in the report. For example, when employees travel on business, they might have to enter line items with expense types *Food*, *Airfare*, *Car Rental*, *Hotel*, and so on.

When you set up expense types, you specify what expense types are available to employees in the drop-down list that they use to choose expense types. You also specify how these expense types are to be categorized and summarized in expense reports.

You can also create establishments that are associated with these expense types. For example, if the expense type is *Airfare*, you might associate establishments with it such as *Air Canada* and *British Airways*. For more information about associating expense types with establishments, see *Siebel Professional Services Automation Guide*.

NOTE: Before you can add expense types and establishments, you must add them in the List of Values Administration screen so that they can be displayed in the drop-down list. Create expense types under EXP_ITEM_TYPE, and create establishments under EXP_ITEM_ESTAB. For more details about List of Values administration, see [Chapter 5, "Working with Lists of Values."](#)

To set up expense types

- 1 Navigate to the Expense Reports screen > Expense Types view.
- 2 Create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Expense Type	Enter the expense type that the employee will choose in the Expense Type drop-down list of expense report line items, such as Airfare.
Report Category	Enter a category for this expense type. This category will be used in summary reports, such as Air/Rail Fare.
Summary	Enter a larger summary category for this expense type, such as Travel Cost. This summary category will be used in summary reports.

Setting Up Payment Terms

Payment terms are the different terms that you offer to your customers, such as Net 30 days and Net 60 days. You set up payment terms so that they are available in your Siebel application, for example in the Quotes screen.

To set up a payment term

- 1 Navigate to the Administration - Data screen > Orders > Payment Terms view.
- 2 Create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Payment Term	Enter a name for the payment term, such as Net 30.
Net Days	If the payment term requires payment in a specific number of days after the order date, enter the number of days. Optional
Description	Enter a description of the payment term. Optional.
Discount	If there is a discount for early payment, enter the amount of the discount. Optional.
Discount Days	If there is a discount for early payment, enter the number of days within which a customer must pay to qualify for the discount. Optional.
Due	If there is a specific due date for payment, enter the due date. Optional.
Integration ID	Users should not modify this system field. It is a cross-reference that links the Siebel application to corresponding payment term information in the back-office application.

Setting Up Periods

Periods are time periods that are used in your business, such as Q1 2002 or Jan. 2001. Periods are used extensively in the Siebel application, such as in forecasting, time sheets, incentive compensation, and expense reports.

Be sure to set up periods far enough into the future that forecasting will work. For example, the default forecast is for seven months ahead. Therefore, if you keep this default, you must create periods defined for at least seven months from the current date for forecasting to work correctly.

After setting up a period, you can associate Period Units with it. Period Units allow you to define one time unit in terms of another. For example, day periods can be associated with week periods for use in Timesheets. When a new timesheet is created, based on a week period, each day in that week is also added to the timesheet. This functionality requires the day periods to be associated as Period Units with the week period.

To set up periods

- 1 Navigate to the Administration - Data screen > Periods view.
- 2 In the Period Definition list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Period	Enter a name for the period, such as Q1 2001.
Closed	Select this to indicate that the period has already closed.
Start	Enter the start date for the period.
End	Enter the end date for the period.
Type	Select the type of period, such as month, quarter, or year.
Description	Enter a description of the period.

To associate period units with a period

- 1 Navigate to the Administration - Data screen > Periods view, and select the appropriate period.
- 2 In the Period Units list, create a new record.
- 3 In the Period Units dialog box, select all the period units to associate with this period, and then click OK.

Specifying Telephone Formats

Default telephone formats are specified in the List of Values view. You can only have one default telephone number format per country code. The default format is applied when you enter only numbers, without slashes, dashes, or other formatting symbols.

Before users enter telephone numbers:

- Set the default country. See [“Setting Up Locales” on page 41](#). The default phone format is determined by the locale setting.
- Define formats for countries outside the default country. See [“Specifying Non-North American Telephone Formats” on page 59](#).

If a user enters a telephone number from a country for which the format has not yet been specified, the telephone number may be formatted incorrectly.

NOTE: If you define any new telephone formats, coordinate with communications administrators who specify CTI functionality and define dialing filters. For more information, see *Siebel Communications Server Administration Guide*.

North American Telephone Formats

The default format for North American telephone numbers is (000) 000-0000. The telephone formatting logic for North American telephone numbers works as follows:

- If the user enters 10 digits in a telephone number field, it is formatted as (123) 123-1234.
- If the user enters more than 10 digits, the first 10 digits are formatted as (123) 123-1234, and the rest of the digits are used as the extension number. The user can enter up to 40 digits.
- If the user enters fewer than 10 digits, an error message appears.
- If the user begins the telephone number with a leading zero, an error message appears.

This telephone formatting logic is followed even when the default country is not in North America.

Specifying Non-North American Telephone Formats

If your users need to enter telephone numbers for countries outside North America, you must specify telephone number formats for those countries.

To specify non-North American telephone formats

- 1 Navigate to the Administration - Data screen > List of Values view.
- 2 Query the Type field for the entry PHONE_FORMAT to see existing telephone formats.

3 Create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Display Value	Enter the format string.
Language-Independent Code	<p>Use the number zero (0) to represent required digits, the character # to represent optional digits, and other formatting characters to represent how the telephone number should appear. Do not include any alphanumeric characters other than 0.</p> <p>For example, to format an Australian phone number, which includes a two-digit area code and a six- or eight-digit number, use (00) 000# 000#.</p> <p>You do not need to include characters to represent the country code in the format. When a user enters a number, the country code is automatically shown if the default country is different from the country code.</p> <p>If a phone number has more digits than the format, the extra digits are used as the extension. For example, if the format is 000-00-0000 and the phone number entered is 12345678912, the number is displayed as 123-45-6789x12.</p>
Order	Enter the country code of the new format. When adding new codes, make sure that no country code is a prefix of any other. For example, because India's country code is 91, you should not add a country code of 9 or of 910 (or any other number beginning with 91).
Type	Enter PHONE_FORMAT or choose it in the drop-down list.

4 Stop and restart the Siebel Server.

International Telephone Formats

To enter an international telephone number (a telephone number for a country other than the current default country) in a telephone field, the user must specify the country by preceding the telephone number with a plus sign (+) followed by the country code (for example, +44). If the user does not enter a country code, the default country code is assumed.

After the user indicates the country by entering the plus sign and country code, the telephone formatting logic for international telephone numbers works as follows (assuming that there is a List of Values telephone format entry for the indicated country):

- If the user enters exactly the same number of digits in a telephone number field as there are in the telephone format for the indicated country, the entry is formatted as specified.
- If the user enters more than the number of digits in the telephone format for the indicated country, the first digits are formatted as specified and the rest of the digits are used as an extension number.

- If the user enters fewer than the number of digits in the telephone format for indicated country, the entry is accepted without an error message. (This is to accommodate telephone numbers of different lengths.)

If there is no List of Values telephone format entry for the indicated country, the number remains formatted the way that you enter it. No error message is returned.

Unformatted Telephone Numbers

When you change or add a telephone number format, the existing telephone numbers are *not* updated automatically.

CAUTION: When entering telephone numbers, users can enter letters in place of digits, but computer telephony integration (CTI) features, such as outbound dialing, do not work for these numbers. Queries for such numbers must include the letters, not the numeric equivalents. Siebel eBusiness Applications do not detect or warn users if they enter Q or Z (letters that do not appear on all telephones).

Examples

Table 8 shows how telephone numbers would appear under various circumstances. In this example, the default country is the United States and the default format is the North American format, (000) 000-0000. Another format has been entered for country code 91: 00-000-0000.

Table 8. Telephone Number Format Examples

User Enters	Number Is Formatted As
1234567890	(123) 456-7890
1234567890123	(123) 456-7890 x123
123456	Error message: "Invalid data has been entered."
+91123456789	+9112-345-6789
+9112345678910	+9112-345-6789 x10
+9112345	+9112345
+2512345	+2512345
?0+9112345678	?0+9112345678 (you see the '?' and the '0')
?0HelloWorld	?0HelloWorld (you see the '?' and the '0')

The telephone format has no effect on sort order.

When performing a query on a telephone number, do not include any format characters such as (,), -, ., x, or spaces.

You can query for only country 61 by typing +61* but you cannot query for only North American telephone numbers this way, because +1* returns all telephone numbers. To query for North American telephone numbers, use not like +* instead.

Table 9 gives examples of how to query telephone numbers.

Table 9. Querying Telephone Numbers

Desired Query Result	Query Criteria
(123) 456-7890	1234567890
+61(123) 45.67.89 x0	+611234567890 (if 61 is defined as a country code)
Country code 61 telephone numbers	+61*
All telephone numbers	+1*
415 area code numbers (North America only)	415*
Null telephone numbers	is null
415 area code or null (North America only)	415* or is null
(800) SKY-PAGE	800SKY*

When the user performs a query using a telephone number, the country code of the default country automatically prefixes the query (unless the default country is in North America, in which case no prefix is added). For example, if the default country is Germany, and the user types “0181” in the telephone field of a query, the German country code (+49) is added to the query (that is, +49*0181*).

To find a number for a country other than the default country, the user must specify the country code in the query. To avoid limiting the query to one country, the user must refine the query and remove the country code portion of the query specification.

To see a demonstration of this behavior, look at the Contacts screen. Every number for a country other than the default contains a “+n” at the beginning, while every number for the default country code appears as local (no +). Numbers that have the “+n” require explicit queries (country code plus number) while local numbers are returned normally.

Importing Information with EIM

Siebel Enterprise Integration Manager (EIM) manages the exchange of data between Siebel database tables and other corporate databases. When you use EIM to import information that includes international telephone numbers, the numbers are handled as described in the previous sections.

For more information about EIM, see *Siebel Enterprise Integration Manager Administration Guide*.

Maximum Length for International Telephone Numbers

Refer to [Table 10](#) to calculate the safe maximum length for international telephone numbers:

Table 10. Maximum Length for International Telephone Numbers

Is there a PHONE_FORMAT LOV for the country code?	Then, the safe maximum length for international telephone number is
Yes	$C + 2N + E + 2 \leq 40$
No	$2C + 2N + E + 2 \leq 40$

In the formulae in [Table 10](#):

- C is the length of the country code
- N is the length of the city code and the subscriber number, including any formatting, such as spaces or hyphens
- E is the length of the extension number

[Figure 1](#) shows an example.

+834 91 518-400 x 123

+834
91 518-400
x 123

C = 3
N = 10
E = 3

Figure 1. Example International Number

Setting Up Pager Companies

Pager companies can be set up so they are available from the File > Send > Page menu.

To set up a pager company

- 1 Navigate to the Administration - Communications screen > Pager Companies view.
- 2 In the Pager Companies list, create a new record and complete the necessary fields.

NOTE: The pager companies you use to send pages must support Telocator Alphanumeric Protocol (TAP), which is an industry standard for sending alphanumeric pages.

About Date Formats

For the Siebel Web Client the display format for date and time is determined by the locale settings of the application server. For more information, see [“Setting Up Locales” on page 41](#).

For the Siebel Dedicated Web Client and the Siebel Mobile Web Client, the date format is determined by the specification in the client computer’s operating system.

When a user creates a query using a date field, the user must use the appropriate date format.

Setting Up ZIP Codes

ZIP Codes are used to look up address attributes (City, State, and so on). They are also used to look up nine-digit postal codes based on the street address. Siebel eBusiness Applications ship with a table of United States Postal Service ZIP Codes, and the table is available for customer use.

To add a ZIP Code

- 1 Navigate to Administration - Data screen > ZIP Code Administration view.
- 2 In the ZIP Geocodes list, create a new record and complete the necessary fields.

Administering Global Time Zone Support

The time zones records that are shipped with Siebel applications as seed data include the 74 world time zones. These are the same time zones used by Microsoft in its operating systems. Use the Time Zone administration view to:

- Edit the text descriptions of time zones and their abbreviations
- Manage the active status of time zones to control which time zones are available to end users for use in the applications
- Manage multilingual translations to control how time zone information is displayed to users in multiple languages

Tasks for administering time zones include:

- [“Modifying Time Zones” on page 64](#)
- [“Maintaining Translations of Time Zones” on page 65](#)

For more information on global time zone support, see *Global Deployment Guide*.

Modifying Time Zones

You rarely need to modify a time zone’s regional settings. However, you may want to modify other time zone settings such as the display name or daylight savings rules, as these occasionally change.

NOTE: You cannot add or delete time zones.

To modify time zone settings

- 1 Navigate to Administration - Data screen > Time Zone Administration view.
- 2 In the Time Zone list, select the time zone record you want to modify.

3 Modify the fields as necessary.

Some fields are described in the following table.

Field	Comments
Name	Name of time zone.
Standard Abbreviation	The abbreviation for the time zone.
UTC Offset	Offset, in minutes, from Coordinated Universal Time (UTC) when daylight savings is not in effect.
DST Abbreviation	The abbreviations for daylight savings time (DST).
DST Bias	Incremental DST offset, in minutes, from UTC when DST is not in effect.
DST Start Ordinal	Part of the rule that determines when DST starts. For example, if the rule is <i>the first Sunday in April</i> , <i>First</i> is defined in this field.
DST Start Day	Part of the rule that determines when DST starts. For example, if the rule is <i>the first Sunday in April</i> , <i>Sunday</i> is defined in this field.
DST Start Month	Part of the rule that determines when DST starts. For example, if the rule is <i>the first Sunday in April</i> , <i>April</i> is defined in this field.
DST Start Time	Minutes after midnight that DST starts. For example, if DST starts at 2:00 A.M., set the start time to 120.

Maintaining Translations of Time Zones

You maintain translations of the text-based fields for each time zone using the Time Zone Administration view.

To maintain translations of time zones

- 1 Navigate to Administration - Data screen > Time Zone Administration view.
- 2 In the Time Zone list, select the time zone you want to translate.
- 3 In the Time Zone Translation list, create a new record and complete the necessary fields, including the translation of the Name field for the selected language.
- 4 Repeat [Step 3](#) for each language required for translation.

Date and Timestamps

The date and time used for timestamping records are obtained by the Siebel Server. When a remote user runs the Siebel client in disconnected mode, the Siebel Server runs on the user's machine and takes the date and time from that machine.

If the Global Time Zone feature is enabled, then fields of data type UTCDATETIME are converted to UTC during Object Manager-based operations. For more information, see the *Global Deployment Guide*.

Setting Up Email, Fax, and Mail Accounts (Contact Us)

Salespeople use the Contact Us screen to answer questions and provide contact information to customers. If your organization uses Siebel eService, your customers can access this information directly from a Contact Us page on your Web site.

Creating a Contact Us Account

To help your salespeople provide information on a chosen topic, you can create different accounts, such as Technical Support, Shipping, and Sales.

To add a Contact Us account

- 1 Navigate to Administration - Application screen > Contact Us view.
- 2 In the Email, Fax and Mail Accounts list, create a new record and complete the necessary fields. Some fields are described in the following table.

Field	Description
Account Type	Choose the Contact Us type.
Access List	Indicates which employees can view the Contact Us account.

About Adding Email Addresses and Subjects

If your organization uses Siebel eService, any email addresses you include in Contact Us accounts appear on a Contact Us page on your Web site. You can create default email subjects that are added to the user's Subject line when the user sends email through your Web site.

For more information, see *Siebel eService Administration Guide*.

Setting Up Industries

You can set up and maintain industry information used throughout the application. The information in the Industries view populates the Industries drop-down list, which is found in a variety of screens and views, such as in the Accounts and References screens. The Industry list can also be used by Siebel Assignment Manager to assign new leads or service requests to Siebel users. For example, a sales representative who covers the pharmaceutical industry can be assigned automatically to new accounts based on a *Pharmaceutical* Industry value.

To add an industry

- 1 Navigate to Administration - Data screen > Industries view.
- 2 In the Industries list, create a new record.

- 3 Complete the Industry, SIC Code, and Type fields.

NOTE: The Industry and SIC Code values must be unique. If you add a value that already exists, you receive an error message.

Setting Up Languages

You can set up and maintain language information used throughout the application. The information in the Languages view populates the Language drop-down list, which is found in a variety of screens and views, such as in the References and SmartScripts screens. The Language field can also be used by Siebel Assignment Manager to give assignments to call center agents who work for international companies and speak a variety of languages with customers.

For example, a sales representative for a German chemical manufacturing company could use a Danish SmartScript to make a sales call to a prospective customer in Copenhagen, and then make the same sales call using an Italian SmartScript when speaking to a prospective customer in Rome. In these cases, the Language field is used to identify the language into which each SmartScript has been translated.

To add a language

- 1 Navigate to Administration - Data screen > Languages view.
- 2 In the Languages list, create a new record.
- 3 Complete the Name and Code fields.

NOTE: The Name and Code values must be unique. If you add a value that already exists, you receive an error message.

NOTE: Languages cannot be deleted because deleting languages may cause problems with Mobile Web Client synchronization. While the delete language command can be restored using Siebel Tools, this is strongly discouraged. Additionally, ask for assistance from Siebel Technical Services before modifying any language code.

About Case Sensitivity

By default, Siebel applications are case-sensitive. If you perform a query or search, there is a match only if the search criteria you enter are capitalized in the same way the data is capitalized in the database.

If you do not want queries and searches to be case-sensitive, you can enable case insensitivity either for the entire application or for selected fields. Regardless of which setting you choose, users can use operators to force case-sensitive or case-insensitive searches.

For information on how case insensitivity affects performance, see *Performance Tuning Guide*.

To force a case-sensitive search, use the operator = followed by the criterion in single quotation marks. For example, if the user enters the criterion = 'Computer', the query returns only records that have "Computer" spelled with a capital C in the field.

To force a case-insensitive search, use the operator ~LIKE. For example, if the user enters the criterion ~LIKE computer, the query returns all records that have "computer" in the field, regardless of capitalization.

The user must also use ~LIKE to force case insensitivity in searches with complex criteria, regardless of the setting for case sensitivity.

NOTE: You should determine your requirements for case-insensitive searching and set the appropriate parameters for the application or individual field before users enter any data.

Enabling Application-Wide Case Insensitivity

About the CaseInsensitive Parameter

Application-wide case sensitivity is controlled through the CaseInsensitive parameter of the named subsystem representing the data source definition.

The CaseInsensitive parameter only affects which data is retrieved by queries. It does not affect the order in which data appears on the screen. The sort sequence is database-dependent, and independent of the CaseInsensitive parameter.

In addition, the content of SRF files is case-sensitive in most cases and is not affected by how this parameter is set in the application configuration file.

You change the CaseInsensitive parameter in different ways, depending on whether you are working with Siebel Web Client or Siebel Dedicated Web Client:

- ["Enabling Application-Wide Case Insensitivity for Siebel Web Client" on page 69](#)
- ["Enabling Application-Wide Case Insensitivity for Siebel Dedicated Web Client" on page 69](#)

About the InsensitivityFactor Parameter

When you change the CaseInsensitive parameter, you may also want to change the InsensitivityFactor parameter to minimize performance degradation.

The default setting for the InsensitivityFactor parameter is 2.

NOTE: Do not change the default value of InsensitivityFactor for Gateway Data Source (GatewayDataSrc) in the CFG file.

You may want to test a number of values for this parameter with your database, spool the SQL to see the effect of different settings on response time and then choose a value that meets your needs. For more information about the InsensitivityFactor parameter, see *Siebel System Administration Guide*.

Enabling Application-Wide Case Insensitivity for Siebel Web Client

For Siebel Web Client, you make changes to the CaseInsensitive parameter in the Administration - Server Configuration screen.

To enable application-wide case insensitivity for Siebel Web Client

- 1 Navigate to the Administration - Server Configuration screen > Enterprises view.
- 2 Click the Profile Configuration view tab.
- 3 In the Profile Configuration list, select a data source record, for example, the Server Datasource.
- 4 In the Profile Parameters list, change the value of the DSCaseInsensitiveFlg to True.
Optionally, change the DSInsensitivityFactor parameter as well, to control performance degradation.
- 5 Stop and restart the Application Object Manager (AOM) server components.

Enabling Application-Wide Case Insensitivity for Siebel Dedicated Web Client

For Siebel Dedicated Web Client, application-wide case sensitivity is controlled through the CaseInsensitive parameter in the configuration file for your application.

The configuration file for each Siebel application has a section for each one of the potential data sources for the application. By default, each of these data source sections has the following line:

```
CaseInsensitive = FALSE
```

To enable application-wide case insensitivity for Siebel Dedicated Web Client

- 1 Use any text editor to open your application configuration (CFG) file.
- 2 Change the CaseInsensitive parameter to
CaseInsensitive = TRUE
- 3 Optionally, change the InsensitivityFactor parameter to control performance degradation.
The InsensitivityFactor parameter follows the CaseInsensitive parameter in each application configuration file.

Enabling AOM Case Insensitivity

It is possible to have different case sensitivities for different Application Object Managers (AOMs).

The procedure outlined here for changing the case settings for individual server components should only be carried out by an experienced configurator.

To set case insensitivity for a single AOM

- 1 Create a new Server Datasource that is the same as the standard Server Datasource except that `DSCaseInsensitiveFlg = TRUE`.
- 2 Create a new AOM.
The new AOM is required because the Datasource parameters are fixed for the standard AOMs and cannot be changed there.
NOTE: Copying an object manager does not set all parameters automatically in the copy, so you need to set them manually.
- 3 For the following parameters, replace each `ServerDataSrc` value with your new Datasource name:
 - `CFGDatasource`
 - `DataSource`
 - `NamedDataSource` (This is an advanced parameter.)

Enabling Field-Specific Case Insensitivity

You can also make individual fields case-insensitive.

You control field-specific case insensitivity with the Use Default Sensitivity property. This property determines whether the field uses the default property specified by `CaseInsensitive` parameter in the CFG file, described previously. Table 11 illustrates the relationship between the application-wide `CaseInsensitive` parameter and the field-specific Use Default Sensitivity property.

Table 11. Case Sensitivity Behavior

Use Default Sensitivity =	CaseInsensitive = TRUE	CaseInsensitive = FALSE
TRUE	Field is case insensitive	Field is case sensitive
FALSE	Field is case sensitive	Field is case insensitive

To enable case insensitivity for individual fields

- 1 Leave the `CaseInsensitive` parameter set to `FALSE` in the application configuration file.
- 2 In Siebel Tools, navigate to the Business Component/Field screen.
- 3 For each field you want to be case-insensitive, set the Use Default Sensitivity property in the field object to `FALSE` for the Field level Object Type.
You can also force the case of data in a field to be `UPPER` (all uppercase), `LOWER` (all lowercase), `FIRSTUPPER` (first letter of each word is uppercase, or `NONE` (unchanged).
- 4 After doing this for all of the fields you want to control, recompile your SRF file.

- 5 Replace the SRF file in your Siebel Server installation.

Adding Web Browser Capabilities

Siebel applications come with a number of browsers configured for use. Generally, you do not need to make changes to the Web browser settings. However, if you need to add a capability to a browser, you can do so through the Web Browser Administration screen.

Web browser capabilities identify what an end user's browser can and cannot do. They support the Siebel Web Engine's ability to provide different HTML tags and other markup tags to different browsers, based on what each particular browser is capable of rendering. This can also allow an administrator or developer to specify what looks best in a particular browser.

When a user logs into a Siebel Web application, the Siebel Web Engine reads information encapsulated in the requests coming from the user's browser to determine the browser's version and make. It then correlates that information with the data contained in the Web Browser Administration views to determine the browser's capabilities.

One of the primary ways this information is applied is through conditional tags in Web templates. For example, if some of your users use an older browser that does not support frames, your template might include a conditional tag that prevents these users from receiving pages with frames. Conditional Web engine tags that evaluate browser capabilities can be used in all Siebel Web templates and Web applications, but are used most prominently in those that support wireless devices. For example, the SWLSStart.swt template includes the following conditional tag:

```
<swe: swi tch>

<swe: case condi ti on="Web Engi ne User Agent, TestCapabi l i ty, ' Defaul tMarkup: XML' ">

<swe: pagei tem i d="3" property="FormattedHtml " />

</swe: case>
```

By the time that the Web Engine interprets the swe:case tag, it has already determined what type of browser the user has. The usage of the tag causes the Web Engine to call the TestCapability method on the Web Engine User Agent business service. The TestCapability method returns TRUE if the user's browser has a Capability called DefaultMarkup with a value of XML. When the condition is met (that is, the method returns TRUE) the tags between <swe:case> and </swe:case> are processed. For more information about the syntax of conditional tags, see *Configuring Siebel eBusiness Applications*.

Adding Additional Capabilities

Siebel applications come with a number of predefined capabilities. These capabilities can be added to any browser. Some examples include:

- **FrameSupport.** Indicates whether the browser can render frame tags (for example, <swe:frameset>).
- **CookiesAllowed.** Indicates whether the browser supports cookies.

- **HighInteract.** Indicates whether the browser is among those supported for Siebel's High Interactivity Web applications (such as Internet Explorer 5.5).
- **ActiveX.** Indicates whether the browser can support ActiveX controls.

You can also add other capabilities that are not included in the standard Siebel application. For example, you could add a capability named *SupportsWingDingFont*. New capabilities then become available for use in any browser definition.

To add a capability

- 1 Navigate to Administration - Web Browser screen > Capabilities view.
- 2 In the Capabilities list, create a new record.
- 3 Complete a name and description for the new capability.

Adding Additional Web Browsers

If you need to add a Web browser definition that is not included in the standard Siebel application, you can choose between the following two methods.

- **Add a parent browser definition.** This definition includes all of the browser capabilities. Use this method if you need to add a completely new browser (such as Opera), or a major upgrade release of an existing browser (such as future releases of Microsoft Internet Explorer or Netscape). For information about this procedure, see [“To add a parent Web browser” on page 74](#).
- **Add a child browser definition.** Child browser definitions inherit the capabilities of the parent browser, and add additional capabilities as necessary. Use this method for adding interim releases based on a browser that is already defined. For example, a “dot” release, such as 5.7 or 5.8. For information about this procedure, see [“To add a child Web browser” on page 74](#).

Required Browser Capabilities

For a browser to work correctly, it must include two capabilities that allow the browser to be identified at run time. The required capabilities are:

- **User-Agent.** This capability names the browser.
- **Accept.** This capability indicates what types of documents the browser can open.

These capabilities are part of HTTP standard information and appear in HTTP request headers sent from a browser. For example, a request from a Microsoft Internet Explorer 5.5 browser sent to a Web application might include the following lines:

```
Accept: image/gif, image/x-xbitmap, image/jpeg, image/pjpeg, application/vnd.ms-
powerpoint, application/vnd.ms-excel, application/msword, */*
```

```
User-Agent: Mozilla/4.0 (compatible; MSIE 5.5; Windows NT 4.0)
```

In this example, the value for the User-Agent capability would be Mozilla/4.0 (compatible; MSIE 5.5; Windows NT 4.0).

Both the User-Agent and Accept capabilities must be included. This is because at run time, the User-Agent is checked to identify the browser. If the User-Agent is not recognized, the values for the Accept parameter in the header are compared to the Accept parameters of the browsers listed in the Web Browser Administration screen, to find the browser with the most closely matching Accept parameters.

In addition to the User-Agent and Accept capabilities, if a browser is based on an existing parent browser, it must include the Parent capability.

NOTE: Parent browsers frequently do not have the User-Agent and Accept capabilities. This is because parent browsers are intended to serve as containers of other capabilities that can be inherited. If a browser does not have its own User Agent and Accept capabilities, then it is acting as a parent of another browser that has these capabilities.

Adding JumpTab Capability for Internet Explorer 5.0

If you are running your Siebel application on Internet Explorer 5.0, you need to set the JumpTab capability to True.

(If the JumpTab capability is not set, users need to click the back button twice to return to the previous page.)

To add the JumpTab capability

- 1 Navigate to Administration - Web Browser screen > Capabilities view.
- 2 In the Capabilities list, select the JumpTab capability record.
- 3 In the form, in the Capability Value field, enter TRUE.

Adding a Web Browser

Whether you are adding a parent browser or a child browser, the process is similar. However, in the case of a parent browser, you add all detailed components, and in the case of a child browser, you base the browser on an existing browser.

NOTE: Although a parent browser may contain the User-Agent and Accept capabilities, it does not have to. If you use parent browsers as templates for child browsers, do not include these two capabilities in the parent browser template.

To add a parent Web browser

- 1 Navigate to Administration - Web Browser screen > Browsers view.
- 2 In the Browser list, create a new record.
- 3 Complete a name and description for the new browser.
- 4 Drill down on the record.
- 5 In the Capabilities list, create records for each of the capabilities for this browser.

NOTE: If there is an existing browser that contains most of the appropriate capabilities, you can copy it and then make changes. To do so, in [Step 2](#), click the menu button and choose Copy Record instead of New Record.

To add a child Web browser

- 1 Navigate to Administration - Web Browser screen > Browsers view.
- 2 Note the name of the parent browser (that is, the one on which you will base the new browser).
- 3 Create a new record.
- 4 Complete a name and description for the new browser.
- 5 Drill down on the record.
- 6 In the Capabilities list, create these three records:
 - **Parent.** Set the capability value to the parent browser you identified in [Step 2](#).
 - **User-Agent.** Enter the appropriate User-Agent.
 - **Accept.** Enter the types of documents that can be opened by the browser.
- 7 Add any additional capabilities that are not included in the parent browser or that differ from those inherited from the parent browser.

Administering Quick Fill Templates

For information about creating Quick Fill Templates, see *Fundamentals*.

Users can create quick fill templates for their personal use. Administrators can make these templates public so that all users have access to them. Administrators can also delete any quick fill template and make simple changes to the template record (such as name, sequence, and public flag).

To make a quick fill template public

- 1 Navigate to the Administration - Application screen > Quick Fill Templates Administration view.
- 2 Select the template record.
- 3 Click the Menu button, and select Make Public.

To edit a quick fill template

- 1 Navigate to the Administration - Application screen > Quick Fill Templates Administration view.
- 2 Select the template record.
- 3 Edit the fields as necessary.

The Sequence Number determines the order in which the fields are filled in.

Setting Up Default View Links for Screen Home Pages

For more information about screen home pages and setting up view links, see *Fundamentals*.

Administrators can define links that appear on the quick links area of screen home pages. These default view links are visible to all users.

To add a default view link to a screen home page

- 1 Navigate to the Administration - Application screen > View Links view.
- 2 In the Screen Homepages list, select the home page.
- 3 In the View Links list, create a new record and complete the necessary fields.

Make sure that the view you specify is available to all users.

TIP: Use increments of 10 to sequence the links. This gives users space to create their own view links between the default ones that you create.

5

Working with Lists of Values

This chapter provides guidelines to administrators for working with lists of values within Siebel applications. It includes the following topics:

- [“About Lists of Values” on page 77](#)
- [“Adding a New Value to an Existing List of Values” on page 78](#)
- [“Clearing the Cache” on page 79](#)
- [“List-of-Values Fields” on page 80](#)
- [“Modifying a List of Values” on page 82](#)
- [“Inactivating a Value in a List of Values” on page 83](#)
- [“Constrained Lists of Values” on page 84](#)

About Lists of Values

A list of values (LOV) is a set of values that populates a *static picklist*, which is accessed when a user clicks a drop-down list in the user interface.

Drop-down lists can be based on two types of picklists: static picklists and dynamic picklists.

- A static picklist has a selection list that is a static list of values. An example of a static picklist is a drop-down list containing postal abbreviations for states and countries.
- A dynamic picklist has a selection list that usually contains transactional data. An example of a dynamic picklist is a drop-down list containing account names.

As a rule of thumb, dynamic picklists include all picklists that do not retrieve values stored in the S_LST_OF_VAL table. Dynamic picklists are typically rendered through a pick applet, such as the picklist used to choose an account for a contact. However, they can be configured to appear as a drop-down list.

The remainder of this section focuses on static picklists, whose contents can be administered from the list-of-values views. For information on how to set up a new list of values and configure both static and dynamic picklists, see *Configuring Siebel eBusiness Applications*.

This section describes how to work with the values that populate static picklists, including how to create or modify values in an existing list of values, and inactivate values when you do not want them to display. In addition, it describes how lists of values can be constrained by selections in other lists.

NOTE: If you will be creating multilingual lists of values (MLOV), you should also review *Configuring Siebel eBusiness Applications*.

There are two views in the Administration - Data screen in which you can view list-of-values data:

- In the List of Values view, a list view

■ In the LOV Explorer view

The values in these two views are the same. Only the format in which the information is presented is different. The procedures in this section give instructions that specify using the list view. If you prefer to use the explorer view, you may do so.

Your Siebel applications come with numerous lists of values that support the static picklists used throughout Siebel screens. You can use these as they are, or you can modify them through the list-of-values views to support your organization's requirements.

Adding a New Value to an Existing List of Values

In order to add an item to an existing list of values so that it shows up in a drop-down list, you must know its type. You can find out the type by querying the list-of-values list to determine the type associated with a specific display value. Then you can create a new record with that type. For instance, in the Accounts list you can see the Status drop-down list. Imagine that you use this field to indicate ratings for your accounts' reliability. Initial settings are Gold and Silver. You might want to add another status of Bronze to this list, to give to customers that have a reliable account rating. The procedure below uses this example.

The maximum number of values allowed for one LOV type is 10,000.

To identify the list-of-values type for a display value

- 1 Navigate to the screen displaying the drop-down list to which you want to add a value (for example, the Accounts screen).
- 2 Select the drop-down list and make note of one of the choices.
For example, in the Accounts screen, select the Status drop-down list and make note of the value *Gold*.

TIP: Be sure to note the capitalization and spacing of the choice.

- 3 Navigate to Administration - Data screen > List of Values view.
- 4 In the list-of-values list, perform a query in the Display Value field, using the value you noted in [Step 2](#).
- 5 In the list of records that is returned, identify the appropriate record by reviewing the entries in the Type field.

List-of-values types usually have names that relate to the field labels in the screens where they are used. In this example, you would look for a type labeled something like ACCOUNT_STATUS.

When you create a new value for this list, you will use this type.

To add a new value to an existing list of values

- 1 Navigate to Administration - Data screen > List of Values view.

- 2 Click New to create a new record, and then enter the list-of-values type in the Type field.

- 3 Enter a new value in the Display Value field.

For example, if Bronze is the status that your organization gives customers that have a reliable account rating, and you want to make Bronze available as in the Account Status drop-down, you would create a new record with ACCOUNT_STATUS as the type and Bronze as the display value.

Make sure that the length of the Display Value you enter does not exceed the allowed length of the destination column.

- 4 Enter a value in the Language Independent Code field. This value is usually the same as the Display Value.

Make sure that the length of the Language Independent Code you enter does not exceed the allowed length of the destination column.

NOTE: The Display Name and Language Independent Code must both be unique within a list-of-values type, except when configuring a multilingual list of values. If you add a value that already exists, you get an error message. For example, there cannot be two ACCOUNT_STATUS records that have a display value of Bronze. For information about how this differs for multilingual lists of values, see the definition of the Language Independent Code field in [Table 12 on page 80](#).

- 5 If applicable, in the Order field, you can enter a number to indicate the numerical order in which the value appears in a drop-down list.

For example, if the order numbers for Gold and Silver are 1 and 2, respectively, the order number for Bronze would be 3.

- 6 If appropriate, complete the remaining fields in the record.

For a description of these fields, see [“List-of-Values Fields” on page 80](#).

- 7 Clear the LOV cache by clicking Clear Cache.

After you have cleared the cache, you can navigate to a screen and select the new value in the related drop-down list. For example, you can navigate to the Accounts screen, select a record from the Accounts list, and then choose Bronze in the record's Account Status drop-down list.

Clearing the Cache

A particular list of values is cached the first time a user opens a drop-down list that uses the list of values. This improves performance by avoiding the need to retrieve the list from the database upon subsequent usage of the drop-down list. However, this also means that updates to a list of values do not show up in a drop-down list until you clear the cache. Clearing the cache instructs the Siebel application to read the updated values out of the database and display them.

Users who log in after you add or change a list of values can see the addition or change that you made. However, in order for you to see the changes that you made in real time, you must do one of the following:

- For the Dedicated Web Client, log out of the application and log back in.
- For either the Web Client or the Dedicated Web Client, clear the cache.

About LOV Caching on Screen Home Pages

LOV caching behaves slightly differently on screen home pages.

On screen home pages, the LOVs are cached as soon as the page is displayed. It is not necessary for the user to open the drop-down list in order to have the LOVs cached.

Procedure for Clearing the Cache

To clear the cache (using the Clear Cache button)

- 1 Navigate to Administration - Data screen > List of Values view.
- 2 In the List of Values list, click Clear Cache.

List-of-Values Fields

List-of-values records have the fields shown in [Table 12](#). Not all fields for list-of-values records are displayed in the standard user interface. You can use the Columns Displayed menu option to see a field that is not displayed.

Some list-of-values fields, such as High, Low, and Weighting Factor, are for use by specialized Siebel C++ code to store additional information about the selected list-of-values record. In addition, pick maps can use list-of-value fields such as High, Low, and Weighting Factor. Pick maps normally use the Display Value field, which causes the list item selected by the user to be stored in the database exactly as it appears in the list. These fields can be used to populate other fields of the business component in which the pick map is defined.

If you need to use the High or Low fields, or other extra fields, use Siebel Tools to extend the PickList Generic BusComp by adding fields mapped to the corresponding columns on the S_LST_OF_VAL table. For example, you could use the High and Low fields to automatically fill in the high and low temperatures when a user picks a Month value in a Date drop-down list. To do so, you would add two pick maps to the Month field by adding the High and Low list of value fields to the Pick List field of Pick Map. For more information about the PickList Generic BusComp, and about configuring static picklists and pick maps, see *Configuring Siebel eBusiness Applications*.

NOTE: The Target High and Target Low fields are used exclusively with Smart Reports. For more information, see *Siebel Reports Administration Guide*.

Table 12. List-of-Values Fields

Field	Description
Type	The type of list of values (the field name).
Display Value	Value as displayed in the drop-down list.
Translate	When checked, indicates that internationalization is needed. (There is no client or server functionality associated with this field.)

Table 12. List-of-Values Fields

Field	Description
Multilingual	When checked, indicates that the list of values is part of a multilingual list of values (MLOV). (There is no client or server functionality associated with this field.)
Language Independent Code (LIC)	<p>Along with the Display Value, the Language Independent Code uniquely identifies a value for a particular LOV type. In most cases the Language Independent Code is the same as the Display Value. However, the Language Independent Code and Display Value are different for multilingual lists of values (MLOVs). MLOVs allow a single logical list item to support multiple display values for users who are accessing the Siebel application in different languages.</p> <p>For example if the MR_MS (Personal Title) list of values were multilingual, there might be three list-of-values items with a Language Independent Code of Mr. These might have a display value and language of Mr. (English-American), Senor (Spanish - Modern), and Herr (German), respectively. German users would see Herr in the Personal Title drop-down list, Spanish users would see Senor and English users would see Mr. Although the display values vary across language instances, the value stored in the database when a user selects any one of these is always Mr. because that is the Language Independent Code associated with Herr, Senor, and Mr.</p> <p>Values entered in the Language Independent Code field are sometimes referred to as LIVs (language independent values).</p>
Parent LIC (Language Independent Code)	<p>The Language Independent Code of a parent list of values. Used in hierarchical lists of values, where the values that will display in a drop-down list are constrained by the value selected in the parent drop-down list of values. For more information, see “Constrained Lists of Values” on page 84.</p> <p>There are only parents and children in this hierarchy. Grandchildren are not allowed. This is enforced by limiting the values in the Pick Parent dialog box to those values which do not themselves have parent display values.</p>
Replication Level	Specifies whether the translation is intended for use at all levels in the translation hierarchy or only at the regional level.
High	Extra field available for use by pick maps or for customization.
Low	Extra field available for use by pick maps or for customization.
Order	The numerical order in which a value is displayed within a drop-down list.
Active	When checked, indicates that the value is displayed to the end user. When unchecked, indicates that the value is not displayed to the end user.

Table 12. List-of-Values Fields

Field	Description
Language Name	Language used for the list of values Display Value field.
Target Low	Extra field used in Smart Reports.
Target High	Extra field used in Smart Reports.
Weighting Factor	Extra field available for use by pick maps or for customization.
Bitmap	Bitmap file that is displayed.
Description	Description of a specific value.

Modifying a List of Values

CAUTION: Use caution when modifying lists of values that are part of the seed data. Modifying some list-of-values fields that are used programmatically by the Siebel application can adversely impact standard Siebel functionality. However, you can modify the Display Value field without affecting standard Siebel functionality both when the list is a multilingual list of values (MLOV) and when it is a standard list of values.

Modifying some lists of values can adversely impact standard Siebel functionality:

- Do not change the Language Independent Code values for lists of values because the internal Siebel application uses the Language Independent Code field.
- Some lists of values are for use only by the internal Siebel application and should not be modified. For example, the list-of-values SOURCE_TYPE (Internal) and list-of-values types that include REPOSITORY in the Type field name are for internal use only.
- Some list-of-values modifications can have undesired results. For example, changing all lists of values in the application to uppercase or changing the Language Independent Code from the Siebel standard can result in values not being displayed or being displayed improperly.

NOTE: Modifying a Display Value field does not automatically update records that have been populated with the old value. For example, if you change *Ms.* to *Miz* in the Display Value field, *Miz* show up in the drop-down list, but all contact records that were previously entered with *Ms.* in the Personal Title field still have *Ms.* in the Personal Title field.

For more information about multilingual lists of values (MLOVs), see *Configuring Siebel eBusiness Applications*.

In order to modify a value in a drop-down list, you must know its display value and type. You can find out the type by querying the list-of-values list for a specific display value. For example, if you needed to make a change to the value *1-ASAP* in the Priority drop-down list in the Activities screen, you could do so using the following steps.

To modify an item in a list of values

- 1 Navigate to Administration - Data screen > List of Values view.
- 2 Click the menu button, and then choose New Query.

- 3 Enter the Display Value for the record you want to change in the Display Value field.
For example, you might enter the value *1-ASAP*.
- 4 Click the menu button, and then choose Run Query.
A list of records appears that includes the display value that you entered. More than one record may appear, and the records may have different types.
- 5 In the list of records, select the record that you want to modify, and make the desired change.
- 6 To see the list-of-values modification in the application, click Clear Cache. For instructions about how to clear the cache, see ["To clear the cache \(using the Clear Cache button\)" on page 80](#).

Inactivating a Value in a List of Values

You can inactivate individual values in a list, but you cannot delete values. Inactive values are values that the application does not display to end users in a drop-down list, whereas active values are displayed to end users.

CAUTION: Inactivating some lists of values can adversely impact standard Siebel functionality.

Do not inactivate list-of-values types or values used internally by the Siebel application. For example, do not inactivate list-of-values types that include "Repository" in the Type field name.

Be careful when inactivating a list of values, because the application may depend on the list of values being present.

Be careful when inactivating individual values as well. For example, if you inactivate the value Commercial in the Account_Type list of values, but you have existing or old account data that stored Account Type = Commercial, you may introduce inconsistencies in your data. If you want to inactivate a display value, you need to clean up the account records in the database first.

To inactivate a value in a list of values

- 1 Navigate to Administration - Data screen > List of Values view.
- 2 If necessary, perform a query to locate the record you want to make inactive.
- 3 Select the list of values record you want to make inactive.
- 4 In the Active field, click the check mark. When a square containing an x appears, click the x.
The x disappears and the Active field no longer contains a check mark.
- 5 To see that the value has been inactivated, click Clear Cache.

Constrained Lists of Values

Some drop-down lists are set up to display a subset of values based on a value set in another drop-down list. For example, if you have two fields for Service Request, *Area* and *Subarea*, the values shown in the *Area* drop-down list might include *Network* and *Upgrade*. If the user chooses *Network*, that user might see a drop-down list for *Subarea* that includes *Ethernet Card* and *3rd Party Software*. If on the other hand the user chooses *Upgrade* for the *Area*, that user might see *CD-ROM*, *Disk Drive*, *Memory*, and *Operating System* in the *Subarea*. Setting up this type of filtering is referred to as setting up a *constrained picklist*. In such a case, the lists of values have been configured to be dependent on one another. In this example, the *Area* drop-down list is considered to be the parent and the *Subarea* drop-down list is the child.

Figure 2 shows the values available in the *Area* drop-down list, and the values available in the *Subarea* list when *Network* and *Upgrade* have been selected, respectively.

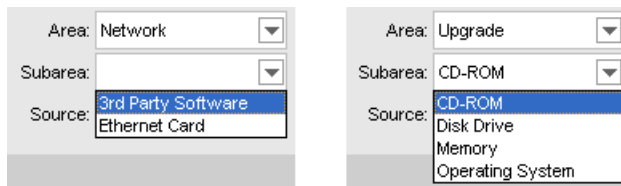


Figure 2. Contents of Drop-Down List Constrained by Parent Drop-Down List

Constrained picklists (or lists of values) must first be set up through Siebel Tools. After they are configured through Siebel Tools, specific values in lists can be made hierarchically dependent through the List of Values view. This is accomplished by using the Parent LIC attribute in the list-of-values record to specify which values show up when a value is selected in the parent drop-down list.

For example, the LOV Type `SR_AREA` is used by both the Area and Subarea drop-down lists in a Service Request. The values that show up in the Area drop-down list are constrained to those that have a Parent LIC value of `External`. [Figure 3](#) shows how the records for these values appear in the list-of-values list, including the Parent LIC value of `External`.

List of Values Menu ▾ New Delete Query Clear Cache							
Type	Display Value	Language-Indepe	Language Name	Parent LIC	Order	Active	Translate
SR_AREA	User Interface	User Interface	English-American	External	7	✓	✓
SR_AREA	Installation	Installation	English-American	External	3	✓	✓
SR_AREA	Upgrade	Upgrade	English-American	External	5	✓	✓
SR_AREA	Usage	Usage	English-American	External	6	✓	✓
SR_AREA	Network	Network	English-American	External	4	✓	✓
SR_AREA	Internet Registration	Internet Registration	English-American	External	8	✓	✓
SR_AREA	Configuration	Configuration	English-American	External		✓	✓
SR_AREA	CTI Hardware	CTI Hardware	English-American	External		✓	✓
SR_AREA	Solution Search	Solution Search	English-American	External		✓	✓
SR_AREA	eMail Response	eMail Response	English-American	External		✓	✓
SR_AREA	Smart Scripts	Smart Scripts	English-American	External	2	✓	✓

Figure 3. LOV Records with the Same Parent LIC

The values that show up in the Subarea drop-down list are constrained to those that have a Parent LIC value that matches the user's selection for the Area. For example, if the user selects *Network* in the Area drop-down, only those values that have the Parent LIC set to *Network* show up in the Subarea drop-down list, while if the user selects *Upgrade* in the Area drop-down, only those values that have the Parent LIC set to *Upgrade* show in the Subarea drop-down list. [Figure 4](#) shows the records for the values that are available for both the Network and Upgrade parent values.

List of Values Menu ▾ New Delete Query Clear Cache							
Type	Display Value	Language-Independent Code	Language Name	Parent LIC ▲	Order	Active	Translate
SR_AREA	3rd Party Software	3rd Party Software	English-American	Network	5	✓	✓
SR_AREA	Ethernet Card	Ethernet Card	English-American	Network	5	✓	✓
SR_AREA	Memory	Memory	English-American	Upgrade	5	✓	✓
SR_AREA	Operating System	Operating System	English-American	Upgrade	5	✓	✓
SR_AREA	CD-ROM	CD-ROM	English-American	Upgrade	5	✓	✓
SR_AREA	Disk Drive	Disk Drive	English-American	Upgrade	5	✓	✓

Figure 4. LOV Records Constrained by the Values Upgrade and Network

If you needed to change the parent Area to which a Subarea list item belongs, you would modify the Parent LIC code of the Subarea list item. Similarly, to add a new Subarea list item, you would create a new record, setting the list-of-values type to SR_AREA and the Display Value, Language Independent Code, and Language as described in [“Adding a New Value to an Existing List of Values” on page 78](#). Then you would set the Parent LIC code to the appropriate parent area. By contrast, to add a new item to the Area drop-down list, you would follow the same steps, but specify that the Parent LIC code have the value *External*.

NOTE: The usage of the value *External* to identify items in the parent drop-down list is specific to this example. To determine what this value would be for any given pair of constrained picklists, reference the underlying configuration in the Tools Repository.

For information about constraining both static picklists (maintained through lists of values) and dynamic picklists, see *Configuring Siebel eBusiness Applications*.

NOTE: In the example above using the Area and Subarea drop-down lists, both parent and child lists of values have the same list-of-values type. While this is not required, it has the advantage of avoiding EIM unique key violation errors. These errors can occur when constraining picklists using Siebel Tools, when the parent and child lists of values contain different list-of-values types. If you plan to use Siebel EIM to exchange list-of-values data, you should consider constraining picklists by configuring them so that the parent and child lists of values have the same list-of-values type.

6

Audit Trail

This chapter is about Audit Trail. It includes the following topics:

- [“About Audit Trail” on page 87](#)
- [“Process of Configuring and Using Audit Trail” on page 91](#)
- [“Configuring Audit Trail in Siebel Tools” on page 91](#)
- [“Specifying Business Components and Business Component Fields for Audit” on page 93](#)
- [“Specifying Parent–Child Associations for Audit” on page 94](#)
- [“Specifying Audit Trail Restrictions” on page 96](#)
- [“Verifying Audit Trail Configuration” on page 97](#)
- [“Viewing Audit Trail Records” on page 97](#)
- [“Viewing Audit Trail Records” on page 97](#)
- [“About the Audit Trail Engine Business Service” on page 100](#)

About Audit Trail

Audit Trail creates a history of the changes that have been made to data in Siebel applications. An audit trail is a record showing who has accessed an item, which operation was performed, when it was performed, and how the value was changed. Therefore, it is useful for maintaining security, examining the history of a particular record, documenting modifications for future analysis, and record keeping. Audit Trail logs information without requiring any interaction with, or input from, your users.

Audit Trail can be used for a variety of purposes. In a simple example, a call center uses an audit trail to track the status change of a service request, who changed it and when. Audit trail capabilities can also be used to track the time needed to change the state of an item, such as a service request from open to closed. A calculation of the time difference can help the call center manager measure and improve service quality. Audit trail can also be used to reproduce a record at a given point in time to maintain regulatory compliance by looking at the audit trail records of changes and the current state of the record.

NOTE: For any audit trail deployment, the combination of the number of fields audited and the number of audit records created by a given business process has performance implications. Auditing a large number of fields on a business component or auditing fields in a large number of business components may produce unacceptable performance that is counter to the overall business requirement.

Audit trail works for replication and synchronization. For Siebel Remote and Siebel Replication users making changes to records Audit Trail records successfully committed transactions and also transactions that did not get synchronized to the server because of conflicts.

Audit Trail Features

More Audit Trail features are described in the following topics:

- [“Audit Scope” on page 88](#)
- [“Audit Trail Content” on page 88](#)
- [“Audit Trail Modes” on page 88](#)
- [“Audit Trail Constraints” on page 89](#)
- [“Audit Trail for Siebel Remote and Siebel Replication Users” on page 90](#)
- [“File Auditing and Database Auditing Modes” on page 90](#)
- [“Audit Trail Recovery in File Auditing Mode” on page 91](#)

Audit Scope

System administrators can specify the audit scope by the following means:

- Operations (such as update, new, delete, and copy) performed on business components
- Operations performed in a specific time period
- Only those operations performed by certain responsibilities, positions, or employees

Audit Trail Content

Audit Trail records the following information in selected business components:

- Field
- Row ID of the record being changed
- Operation being performed (Update/New/Delete/Copy)
- Original value
- Changed value
- User ID performing the operation
- Date and time the operation was performed

Audit Trail Modes

The Siebel Web Client supports the following choice of audit trail modes:

- **File auditing.** An audit trail can be written to files and later imported into the database, providing better performance.

- **Database auditing.** An audit trail can be written directly into the database, supporting both remote users and replicated databases. Changes to an audit trail field are cached in the application. Exiting from the Siebel application and restarting it writes all cached changes to the database. Alternatively, when the cache size is reached, all cached entries are automatically written to the database even without exiting from the application.

Audit Trail Constraints

The following cannot be audited:

- The underlying business component not derived from CSSBCBase. This is because Audit Trail's functionality resides only in business components of class CSSBCBase. The procedure ["To determine if a business component can be audited"](#) tells you how to determine whether or not a business component can be used in Audit Trail.
- Virtual business components. This is because they are not derived from business components of class CSSBCBase.
- The merge action.
- Calculated fields. This is because, typically, the value for a calculated field is derived from a table-based field. To audit a calculated field, you can audit the table-based field that was used to derive the calculated field.
- Record inserts, updates, and deletes performed through Enterprise Integration Manager (EIM), Assignment Manager, or workflow policy actions. This is because these do not go through the Siebel Object Managers.

To determine if a business component can be audited

- 1 Launch Siebel Tools.
- 2 In the Object Explorer, navigate to the Business Component object type.
- 3 In the Object List Editor, select the business component.
- 4 In the Class field, look for CSSBCBase. If the class is CSSBCBase, the business component can be used for Audit Trail.

CSSBCBase and CSSBusComp are the most basic class types. If there is a value in the Class field that is not CSSBCBase or CSSBusComp, then there is specialized functionality that has been written in C++ related to this class.

NOTE: You can change the class from CSSBusComp to CSSBCBase.

- 5 To see if this specialized class is related to CSSBCBase, drill down on the Class hyperlink.

- 6 In the Super Class field, look for CSSBCBase. If the class is not CSSBCBase, drill down on the Super Class hyperlink.

If the Super Class is...	Then the business component...
CSSBCBase	can be audited.
CSSBusComp	cannot be audited.
(blank)	cannot be audited.

NOTE: Repeat [Step 6](#) until the Super Class field is either CSSBCBase, CSSBusComp, or blank.

Audit Trail for Siebel Remote and Siebel Replication Users

The following information applies to remote and replication users:

- Disconnected users can use Audit Trail as well as connected users. Audit Trail stamps transactions with local machine time.
- Remote and replication users should only use database auditing mode (and not file auditing mode). This is because file mode does not allow the auditing information to be synchronized with the server database.
- Audit trails are synchronized or replicated along with other data.
- If the transaction is rejected during the conflict resolution, the corresponding audit trail record is not discarded.

File Auditing and Database Auditing Modes

The following information applies to file auditing and database auditing modes:

- Database auditing writes transaction records directly to the database, while file auditing writes to the Siebel File System. You can later import these files into the database. (See [“To import audit trail items from a file into the Siebel database” on page 98](#).) You can schedule import batch processes for these files using workflow processes. (See the ImportAll method in [Table 13 on page 100](#).)
- If you use file auditing mode, you have to import files into the database to have a comprehensive view and to be able to query for the information you need. Otherwise, you can view records only on a file-by-file basis.
- For systems in which every user is a connected user, file auditing mode yields better performance. Systems using Siebel Remote should use database auditing.
- Purging and archiving can be done at the database level.

Audit Trail Recovery in File Auditing Mode

When running in file auditing mode, instead of writing to the Siebel File System every time a new Audit Trail file is created, the Siebel application saves Audit Trail files to a file directory on the Object Manager to improve performance. When the Object Manager closes normally, these files are uploaded to the Siebel File System simultaneously.

If the Object Manager exits abnormally, Audit Trail keeps track of which files have been uploaded to the Siebel File System and which ones have not. The next time Audit Trail starts, any files that have not been uploaded are uploaded automatically.

Process of Configuring and Using Audit Trail

This example process represents the tasks that are carried out when setting up and monitoring Audit Trail.

- 1 [“Configuring Audit Trail in Siebel Tools” on page 91](#) (Enabling Audit Trail)
- 2 [“Specifying Business Components and Business Component Fields for Audit” on page 93](#)
- 3 [“Specifying Parent–Child Associations for Audit” on page 94](#)
- 4 [“Specifying Audit Trail Restrictions” on page 96](#) (Restricting according to user, position, or responsibility)
- 5 [“Verifying Audit Trail Configuration” on page 97](#)
- 6 [“Viewing Audit Trail Records” on page 97](#)

Configuring Audit Trail in Siebel Tools

The Audit Trail functionality is not enabled in the preconfigured application. By enabling the Audit Trail business service with Siebel Tools, Audit Trail becomes available to application objects. You can turn off the Audit Trail for individual applications by deactivating the Audit Trail application event service for the application.

For workflows, the Audit Trail function will not work unless the Start Method of the Audit Trail Engine Business Service is included as a first step in the workflow process. For more information, see [“About the Audit Trail Engine Business Service” on page 100](#).

NOTE: Audit Trail does not create history records for predefault values; predefault values are assumed to be part of the initial record. If, however, the default values are changed at a later date and those fields are set to be audited, then both the original and changed values are recorded.

Enabling the Audit Trail Engine Business Service

This task is a step in [Process of Configuring and Using Audit Trail on page 91](#).

To enable the Audit Trail Engine business service

- 1** Launch Siebel Tools.
- 2** In the Object Explorer, select the Business Service object, and then select the Business Service User Prop object.
- 3** Select Audit Trail Engine in the Business Services object list.
- 4** Configure the Business Service User Properties to use the following values:

Name Field	Value Field	Description
Audit Source	TABLE	Can be TABLE or FILE. Signifies the database or file auditing mode in which you are going to run Audit Trail.
Cache Entries Size	1	The number of records to cache before writing the audit trail records for the selected mode. For example, if this field is set to 10 and Audit Source is running in FILE mode, then after the user makes 10 audited changes for a particular business component, the Audit Trail engine creates one file in the Siebel File System. When running in TABLE mode, you should use the default value of 1 because there is no performance gain from increasing this value.
Enable	TRUE	Can be TRUE or FALSE. Determines the current state of the Audit Trail.

NOTE: Audit Trail data is cached by the business service and only written out when the number of Audit Trail changes exceeds the specified cache size. You can also flush cached entries by logging out of the current session and then logging back in to check the Audit Trail data.

Disabling Audit Trail for an Application***To disable Audit Trail for an application***

- 1** Launch Siebel Tools.
- 2** In the Object Explorer, double-click the Application object to expand it and select Application Event Services.
- 3** In the Application Event Services list, deactivate the Audit Trail Engine business service record. (Look for a record with the following values.)

Name Field	Value Field
Business Service	Audit Trail Engine

Name Field	Value Field
Event Name	Start
Method Name	Start

Configuring an Application for Audit Trail

Use the following procedure to enable a customized application object for auditing, or to re-enable an application object that has been turned off.

To configure an application for Audit Trail

- 1 Launch Siebel Tools.
- 2 In the Object Explorer, double-click the Application object to expand it and select Application Event Services.
- 3 In the Application Event Services list, create the following record if it does not already exist.

Name Field	Value Field
Business Service	Audit Trail Engine
Event Name	Start
Method Name	Start
Name	Start
Sequence	1 or the next available sequence number

About Using Audit Trail with Object Interfaces

When accessing an Application Object Manager through object interfaces such as COM Data Control and Java Data Bean, Audit Trail is not started automatically. In these cases, you must invoke the Audit Trail Engine business service explicitly.

Specifying Business Components and Business Component Fields for Audit

You administer the business component and the business component fields to be audited.

This task is a step in [Process of Configuring and Using Audit Trail on page 91](#).

To configure the business component and business component fields to be audited

- 1 Navigate to the Administration - Audit Trail screen.

- 2 In the Audit Trail Buscomp list, create a new record and complete the necessary fields. Some fields are described in the following table.

Field	Description
Assoc	Specifies whether to audit associations with the child business components in the Child Buscomp list. See “Specifying Parent–Child Associations for Audit” on page 94 .
Copy	Select if you want to audit the Copy operation.
Delete	Select if you want to audit the Delete operation. Clear this check box if you want to make sure that the delete operation is not audited.
End Date	Date on which the auditing stops. To turn Audit Trail off for an individual business component, set the End Date to a date that has already passed.
New	Select if you want to audit the New operation.
Restriction Type	Specifies whether there is a rule determining who gets audited.
Start Date	Date on which the auditing starts.
Update	Select if you want to audit the Update operation.

- 3 In the Field list, create a new record for the field you want to audit.
- 4 Repeat [Step 3](#) until the Field list shows all the fields in that business component that you want to audit.

NOTE: For any audit trail deployment, the combination of the number of fields audited and the number of audit records created by a given business process has performance implications. Auditing a large number of fields on a business component or auditing fields in a large number of business components may produce unacceptable performance that is counter to the overall business requirement.

To disable individual business components

- 1 Navigate to Administration - Audit Trail screen.
- 2 Use one of the following methods to disable Audit Trail:
 - In the Audit Trail Buscomp list, enter an end date prior to today’s date in the End Date field.
 - In the Audit Trail Buscomp list, delete the record for the business component.

Specifying Parent–Child Associations for Audit

In the Siebel application, parent–child associations are set through:

- MVG (multi-value group) fields
- Parent–child applets

Audit Trail can keep track of changes in parent–child associations. For example, you can audit the association (and dissociation) of contacts with accounts.

This task is a step in [Process of Configuring and Using Audit Trail on page 91](#).

To configure business components for auditing of parent–child associations

- 1** Determine the name of the child business component whose association you want to audit.
- 2** Navigate to the Administration - Audit Trail screen.
- 3** In the Audit Trail Buscomp list:
 - Select an existing record for the parent business component.
 - Or
 - Create a new record for the parent business component and complete the necessary fields. Some fields are described in table in [Step 2 on page 94](#) of the preceding procedure.
- 4** Make sure that the Assoc field is checked.
- 5** Click the Child Buscomp view tab.
- 6** In the Child Buscomp list, create a new record for the child business component whose association with the parent business component you want to audit.

TIP: The Business Component dialog box lists all business components—query for the name of the child business component you identified in [Step 1](#).

Specifying Audit Trail Restrictions

You can restrict who gets audited by user, position, or responsibility.

For example, if you set the Restriction Type to “Users” on the Audit Trail Buscomp Fields view, you then go to the Audit Trail Users View and add the users whom you want to audit. Restriction by responsibility or position works in the same way.

This task is a step in [Process of Configuring and Using Audit Trail on page 91](#).

To restrict by user

- 1 Navigate to Administration - Audit Trail screen.
- 2 Select a business component entry in the Audit Trail Buscomp list.
- 3 Click the User view tab.
- 4 In the Audit Trail Buscomp list, change the Restriction Type field to User.
- 5 Select the Audit Trail User list, and create or edit records.
Only these users are audited for the operations on this particular business component.
- 6 If you:
 - Changed the Restriction Type field in [Step 4](#) (for example from No Restriction to User), then restart the Application Object Manager so that the changes take effect.
 - Only created or changed users, then start a new session to see the changes take effect.

To restrict by position

- 1 Navigate to Administration - Audit Trail screen.
- 2 Select a business component entry in the Audit Trail Buscomp list.
- 3 Click the Position view tab.
- 4 In the Audit Trail Buscomp list, change the Restriction Type field to Position.
- 5 Select the Audit Trail Position list, and create or edit records.
Only these positions are audited for this particular business component.
- 6 If you:
 - Changed the Restriction Type field in [Step 4](#) (for example from No Restriction to Position), then restart the Application Object Manager so that the changes take effect.
 - Only created or changed positions, then start a new session to see the changes take effect.

To restrict by responsibility

- 1 Navigate to Administration - Audit Trail screen.
- 2 Select a business component entry in the Audit Trail Buscomp list.

- 3 Click the Responsibility view tab.
- 4 In the Audit Trail Buscomp list, change the Restriction Type field to Responsibility.
- 5 Select the Audit Trail Responsibility list, and create or edit records.
Only these responsibilities are audited for this particular business component.
- 6 If you:
 - Changed the Restriction Type field in [Step 4](#) (for example from No Restriction to Responsibility), then restart the Application Object Manager so that the changes take effect.
 - Only created or changed responsibilities, then start a new session to see the changes take effect.

Verifying Audit Trail Configuration

The following steps are part of the verification process to make sure that the business component and business component fields were specified correctly.

This task is a step in [Process of Configuring and Using Audit Trail on page 91](#).

To verify audit trail records

- 1 Navigate to the view for the business component that you want to audit.
- 2 Make a change to the data in that view.
- 3 If you are using database auditing, verify audit creation as follows:
 - a Navigate to Audit Trail screen > Audit Trail Items view.
 - b In the Audit Trail Items list, make sure there is a new record showing the changes that you made to the business component by querying the business component and field values.
- 4 If you are using file auditing mode, verify audit creation as follows:
 - a Exit and restart the application.
 - b Navigate to Audit Trail screen > Audit Trail List view.

NOTE: The Host Computer name in the Audit Trail record is the name of the machine on which the object manager is running. This field is not configurable.
 - c Verify that there is a new record in the Audit Trail list from your previous session and the corresponding Audit Trail Item list displays the changes you made to the business component.

Viewing Audit Trail Records

After you have set up the fields, operations, responsibilities, positions, and employees to be audited, you can read the results of the audit trails in the Audit Trail view and the Audit Trail Items view.

Audit Trail View for File Auditing Mode

When you use file auditing mode, the Audit Trail list in the Audit Trail view provides a list of files that have been audited for each user, business component, and session. The Audit Trail Items list gives details of the selected file record. You have to import files into the database to have a comprehensive view; otherwise, you can view records on a file-by-file basis only.

CAUTION: You should purge and archive your records from the Siebel audit table S_AUDIT_ITEM regularly to prevent the table from becoming too large. Carry out these operations directly at the database level using native SQL. There is no EIM interface table corresponding to the S_AUDIT_ITEM table.

This task is a step in [Process of Configuring and Using Audit Trail on page 91](#).

To import audit trail items from a file into the Siebel database

- 1 Navigate to Audit Trail screen > Audit Trail List view.
- 2 Select a record in the Audit Trail Buscomp list.
- 3 In the Audit Trail Item list, click the menu button and select Import Audit Trail Item.
The audit trail items are imported into the table.
- 4 From the Show drop-down list, select Audit Trail Items.

NOTE: If you go back to the Audit Trail view and try to import audit trail items that you have already imported, you will not be able to import them.

To view audit trail records and record details

- 1 Navigate to the Audit Trail screen > Audit Trail Items view.
- 2 Select a record in the Audit Trail list.
The Audit Trail Items list displays details of the selected record.

Querying Audit Trail Information

After recording or importing Audit Trail records into the database, you can query Audit Trail information in the Audit Trail Items view. For example, you can query Audit Trail items to determine changes made by team members, dates, or operations performed on a business component.

To query audit trail information

- 1 Navigate to the Audit Trail screen > Audit Trail Items view.
- 2 Query the list for Audit Trail items of interest.

Linking Audit Trail to a Business Component

In some circumstances, you might need to link the Audit Trail view to a specific business component view. For example, a Call Center team might want to see the Audit Trail records for individual service requests. Using Siebel Tools, you can create a view that would allow the Call Center team to see these Audit Trail records, if the following conditions are met:

- Audit Trail must be running in database auditing.
- You must be able to audit the business component you are linking to Audit Trail. For information on determining if a business component can be used in Audit Trail, see [“Audit Trail Constraints” on page 89](#).

NOTE: Because audit trail item records are not routed to mobile Web clients, data in these linked views can only be displayed in Siebel Web client and the Siebel Dedicated Web client. Make sure that mobile clients do not have access to views displaying audit trail data.

To link Audit Trail to a business component

- 1 Launch Siebel Tools.
- 2 Create a link between the Audit Trail Item 2 business component and the business component to which you are linking Audit Trail. Set the parent business component property of the link to the name of the audited business component.

For example, if you are configuring the view to show the audit trail records for the Product Defect business component, the parent business component should be Product Defect. The Child Business Component for the link should be Audit Trail Item List 2. The Source and Destination Fields for the link should be Id and Record Id respectively.
- 3 Modify the business object for the business component to which you are linking Audit Trail. You need to create Audit Trail Item 2 as one of the business object components and specify the Link property as the link you created in [Step 2](#).
- 4 Create a view which has an applet based on the selected business component as a parent and the Audit Trail Item List 2 applet as a child.
- 5 Add this view to a screen.
- 6 Launch a Siebel employee application.
- 7 Navigate to Administration - Application screen > Views view.
- 8 From the Show drop-down list, choose Responsibilities, and add the new view to applicable responsibilities.

About the Audit Trail Engine Business Service

The Audit Trail Engine business service is located in the Object Manager and stays active as long as the Object Manager is active. The purpose of the Audit Trail Engine business service is to capture changes (updates and deletes) to records and to store them in the designated format (database or Siebel File System, according to the audit trail mode selected). For the various data operations, if the auditing condition is met, the business component being audited triggers the Audit Trail Engine business service.

The methods listed in [Table 13](#) are associated with the Audit Trail Engine business service. The Start, Stop, and ImportAll methods are accessible to an administrator and allow the performance of certain tasks.

Table 13. Exposed Methods in the Audit Trail Engine Business Service

Method	Mode	Internal Use Only	Description
Start	Both		Starts the Audit Trail Engine.
Stop	Both		Stops the Audit Trail Engine.
ImportAll	File only		Imports all the associated Audit Trail Item business component records.
AddTrailEntry	Both	X	For the person specified, creates an audit trail entry to the pertinent data structure (unsaved audit list).
CommitTrail	Both	X	Removes the uncommitted elements from the unsaved list and puts them on the saved list, and writes to the database or file if the cache size has been reached.
CrashRecover	File only	X	Saves file from local system to the Siebel File System.
Kill Unsaved Trail	Both	X	Kills the unsaved audit trail; this happens on an UndoRecord.

The easiest way to use these methods is through a workflow process. If you want to stop or restart the Audit Trail Engine, create a new workflow process, or reuse an existing one: create a business service node that implements the Stop method or the Start method. For general information about Siebel workflows, see *Siebel Business Process Designer Administration Guide*.

7

Creating and Administering iHelp

This chapter is about administering iHelp. It includes the following topics:

- "About iHelp" on page 101
- "Scenario for Administering iHelp" on page 101
- "Process of iHelp Administration" on page 102
- "Creating iHelp Item Records" on page 102
- "Designing iHelp" on page 104
- "Clearing the iHelp List Cache" on page 108
- "Activating, Revising, and Deactivating iHelp Items" on page 108
- "Translating iHelp Items" on page 110
- "Importing and Exporting iHelp Items" on page 111

About iHelp

iHelp is real-time step-by-step instruction that helps users complete tasks within the application.

iHelp is best used to provide instruction to first time or occasional users.

NOTE: iHelp may not be appropriate for enforcing standards, because users are free to follow or not follow any given step.

For information about how to use iHelp, see *Fundamentals*.

About iHelp and Standard Activity Mode

iHelp instructions can be used in both standard and high interactivity mode. However, high interactivity mode is required to create and administer iHelp items.

Scenario for Administering iHelp

This scenario provides an example of a process performed by two iHelp administrators. Your company may follow a different process according to its business requirements.

Introduction

The agents in training in the North American call centers of a multinational company want step-by-step instructions on how to create activities.

The iHelp Administrator in North America

The North American administrator creates an iHelp item to appear in the iHelp pane of the Activities and Accounts screens (screens frequently used by the agents). Because these instructions only pertain to call center agents, this iHelp item is set to be visible only to those users with the Call Center responsibility.

The North American administrator and the call center managers are the only people who need to modify this iHelp item; the administrator restricts edit access by associating the Call Center access group with the iHelp task.

Various employees test the iHelp task. When the tests are complete, the administrator activates the iHelp item.

At the end of the month, a policy change takes place that effects some steps in the iHelp item. This is handled by creating two versions of the iHelp item. One item is set to expire at the end of the month and second item (with steps corrected for the new policy) is set to become active at the beginning of the next month.

In North America, the call centers operate in both English and French. The manager of the francophone call center revises the iHelp item, translating the text into French.

The European iHelp Administrator in Europe

The European call centers use a different database, but they also want their call center agents to see this iHelp item. The North American administrator exports the iHelp item to file and sends it to the European administrator. Then, the European administrator imports the item into the European database, adds responsibilities and access groups, and activates the iHelp item.

Process of iHelp Administration

This example process represents the tasks that are carried out in the [“Scenario for Administering iHelp” on page 101](#).

- 1 [“Creating iHelp Item Records” on page 102](#)
- 2 [“Designing iHelp” on page 104](#)
- 3 [“Clearing the iHelp List Cache” on page 108](#)
- 4 [“Activating, Revising, and Deactivating iHelp Items” on page 108](#)
- 5 [“Translating iHelp Items” on page 110](#)
- 6 [“Importing and Exporting iHelp Items” on page 111](#)

Creating iHelp Item Records

The first task in creating iHelp items is to create the iHelp item record.

In this task, you determine the following for the iHelp item:

- In which applications the iHelp item is displayed

- In which screens the iHelp item is displayed
- Which users can see the iHelp item
- Which administrators can modify the iHelp item
- (Optional) Activation and expiration dates for the iHelp item
- If the iHelp item is downloaded to remote and local databases

TIP: Although iHelp items can be exported and imported, best practice is to create and test your iHelp item in the production environment where it will be used. While testing, restrict visibility to the item by limiting the associated responsibilities.

This task is a step in [Process of iHelp Administration on page 102](#).

To create an iHelp item record

- 1** Navigate to the Administration - iHelp screen > All iHelp Items view.
- 2** Create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	<p>This is the name that appears in the iHelp pane. Make sure that the name clearly identifies the iHelp item.</p> <p>Do not include any special characters such as colons or quotation marks in the Name.</p>
Remote Support	<p>iHelp items can be downloaded to regional and local databases. Use this field to determine if items are downloaded:</p> <ul style="list-style-type: none"> ■ All. Items are downloaded to both regional and local databases ■ Regional. Items are downloaded to regional databases only ■ None. Items are not downloaded to databases
Application	<p>Add the applications where you want the iHelp item to display. For example, if you want the iHelp item to be used in Siebel Call Center, set this field to Siebel Universal Agent (the internal name for the Call Center application).</p> <p>Make sure that all these applications contain the screens and views needed for the item iHelp you create.</p>
Private	<p>If this box is not selected, any user with access to the Administration - iHelp screen can modify the iHelp item. If you want to restrict edit access for this iHelp item, see Step 5 on page 104.</p>
Activation Date	<p>(Optional) If an activation date is set, the iHelp item does not appear in the iHelp pane until that date.</p>
Expiration Date	<p>(Optional) If an expiration date is set, the iHelp item does not appear in the iHelp pane after that date.</p>

Field	Comments
Status	The status changes when the Activate, Revise, and Deactivate buttons are clicked.
Version	This field is automatically updated when a item of the same name is created or imported.
Description	(Optional) Enter a description of the iHelp item. This description is for the administrator only. The text does not appear in the iHelp pane.

3 Set which users can see the iHelp items (in the iHelp pane or Map):

- a** Click the Responsibilities view tab.
- b** Associate the responsibilities of those users who you want to see the iHelp item.
- c** Make sure the Active flag is selected for each responsibility.

NOTE: Users also need to have the Task Assistant Player View associated with at least one of their responsibilities.

4 Set the screens and views where the iHelp item appears:

- a** Click the Screens view tab.
- b** Associate screen name/business object/view tab records with the iHelp item.

Only screens and views that are common to all the applications specified in the Application field can be associated.

For example: to have an iHelp item appear on the Activities screen home page and the Activities screen (My Activities, My Team's Activities, and so on), associate the Action Home and the Action business objects with the item.

5 If you want to restrict edit access for the item, set the access groups to determine who can modify the iHelp item:

- a** Click the Access Groups view tab.
- b** Associate access groups with the iHelp item. Make sure that you belong to one of the access groups.
- c** Click the More Info view and select Private check box in the form view.

For more information about access groups, see *Security Guide for Siebel eBusiness Applications*.

Designing iHelp

Assemble step-by-step iHelp instructions in the iHelp Designer by creating steps and connecting them with branches.

Figure 5 shows an example of iHelp instructions displayed in the iHelp pane.

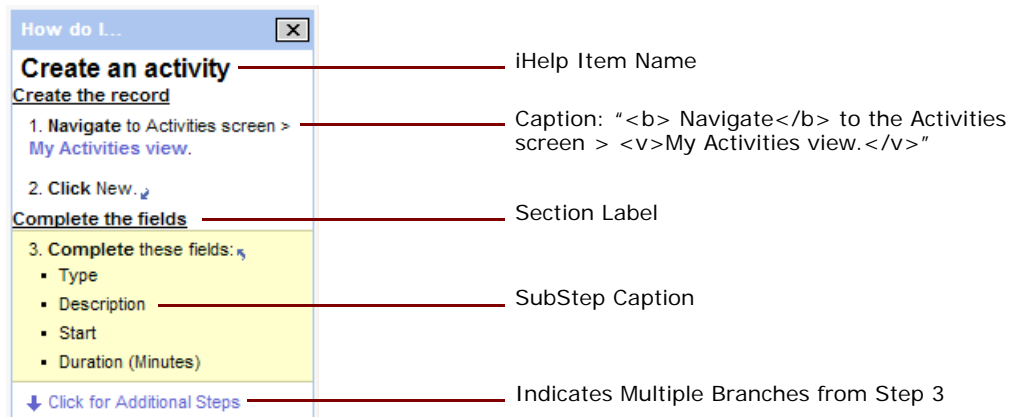


Figure 5. Relation Between iHelp and Components of iHelp Designer

Figure 6 shows the fields listed in Step 3 of Figure 5, highlighted.

Figure 6 is a screenshot of the "Activity" form in the iHelp Designer. The form has a title bar "Activity" and a menu bar with "Menu", "New", "Delete", "Cancel", and "Query". The form contains several fields: "Description", "Priority", "Start", "Display In", "Status", "Duration", "Type", "Private", and "End". The fields "Description", "Display In", "Type", and "Duration" are highlighted in yellow.

Figure 6. Fields Highlighted (Step 3)

Figure 7 shows how the iHelp instructions appear in the iHelp Designer.

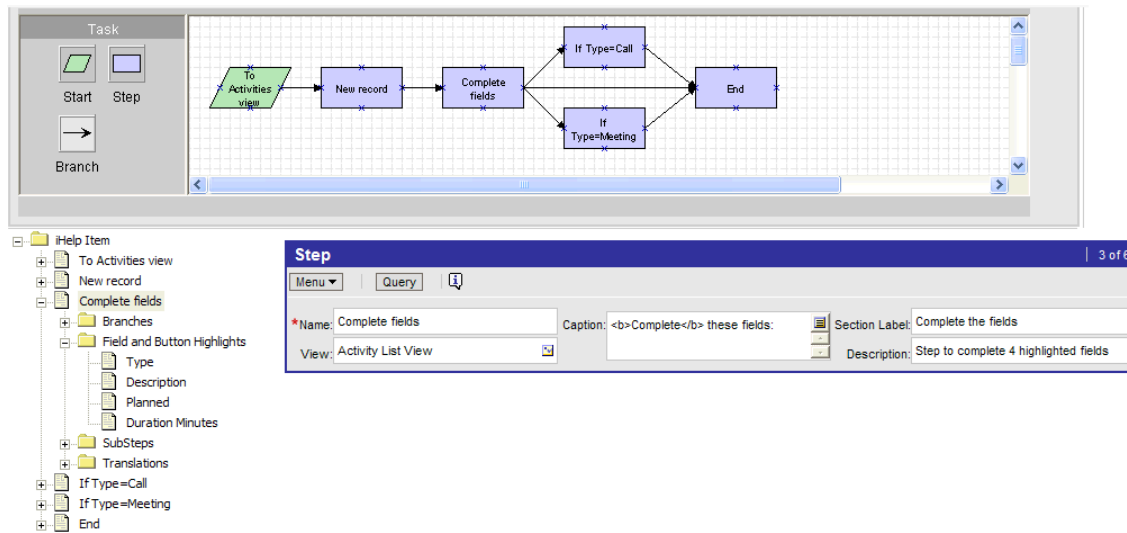


Figure 7. iHelp Designer Shows iHelp Steps That Correspond to Figure 5

To access the iHelp Designer

- 1 Navigate to the Administration - iHelp screen > All iHelp Items view.
- 2 Drill down on the name of the iHelp item.

To create an iHelp step

- 1 In the iHelp Designer, drag the Step or Start icon onto the grid.

The first step in any iHelp must be Start. The start step should navigate the user to the correct view for the iHelp item. Only one Start step is allowed per iHelp item.

2 In the Step form, complete the fields.

Some fields are described in the following table.

Field	Comments
Name	This name appear on the step's icon in the iHelp Designer. The user does not see this name.
View	<p>Enter a view name if you want the step to:</p> <ul style="list-style-type: none"> ■ Provide a hyperlink to a view. ■ Highlight buttons or fields on the view. <p>NOTE: If you provide a hyperlink to a screen which is different from the main screen for the iHelp, you may lose record context as you navigate to the other screen. For example, a user in the Contact Activities view of the Contacts screen, highlights an activity record and clicks an iHelp link to the Activities screen. In going to the Activities screen, the record context is broken. The highlighted activity is no longer selected, and the user must query for it again. If you remain in the same screen, context is generally maintained.</p> <p>Only views that are common to all the applications specified in the Application field are available for selection.</p>
Caption	<p>This is the text that appears in the step.</p> <p>Use the following tags to format step captions:</p> <ul style="list-style-type: none"> ■ <code></code> and <code></code> for bold ■ <code><i></code> and <code></i></code> for italic ■ <code><u></code> and <code></u></code> for underlining ■ <code><v></code> and <code></v></code> for view navigation links
Section Label	(Optional) This text appears above the step.
Description	For the administrator's use only. This description is not visible in the iHelp pane.

3 (Optional) Highlight a button or field:

- a Click the Field and Button Highlights folder.
- b In the Field and Button Highlights list, create new records and complete the fields.

NOTE: Most buttons, column headings, and single-value fields can be highlighted. These are applet controls with HTML Type of Field or MiniButton (all MiniButton types). MVG fields and read-only fields cannot be highlighted.

4 (Optional) Create substeps:

- a Click the SubSteps folder.

- b** In the SubSteps list, create new records, and complete the Caption field.

NOTE: You cannot add view navigation links to substeps.

To connect steps with branches

- 1** Drag the Branches icon onto the grid.
- 2** Move the end points of the branch to connect two steps.
- 3** If multiple branches leave one step, set conditions on the branches:
 - a** Click the Branches folder for the step.
 - b** In the Branches list, complete the fields.

No Condition Expression is required for the last branch in the sequence.

For information on the Branch Condition Expression Designer, see *Siebel Business Process Designer Administration Guide*.

Clearing the iHelp List Cache

iHelp loads all iHelp items to the iHelp Map and iHelp pane when the application is initialized. When you modify iHelp items, you may need to clear the iHelp List Cache before you can see changes to the iHelp item (in the iHelp pane).

To clear the iHelp List Cache

- 1** Navigate to the Administration - iHelp screen > All iHelp Items view.
- 2** From the menu button, choose Clear iHelp List Cache.

Activating, Revising, and Deactivating iHelp Items

The Activate, Revise, and Deactivate buttons control:

- The status of the iHelp items.
- Whether the items are visible in the iHelp pane and iHelp Map.
- Whether the items can be edited.

The behavior of these buttons is described in [Table 14](#).

Table 14. About the Activate, Revise, and Deactivate Buttons

Button	When to Use	Effect	Changes Status From...	To...
Activate	The iHelp item is complete and ready for general use.	Cannot be modified (although it can be deleted) The status and version no longer appear with the item name in the iHelp pane.	In Progress	Active ¹
Revise	You want to make changes to an active iHelp item.	Copies the iHelp item to a new record that can be edited. For the new record, deselects Active flag on Responsibilities view.	Active Inactive	In Progress
Deactivate	You no longer want the item to display in the iHelp pane.	The iHelp item is no longer displayed in the iHelp pane or the iHelp Map.	Active	Inactive

1. Any active version of the item becomes Outdated

To activate an iHelp item

- 1 Navigate to the Administration - iHelp screen > All iHelp Items view.
- 2 Select an in-progress iHelp item.
- 3 Click Activate.

To revise an active iHelp item

- 1 Navigate to the Administration - iHelp screen > All iHelp Items view.
- 2 Select an active iHelp item.
- 3 Click Revise.

To deactivate an iHelp item

- 1 Navigate to the Administration - iHelp screen > All iHelp Items view.
- 2 Select an active iHelp item.
- 3 Click Deactivate.

Translating iHelp Items

When translating an iHelp Item, only the text strings that the user sees is translated. These text strings are:

- Item name
- Section labels
- Step captions
- Substep captions

If translation is not defined for a language, the text from the base record is displayed.

To translate an iHelp item

- 1 Navigate to the Administration - iHelp screen > Translations view.
- 2 In the iHelp Items list, select an iHelp item.
- 3 In the Translations list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Display Name	Translation of the iHelp item name

- 4 Click the Designer view tab.
- 5 For each step:
 - a Open the Translations folder.
 - b Create a record to the Translations list and complete the fields.
- 6 For each substep:
 - a Open the Translations folder for the substep.



- b In the Translations list, create a new record and complete the necessary fields.

Importing and Exporting iHelp Items

iHelp items can be exported and imported as XML files.

Export and import iHelp items to:

- Move iHelp items from one database to another, for example when upgrading
- Create backups of iHelp items

You cannot move iHelp items between different types of Siebel repositories. For example, you cannot export from a Siebel Call Center application to a Siebel Automotive application. In general, you need to make sure that all the applications, screens, and views referenced in the exported item are available in the repository where the item is imported.

To export an iHelp item as an XML file

- 1 Navigate to the Administration - iHelp screen > All iHelp Items view.
- 2 In the iHelp Items list, select an iHelp item.

CAUTION: Make sure that the name of the item does not contain any special characters such as colons or quotation marks.

- 3 From the menu button, choose Export iHelp Item Definition.

To import an iHelp item

- 1 Navigate to the Administration - iHelp screen > All iHelp Items view.
- 2 From the menu button in the iHelp Items list, choose Import iHelp Item Definition.
- 3 Browse for the iHelp item XML file and click Import.

If an iHelp item of the same name already exists, the imported iHelp item is imported as a new version of the item.

After import, the iHelp Items list is filtered to show only the newly imported item.

CAUTION: Responsibility and access group information is not exported or imported.

8

Message Broadcasting

This chapter explains the procedures necessary to administer message broadcasting for Siebel applications. It includes the following topics:

- [“About Message Broadcasting” on page 113](#)
- [“Scenario for Administering Message Broadcasting” on page 114](#)
- [“Process of Message Broadcasting” on page 115](#)
- [“Enabling and Disabling Message Broadcasting” on page 115](#)
- [“Creating a Message Broadcast” on page 116](#)
- [“About Automatically Updating Message Broadcasting Text” on page 119](#)
- [“Configuring Message Broadcast Caching” on page 120](#)

About Message Broadcasting

Message broadcasting provides a platform for administrators and other users with access to the Message Broadcasts view to send important information directly to users’ screens. Typically, this information is time-critical such as a due date, or it is updated frequently such as a call queue’s status.

NOTE: Message Broadcasting is available for employee applications. (It is not available for customer or partner applications.)

The messages can be displayed by one of the following two methods:

- Scroll messages in the message bar across the bottom of a user’s screen, visible at all times.
- Display messages in a dialog box in the middle of the screen in addition to scrolling across the bottom of the screen.

Messages have severity levels (indicated by color) and activation and expiration dates.

Message Broadcasts can be created through the administration view, automatically from Siebel Business Process Designer, or remotely from a third-party application through Siebel eAI.

In What Order Are Messages Displayed?

Message Broadcast messages are retrieved from the Message table through the Siebel application server and sent to the message bars of the targeted Siebel Web Client sessions. There is no set order for the messages to appear on the message bar, that is, the order cannot be controlled by the administrator or the end user.

About Disabling Messages

Users can disable their scrolling message bar, but the administrator can override this setting for broadcast messages.

About Message Broadcast Caching Versus Directly Polling the Database

There are two methods for ways for the application to obtain the messages for display:

- The default behavior is to have the messages read from the database each time the message bar is refreshed. This method can adversely affect performance if the message bar is set to refresh frequently.
- Message Broadcast Caching stores messages in each application's object manager. The messages are then broadcast through the Service Request Broker (SRBroker).

Scenario for Administrrating Message Broadcasting

This scenario is an example of process flows performed by an administrator working with call center agents to create and send broadcast messages. Your company may follow a different process flow according to its business requirements.

The contact center administrator wants to inform customer-care representatives of the current total number of outbound calls relative to their day's goal. In addition, the administrator wants the customer-care representatives to be aware of the current customer service levels and whether there are customers waiting for service.

After working with the telecommunications and application teams to define the appropriate real-time contact center statistics for his customer-care representatives and contact center, the contact center administrator creates broadcast messages, using statistics that come from a variety of sources and third party solutions. The real-time data feed into the Message Broadcasting tables are accomplished through Siebel eAI, UAN, or both after the appropriate statistics and their sources have been identified. The customer-care representatives then receive their individualized and group statistics on their message bar in real time.

In addition to providing his customer-care representatives with this real-time status information, the contact center administrator also wants to send informative messages to individuals and teams in real time. Throughout the shifts and work day, he sends these messages to individuals and teams using the Message Broadcasts view within the Siebel application. The contact center administrator can send a message to an individual employee, a set of employees with the same responsibility, a division of employees, or to all employees.

The customer-care representatives service customers using multiple communications channels with the Siebel application. The customer-care representative can receive contact center statistics calculated for an individual, group, or in summary on the message bar within their Siebel application. This real-time information updates the customer-care representatives as to whether they and the call center are meeting their service objectives.

Process of Message Broadcasting

To set up message broadcasting, the administrator typically performs the following tasks:

- 1 "Enabling and Disabling Message Broadcasting" on page 115.
- 2 "Creating a Message Broadcast" on page 116.

Enabling and Disabling Message Broadcasting

By default, message broadcasting is enabled. As an administrator, you can enable or disable message broadcasting at the server level using the following modes:

- Always enabled
- Always disabled
- User enabled (default)

To enable or disable message broadcasting at the server level

- 1 For each application's object manager, edit the Application Message Bar Flag parameter's value, referring to [Table 15](#).

For details on configuring server component (or AOM) parameters, see *Siebel System Administration Guide*.

Table 15. Application Object Manager Parameter Values

Parameter Value	Description
TRUE	<p>Message broadcasting is always enabled. Users cannot disable message broadcasting by setting their personal preferences. For a Siebel Web Client deployment, the Siebel application pushes messages to users. For Mobile Web Client users, messages are synchronized.</p> <p>If you set the Application Message Bar Flag parameter to true, you can specify the update interval for the message bar by selecting the Application Message Bar Update parameter and editing the Current Value. The default value is 120 seconds. (If the update interval is less than the SessionTimeout set in the application's CFG file, sessions never time out.)</p>

Table 15. Application Object Manager Parameter Values

Parameter Value	Description
FALSE	Message broadcasting is always disabled. The message bar and message broadcast alerts do not appear on users' screens. For a Siebel Web Client deployment, the Siebel application server does not push messages to users. For a mobile client users, messages are not synchronized.
User Enable (Or any value other than true or false)	<p>This is the default setting. Message broadcasting is enabled; however, users can set their user preferences to enable or disable message broadcasting. When a Web client user disables message broadcasting, the Siebel application server does not push messages to the user. When a mobile client user disables message broadcasting, messages are not synchronized.</p> <p>If you set the Application Message Bar Flag parameter to User Enable, the update interval is a user preference. For more information, see <i>Fundamentals</i>. (If the update interval is less than the SessionTimeout set in the application's CFG file, sessions never time out.)</p>

To enable or disable message broadcasting on Mobile and Dedicated Web Clients

- 1 Use a text editor to open the CFG file for your Siebel application.
- 2 Find the ShowMessageBar parameter in the CFG file.
For example:
ShowMessageBar=TRUE
- 3 Set the parameter value to TRUE, FALSE, or User Enabled.
See [Table 15 on page 115](#) for more descriptions of each parameter value.
- 4 If you set the ShowMessageBar parameter to true, specify the update interval for the message bar by adding the following line to the CFG file:
MessageBarUpdateInterval = seconds
where *seconds* is the interval in seconds between message bar updates (refreshes). The default value is 120 seconds.
- 5 Save and close the CFG file.

Creating a Message Broadcast

When you create a message broadcast, all connected users that you specify receive the message immediately upon the date and time you have specified that the message be activated. Mobile users, such as field representatives, receive the activated messages when they synchronize.

NOTE: To send a message broadcast, you must have responsibilities that include access to the Message Broadcasts view.

Typically, the appearance of a message broadcast is designated by a single severity level, as specified in the Severity field. Each severity level is associated with a different color. The severity level that you choose determines the color of the message broadcast and how it is delivered.

In addition to using the Severity field to determine the appearance of a message, you can also combine multiple severity levels to create a message broadcast with unique formatting. By adding special tags to the text of a message broadcast, you can change the color of different sections of the message. The following tags are used to combine severity levels in a message:

- [N] for Normal
- [H] for High
- [U] for Urgent

For example, if your message has a severity of normal, but you want specific text to be highlighted, you can tag parts of the text with the code for High or Urgent. Here is an example:

The trunk line from [H]Chicago, Illinois [N]is [U]DOWN!

The beginning of the message appears in the color for the severity of the message, Normal; the words *Chicago, Illinois* appears in the color for High; and the word *DOWN!* appears in the color for Urgent.

To create a message broadcast

- 1 Navigate to the Administration - Communications screen > Message Broadcasts view.
- 2 In the Message Broadcasts list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Abstract	A brief description of the message.
Activation Date/Time	<p>Date and time at which you want to start broadcasting the message. If the Activation field is left blank, the message is broadcast immediately.</p> <p>However, broadcasts are controlled by the application message interval and login.</p> <p>NOTE: The date and time are taken from the Siebel Server (not from the machine where the client browser is running). Make sure that the date and time are set correctly on the Siebel Server.</p>
All Users	Check this option to broadcast the message to all users.
Briefing Bulletin	Check this option to distribute the message as a bulletin on the My Briefing page. For more information, see <i>Siebel eBriefings Administration Guide</i> .
Broadcast	<p>Required to send the message broadcast to recipient's message bar.</p> <p>Check this option to broadcast and display the message. If not checked, the message is not broadcast in the message bar at the bottom of the screen.</p>

Field	Comments
Expiration Date/Time	<p>Date and time at which you want to stop broadcasting the message. If the Expiration field is left blank, the message does not expire and the message continues to be broadcast.</p> <p>NOTE: The date and time are taken from the Siebel Server (not from the machine where the client browser is running). Make sure that the date and time are set correctly on the Siebel Server.</p>
Message	<p>Required to create the message broadcast record. The text you want to send as the message broadcast. This field accepts up to 2,000 characters.</p> <p>To use severity levels within the message text, see “About Automatically Updating Message Broadcasting Text” on page 119.</p>
Recipient Division	<p>The broadcast message is sent to all users associated with the divisions selected in the Divisions dialog box.</p> <p>This field can be used in combination with the Recipient Position field.</p>
Recipient Position	<p>The broadcast message is sent to all users specified in the Recipients dialog box.</p> <p>This field can be used in combination with the Recipient Division field.</p> <p>For an employee name to show up in the Recipients dialog box, the employee must have a position defined and be marked active for that position. If multiple employees occupy the same position, the message is sent to all of them, even though you only see the active employee on the list.</p> <p>Employees with multiple positions see messages sent to any of their positions, regardless of what position they log in as.</p>
Severity	<p>Required to create the message broadcast record. Choose the severity level to indicate the importance and appearance of the message.</p> <p>To force the message broadcast to appear in an alert box in the middle of the screen, in addition to its appearance on the message bar, select Urgent with Alert.</p>

- 3** In the Message field, enter the message broadcast text you want to send.
- 4** (Optional) In the Message field, insert severity level tags as necessary to set the appearance of the message broadcast text.

About Automatically Updating Message Broadcasting Text

As an administrator, you can customize message broadcasting to automatically update message text that changes frequently. For example, a call center's queue statistics frequently change. Every few minutes, an administrator has to update the statistics to make sure agents have the most accurate information. This manual approach is very time consuming and inefficient when dealing with frequently changing data.

You can use Siebel eAI to automatically update message broadcasting text. Your CTI middleware or ACD switch can provide the data for the Siebel application to distribute.

The Broadcast Message business component manages the messages. The fields of this business component are listed and described in [Table 16](#). These field names are necessary for developing the integration object.

Table 16. Field Names for the Broadcast Message Business Component

Field	Description
Abstract	Short summary for identifying the purpose of a message, such as "Calls In Queue"
Activation Date/Time	When the message broadcasting should begin
All	To broadcast the message to all employees with positions defined
Body	The text of the message displayed in the message bar
Division	Used to set recipients using division
Division Id	The internal identification value for Division
Expiration Date/Time	When the message broadcasting should end
Position	Used to set recipients using position
Position Id	The internal identification value for Position
Recipient	Used to set recipients using employee
Recipient Id	The internal identification value for Recipient
Type	Severity of the message as defined in the List of Values type BRDCST_MSG_TYPE
Via Broadcasting	To send the message using message broadcasting
Via Interactive	To send the message via Siebel eBriefings

A sample Visual Basic (VB) script follows, which demonstrates how to create and update a broadcast message with information, using the call center queue as an example. The sample Visual Basic script is generic; your CTI middleware's API determines the structure of syntax like the Msg command.

Sample Message Broadcasting Script

The script can be created through a button, an Excel macro, or another VB application. Because it is a script and not an application, it does not need the VB Set command. All the commands are standard to VB coding.

This script is designed to update a message without an expiration date, not to create a new message every time. For more information on how to get or create a Siebel Application Object, see *Configuring Siebel eBusiness Applications*.

CAUTION: The code in this example updates single value fields. For information on how to update multi-value fields, see *Configuring Siebel eBusiness Applications*.

```
' Get "Broadcast Message" BusComp
  Set BusObj = Siebel Application.GetBusObject("Broadcast
    Message", errCode)
  Set BusComp = BusObj.GetBusComp("Broadcast Message", errCode)

' Find "Calls Waiting" message
  BusComp.SetSearchSpec "Abstract", "Calls In Queue", errCode
  BusComp.ExecuteQuery 0, errCode
  If BusComp.FirstRecord(errCode) <> True Then

' We need to create a new message
  BusComp.NewRecord 0, errCode
  BusComp.SetFieldValue "Abstract", "Calls In Queue", errCode
  End If

' Prepare message using middleware API info.
  Set Msg = "[N]Calls Waiting: [U]10"

' Update the record
  BusComp.SetFieldValue "Body", Msg, errCode
  BusComp.SetFieldValue "All", "Y", errCode

' Write the record
  BusComp.WriteRecord errCode
```

In addition to writing a script, you can use Siebel Business Process Designer to create or update a broadcast message. For more information, see *Siebel Business Process Designer Administration Guide*.

Configuring Message Broadcast Caching

The following task describes how to configure your applications to take advantage of message broadcast caching.

NOTE: Message Broadcast administration is not supported on Mobile Web Clients when message broadcasting caching is on. Additions, edits, and deletions to the Message Broadcasts list should be made when connected to the server.

To configure message broadcast caching

- 1** Enable message broadcast caching at the server level: For each application's object manager, set the Application Enable Message Broadcast Cache parameter to True.

For details on configuring server component (or AOM) parameters, see *Siebel System Administration Guide*.

NOTE: The default value for the Application Message Broadcast Cache Size parameter is 100. It is unlikely that you need to increase this value. The minimum cache size is the ratio [message bar refresh rate] / [message update interval]. For example, if the message bar updates every 120 seconds and the message updates every 10 seconds, you need to set the cache size parameter to at least 12.

- 2** Enable message broadcast caching for Dedicated Web Clients (if any): Add or edit the EnableMsgbroadcastCache parameter in the [Siebel] section in your application's CFG file:

Enabl eMsgbroadcastCache = TRUE

- 3** If you use any workflow policy that contains a workflow policy program of Type = Send Broadcast Message, then activate the Check New Broadcasted Message workflow policy, which belongs to the Siebel Messaging policy group.

For information about activating workflow policies, see *Siebel Business Process Designer Administration Guide*.

The Check New Broadcasted Message policy monitors the S_BRDCST_MSG table and invokes the Notify Broadcasted Message workflow process to broadcast any new message added to the table.

9

Alerts

This chapter explains the procedures necessary to create alerts for Siebel applications. It includes:

- [“About Alerts” on page 123](#)
- [“Scenario for Using Alerts” on page 123](#)
- [“Creating Alerts” on page 124](#)

About Alerts

Alerts provide a platform for administrators and other users with access to the Alert Administration view to send long, complex, and customized messages directly to selected groups of recipients. Typically, these messages are time-critical, but also need to have associations with data in the company database (for instance, literature or products) and to be customized for the recipient.

For example, to communicate product pricing changes to a sales team with members around the world, a sales manager would want to be able to distribute new pricing structures and product information as soon as they are approved. Traditionally, this would be done with email messages, phone calls, or mailed literature. This approach presents some challenges:

- To provide the necessary details, a large quantity of information may need to be distributed, with file attachments or links provided by the manager.
- Different team members may require different price list or product information, depending on their organization, division, or position.
- Distributing information to remote team members may produce a communication lag time.

Features of alerts include the following:

- The abstract of alert messages are displayed in an applet on the recipients' home page, listed in order of the priority specified by the sender. Recipients can click on the abstract to read the entire message.
- Literature items, products, systems, and subsystems can be associated with alerts.
- Access to price list and product information available to different team members may be controlled by organization, division, or position.

Scenario for Using Alerts

This scenario provides an example of a process flow performed by an administrator, a sales manager, and a Human Resources director. Your company may follow a different process flow according to its business requirements.

A multinational software development corporation uses the Siebel Sales application to automate their sales workforce. The company is organized geographically by division for the purpose of access control, and alerts are enabled.

An international sales manager has just been given the go-ahead for a new set of software product bundles, which include one new product. He needs to communicate these price changes to his company's sales force as soon as possible. Because pricing varies by geography, each of the four major geographical regions represented by his company's four sales divisions need to receive a customized message about the new product bundles. He tells the Siebel administrator the details of the alert message that needs to be sent.

The Siebel administrator creates the alert message, and associates a price list and the new product with the message. She creates keywords that users will be able to search on to find the message at a later date, if necessary.

When the Siebel administrator sends the alert, a customized message is sent to all international sales representatives, with the appropriate price list for their division associated. The sales representatives see the alert message on their home pages upon login to the Web client or downloads alerts during synchronization. These users can navigate through the home page or Site Map to read the text and any associated literature items or products.

After sending the alert to the sales force, the Siebel administrator continues with other work. The Human Resources director has requested that employees be sent a weekly alert for the next month, reminding them to attend a benefits information session. The Siebel administrator creates this Human Resources alert, using the same process she used to create the sales force alert, but, instead of sending it as a single-message alert, she designates it to recur at weekly intervals.

Creating Alerts

When you create an alert, all designated connected users receive the alert at the date and time the alert is activated. Mobile users, such as sales field representatives, receive an activated alert after synchronization.

To create an alert

- 1 Navigate to the Administration - Alert screen > Alerts view.
- 2 In the Alerts list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Priority	The priority of the message determines where the message appears in the list of alerts on the users' home pages. Messages with the highest priority are at the top of the list.
Keyword	Enter keywords that the user searches on to find this message.

Field	Comments
Type	<p>The type chosen from the drop-down list helps determine who receives the alert, as follows:</p> <ul style="list-style-type: none"> ■ Employee Home Page Alert: Displays the alert on all employees' home pages. ■ Partner Alert: Displays alerts to employees of registered partner companies. ■ Program Information: Displays the alert to self-registered, individual partners. ■ Public Information: Displays the alert to unregistered, anonymous users.
Abstract	Enter a brief abstract that summarizes the message. This appears as a hyperlink on the appropriate users' home pages.
Activation	Enter the date when the message will first appear to users.
Expiration	Enter the date when the message will no longer appear to users.
Partner Alert	Indicates that the alert is intended for partner companies. Make sure that this field is selected so that your alert will be seen.
Employee Alert	<p>Indicates that the alert is intended for employee users.</p> <p>Make sure that this field is selected so that your alert will be seen.</p>
All Users	<p>Select this box if you want the alert to appear to all users, as indicated by the Employee Alert or Partner Alert check boxes.</p> <p>For example, if the Employee Alert check box is checked, and the All Users check box is checked, all employees receive the alert.</p>
Message Body	<p>Type in the text of the message, including HTML formatting code if desired.</p> <p>Alerts can be enhanced by using the following HTML formatting codes:</p> <ul style="list-style-type: none"> ■ <code>text</code> = bold ■ <code><u>text</u></code> = underline ■ <code><i>text</i></code> = italics ■ <code><h4>text</h4></code> = font size ■ <code><a>href="http:text"</code> = hyperlink to Web page or site
Message Body Preview	Displays message as it will look to users.

- 3 Drill down on the new record.
- 4 If you want to add literature as an attachment:
 - a Click the Literature view tab.

- b** In the Literature list, create a new record for the literature item.

NOTE: Only literature of type Sales Tool can be added.

- 5** If you want to add a product as an attachment:

- a** Click the Product view tab.

- b** In the Product list, create a new record for the product.

- 6** If you want to specify the recipients:

- a** Click the Recipients view tab.

- b** From the Show drop-down list, select Recipient Divisions or Recipient Positions.

- c** Create new records to the Recipient List.

Remember, if you selected the All Users check box in [Step 2 on page 124](#), the message will automatically be sent to all recipients.

10 Administering and Using Inbox

This chapter contains information about Inbox, how end users use Inbox and how administrators can make changes to Inbox types that are already configured.

If you want to create and configure new Inbox types or make changes to Inbox functionality that requires Siebel Tools, see [Chapter 11, "Configuring the Inbox."](#)

This chapter includes the following topics:

- ["About the Inbox" on page 127](#)
- ["Scenarios for Administering and Using the Inbox" on page 129](#)
- ["Process of Administering and Using the Inbox" on page 130](#)
- ["Reviewing All Inbox Items" on page 131](#)
- ["Deleting Inbox Items" on page 132](#)
- ["Setting Expiration Dates and Due Dates for Inbox Items" on page 132](#)
- ["Changing the Destination View for an Inbox Type" on page 132](#)
- ["Changing Inbox Downloading to Remote Databases" on page 133](#)
- ["Adding Inbox Translations" on page 134](#)
- ["Taking Action on Inbox Items \(End User\)" on page 134](#)
- ["Reviewing Completed Items \(End User\)" on page 135](#)
- ["Reviewing Submitted Items \(End User\)" on page 135](#)

NOTE: If you have been using the previous version of Inbox and have upgraded to Version 7.7, see *Upgrade Guide* for the operating system you are using.

About the Inbox

The goals of the Inbox are to provide end users with:

- A single screen that shows all approval and notification items assigned them regardless of the screen where the item originated.
- Enough detailed information about the item so that they can act on the item from the Inbox and not have to navigate to other screens for more information.

Table 17 lists some terminology used in this chapter.

Table 17. Inbox Terminology

Term	Definition
Inbox item	Inbox items are requests for approval and notification that appear in end users' Inboxes. Inbox items point to other records (or to feature objects in the database) which require review or approval. Inbox item is shortened to "item" in some text in this chapter.
Deactivated Inbox item	The Inbox item has been processed or has expired. (It no longer appears in the Inbox Items List.)
Inbox screen	This is the screen where the end users: <ul style="list-style-type: none"> ■ Take action on their current Inbox items ■ View their completed items ■ View their submitted items
Inbox Items List	Inbox items that the user (the item's owner) needs to act on appear in the Inbox Items List.
Submitted Items List	Deactivated Inbox items that have been submitted by the user appear in the Submitted Items List.
Completed Items List	Deactivated Inbox items appear in this list. Typically these are the items for which the approval process is complete.
Inbox action	This is action that the end user takes on the Inbox item. Usually this is approval or rejection or acknowledgement.
Inbox type	The Inbox type determines some characteristics of the Inbox item, such as which actions (through business service methods) can be taken on it and its expiration date.
Destination view	The Name hyperlink leads to the destination view (which displays data from the feature object).
Feature object	A feature object is the underlying thing that the Inbox record points to; for example, a service request record or, for ESS, a row in the SmartScript session table. When you drill down on an item in the Inbox, you see the feature object.
ESS	Siebel Employee Self-Service application. The Inbox is an important feature for this application. Information that is specific to the ESS application is called out in this chapter.
Universal Inbox	This is an alternate name for the Inbox.

How the Inbox Interacts with the Feature Objects

Inbox items contain references to the feature objects.

Feature objects interact with Inbox items through the methods of the Universal Inbox business service. These methods can be invoked using various mechanisms, for example Run-time Events can catch the feature object's business component operations.

The Inbox interacts with feature objects through Inbox actions, which are defined as part of the Inbox type. Integration business service methods are invoked when the users take action on Inbox items.

Figure 8 illustrates interaction between feature objects and the Inbox.

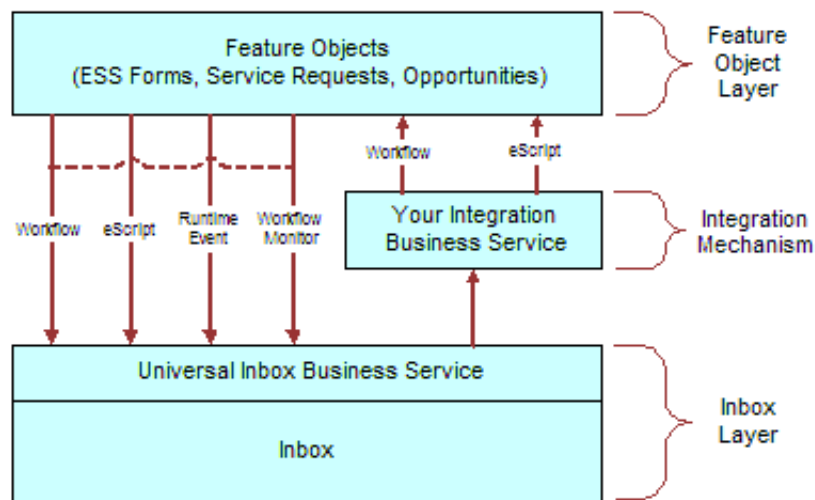


Figure 8. How Inbox Interacts with Feature Objects

About the Universal Inbox Business Service

The Universal Inbox business service is the interface between the underlying feature object and the Inbox items. Universal Inbox business service methods handle creation, update, deactivation, and deletion of Inbox items.

CAUTION: Do not interact with the Inbox through any channel other than the Universal Inbox Business Service.

For information about the methods in Universal Inbox business service, see ["Universal Inbox Business Service Methods"](#) on page 149.

Scenarios for Administering and Using the Inbox

These two scenarios provide examples of processes performed by administrators and end users. Your company may follow a different process according to its business requirements. The examples provided in this topic are for an approval process, however, similar logic applies for other items such as notification.

■ ["Scenario for Service Request Management"](#) on page 130

■ [“Scenario for Approving Personnel Action Forms Requests Captured Using ESS” on page 130](#)

Scenario for Service Request Management

This organization has implemented an automated Inbox assignment and escalation policy for service requests. According to this policy, service requests are assigned based on the area, and an Inbox item is created to notify the service request owner of each assignment. In addition, an Inbox item is also created for the service request owner's manager—this is done based on a preset criterion, the priority of the service request. The Inbox was configured when the Siebel application was initially rolled out, but this recent change in policy requires the administrator to perform some tasks.

The administrator changes the replication-level feature, which is currently set to Regional. He changes the setting so that Inbox items are downloaded to both regional and local databases.

In addition, the policy has to be implemented in Japanese installations, so he adds the appropriate language translation.

Previous Inbox items have been lingering in the Inbox for too long, so the administrator reduces the item expiration period.

Finally, he adds a new drilldown destination view for certain users who do not have access to the standard Service Request views.

Scenario for Approving Personnel Action Forms Requests Captured Using ESS

The Human Resources manager at a company has outlined new personnel action policies for employees. Management has mandated that personnel change requests be filed electronically. An HR representative for the employee's department must first check and approve the request, followed by an approval from the employee's immediate supervisor, and the departmental vice president. This new policy is handed off to a Siebel administrator for implementation.

After using the Employee Self-Service feature to set up and activate the integrated Personnel Action Form (PAF), the administrator designs the approval flows for the business object using Siebel Business Process (Workflow) Administration. Using the Inbox, the administrator creates the required approval type. When an end user submits this particular item, the approval type created by the administrator invokes the approval workflow process.

A manager at the company submits a PAF. The form is routed to the human resources representative, then the manager, and finally the vice president. Each approver can reject the form and send it back to the requestor. If approved, the process flow results in an update of data fields.

Process of Administering and Using the Inbox

This section lists some of the tasks that administrators and end users might follow to administer and manage Inbox items. Your company may follow a different process according to its business requirements.

Administrator Procedures

The following list includes some of the straightforward changes that the administrator can make to Inbox types that have already been configured. For detailed information about how to set up and configure Inbox, see [Chapter 11, “Configuring the Inbox.”](#)

- [“Reviewing All Inbox Items” on page 131](#)
- [“Deleting Inbox Items” on page 132](#)
- [“Setting Expiration Dates and Due Dates for Inbox Items” on page 132](#)
- [“Changing the Destination View for an Inbox Type” on page 132](#)
- [“Changing Inbox Downloading to Remote Databases” on page 133](#)
- [“Adding Inbox Translations” on page 134](#)

End-User Procedures

The following list shows the procedures that the end user, an employee, manager, or approver, typically perform.

The end user (an employee, manager, or approver) uses the Inbox to:

- [“Taking Action on Inbox Items \(End User\)” on page 134](#)
- [“Reviewing Completed Items \(End User\)” on page 135](#)
- [“Reviewing Submitted Items \(End User\)” on page 135](#)

Reviewing All Inbox Items

Administrator can view all the Inbox items. The administrator can also take action on any Inbox item.

To review all items

- 1 Navigate to the Administration - Inbox screen and one of the following views:
 - **All Inbox Items.** All items that are in users’ Inbox Items Lists—the administrator sees one record for each owner.
 - **All Completed Items.** All items that are in users’ Completed Items Lists—the administrator sees one record for each owner.
 - **All Submitted Items view.** All items that are in users’ Submitted Items Lists—the administrator sees one record for each originator.
- 2 Click the Detail view tab to see information about the feature object.
- 3 Click the History view tab to see who owns the item and which owners have taken action on the item.

Deleting Inbox Items

The administrator can delete Inbox items in the All Submitted Items view. When an item is deleted, it is deleted for all owners and for the user who submitted it.

To delete Inbox items

- 1 Navigate to the Administration - Inbox screen > All Submitted Items view.
- 2 Delete Inbox records.

Setting Expiration Dates and Due Dates for Inbox Items

Each Inbox item that gets created is associated with an Inbox type. Fields in the Inbox Type record determine the expiration and due dates for items of that type.

- **Item Expiration Duration (Days)**. The item expires this many days after submission.
- **Default Queue Duration (Days)**. The item is due this many days after it appears in the owner's Inbox.

This task is a step in [Process of Administering and Using the Inbox on page 130](#).

To change how item expiration and due dates are set for Inbox items of a given type

- 1 Navigate to Administration - Inbox screen > All Inbox Types view.
- 2 In the Inbox Types list, select a record and edit the following fields.

Field	Comments
Default Queue Duration (Days)	This field determines the due date for the item. When the item has been in the owner's Inbox for more than this many days, the Past Due flag is turned on.
Item Expiration Duration (Days)	This field determines the expiration date for the item. The Expiration field appears in the Submitted Items List. (By default, no action is taken when the item expires.)

Changing the Destination View for an Inbox Type

If the Inbox item is set up to link to a particular view through the Name hyperlink, you can easily change this destination view or add new destination view. (The Name field as a hyperlink is shown in [Figure 10 on page 140](#).)

For example, if some users do not have responsibilities to see the current destination view, you can add a destination view that they can see.

Multiple views can be associated with one Item type. Each view is assigned a sequence number. When users drill down on the Item hyperlink in the Inbox, they see the first view in the sequence that they have access to (based on their responsibilities).

This task is a step in the [Process of Administering and Using the Inbox on page 130](#).

Procedure

To add or change destination views for an Inbox type from the Views view

- 1 Navigate to Administration - Inbox screen > Actions view.
- 2 Select the Inbox type.

NOTE: If there is a record in the Action list where Action = Name Drilldown, then changing the destination view in the Views view has no effect. You need to change the Name Drilldown instead. For information on how to do this, see [“Setting Up Inbox Actions” on page 142](#).
- 3 Click the Views view tab.
- 4 In the Views list, do one of the following:
 - a Edit the View name or Sequence # for an existing record.
 - b Create a new record and complete the View and Sequence # fields.

Make sure that the view you enter belongs to Business Object specified for the Inbox type.

Changing Inbox Downloading to Remote Databases

Inbox items can be set to download to regional and local databases. If your Inbox type is currently configured to download to remote databases, you can change this setting.

NOTE: If your Inbox type is not currently set to download to remote databases, see [“Configuring Inbox for Use with Remote Databases” on page 144](#).

This task is a step in the [Process of Administering and Using the Inbox on page 130](#).

To change remote downloading for an Inbox type

- 1 Navigate to Administration - Inbox screen > All Inbox Types view.
- 2 Select the Inbox type.
- 3 In the form view, edit the Replication Level:
 - **All.** To download Inbox items to regional and local databases
 - **Regional.** To download Inbox items to regional databases only

- **None.** Items are not downloaded to remote databases

CAUTION: If the Replication Level is currently set to None, see “Configuring Inbox for Use with Remote Databases” on page 144 before changing it.

Adding Inbox Translations

If you have a multilingual Siebel application, and the Inbox is not currently supporting all languages, you can use the Translations view to extend language support.

Create a translation record for each language supported in your multilingual application.

This task is a step in [Process of Administering and Using the Inbox on page 130](#).

To set up an Inbox translation

- 1 Navigate to Administration - Inbox screen > All Inbox Types view.
- 2 In the Inbox Types list, select the Inbox item and click the Translations view tab.
- 3 In the Translations list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Display Name	Translation of the Inbox type Name.

Taking Action on Inbox Items (End User)

End users can take action on items that are sent to them for approval. The most typical actions are to approve, to reject, and to acknowledge. The actions available to the end user are determined by the item’s Inbox type.

This task is a step in [Process of Administering and Using the Inbox on page 130](#).

To approve or reject an Inbox item

- 1 Navigate to the Inbox in the Site Map.
- 2 Select My Inbox Items or My Team’s Inbox Items.
- 3 In the Inbox Items list, select the item you want to approve or reject.

NOTE: You can click the Name hyperlink to review the feature object.

- 4 In the Action field, select the desired action, for example, Approved.
- 5 (Optional) In the Comments field, enter a brief explanation.

When the record is saved, the business service and method defined (in the Inbox type) for the action are triggered.

Reviewing Completed Items (End User)

The History view lets end users track the progress of the items through each stage of the approval process. For example, managers can review the approval decision and comments made by each approver.

This task is a step in [Process of Administering and Using the Inbox on page 130](#).

To review items that have been previously approved

- 1 Navigate to the Inbox screen.
- 2 From the Show drop-down list, select My Completed Items or My Team's Completed Items.
- 3 In the Completed Items List, select the item you want to review.
- 4 Drill down on the Name hyperlink to review the feature object.

Reviewing Submitted Items (End User)

Users can review the Inbox items that they have submitted. They can check the progress of an item, for example, to see who has approved it and who has not.

This task is a step in [Process of Administering and Using the Inbox on page 130](#).

To review submitted items

- 1 Navigate to the Inbox screen.
- 2 From the Show drop-down list, select My Submitted Items or My Team's Submitted Items.
- 3 Review the Inbox items that you (or your team) have submitted.

11 Configuring the Inbox

This chapter contains information about configuring the Inbox.

For administration and end-user information about the Inbox, see [Chapter 10, “Administering and Using Inbox.”](#)

This chapter includes the following topics:

- [“Process of Setting Up and Configuring Inbox” on page 137](#)
- [“Planning for Inbox Configuration” on page 138](#)
- [“Creating Inbox Items” on page 138](#)
- [“Creating Inbox Types” on page 139](#)
- [“Setting Up Inbox Links to Views and SmartScripts” on page 141](#)
- [“Setting Up Inbox Actions” on page 142](#)
- [“Configuring Inbox for Use with Remote Databases” on page 144](#)
- [“Setting Up Inbox Approval Translations” on page 145](#)
- [“Configuring the Toggle Applets for Inbox Views \(in Siebel Tools\)” on page 146](#)
- [“Configuring the Category Icon for the Inbox \(in Siebel Tools\)” on page 147](#)
- [“Configuring Action Buttons for Inbox Views \(in Siebel Tools\)” on page 148](#)
- [“Setting the Log File for Troubleshooting” on page 149](#)
- [“Universal Inbox Business Service Methods” on page 149](#)
- [“Examples of Inbox Triggers” on page 168](#)

Process of Setting Up and Configuring Inbox

The following section describes the processes an administrator might follow to set up and configure the Inbox.

- 1 [“Planning for Inbox Configuration” on page 138](#)
- 2 [“Creating Inbox Items” on page 138](#)
- 3 [“Creating Inbox Types” on page 139](#)
- 4 [“Setting Up Inbox Links to Views and SmartScripts” on page 141](#)
- 5 [“Setting Up Inbox Actions” on page 142](#)
- 6 [“Configuring Inbox for Use with Remote Databases” on page 144](#)

7 “Setting Up Inbox Approval Translations” on page 145

Planning for Inbox Configuration

Before you start configuring the Inbox, you need to do some research and planning.

This task is a step in [Process of Setting Up and Configuring Inbox on page 137](#).

To plan an Inbox Configuration

- 1 Choose the feature object you want to integrate with the Inbox.
For example, Employee Self-Service forms, Service Requests, Opportunities.
- 2 Analyze how the object is currently being accessed by answering the following questions:
 - a Is the object accessed from the UI or from workflow processes? Is the object accessed from one place or many?
 - b How is the object related to other objects? Are other objects dependent on the object?
 - c What operations do end users perform on the object?
- 3 Determine the integration mechanism by considering what needs to happen to the object after it enters the Inbox.

There are two kinds of integration with the Inbox:

- Inbound (Typically triggered through workflows, eScripts, Runtime Event, or Workflow Monitor agents)
- Outbound (Typically through workflows and eScripts)

For example, if end users access the feature object in other ways besides through the Inbox, you need to synchronize (inbound) the Inbox with the object's current data. (See also [Figure 8 on page 129](#).)

- 4 Consider the following best practices:
 - Only interact with the Inbox through the methods in the Universal Inbox business service. (Do not edit Inbox fields directly.)
 - Do not customize fields in the Inbox.
 - Once an Inbox item has been deactivated for a given owner, it cannot be reactivated. Instead, create a new Inbox item for that owner.

Creating Inbox Items

Inbox items are created by the Universal Inbox business service. Methods for this business service can be called using various mechanisms, for example:

- Workflows
- Workflow Monitor Agent

- eScripting
- Runtime Events

If you want to configure the application to have Inbox items created in a certain screen or for a business component, the following procedure outlines how this can be done.

This task is a step in [Process of Setting Up and Configuring Inbox on page 137](#).

To configure the application to create Inbox items

- 1** Review the information about the Inbox business service, methods and workflows at the end of this chapter.
- 2** Review the procedures for setting up Inbox types.
- 3** Use one of the ways given in the preceding list to call the Inbox business service and create Inbox items.

Creating Inbox Types

Each Inbox item that gets created is assigned an Inbox type. The Inbox type sets the following characteristics for the Inbox item:

- Action Type
- Category
- Replication Level
- Integration Object Name
- Business Object Name
- Item Expiration Duration (Days)
- Default Queue Duration (Days) (Due date)
- Views and SmartScripts that link to the Inbox item
- Effects of the actions that the user can choose

Action Type

The action type is the LOV type that determines the actions the user can choose to take on an Inbox.

Example

The action type is UINBOX_STATUS_TYPE.

There are three LOV records of type UINBOX_STATUS_TYPE: Approved, Received, and Rejected. These represent the actions that the user can take on an Inbox item of this type, as shown in Figure 9.

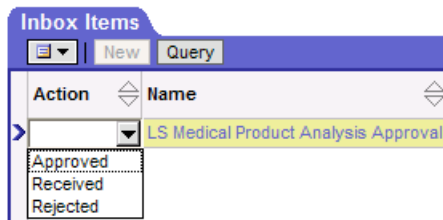


Figure 9. The Action Drop-Down List in the Inbox

NOTE: Because the effect of action is set per Item type, this LOV type can be used for many Item types, but the effect of approving or rejecting can be different for each Item type.

Category

The category determines the icon that appears in the Category field for the item in the Inbox. See Figure 10.

The category field can be useful for querying and sorting Inbox item and Inbox type records. For information about editing the Category icon, see “Configuring the Category Icon for the Inbox (in Siebel Tools)” on page 147.

Inbox Item:





Submitted Items			
Menu		Save	Query
Category	Name	From	
> 	1-30H0L	Kenneth Goldman	
> 	1-30G8T	Paul Wahl	
> 	1-30FML	Bruce Cleveland	
> 	1-30ES2	Henry Roy	

Figure 10. The Check Mark Indicates the Category Is Approvals

Procedure

This task is a step in [Process of Setting Up and Configuring Inbox on page 137](#).

To create an Inbox type

- 1 Navigate to Administration - Inbox screen > All Inbox Types view.

- 2 In the Inbox Types list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Replication Level	If you do not want to download Inbox items to remote databases, select None. Otherwise, see “Configuring Inbox for Use with Remote Databases” on page 144.
Integration Object Name	If there is an integration object associated with the Inbox type, you can specify it here. This is no special logic associated with this field.
Business Object Name	Enter the feature object that the destination view belongs to.
Default Queue Duration (Days)	This field determines the due date for the item. When the item has been in the owners Inbox for more than this many days, the Past Due flag is turned on.
Item Expiration Duration (Days)	This field determines the expiration date for the item. The Expiration field appears in the Submitted Items List. (By default, no action is taken when the item expires.)

Setting Up Inbox Links to Views and SmartScripts

As an administrator you can specify that the Name field for the Inbox item drills down to a particular view and optionally runs a SmartScript. The Name field as a hyperlink is shown in [Figure 10 on page 140.](#)

Multiple views can be associated with one Item type. Each view is assigned a sequence number. When users drill down on the Item hyperlink in the Inbox, they see the first view in the sequence that they have access to (based on their responsibilities).

How to Set up Views and SmartScripts for an Inbox Type

This task is a step in [Process of Setting Up and Configuring Inbox on page 137.](#)

NOTE: If you have set a Name Drilldown action, then view records you set up are ignored.

To set up views and SmartScripts for an Inbox type

- 1 Navigate to the Administration - Inbox screen > All Inbox Types view.
- 2 In the Inbox Types list, select a record, and then click the Views view tab.

- 3 In the Views list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
View	Specify the view that an end user sees when they drill down on an Inbox item. For ESS, use the EmpSS Form Player view.
Sequence #	Specifies the sequence in which views are available to the end user.
SmartScript	Specifies the SmartScript to be run in the view. SmartScripts are primarily used for ESS integration with Inbox. For example, an ESS Summary Form SmartScript.

Setting Up Inbox Actions

About Actions

There are four circumstances where a business service method can be invoked to act on an Inbox item. A different action type is used for each. These are summarized in [Table 18](#).

Table 18. Actions for Inbox Types

Action	Invokes the Specified Business Service Method When . . .
Action Field Dropdown	The user takes action (edits the Action field) on the Inbox item.
Name Drilldown	The user drills down on the item's Name hyperlink. (Another way you can configure this hyperlink is through the Views view. See "Setting Up Inbox Links to Views and SmartScripts" on page 141.)
Local Validation	The user, in a remote database, drills down on the item's Name hyperlink. For more information, see "Configuring Inbox for Use with Remote Databases" on page 144.
Initialize	This action is provided for backward compatibility. Unless you are upgrading, use of this action is not recommended. For more information, see the <i>Upgrade Guide</i> for the operating system you are using. This action invokes the Initialize method of the Universal Business Service. It creates an Inbox item and starts the defined method.

About Deactivate Item Upon Finish and Deactivate Owners Upon Finish Fields

There are two ways that an Inbox item can be deactivated:

- Deactivation can be done through one of the Universal Inbox Business Service methods.

- The Inbox type can be set up so that if the business method in the Actions record finishes without error, the item is deactivated. The item can be deactivated for all the owners or only for owner who takes the action:
 - If Deactivate Item Upon Finish is set, when one owner takes action on the item, the item is deactivated for all owners and all owners see the item in their Completed Items List.
 - If Deactivate Owners Upon Finish is set, when one owner takes action, the item is deactivated (and moved to the Submitted Items List) for that owner alone. The item remains in the other owners' Inbox List.

Procedure

This task is a step in [Process of Setting Up and Configuring Inbox on page 137](#).

To set up an Inbox action

- 1 Navigate to Administration - Inbox screen > All Inbox Types view.
- 2 In the Inbox Types list, select the approval record, and click the Actions view tab.
- 3 In the Actions list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Action	See Table 18 on page 142 .
Business Service	Specifies business service to be used. For example, Workflow Process Manager.
Business Service Method	Specifies the method to be invoked for the business service selected above. For example, RunProcess.
Business Service Method Arguments	Specifies the arguments required for invoking the business service method. If the Workflow Process Manager business service is being used, your workflow needs to contain process properties with these same argument names. For the above example, the arguments might be "ProcessName", "Location Change - Business Title Edit (Single Step Manager)".
Deactivate Item Upon Finish	Select to deactivate the Inbox item (for all owners) after the method has successfully completed.
Deactivate Owners Upon Finish	Select to deactivate the Inbox item (for one owner) after the method has successfully completed.

In addition to the arguments passed in the Business Service Method Arguments field, the following arguments are always passed:

- BusinessObjectName (Feature object name)

- InboxItemId (Row Id of the Inbox item)
- InboxTypeName (The Inbox type for the item)
- ActionLIC (Value selected in Action)
- ObjectId (Id of the feature object)
- InboxTypeId (Id of the Inbox type of the Inbox item)
- OwnerInfolId (Id of the Inbox item owner)

NOTE: The Inbox Action passes the row id of the feature object in ObjectId. Within a workflow process, the id of the primary business component on which the process is based should be stored in process properties "Object Id" (with a space). Therefore, the workflow process should first copy the content of "ObjectId" to "Object Id" if needed.

Configuring Inbox for Use with Remote Databases

Inbox items can be downloaded to regional and local databases.

The Inbox functionality downloads Inbox item records but does not download the underlying feature object.

CAUTION: The Inbox configurator must make sure that the feature object is downloaded; for example that the service request records that the Inbox item points to is downloaded to the local database.

If you are downloading Inbox items to remote databases, it is recommended that you set up a Localization Validation action. The Localization Validation action invokes a business service method (that you defined) when a remote user attempts to drill down from the Inbox to view the underlying feature object. The method you define needs to return an argument to the Inbox, telling it that the feature object is not there. The Inbox then displays an error message to the user and prevents the drill down.

To configure the Inbox for remote use

1 Define a business service with a business service method that:

- a** Accepts the following arguments from the Inbox:
 - InboxItemId
 - OwnerInfolId
 - ObjectId
 - InboxTypeName
 - BusinessObjectName
 - IntegrationObjectName
 - Name-value pairs from the Inbox Parameters tables

- b** Looks for the feature object, and, if the feature object is found, sets the output argument LocalValidationError to N.
- 2** Navigate to Administration - Inbox screen > All Inbox Types view.
- 3** In the Inbox Types list, select the type record.
- 4** In the More Info form, set the Replication Level:
 - **All.** To download Inbox items to regional and local databases
 - **Regional.** To download Inbox items to regional databases only
- 5** Click the Actions view tab.

In the Actions list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Action	Local Validation
Business Service	The business service that you defined in Step 1 .
Business Service Method	The business service method that you defined in Step 1 .
Business Service Method Arguments	Arguments for the business service method.

Setting Up Inbox Approval Translations

If your Siebel application is multilingual, you need to create a translation record for each language.

Use the Translations view to specify Inbox Type names in other languages.

This task is a step in [Process of Setting Up and Configuring Inbox on page 137](#).

To set up an Inbox translation

- 1** Navigate to Administration - Inbox screen > All Inbox Types view.
- 2** In the Inbox Types list, select the approval record and click the Translations view tab.
- 3** In the Translations list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Display Name	Translation of the Inbox type Name.

Configuring the Toggle Applets for Inbox Views (in Siebel Tools)

The Inbox supports dynamic toggle applets in three types of views, see [Table 19](#).

Table 19. Dynamic Toggle Applets for Inbox

Views Supporting Dynamic Toggle Applet	Toggle Applet Name	Corresponding Business Component for Views
Inbox items detail views	UInbox Item Task Toggle List Applet	UInbox Item Task
Completed items detail views		
Submitted items detail views	UInbox Item Toggle List Applet	UInbox Item

Setting up the dynamic applet toggles determines what form applet appears in the lower portion of the Inbox Detail views. In general, you want the applet based on the business object of the underlying feature object.

Example

For example, if you are setting up the Inbox for service request approvals, you can create a dynamic applet toggle that displays the Service Request Detail Applet form applet (when the business object for the Inbox type is Service Requests). You then create a link between the Inbox business components and the Service Request business component so that the service request information can display in the Inbox detail views.

Procedure

To configure dynamic toggle applets for the Inbox

- 1 In Siebel Tools, create an applet child object for the appropriate toggle applet ([Table 19](#)), as follows:
 - Applet = *a form applet* (Make sure that an Applet Web Template is defined for the Edit mode of this applet.)
 - Auto Toggle Field = Item Type BusObj Name
 - Auto Toggle Value = *the business object of the Inbox type* (For example, Service Request.)

For more information about how to configure applet toggles, see *Configuring Siebel eBusiness Applications*.
- 2 Create a links between the feature object's business component and the two Inbox business components (UInbox Item and UInbox Item Task).

- a** Create a link record.
- b** Complete the fields as follows:
 - Name = *this field is automatically populated after the Parent Business Component and Child Business Component fields are completed*
 - Parent Business Component = UInbox Item Task *or* UInbox Item
 - Child Business Component = *the business component for the dynamic applet toggle*, for example, Service Request
 - Source Field = Item Object Id
 - Destination Field = *the Id of the feature object displayed in the dynamic applet toggle; usually this is Id*)

For more information about creating links, see *Configuring Siebel eBusiness Applications*.

- 3** Associate the business component for the dynamic applet toggle with the two Inbox business objects (UInbox ItemTask and UInbox Item History). For each link:
 - a** Create a business object component record.
 - b** Complete the fields as follows:
 - Name = *the name of the business component for the dynamic applet toggle*, for example Service Request
 - Link = *the name of the link from [Step 2](#)*

Configuring the Category Icon for the Inbox (in Siebel Tools)

You can change and add to the icons that appear in the Category field by editing the Bitmap Category called Inbox Category.

For more information about bitmap categories and working with images, see *Configuring Siebel eBusiness Applications*.

To add Category icon for a Category field value

- 1** Add the icon image file (.gif) to the images directory.

Base the size of your image on the existing Category icons in this directory, for example, icon_approval.gif.
- 2** In Siebel Tools, create a bitmap record for the Bitmap Category object called Inbox Category and complete the fields as follows:
 - Name = *the Language-Independent Code for the value, from the UINBOX_INBOX_TYPE LOV, for example CAMPAIGNS*
 - Bitmap = *The name of the file from [Step 1](#)*
 - Bitmap Category = Inbox Category

Configuring Action Buttons for Inbox Views (in Siebel Tools)

In the preconfigured Siebel application, users take action on an Inbox item by choosing from the Action drop-down list.

You can configure the Inbox so that the first five values in the Action drop-down list display as buttons on the UIInbox Item Task List Applet applet. See [Figure 11](#) for an example.



Figure 11. Example of Action Buttons

Activating the Inbox Action Buttons

Which controls you activate depends on whether your application runs in standard or in high interactivity mode.

For more information about working with controls in applets, see the section about editing applet layout in *Configuring Siebel eBusiness Applications*.

To configure action buttons for standard interactivity

- 1 Navigate to the UIInbox Item Task List Applet.
- 2 Select the Edit List Applet Web Template and then activate the following Applet Web Template Items:
 - ActionController0
 - ActionController1
 - ActionController2
 - ActionController3
 - ActionController4

To configure action buttons for high interactivity

- 1 For the Applet Siebel Object called UIInbox Item Task List Applet, select the Edit List Applet Web Template item.

- 2 Activate the UInboxCustomCtrl.

The first five entries in the Action drop-down list display as buttons on the applet.

Configuring Background Colors for the Inbox Action Buttons

If you edited the cascading style sheet for the list applet and changed the background colors, you need to edit the background colors for the action buttons so that they match the applet.

To change the background colors for the action buttons

- For the UInboxCustomCtrl Applet Control, edit these user properties, shown in the following table.

User Property	Comment	Default Value
ActiveBackgroundColor	Color code for the active background color	#333399
InActiveBackgroundColor	Color code for the inactive background color	#ffffff

Setting the Log File for Troubleshooting

For troubleshooting problems with the Inbox, set the Inbox log file to a verbose level.

To set the level of the Inbox log file for troubleshooting

- Set the Log Level for the Inbox log file (Alias = InboxLog) to 5.

For information about log files, see *System Monitoring and Diagnostics Guide for Siebel eBusiness Applications*.

Universal Inbox Business Service Methods

This section discusses the Universal Inbox business service and lists its methods.

Definitions needed to understand the Universal Inbox Business Service (see also [Figure 12](#)):

- **Inbox item and Inbox item owner.** For most of this chapter, the term *Inbox item* has been used synonymously with Inbox item owner. But to understand how the methods for the Universal Inbox business service work, it is necessary to distinguish between the two:
 - **The Inbox item.** This is the record that appears in the Submitted Items views.
 - **The Inbox item owner.** This is the record that appears in Inbox Items and Completed Items views. Owner information contained in this record. Typically there are one or more Inbox item owner records associated with one Inbox item record.

- **Name-value pairs.** In addition to the predefined fields that belong to the Inbox item records (such as, type name, expiration date), there is provision to store additional data with the Inbox item in the form of name-value pairs. The name-value pairs are typically used to record data specific to the underlying feature object. The name-value pairs are stored in the Inbox Parameters table associated with the Inbox item.

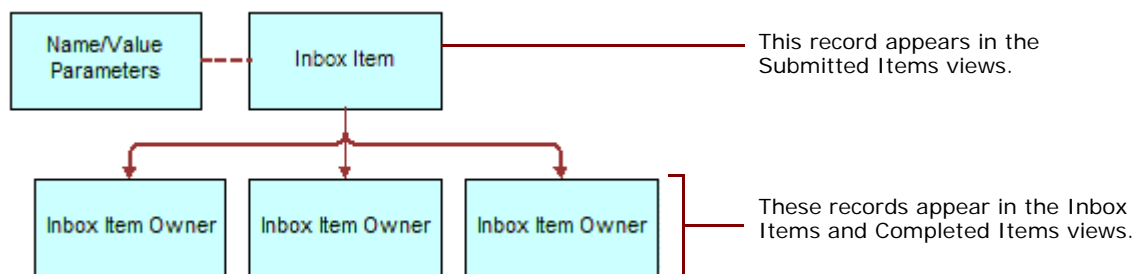


Figure 12. Relationship Between Inbox Items and Inbox Item Owners

Table 20 lists the Universal Inbox business service methods.

Table 20. Universal Inbox Business Service Methods

	Method Name	Description
1	CreateInboxEx	This method creates an Inbox item and an Inbox item owner.
2	CreateInbox	This method creates multiple Inbox items and multiple Inbox item owners.
3	CreateInboxItem	This method creates multiple Inbox items.
4	CreateInboxOwner	This method creates multiple Inbox item owners for an Inbox item.
5	IsInboxItemExisted	This method checks if an Inbox item exists.
6	GetInboxItemInfo	This method returns field values from an Inbox item and, if GetParams is true, returns the name-value pairs for the Inbox item.
7	GetInboxParamInfo	This method returns the name-value pairs for an Inbox item.
8	GetInboxOwnerInfoEx	This method returns field values for an Inbox item owner.
9	GetInboxOwnerInfo	This method returns field values for multiple Inbox item owners for a given Inbox item, and returns information about the action status of the items.
10	SetInboxParamInfo	This method inputs name-value pairs for an Inbox item.
11	UpdateInboxItemInfo	This method updates field values for an Inbox item.
12	DeactivateInboxItem	This method deactivates all Inbox item owners for an Inbox item and updates field values for that Inbox item.

Table 20. Universal Inbox Business Service Methods

	Method Name	Description
13	DeactivateInboxOwner	This method deactivates an Inbox item owner and updates field values for that Inbox item owner.
14	UpdateInboxOwnerInfo	This method updates field values for an Inbox item owner.
15	DeleteInboxItem	This method deletes an Inbox item and all associated Inbox item owners.
16	Initialize	<p>This method is intended for use only by those upgrading from the 7.5.3 version of the application.</p> <p>This method creates an Inbox item and starts the business service method defined in the Initialize action.</p>
17	RouteInboxItem	<p>This method is intended for use only by those upgrading from the 7.5.3 version of the application. For more information about this method, see <i>Upgrade Guide</i> for the operating system you are using.</p> <p>This method deactivates existing Inbox item owners and creates new Inbox item owners for an Inbox item.</p>

CreateInboxEx Method

This method creates an Inbox item and an Inbox item owner.

See [Table 21](#) and [Table 22](#).

Input Arguments

Table 21. CreateInboxEx Method, Property Set, Type = InboxInfo

Property Name	Req'd	Comments
InboxName	Y	
InboxTypeName	Y	
InboxPartyId	Y	
Comments		
ObjectId		
InboxExpirationDuration		In seconds
InboxUTCExpirationTS		UTC timestamp

Table 21. CreateInboxEx Method, Property Set, Type = InboxInfo

Property Name	Req'd	Comments
ReplicationLevel		Indicate whether this Inbox item needs to be routed when using remote databases. ■ All = HQ, Regional, Local ■ Regional = HQ, Regional ■ None = HQ
OwnerPartyId	Y	
OwnerPriority		
OwnerQueueDuration		In seconds
OwnerUTCStartWorking TS		UTC timestamp
OwnerActionLIC		Language independent code
OwnerUTCDueTS		UTC timestamp
The name-value pairs are put into the Inbox Parameters table		

Output Arguments

Table 22. CreateInboxEx Method, Property Set

Property Name	Comments
InboxItemId	
OwnerInfold	

CreateInbox Method

This method creates multiple Inbox items and multiple Inbox item owners.

See [Table 23](#) and [Table 26](#).

Input Arguments

Table 23. CreateInbox Method, Property Set, Type = InboxInfo

Property Name	Req'd	Comments
Child properties		Multiple children are allowed. See Table 24 .

Table 24. CreateInbox Method, Child Property Set, Type = InboxItemInfo

Property Name	Req'd	Comments
InboxName	Y	
InboxTypeName	Y	
InboxPartyId	Y	
ObjectId		
InboxExpirationDuration		In seconds.
InboxUTCEXpirationTS		UTC timestamp.
Comments		
The name-value pairs are put into the Inbox Parameters table.		
Child properties		Multiple children are allowed. See Table 25 .

Table 25. CreateInbox Method, Grandchild Property Set, Type = InboxOwnerInfo

Property Name	Req'd	Comments
OwnerPartyId	Y	
OwnerPriority		
OwnerQueueDuration		In seconds
OwnerUTCDueTS		UTC timestamp
OwnerUTCStartWorkingTS		UTC timestamp
OwnerActionLIC		Language independent code

Output Arguments

Table 26. CreateInbox Method, Property Set

Property Name	Comments
Child properties	Multiple children can be returned. See Table 27 .

Table 27. CreateInbox Method, Child Property Set, Type = ItemOutput

Property Name	Comments
InboxItemId	The row Id of the newly created Inbox item.
Child properties	Multiple children can be returned. See Table 28 .

Table 28. CreateInbox Method, Grandchild Property Set, Type = OwnerInfoOutput

Property Name	Comments
OwnerPartyId	
OwnerInfolId	

CreateInboxItem Method

This method creates multiple Inbox items.

See [Table 29](#) and [Table 30](#).

Input Arguments

Table 29. CreateInboxItem Method, Property Set, Type = InboxItemInfo

Property Name	Req'd	Comments
InboxName	Y	
InboxTypeName	Y	
InboxPartyId	Y	
ObjectId		
InboxExpirationDuration		In seconds
InboxUTCExpirationTS		UTC timestamp
Comments		

Table 29. CreateInboxItem Method, Property Set, Type = InboxItemInfo

Property Name	Req'd	Comments
ReplicationLevel		<p>Indicate whether this Inbox item needs to be routed when using remote databases.</p> <ul style="list-style-type: none"> ■ All = HQ, Regional, Local ■ Regional = HQ, Regional ■ None = HQ

The name-value pairs are put into the Inbox Parameters table

Output Arguments

Table 30. CreateInboxItem Method, Property Set, Type = ItemOutput

Property Name	Comments
InboxItemId	The row Id of the newly created Inbox item

CreateInboxOwner Method

This method creates multiple Inbox item owners for an Inbox item. If DeactivateOthers is true, the method deactivates the current active Inbox item owners before creating new ones.

The method searches as follows:

- 1 InboxItemId
- 2 ObjectId + InboxTypeName

See [Table 31](#) and [Table 33](#).

Input Arguments

Table 31. CreateInboxOwner Method, Property Set

Property Name	Req'd	Comments
InboxItemId		
ObjectId		
InboxTypeName		
DeactivateOthers		Default is yes (deactivate others).
Child properties		Multiple children are allowed. See Table 32 .

Table 32. CreateInboxOwner Method, Child Property Set, Type = InboxOwnerInfo

Property Name	Req'd	Comments
OwnerPartyId	Y	
OwnerPriority		Language independent code
OwnerQueueDuration		In seconds
OwnerUTCDueTS		UTC timestamp
OwnerUTCStartWorking TS		UTC timestamp
OwnerActionLIC		Language independent code

Output Arguments

Table 33. CreateInboxOwner Method, Property Set, Type = ItemOutput

Property Name	Comments
InboxItemId	The row Id of the newly created Inbox item.
Child properties	Multiple children can be returned. See Table 34 .

Table 34. CreateInboxOwner Method, Child Property Set, Type = OwnerInfoOutput

Property Name	Comments
OwnerPartyId	
OwnerInfoId	

IsInboxItemExisted Method

This method checks if an Inbox item exists.

The method searches as follows:

- 1 InboxItemId
- 2 ObjectId + InboxTypeName

See [Table 35](#) and [Table 36](#).

Input Arguments

Table 35. IsInboxItemExisted Method, Property Set

Property Name	Req'd	Comments
InboxItemId		
ObjectId		
InboxTypeName		

Output Arguments

Table 36. IsInboxItemExisted Method, Property Set

Property Name	Comments
IsInboxItemExisted	1 or 0
InboxItemId	
HasActiveOwners	Indicates if the Inbox item has active owners (1 or 0)

GetInboxItemInfo Method

This method returns field values from an Inbox item and, if GetParams is true, returns the name-value pairs for the Inbox item.

The method searches as follows:

- 1 InboxItemId
- 2 ObjectId + InboxTypeName

See [Table 37](#) and [Table 38](#).

Input Arguments

Table 37. GetInboxItemInfo Method, Property Set

Property Name	Req'd	Comments
InboxItemId		For searching, not updated
ObjectId		For searching, not updated
InboxTypeName		For searching, not updated
GetParams		If Y, returns all name-value pairs

Output Arguments

Table 38. GetInboxItemInfo Method, Property Set

Property Name	Comments
ObjectId	
InboxTypeId	
InboxTypeName	
InboxName	
InboxPartyId	
Comments	
InboxUTCExpirationTS	UTC timestamp
Name - value pairs	

GetInboxParamInfo Method

This method returns the name-value pairs for an Inbox item.

The method searches as follows:

- 1 InboxItemId
- 2 ObjectId + InboxTypeName

See [Table 39](#) and [Table 40](#).

Input Arguments

Table 39. GetInboxParamInfo Method, Property Set

Property Name	Req'd	Comments
InboxItemId		For searching, not updated
ObjectId		For searching, not updated
InboxTypeName		For searching, not updated

Output Arguments

Table 40. GetInboxParamInfo Method, Property Set

Property Name	Comments
Name - value pairs	

GetInboxOwnerInfoEx Method

This method returns field values for an Inbox item owner. If the Inbox item owner is in the screen-active business component record, the method returns the values from the screen-active business component.

The method searches as follows:

- 1 OwnerInfoId
- 2 InboxItemId, OwnerPartyId
- 3 ObjectId, InboxTypeName, OwnerPartyId

See [Table 41](#) and [Table 42](#).

Input Arguments

Table 41. GetInboxOwnerInfoEx Method, Property Set

Property Name	Req'd	Comments
ObjectId		For searching, not updated
InboxTypeName		For searching, not updated
OwnerPartyId		For searching, not updated
InboxItemId		For searching, not updated
OwnerInfoId		For searching, not updated

Output Arguments

Table 42. GetInboxOwnerInfoEx Method, Property Set

Property Name	Comments
OwnerInfoId	
OwnerPriority	
OwnerActionLIC	
OwnerUTCDueTS	
OwnerComments	
OwnerStartWorkingTime	
OwnerEndWorkingTime	

GetInboxOwnerInfo Method

This method returns field values for multiple Inbox item owners for a given Inbox item, and returns information about the action status of the items.

The method searches as follows:

- 1 InboxItemId
- 2 ObjectId + InboxTypeName

See [Table 43](#) and [Table 44](#).

Input Arguments

Table 43. GetInboxOwnerInfo Method, Property Set

Property Name	Req'd	Comments
InboxItemId		For searching, not updated
ObjectId		For searching, not updated
InboxTypeName		For searching, not updated
ActiveOwnerOnly		Default is TRUE. Indicates that information is returned only for active owners.
EvaluateOR		Evaluate the OR condition on all owners' actions based on the Action which is passed in from the caller
EvaluateAND		Evaluate the AND condition on all owners' actions based on the Action which is passed in from the caller

Output Arguments

Table 44. GetInboxOwnerInfo Method, Property Set

Property Name	Comments
OREvalResult	1 or 0
ANDEvalResult	1 or 0
Child Properties	Multiple children can be returned. See Table 45 .

Table 45. GetInboxOwnerInfo Method, Child Property Set, Type = InboxOwnerInfo

Property Name	Comments
OwnerInfolId	
OwnerPriority	
OwnerActionLIC	Language independent code
OwnerUTCDueTS	UTC timestamp
OwnerComments	
OwnerStartWorkingTime	UTC timestamp
OwnerEndWorkingTime	UTC timestamp

SetInboxParamInfo Method

This method inputs name-value pairs for an Inbox item.

The method searches as follows:

- 1 InboxItemId
- 2 ObjectId + InboxTypeName

See [Table 46](#).

Input Arguments

Table 46. SetInboxParamInfo Method, Property Set

Property Name	Req'd	Comments
InboxItemId		For searching, not updated
ObjectId		For searching, not updated

Table 46. SetInboxParamInfo Method, Property Set

Property Name	Req'd	Comments
InboxTypeName		For searching, not updated
The name-value pairs are put into the Inbox Parameters table		

UpdateInboxItemInfo Method

This method updates field values for an Inbox item.

The method searches as follows:

- 1 InboxItemId
- 2 ObjectId + InboxTypeName

See [Table 47](#).

Input Arguments

Table 47. UpdateInboxItemInfo Method, Property Set

Property Name	Req'd	Comments
InboxItemId		For searching, not updated.
ObjectId		For searching, not updated.
InboxTypeName		For searching, not updated.
InboxName		Value passed cannot be empty.
InboxPartyId		Value passed cannot be empty.
ReplicationLevel		Indicate whether this Inbox item needs to be routed when using remote mobile client. Possible values are: <ul style="list-style-type: none"> ■ All = HQ, Regional, Local ■ Regional = HQ, Regional ■ None = HQ
Comments		
InboxExpirationDuration		In seconds. Value passed cannot be empty.
InboxUTCExpirationTS		UTC timestamp. Value passed cannot be empty.
The name-value pairs are put into the Inbox Parameters table.		

DeactivateInboxItem Method

This method deactivates all Inbox item owners for an Inbox item and updates field values for that Inbox item.

The method searches as follows:

- 1 InboxItemId
- 2 ObjectId + InboxTypeName

See [Table 48](#).

Input Arguments

Table 48. DeactivateInboxItem Method, Property Set

Property Name	Req'd	Comments
InboxItemId		For searching, not updated.
ObjectId		For searching, not updated.
InboxTypeName		For searching, not updated.
InboxName		Value passed cannot be empty.
InboxPartyId		Value passed cannot be empty.
ReplicationLevel		Indicate whether this Inbox item needs to be routed when using remote mobile client. Possible values are: <ul style="list-style-type: none"> ■ All = HQ, Regional, Local ■ Regional = HQ, Regional ■ None = HQ
Comments		
InboxExpirationDuration		In seconds. Value passed cannot be empty.
InboxUTCExpirationTS		UTC timestamp. Value passed cannot be empty.
The name-value pairs are put into the Inbox Parameters table.		
Child Properties		Multiple children are allowed. See Table 49 .

Table 49. DeactivateInboxItem Method, Child Property Set, Type = InboxOwnerInfo

Property Name	Req'd	Comments
OwnerPartyId		For searching, not updated
OwnerInfoId		For searching, not updated

Table 49. DeactivateInboxItem Method, Child Property Set, Type = InboxOwnerInfo

Property Name	Req'd	Comments
OwnerPriority		
OwnerActionLIC		Language independent code
OwnerComments		
OwnerStartWorkingTime		UTC timestamp, or Y, T, or TRUE to set to the current time.
OwnerEndWorkingTime		UTC timestamp, or Y, T, or TRUE to set to the current time.

DeactivateInboxOwner Method

This method deactivates an Inbox item owner and updates field values for that Inbox item owner.

The method searches as follows:

- 1 OwnerInfold
- 2 InboxItemId, OwnerPartyId
- 3 ObjectId, InboxTypeName, OwnerPartyId

If there is SSASqlErrWriteConflict conflict, clear the error message in order not to show the error message on UI.

See [Table 50](#).

Input Arguments

Table 50. DeactivateInboxOwner Method, Property Set

Property Name	Req'd	Comments
ObjectId		For searching, not updated
InboxTypeName		For searching, not updated
OwnerPartyId		For searching, not updated
InboxItemId		For searching, not updated
OwerInfold		For searching, not updated
OwnerPriority		
OwnerActionLIC		Language independent code
OwnerComments		

Table 50. DeactivateInboxOwner Method, Property Set

Property Name	Req'd	Comments
OwnerStartWorkingTime		UTC timestamp, or Y, T, or TRUE to set to the current time.
OwnerEndWorkingTime		UTC timestamp, or Y, T, or TRUE to set to the current time.

UpdateInboxOwnerInfo Method

This method updates field values for an Inbox item owner.

The method searches as follows:

- 1 OwnerInfold
- 2 InboxItemId, OwnerPartyId
- 3 ObjectId, InboxTypeName, OwnerPartyId

See [Table 51](#).

Input Arguments

Table 51. UpdateInboxOwnerInfo Method, Property Set

Property Name	Req'd	Comments
ObjectId		For searching, not updated
InboxTypeName		For searching, not updated
OwnerPartyId		For searching, not updated
InboxItemId		For searching, not updated
OwerInfold		For searching, not updated
OwnerPriority		
OwnerActionLIC		Language independent code
OwnerQueueDuration		In seconds
OwnerUTCDueTS		UTC timestamp
OwnerComments		

Table 51. UpdateInboxOwnerInfo Method, Property Set

Property Name	Req'd	Comments
OwnerStartWorkingTime		UTC timestamp, or Y, T, or TRUE to set to the current time.
OwnerEndWorkingTime		UTC timestamp, or Y, T, or TRUE to set to the current time.

DeleteInboxItem Method

This method deletes an Inbox item and all associated Inbox item owners.

The method searches as follows:

- 1 InboxItemId
- 2 ObjectId + InboxTypeName

See [Table 52](#).

Usage Example

Call this method when the underlying feature object for the Inbox item has been deleted.

Input Arguments

Table 52. DeleteInboxItem Method, Property Set

Property Name	Req'd	Comments
InboxItemId		For searching, not updated
ObjectId		For searching, not updated
InboxTypeName		For searching, not updated

Initialize Method

This method is intended for use only by those upgrading from the 7.5.3 version of the application.

This method creates an Inbox item and starts the business service method defined in the Initialize action.

CAUTION: Priority is no longer an input argument for the Initialize method. (Task) Priority is an input argument for the RouteInboxItem Method.

See [Table 53](#).

Input Arguments

Table 53. Initialize Method, Property Set

Property Name	Req'd	Comments
ItemType	Y	
ItemDescription	Y	
ItemObjectId	Y	
ItemSubmittedBy	Y	
ItemPriority		Not supported in version 7.7
ItemQueueDuration		
ItemComments		

RouteInboxItem Method

This method is intended for use only by those upgrading from the 7.5.3 version of the application. For more information about this method, see *Upgrade Guide* for the operating system you are using.

This method deactivates existing Inbox item owners and creates new Inbox item owners for an Inbox item.

See [Table 54](#) and [Table 56](#).

Input Arguments

Table 54. RouteInboxItem Method, Property Set

Property Name	Req'd	Comments
ItemWorkflowInstanceId	Y	
Child Properties	Y	Multiple children are allowed. See Table 55 .

Table 55. RouteInboxItem Method, Child Property Set, Type = TaskOwnerInfo

Property Name	Req'd	Comments
TaskOwnerId	Y	
TaskStatus		
TaskPriority		

Output Arguments

Table 56. RouteInboxItem Method, Property Set, Type = ItemOutput

Property Name	Comments
InboxItemId	The row Id of the newly created Inbox item.
Child properties	Multiple children can be returned. See Table 57 .

Table 57. RouteInboxItem Method, Child Property Set, Type = OwnerInfoOutput

Property Name	Comments
OwnerPartyId	
OwnerInfolId	

Examples of Inbox Triggers

This section presents samples of Inbox triggers.

- [“Inbox Trigger Used in ESS” on page 168](#)
- [“Inbox Trigger Using Server Script” on page 169](#)

Inbox Trigger Used in ESS

This section presents a sample of SmartScript code.

This code is entered in the Script_Finish statement of the ESS Form (SmartScript). It can be accessed from the Administration - SmartScript screen > Scripts view in the ERM application. For more information, see about Linking Self-Service Forms to the Inbox in *Siebel Employee Relationship Management Administration Guide*.

The purpose of the script is to take data from the ESS Form (SmartScript) as well as some required arguments to invoke the Universal Inbox business service under the Initialize method. When the user submits the ESS Form (SmartScript), this eScript code is launched, invoking the Universal Inbox business service, and creating an Inbox item based on the parameters specified in the eScript and the Inbox type.

```
function Script_Finish ()
{
    var szScriptSessionId;
    var szRequester;
    var svc;
    var indata;
    var outdata;
    var ssPage;
    var ssQuestion;
    var EmployeeLastName;
    var EmployeeFirstName;
    var RequestedChange;
```



```

var PAFComments;
var PAFPri ority;
var szSSLanguageCode;
var szSSSCurrencyCode;

ssPage = GetPage("PAF Which Change");
ssQuestion = ssPage.GetQuestion("Di splay Em ployee Last Name");

EmployeeLastName = ssQuestion.GetCurrentValue();
ssQuestion = ssPage.GetQuestion("Di splay Em ployee First Name");
EmployeeFirstName = ssQuestion.GetCurrentValue();
ssQuestion = ssPage.GetQuestion("PAF Change Requested");
RequestedChange = ssQuestion.GetCurrentValue();
ssQuestion = ssPage.GetQuestion("PAF Comments");
PAFComments = ssQuestion.GetCurrentValue();
ssQuestion = ssPage.GetQuestion("PAF Pri ority");
PAFPri ority = ssQuestion.GetCurrentValue();

// Cancel saving everything to the database
Cancel ();

indata =TheApplication ().NewPropertySet ();
outdata = TheApplication ().NewPropertySet ();

// Get the login name of the user
szRequester = TheApplication ().LoginName ();
// Get SmartScript Save Session table Id.
szScriptSessionId = GetSessionId ();

szSSLanguageCode = GetParameter("Language");
szSSSCurrencyCode = GetParameter("Currency");

indata.SetProperty ("SmartScriptLanguageCode", szSSLanguageCode);

// ItemObjectId, ItemType, ItemSubmittedBy, and ItemDescription are the
// required input arguments for the "Universal Inbox.Initialize"
indata.SetProperty ("ItemObjectId", szScriptSessionId);
// Item Type is the Approvals Inbox type defined in the
// Approvals Inbox Administration screen
indata.SetProperty ("ItemType", "Personnel Action Form");
// Short Description of the inbox item
indata.SetProperty ("ItemDescription", RequestedChange + " PAF" + " for " + EmployeeFirstName + " " +
EmployeeLastName);

indata.SetProperty ("ItemSubmittedBy", szRequester);

// ItemQueueDuration, ItemPriority, and ItemComments are the
// optional input arguments for the "Universal Inbox.Initialize"
indata.SetProperty ("ItemQueueDuration", "129600");
indata.SetProperty ("ItemPriority", PAFPri ority);
indata.SetProperty ("ItemComments", PAFComments);
svc = TheApplication ().GetService ("Universal Inbox");
svc.InvokeMethod("Initialize", indata, outdata);
}

```

Inbox Trigger Using Server Script

This section presents a sample Server Script that calls Inbox methods.

This code is entered in the PreWriteRecord statement for the Project business component in Siebel Tools. The purpose of this code is to take data from the project record as well as some required arguments to invoke the Universal Inbox business service under the Initialize method. When the user changes the value of the Status field to For Approval, this eScript code is launched, invoking the Universal Inbox business service and creating an Inbox item based on the parameters specified in the eScript and the Inbox type.

```

function BusComp_PreWriteRecord ()
{
    var FldProjectStatus = this.GetFieldValue("Status");

    if (FldProjectStatus == "For Approval")
    {
        var szScriptSessionId;
        var szRequester;
        var svc;
        var indata;
        var outdata;

        indata = TheApplication ().NewPropertySet ();
        outdata = TheApplication ().NewPropertySet ();

        // Get the login name of the user
        szRequester = TheApplication ().LoginName ();

        // ItemObjectId, ItemType, ItemSubmittedBy, and ItemDescription are the
        // required input arguments for the "Universal Inbox.Initialize"
        var FldProjectNum = this.GetFieldValue("Project Num");
        indata.SetProperty ("ItemObjectId", FldProjectNum);
        // Item Type is the Approvals Inbox type defined in the
        // Approvals Inbox Administration screen
        indata.SetProperty ("ItemType", "ChangeManagement");
        // Short Description of the inbox item
        indata.SetProperty ("ItemDescription", FldProjectNum);
        indata.SetProperty ("ItemSubmittedBy", szRequester);

        // ItemQueueDuration, ItemPriority, and ItemComments are the
        // optional input arguments for the "Universal Inbox.Initialize"
        indata.SetProperty ("ItemQueueDuration", "129600");
        indata.SetProperty ("ItemPriority", "High");
        indata.SetProperty ("ItemComments", "Change Management Project");
        svc = TheApplication ().GetService ("Universal Inbox");
        svc.InvokeMethod("Initialize", indata, outdata);
    }

    return (ContinueOperation);
}

```

12 Messages

This chapter describes the administrative setup tasks that need to be performed before the Messages screen and views are used. It also explains how end users create, view, sort, and send messages.

NOTE: The Messages functionality is unrelated to the message broadcasting and alerts discussed in Chapter 9, “Alerts” and Chapter 8, “Message Broadcasting.”

This chapter includes the following topics:

- “Scenario for Setting Up Messages” on page 171
- “Process of Setting Up and Using Messages” on page 172
- “About Using Messages” on page 172
- “Setting Up Messages” on page 172
- “About Email and Screen Alerts” on page 173
- “Creating a New Message (End User)” on page 173
- “Setting Up Single and Recurring Alerts (End User)” on page 175
- “Viewing Messages (End User)” on page 175
- “Sorting Messages by Intervals (End User)” on page 176
- “Sending a Message Using Email (End User)” on page 176

Scenario for Setting Up Messages

This scenario provides an example of a business process performed by an administrator and a sales representative to set up and manage messages. Your company may follow a different process according to its business requirements.

A corporation has hired four new sales representatives. The Siebel administrator must set up message functionality for these new employees. The administrator sets up accounts for each new sales representative and checks to make sure that the Communications Management and the Workflow Management component groups are enabled.

Next, the administrator activates the Messages workflow policies and the Siebel Message send email and Siebel Message send email for activity owner workflow processes.

The administrative assistant for the sales representatives receives a message for a sales representative, either by phone or by voice mail. Instead of writing the message out by hand, the administrative assistant enters the message in the Messages screen and assigns the message to the sales representative.

The administrative assistant associates the message with an existing account, adds information in the Comments field, and attaches a spreadsheet file to the message. The administrative assistant then prioritizes the message and send it either as an email or a screen alert.

By default, a message is marked private, which means that only the administrative assistant and sales representative can review the message. The administrative assistant can alternately choose not to mark the message private, and then any individual with access to the account, activity, contact, opportunity, or service request associated with the message can view it.

Process of Setting Up and Using Messages

To set up and use messages, the administrator and the end user typically perform the following tasks:

- [“Setting Up Messages” on page 172](#)
- [“Creating a New Message \(End User\)” on page 173](#)
- [“Setting Up Single and Recurring Alerts \(End User\)” on page 175](#)
- [“Sorting Messages by Intervals \(End User\)” on page 176](#)
- [“Sending a Message Using Email \(End User\)” on page 176](#)

About Using Messages

End users, such as sales representatives and call center agents, can use messages to communicate with others who also use Siebel applications. They can create messages, view and sort messages, and associate activities and other items with messages. Using messages allows end users to maintain a history of the communication associated with a contact, account, opportunity, or information request.

Setting Up Messages

Administrators need to set up workflows for the Messages screen and views before a new employee can have email access.

NOTE: Make sure that users have the Message User responsibility so that they can access Messages views. For more information about setting responsibilities for users, read about defining responsibilities in *Security Guide for Siebel eBusiness Applications*.

To set up workflows for the Messages screen and views

- 1 Make sure that the Communications Management and the Workflow Management component groups are enabled.
- 2 Activate the Messages workflow policies. All Messages workflow policies are in the Siebel Messaging policy group.
- 3 Activate Siebel Message send email and Siebel Message send email for activity owner workflow processes.

For detailed information about how to set up workflows, see *Siebel Business Process Designer Administration Guide*.

About Email and Screen Alerts

There are two types of message alerts you can establish to send screen or email and screen alerts. You can set up email and screen alerts for messages and individuals to whom you delegate message-related activities, and perform the following tasks:

- Set up an alert for an individual to whom you routinely send messages
For instance, you routinely send messages to the same individuals, and you want to set up a standard alert method to let them know you have sent a message.
- Set up an alert for a single message so the recipient receives an alert
For instance, you send a message to an individual for whom you have not set up a message alert, but you can also set up an alert for the individual message.

You can opt to receive both email alerts and screen alerts simultaneously.

Email Alerts. A message generates an email alert when the following events occur:

- A message is created and the Alert Type field has a value of Email or Email and Screen Alert.
- A message is assigned to you, and you have set up an alert to receive email when messages or activities are assigned to you by a contact or employee.
- An activity is assigned to you, and you have set up an alert to receive email when messages or activities are assigned to you.
- You send an email from your Siebel application.

Screen Alerts. A message generates a screen alert when the following events occur:

- A message is created and the Alert Type field of the Messages form has a value of Screen Alert or Email and Screen Alert.
- A message is assigned to you, and you have set up an alert to receive a screen alert when messages or activities are assigned to you by a contact or employee.
- An activity is assigned to you, and you have set up an alert to receive a screen alert when messages or activities are assigned to you.

Creating a New Message (End User)

You can create a message using the Message screen.

To create a new message

- 1 Navigate to the Messages screen > Messaging List view.

- 2 In the Messaging list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Account	Shows the Account name associated with the message, if applicable.
Alert Type	Allows you to select a value from the drop-down list to indicate the alert type for the message. Default values include None, Email, Screen Alert, and Email and Screen Alert.
Assigned To	A required field that displays the name of the individual to whom you are assigning the message. You can select a default value in the Default Assigned To field in the User Preferences screen. See <i>Fundamentals</i> for more information on user preferences.
Comment	An optional text field that displays additional information.
Date/Time	An editable field that displays the month, day, year and the hour, minute, second that the message was created.
Email Address	Automatically populates the email address when you select the contact record.
First Name	Automatically populates the first name of the contact when you select the contact record.
Home Phone #	Automatically populates the home telephone number when you select the contact record.
Last Name	A required field that displays the last name of the contact you selected as the message recipient. After a record is saved, you can drill down on the hyperlink to navigate to Contacts and More Info.
Message	A text field that displays the content of the message.
Mobile Phone #	Automatically populates the mobile telephone number when you select the contact record.
Opportunity	Displays the Opportunity associated with the message, if applicable. Click the select button to choose an opportunity.
Priority	Allows you to select a value from the drop-down list to indicate the message priority. Default values include 1-ASAP, 2-High, 3-Medium, and 4-Low.
Private	A check box which, when selected, allows only the message creator and recipient to view the message. When the check box is cleared, team members associated with the opportunity, account, contact, and service request can view the message.
SR #	The Service Request number associated with the message, if applicable.

Field	Comments
Status	Allows you to select a value from the drop-down list to indicate the message status. Default values include New, Read, Delegated, Return Call, and Completed.
Work Phone #	Automatically populates the business telephone number when you select the contact record.

Setting Up Single and Recurring Alerts (End User)

You can set up an ongoing alert type for an individual. This individual always receives an alert when you assign a message to him.

You also can assign an alert to a single message to notify the recipient of a message. You can do this either while you are creating the message or after you have saved the message.

To set up a recurring message alert

- 1 Navigate to the Messages screen > Messaging List > Message Alert Setup view.
- 2 In the Message Alerts Setup list, click New.
- 3 In the new Message Alert record, click the select button in the Last Name field.
- 4 In the Pick Contact dialog box, select the name, and then click OK.
- 5 In the Alert Type drop-down list, select the type of alert.

The default value in the Alert Type field is None. Other values are Email Alert, Screen Alert, and Email and Screen Alert.

To send a single message alert

- 1 Navigate to the Messages screen > Messaging List > Daily Messages view.
- 2 In the Daily Messages list, click New.
- 3 In the Message Details form, click the drop down list in the Alert Type field, and then choose the type of alert to assign to the message.

Viewing Messages (End User)

You can view messages assigned to you, or created by you, using your Siebel application.

To view messages assigned to you

- 1 Navigate to the Messages screen > Messaging List view.

- 2 In the Messaging list, select the message to read.
- 3 In the Message Details form, review the text in the Message field.

To view messages created by you

- 1 Navigate to the Messages screen > Messaging List > All Messages view.
- 2 In the All Messages list, select Columns Displayed from the Menu drop-down list.
- 3 In the Columns Displayed dialog box, move Created By from the Available Columns list to the Selected Columns list, and then click Save.
- 4 In the All Messages list, click Query, complete the Created By field, and then click Go.
- 5 In the All Messages list, sort the messages by the Date/Time field.

Sorting Messages by Intervals (End User)

Use the appropriate view tab to sort messages into Daily, Weekly, or Monthly lists. You also can use queries to achieve the same result. The default query for the Messaging list displays all messages, but you can select predefined Daily, Weekly, or Monthly queries to refine your lists.

To sort messages by intervals

- 1 Navigate to the Messages screen.
A list of messages you received today appears in the Messaging list.
- 2 Click Query and, in the Messages dialog box that appears, enter the date for which you want to find messages, and click Go.
A list of messages for the specified date appears.
- 3 Click Today to reset the date to the current date.
- 4 Click the Weekly Messages view tab to view messages you received in the previous seven-day interval.
- 5 Click the Monthly Messages view tab to view messages you received in the last 30 days.

Sending a Message Using Email (End User)

You can send email messages to the recipient from within Siebel application. The recipient either can be inside or outside your corporate firewall because the Siebel application uses the email address associated with the contact information for the recipient. After you create a message and complete the necessary fields, you can send the message as an email. For information on standard email functionality within Siebel eBusiness Applications, see *Fundamentals*.

To send an email message

- 1** Navigate to the Messages screen.
- 2** In the Messaging list, select the message to send as an email message.
- 3** From File menu, select Send Email.
- 4** In the Send Email dialog box, complete the fields for the email, and then click Send.
In the email form, click To to display the Address Book dialog box.

13 Content Center

This chapter describes the features of Content Center. It includes the following topics:

- "About Content Center" on page 179
- "Content Center Job Roles and Terms" on page 180
- "Business Scenario for Using Content Center" on page 182
- "Process of Setting Up and Using Content Center" on page 183
- "Setting Up a Content Staging Environment" on page 184
- "Configuring Content Objects for Content Center" on page 186
 - "Modifying Business Components for Content Center" on page 186
 - "Creating Integration Objects for Content Center" on page 188
 - "Modifying Integration Objects for Content Center" on page 189
- "Setting Up Content Center Approval Workflows" on page 189
- "Setting Up Content Center Publication Workflows" on page 192
- "About the Content Project Business Service" on page 193
- "Setting Up Content Types" on page 194
- "Setting Up Contributors and Approvers" on page 195
- "Creating Content Projects" on page 195
- "Contributing and Approving Content (End User)" on page 197
- "Publishing Content Projects" on page 198

About Content Center

Content Center allows you to create and manage authored content, which includes items such as price lists, service solutions, and static Web site content, for Siebel eBusiness Applications.

Content Center features include:

- **Preview and simulation.** You can use a content staging environment to preview and test content before you publish it to your production environment. The staging environment displays content exactly as it will appear to customers, employees, and partners in your production environment. The staging environment runs on a separate database from the production environment.

- **Content projects.** You can group a set of content items into one content project, so that related changes can be made together. For example, you can create a content project to manage all the products, catalog categories, price lists, and marketing literature for your company's summer catalog.
- **Approval processes.** You can use Siebel Business Process Designer to design approval processes that allow team members to review a content item before it is published. Siebel Business Process Designer allows you to assign tasks based on a predefined list of content contributors and approvers.
- **Publishing.** After content is approved, Content Center uses Siebel Business Process Designer to publish it to a production environment. The XML-based publication business service can handle both complex database content and unstructured content that is stored in the file system. This component helps maintain transactional integrity between all the items in a content project.

Content Center Job Roles and Terms

Descriptions of Content Center job roles are in [Table 58](#), and terms are defined in [Table 59](#).

Table 58. Content Center Job Roles

Position	Responsibilities
Content Administrator	<p>One or more people in your business who are authorized to administer content. These people need to understand your business requirements in order to know what types of content and content items need to be managed and the appropriate contributor and approver workflows.</p> <p>Depending on your business requirements, one or more of these people may also be responsible for selecting and possibly configuring the appropriate business components, content objects, and content types. Alternatively, this may be done by an application developer.</p>
Content Contributor	A person in your business who is authorized to contribute content items. Examples are technical writers, Web designers, and graphic artists.
Content Approver	A person in your business who is authorized to approve content posted to your company's Web site. Examples are managers and your company's attorneys.

Table 59. Content Center Terms

Term	Definition
Content	<p>The components of the application that are authored, as opposed to application code. Siebel applications recognize the following classes of content:</p> <ul style="list-style-type: none"> ■ Business rules, such as personalization rules and assignment rules ■ Application content, such as product catalog, price lists, and product promotions ■ Web content, such as Web templates and static Web pages, typically stored as HTML, XML, and image files ■ Documentation, such as product data sheets, forms, and white papers <p>Content Center provides content production services for three of the classes listed above: application content, Web content, and documentation, while content asset management only applies to Web content and documentation.</p>
Content Asset	<p>An instance of content managed within Content Center and stored in the content asset repository. Content assets are typically comprised of unstructured markups and can be related to other content assets. For example, an HTML content asset can link to other pages or reference images. For more information, see Chapter 14, "Content Asset Management."</p>
Content Item	<p>Represents a transaction (add, update, delete) stored and associated with a piece of content.</p>
Content Object	<p>Specifies the information that will be transferred from the staging environment to the production environment when the content is published. Each content object is composed of a business object and an integration object.</p>

Table 59. Content Center Terms

Term	Definition
Content Project	A group of related content items. Grouping content items into projects makes it easier to manage changes that should be published simultaneously. Delete because this is defined on the first page.
Content Type	<p>A set of business rules you define for handling content, including rules that apply to the approval workflow, contributors, approvers, and the application views your company uses to edit or preview content. Each content type is based on a content object, and is associated with an approval workflow and a group of contributors and approvers.</p> <p>The following are examples of content types authored in Siebel applications that can be managed through Content Center:</p> <ul style="list-style-type: none"> ■ Siebel Sales Catalog: catalog, categories, product, product line, and product literature ■ Siebel Pricer: price list, pricing factor, rate list, and volume discount ■ Siebel Marketing: offers (Web, phone, email, direct mail, newsletter), campaign, and marketing development fund ■ Siebel Service: service solution, decision issue, resolution document, and SmartScript <p>The term Content Type is also used to describe the file type (or filename extension) of a content asset.</p>

Business Scenario for Using Content Center

This scenario provides an example of a scenario performed by a content administrator (in this case, the business manager), a Web site designer, an application developer, and content contributors and approvers. Your company may follow a different process flow according to its business requirements.

The business manager and Web site designer have designed the company's Internet home page. The page includes a section which will display a single targeted Web offer to customers visiting the site. The contents of this section will require a managed contribution and approval process to produce accurate and timely display of product offers.

First the application developer makes an Offer business component that is content-enabled and defines the Web Offer content type. Then he works with the business manager to develop some personalization rules to target the Web offers, tests the home page, and deploys the home page to the production environment.

The business manager is concerned that the graphics contained in various Web offers may clash with the company logo, so she edits the single approval workflow for the Web Offer content type. She creates an additional approval step for the site designer position, and associates the appropriate contributor and approver positions to those steps in the approval workflow.

Next, she configures the publication workflow, setting the connect string for the server in the production environment.

She then sets up the content project, adding the content items that make up tasks required to create the Web offer. These will be routed to the Content Inboxes of the content contributors and approvers as set up in the approval workflow.

After the content items have been completed and approved, she publishes the project to the production environment.

Process of Setting Up and Using Content Center

This example process represents the tasks that are carried out in the ["Business Scenario for Using Content Center" on page 182](#). Typically [Step 1](#) to [Step 6](#) are carried out once and [Step 7](#) to [Step 9](#) are carried out many times.

- 1 ["Setting Up a Content Staging Environment" on page 184](#)
- 2 ["Configuring Content Objects for Content Center" on page 186](#)
- 3 ["Setting Up Content Center Approval Workflows" on page 189](#)
- 4 ["Setting Up Content Center Publication Workflows" on page 192](#)
- 5 ["Setting Up Content Types" on page 194](#)
- 6 ["Setting Up Contributors and Approvers" on page 195](#)
- 7 ["Creating Content Projects" on page 195](#)
- 8 ["Contributing and Approving Content \(End User\)" on page 197](#)
- 9 ["Publishing Content Projects" on page 198](#)

Figure 13 illustrates the process and indicates who might typically perform each task.

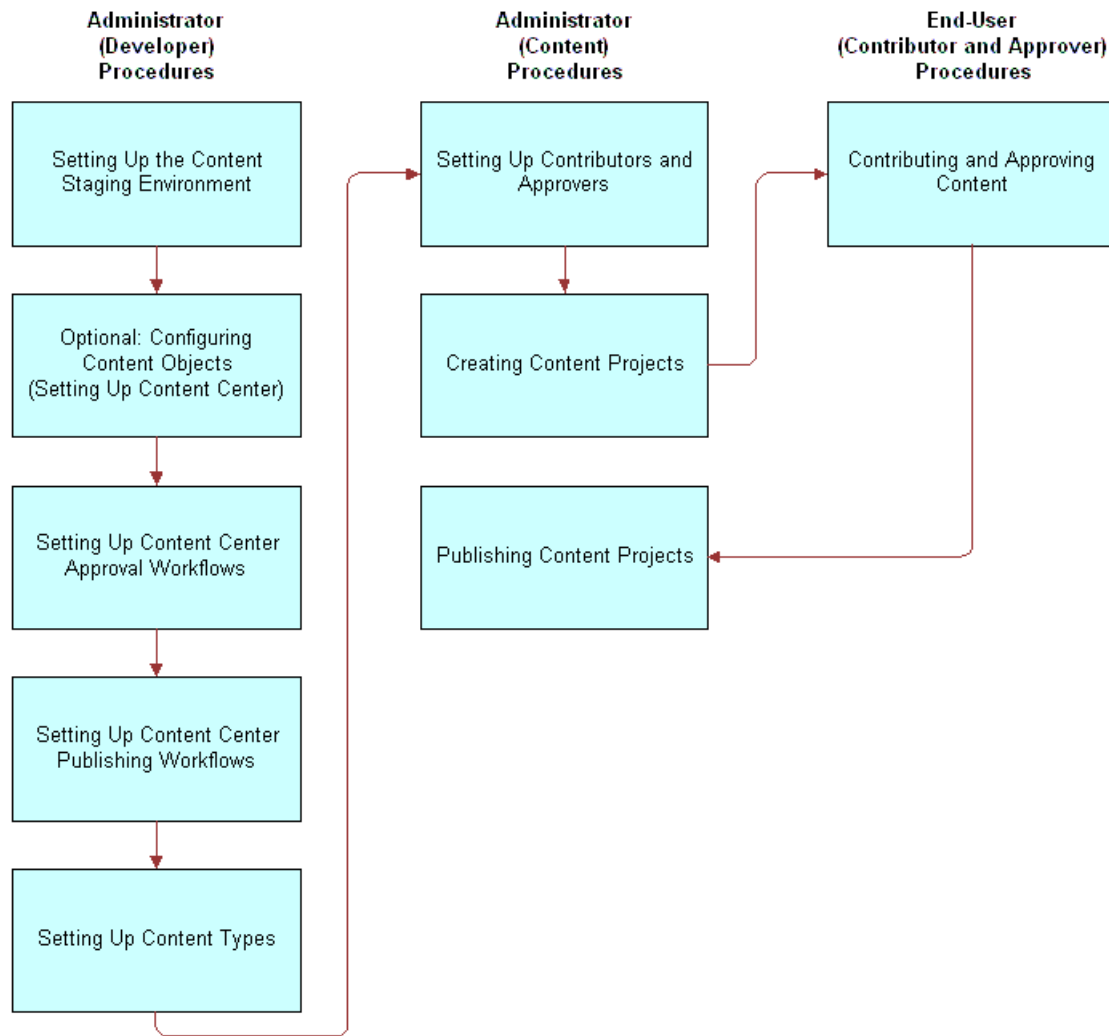


Figure 13. Example Process for Setting Up and Using Content Center

Setting Up a Content Staging Environment

A content staging environment is similar to a test environment, except that you use it to test content rather than application configuration. This allows you to develop and test new content without affecting your production applications.

After content is approved, Content Center uses workflows and the Content Project business service to send it to the production environment. For general information about Siebel workflows, see *Siebel Business Process Designer Administration Guide*.

Required Components for a Content Staging Environment

Content Center requires a separate Siebel eBusiness Applications installation for your content staging environment. The physical hardware for this environment should be the appropriate size for supporting the number of content center administrators, contributors, and approvers who manage your business content.

For more information about installing Siebel eBusiness Applications, see the *Siebel Installation Guide* for the operating system you are using for the operating system you are using.

Your staging environment should contain the following components:

- Database
- Siebel Gateway Name Server
- Siebel Server
- File System
- Web Server and Siebel Web Extension

Maintaining Consistency Between Staging and Production Environments

It is important that the staging and production environments are consistent when Content Center is implemented.

The most important element to keep synchronized is the Siebel repository (SRF) file. This file defines the structure of the application data, for example, the business components and the integration objects.

Keeping the data synchronized is not relevant, with the exception of *content* and related data. For example, if you use Content Center to manage product literature, then Content Center synchronizes the content by publishing it from staging to the production environment. In this case, products could be related data that also need to be kept synchronized. Although you may have chosen not to manage products through Content Center, nevertheless you must have a user key, such as product ID, that exists in both the staging and production environments so that the association of a piece of literature to a product can be made in the staging area and reproduced in the production environment.

The following are some tips to help you maintain consistency between your staging and production environments.

- If your production environment has not yet been installed, the database administrator should install two separate database instances (one for staging and one for production) using an identical Siebel repository (SRF) file, and initialize both instances with the same seed data. This makes sure that the content object definitions in your staging and production environments are the same.

For more information, see the *Siebel Installation Guide* for the operating system you are using.

- If your production environment is already active, the database administrator should install the staging environment using the same Siebel repository (SRF) file as used for the production environment. Make a copy of your database and use the copy to initialize your staging environment.
- Because you perform most or all content administration tasks in your staging environment, you should either disable or limit access to the appropriate content administration views in your production environment. This helps prevent administrators from accidentally making updates in the production environment.

Configuring Content Objects for Content Center

The content object definition specifies the information that is transferred from the staging environment to the production environment when the content is published.

Content objects are based on business objects and integration objects. Siebel Systems provides some prebuilt content objects which you can use, or configure to meet your business needs. See [Appendix B, “Content Center Reference”](#) for details about the prebuilt content object definitions.

You use content objects to create one or several content types. Each content type is based on a content object, and is associated with an approval workflow and a group of contributors and approvers. For example, from the Product content object, you might create two different content types: Software Products and Hardware Products. These two content types may have different approval workflows, as well as different contributors and approvers. For more information, see [“Setting Up Content Types” on page 194](#).

To set up content objects

- 1 Use Siebel Tools to identify or define the business object on which you base the content object. For more information on configuring business objects, see *Configuring Siebel eBusiness Applications*.
- 2 Modify the business components to meet the content object requirements. For instructions, see [“Modifying Business Components for Content Center” on page 186](#).
- 3 Use the Integration Object Builder wizard in Siebel Tools to create an integration object. For instructions, see [“Creating Integration Objects for Content Center” on page 188](#).
- 4 Modify the integration object to meet the content object requirements. For instructions, see [“Modifying Integration Objects for Content Center” on page 189](#).

NOTE: You do not need to create content objects for content assets. These are provided with the preconfigured product.

Modifying Business Components for Content Center

NOTE: This step is potentially recursive. Complete this step before using the Integration Object Builder wizard in Siebel Tools to create integration objects.

After you have identified or defined the business object on which your content object is based, check its business components for underlying tables that contain foreign keys to other tables. If there are business components with foreign keys, you must modify them to assure the integrity of foreign keys when these objects are published.

Typically, you need to follow one of the following two processes to modify the business components.

To modify the business components containing foreign keys

- 1** Create a join in the business component from each foreign key column to the row_id of the foreign key's table.
- 2** Create fields in the business component for all user key columns in the foreign key's table. If any of these columns are foreign keys, repeat [Step 1](#).
- 3** Assign a PickList and fill the PickMap with the foreign key and all related user key fields, including any intermediate foreign key fields.
- 4** Add Pick Map UpdOnlyIfNull columns for each Id type column in the Pick Map.

The UpdOnlyIfNull column should be the same one as its parent on the Pick Map.

Or, if the business component table contains a foreign key to a child (or other descendent) object in the business object:

To modify the business components where the business component table contains a foreign key to a child object

- 1** Create a Multi Value Link to the business component on the foreign key table.
- 2** Include the entire foreign user key as multi-value fields. Expand foreign keys in the user key by joining and adding fields to the Multi Value Link business component.
- 3** Set the Primary Id field of the Multi Value Link to the foreign Key column.

NOTE: To resolve foreign keys to child (descendent) objects in the correct order, you must specify a sequence number and XML sequence number for the resulting integration object.

If two business components joined by a foreign key contain user key columns of the same name, create different field names for each user key column. [Table 60](#) shows an example.

Table 60. Example: How to Handle Identical User Key Column Names

Business Component	User Key Columns	Comments
Internal Product Sales Tool	BU_ID	This is a foreign key from the Internal Product Sales Tool business component to the Organization business component.
	NAME	<p>This is a _U1 user key column in the Internal Product Sales Tool business component.</p> <p>This user key column name is identical to the one in the Organization business component described below.</p> <p>In the Internal Product Sales Tool, create a field called Name to map to this column.</p>
Organization	NAME	<p>This is a user key column in the Organization business component.</p> <p>This user key column name is identical to the one in the Internal Product Sales Tool business component described above.</p> <p>In the Internal Product Sales Tool, create a field called Organization Name to join to this column.</p>

NOTE: Later, you disable all other user keys, so you only need to check for duplicate names in your business component's _U1 table user key.

Creating Integration Objects for Content Center

Integration objects are sometimes called EAI objects, because they use Enterprise Application Integration (EAI) technology. You use the Integration Object Builder wizard in Siebel Tools to create integration objects. For more information, see *Integration Platform Technologies: Siebel eBusiness Application Integration Volume II*.

To create an integration object

- 1 In Siebel Tools, select File > New Object.
- 2 From the dialog box, select Integration Object.

The Integration Object Builder wizard guides you through the process of setting up an integration object.

After you create the integration object, you need to modify it to meet the requirements for a content object. For instructions, see [“Modifying Integration Objects for Content Center” on page 189](#).

Modifying Integration Objects for Content Center

Use the following guidelines to modify integration objects to meet content object requirements.

To modify integration objects

- In the integration object, make sure that the link that defines the parent to child relationships allows update and delete. If the link does not allow those operations, replace it with a link that does.
- In the integration object user properties, add AdminMode, value Y. This gives the EAI Siebel Adapter permissions to do synchronization against a Siebel database.
 - Disable these types of integration components:
 - ❑ All calculated fields.
 - ❑ All integration components created from Multi-Value Link (MVL) components, unless your business requires that you transfer those multi-values to your production environment.
 - ❑ If more than one field is mapped to a table column, all fields except one.
 - ❑ For integration components that have file attachments, the field that stores the file revision number. For example, in the Admin Sales Tool integration component, disable the LitFileRev field.
 - In the integration component, disable:
 - ❑ The NoDelete, NoInsert, and NoUpdate user properties.
 - ❑ All user keys except the one that is based on the _U1 table user key, which is used for integration between the two Siebel databases.
 - ❑ All identification (Id) fields. (Make sure that each field is listed in the Pick Map UpdOnlyIfNull list of its entry in the pickmap for the user key of its join table.)

Setting Up Content Center Approval Workflows

You can use Siebel Business Process Designer to manage workflows for the content item approval process. When the Start Project or Request Start Project action is invoked on a content project, the approval workflows associated with each content item in the project are instantiated.

Approval workflows allow you to specify the structure for contributing, reviewing, and approving content. The designated contributors and approvers are notified by new records in their Content Inbox at the appropriate step in the content production and approval process. For more information about designating contributors and approvers, see [“Setting Up Content Types” on page 194](#).

A state model and some workflows are associated with the approval workflow included in the seed data that is provided in Siebel applications. You can use these processes in your deployment, modify them to meet the needs of your business, or simply use them as a guide for creating your own approval workflows.

For more information on creating or modifying workflows, see *Siebel Business Process Designer Administration Guide*.

NOTE: All Content Center workflows should be placed into the Content Center group.

About the Content Item State Model

A state model, called Content Item Status, controls the status changes of a content item.

Table 61 describes each of the content item states.

Table 61. Content Item Status

State	Description
Pending Submit	Applied by the workflow process. If the current task in the workflow is a Contribute task, the workflow process applies the Pending Submit state to indicate that an end user is expected to perform some action on the content item.
Submitted	Applied by an end user. A content contributor applies the Submitted state to indicate that the actions associated with this content item have been completed.
Pending Approval	Applied by the workflow process. If the current task in the workflow is an Approval task, the workflow process applies the Pending Approval state to indicate that an end user is expected to review the content item.
Approved	Applied by an end user. A content approver applies the Approved state to indicate that the content item has been reviewed and approved.
Rejected	Applied by an end user. A content approver applies the Rejected state to indicate that the content item has been reviewed and disapproved.

Table 61. Content Item Status

State	Description
Canceled	Applied by an end user. A content contributor or approver applies the Canceled state to indicate that the content item should no longer be included in the current content project.
Completed	Applied by the workflow process. This is a terminal state that indicates that the workflow approval process has been completed for the content item. A content item must be in the Completed state before it can be published.

About the Content Approval (Single Approver) Workflow

The Content Approval (Single Approver) workflow is a simple workflow that demonstrates a single approver approval process. You can use this workflow with or without modification.

The Content Approval (Single Approver) workflow uses these step types to construct the business logic for content item approval:

- **Content Task Subprocess.** This step type is used to indicate that the Content task assigns the content item to an end user to perform some action. Each Content task has a type and a sequence number. The task type is either contribution or approval. The task sequence indicates the Siebel position to which the content item should be assigned, as specified on the content item. This step calls the Content task workflow subprocess. For more details about the subprocess, see [“About the Content Task Subprocess” on page 191](#).
- **State Decision Point.** This step type performs branching logic in the approval process. The branching logic is based on the state that is applied to the content item after a Content task. For example, a decision point is used to reassign a content item to the originator after it is rejected.
- **State Update Siebel Operations.** The Siebel Operation step type is used to make updates to the content item state.

You can use these workflow components to create new approval workflows or to modify the Content Approval (Single Approver) workflow for your business. For example, if you require two approval tasks, you can add two Content Task Subprocesses and State Decision Points.

About the Content Task Subprocess

The Content Task Subprocess contains the common logic of assigning a content item and waiting for a user action. The parent approval process calls this subprocess each time a content item is assigned to an end user. Calling this task causes the content item to appear in the Content Inboxes for those users associated with the current sequence (TaskSeq).

The parent business process must pass in the input arguments shown in [Table 62](#).

Table 62. Parent Approval Process Input Arguments

Input Argument	Description
Object Id	The content item ID from the parent (Content Approval) to the child (Content Task) Subprocess.
TaskSeq	Passes the sequence number of the current task.
TaskType	Indicates that the current task is either type Contribute or type Approve.

The Content Task Subprocess performs these actions:

- Sets the content item state to either Pending Submit or Pending Approve, depending on the TaskType for the current task.
- Sets the content item Current Approval Sequence Number field to the TaskSeq value. This makes the content item visible to the appropriate end users in the Content Inbox view.
- Waits for the end user to take action on the content item and make a state change to the item. When this occurs, the workflow process resumes and returns control to the parent approval process.

About the Auto Complete Workflow

An approval workflow must be run for each content item before a content project can be published. (See [“To start the project approval workflow” on page 196](#).) To publish content without routing it through approvers and contributors, use the Auto Complete workflow. The Auto Complete workflow is a simple workflow, provided with the seed data. It sets the status of a content item to Completed immediately so that the project is ready for publication.

Setting Up Content Center Publication Workflows

The Content Project business service publishes content projects. It can transfer any data that can be accessed through a business component: both complex database content and unstructured content. Transactional integrity is maintained between all the items in a content project.

Project publishing is controlled by workflows. This provides flexibility in the publishing process. When a business manager invokes either the Publish or Request Publish action for a project, the publication workflow associated with the project is instantiated.

Siebel applications provide two predefined publication workflows in the standard product:

■ Content Publish workflow

This workflow publishes a content project from a staging environment to a production environment. There is only one step in this workflow, which calls the Content Project business service. You may extend this process to meet your specific business requirements. For example, you may create additional workflow steps to integrate with other systems or wait for a specified period of time before publishing.

■ Content Publish to Files workflow

This workflow is similar to the Content Publish workflow, except that the content project is published to XML files in a specified directory instead of to the production environment.

You can use these processes in your deployment, modify them to meet the needs of your business, or simply use them as a guide for creating your own publication workflows.

For more information on creating or modifying workflows, see *Siebel Business Process Designer Administration Guide*.

NOTE: All Content Center workflows should be placed into the Content Center group.

About the Content Project Business Service

The Content Project business service is designed to publish a content project from the staging environment to the production environment or to publish the content items as XML files. In the publication workflow, the Export method of this business service is called, indicating that the content items in the project will be exported from the staging environment. The publishing target is set using two method arguments, specified as workflow properties:

■ **Connect String.** A Siebel connect string, specified as:

`si ebel : //namesrvr: 2320/enterpri se/obj mgr/si ebsrvr`

For example: `si ebel : //demosrvr: 2320/si ebel /SCCObj Mgr_enu/demosrvr`

The Content Project business service connects to the specified object manager, such as SCCObjMgr for Siebel Call Center, as the current user and makes the appropriate updates, inserts, and deletes for each content item in the project. These changes are made by the content object in the sequence specified in Siebel Tools for each content object.

■ **Export Directory.** The name of a file system directory into which the XML should be placed. For example, `C:\temp` or `\\fileserver\publ ish\export`. The directory must exist and be accessible to the object manager. Specifying this property exports the content items within the project as a series of Siebel XML files. The files use the naming convention:

- Upload *content object name.xml*—for content items that are to be added.
- Delete *content object name.xml*—for content items that are to be deleted in the target system.

NOTE: Detailed information about the other methods in this business service are given in Appendix B, "Content Center Reference."

Setting Up Content Types

Content types define the business rules for managing a class of content through the creation and approval process.

Each content item is assigned a content type. The content type determines the following for the content item:

- The approval workflows
- Which views are used to preview or edit the content

A set of predefined content types are provided. You can also create new content types according to your business process, as described in the following procedure.

NOTE: Do not confuse *content types* with *content asset types*. For information about content asset types, see [“About the Content Asset Types View” on page 207](#).

To set up content types

- 1 Navigate to the Administration - Content Center screen > Content Types view.
- 2 Create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	Unique name of the content type.
Content Object	<p>The object chosen from this MVG specifies the information that is transferred during publishing.</p> <p>For more information, see “Configuring Content Objects for Content Center” on page 186.</p>
Approval Workflow	Defines the content contribution, review, and approval process for this content type. For more information, see “Setting Up Content Center Approval Workflows” on page 189 .
Content Type Views	<p>A list of the views used to administer or preview content of this type. These views determine the end-user navigation from the Content Inbox.</p> <p>Examples are the destination views for the Item Reference hyperlink, in Step 3 in the “To contribute (create or edit) a content item” procedure on page 197 and the Action hyperlink in Step 4 in the “To contribute (create or edit) a content item” procedure on page 197.</p>
Picklist	Determines the drop-down list used to select content of this type.
Pick Applet	Determines the pick applet used to select content of this type.

Setting Up Contributors and Approvers

After you set up approval workflows for content objects, you must specify contributors and approvers for the content.

When you create a content type, you assign default contributors and approvers to each sequence number. If necessary, these defaults can be overridden (Content Item detail view) when the content item is created.

To set up a contributor or approver

- 1 Navigate to the Administration - Content Center screen > Content Types view.
- 2 Select the content type for which you would like to create a list of contributors and approvers.
- 3 Click the Contributors and Approvers view tab.
- 4 In the Contributors and Approvers list, create a new record.
- 5 In the Position field, select a position from the Pick Position dialog box.
- 6 In the Seq field, specify a sequence number for the selected position.

You can specify multiple positions for the same sequence number. Doing so places the content item into multiple Content Inboxes for this task; however, only one individual is able to complete the task.

- 7 In the Comment field, add a default comment for each position.

Comments are visible to users when they receive the content item in their Content Inbox.

Creating Content Projects

You can use a Content Project to manage the process of creating, editing, and deleting application content. The Content Project provides a virtual folder through which a set of related content item changes can be managed. You use the Content Projects view to create projects, start the project approval workflows, and review content project status.

To create a content project

- 1 Navigate to the Administration - Content Center screen > Content Projects view.
- 2 In the Content Projects list, create a new record, specifying a name and description.
- 3 In the More Info form fill in the Plan Publication Date field—the date you plan to publish this project.
This date does not automatically publish the project.
- 4 In the Publication Workflow field, select the publication workflow that you want to use for this project.
- 5 Click the Content Items view tab.

- 6 In the Content Items list, create a new record and complete the necessary fields.

For each content item, you must specify a descriptive name, a content type, a description of the work to be performed, and a status (Add, Update, or Delete). If the item has a status of Update or Delete, you can also specify the item reference, which allows you to select the specific piece of content that should be changed.

NOTE: You can change any contributors or approvers for a content item by editing the Contributors and Approvers list.

To start the project approval workflow

- 1 Navigate to the Administration - Content Center screen > Content Projects view.
- 2 From the Content Projects list, select the appropriate content project.
- 3 In the More Info form, do one of the following:
 - Click Start Project. This changes the state of the project from Draft to In Process and instantiates the approval workflows synchronously. This means that users must wait for all workflow processes to begin before regaining control of the user interface. For large projects, this could take several minutes.
 - Select Request Start Project from the Menu button drop-down list. This changes the state of the project from Draft to In Process and instantiates the approval workflows asynchronously on a separate server component, which returns control to users more quickly. This is the recommended method to use for projects that contain thirty or more items. This method requires that the Content Project Start server component is online. (See *Siebel System Administration Guide* for information about starting server components.)

NOTE: If you add more content items to the project after it is in the In Process state, invoke the Start Project or Request Start Project action again to start the approval workflows for the new content items.

To review status of content project and content items

- 1 Navigate to the Administration - Content Center screen > Content Projects view.
- 2 From the Content Projects list, select the appropriate content project.

The status of the project is given in the More Info form. The table below explains the Project Status values.

Project Status	Description
Draft	The project has been created and the approval workflow has not been started.
In Process	The approval workflow has been started.
Published	The project has been published.

- 3 Click the Content Items view tab.

You can review the status of each content item, and check or change its assignment. By clicking the Item Reference for a content item, you can preview the current state of the content. See [Table 61 on page 190](#) for possible status values.

Contributing and Approving Content (End User)

The Content Inbox is the screen that Content Contributors and Approvers use to interact with the approval workflow. In the My Content Items view users see any content item currently assigned to their position by the approval workflow, and are able to drill down on hyperlinks to the appropriate views to contribute, edit, preview, and approve content.

To contribute (create or edit) a content item

- 1 Navigate to the Content Inbox screen.
- 2 From the Show drop-down list, select My Content Items.

The Content Items list contains all of the content items currently assigned to you by the approval workflow.

Items that require contribution can be identified by the status Pending Submit.

- 3 Drill down on an item and do any of the following:
 - Click the Contributors and Approvers view tab to see the users assigned to the contribution and approval process.
 - Click the History view tab to review actions taken on the item to date.
 - Drill down on Item Reference hyperlink to preview the content item.
- 4 Drill down on the Action hyperlink and use the associated administration view to create or edit content.

This link dynamically takes you to the Add/Edit view associated with the content type. If the action is Delete, this link is not active. Instead, completion of a deletion task indicates approval to delete the referenced item.

For more information about editing content assets, see [Chapter 14, "Content Asset Management."](#)

- 5 Return to the Content Inbox using the back button.
- 6 If the content item is an Add action, update the Item Reference field on the content item to reference the content you just created. Clicking the Item Reference pop-up displays a pick list from which you can select the content record that you just created.
- 7 Click on the Item Reference link to view the item and verify that it is complete and accurate. Return to the Content Inbox using the back button.
- 8 Add comments as needed to the content item, and change the status of the item as appropriate. For example, change the status from Pending Submit to Submitted.

To approve content

- 1 View all content items in the Content Inbox and select an item to work on.
Items that require approval can be identified by the status Pending Approval.
- 2 Drill down on an item and do any of the following:
 - Click the Contributors and Approvers view tab to see the positions assigned to the contribution and approval process.
 - Click the History view tab to review actions taken on the item to date.
 - Drill down on Item Reference hyperlink to preview the content item.
- 3 Make any comments to the content item, and change the status of the item as appropriate.
For example, change the status from Pending Approval to Approved or Rejected.

Publishing Content Projects

After the content for a project has been added and approved, use the Content Center publication workflow to publish to your production environment.

Make sure that:

- The correct publication workflow for the project has been specified. (See [Step 4 in the “To create a content project” procedure on page 195.](#))
- The status of the project is In Process and the status of each item in the project is Completed.

To publish a content project

- 1 Navigate to the Administration - Content Center screen > Content Projects view.
- 2 From the Content Projects list, select the appropriate content project.
- 3 Do one of the following:
 - Click Publish. This changes the state of the project to Published and instantiates the publication workflow synchronously. This means that users must wait for all workflow processes to begin before regaining control of the user interface. For large projects, this could take several minutes.
 - Select Request Publish from the Menu button drop-down list. This instantiates the publication workflow asynchronously on a separate server component, which returns control to users more quickly. This is the recommended method to use for projects that contain thirty or more items. This method requires that the Content Project Publish server component is online. (See *Siebel System Administration Guide* for information about starting server components.)
- 4 If you selected Request Publish in [Step 3](#):
 - a Navigate to the Administration - Server Management screen > Components view.

- b In the Components list, select the Content Project Publish record, and check the State field in the Tasks list.

If publication fails, the task's state is "Exit with Error."

NOTE: A content project cannot be republished, except by creating a new content project, for example by copying the published project.

14 Content Asset Management

This chapter describes setting up, creating, and managing content assets. It includes the following topics:

- [“About Content Assets” on page 201](#)
- [“Business Scenario for Content Asset Management” on page 201](#)
- [“Process of Managing Content Assets” on page 202](#)
- [“Defining Content Sets to Contain Content Assets” on page 202](#)
- [“Adding Content Assets to a Content Set” on page 203](#)
- [“Setting the Home Page for a Content Set” on page 204](#)
- [“Viewing and Editing Content Asset Properties” on page 204](#)
- [“Checking Content Assets In and Out” on page 206](#)
- [“Editing HTML Content” on page 207](#)
- [“About the Content Asset Types View” on page 207](#)
- [“About Configuring Content Asset Management” on page 207](#)

You can use the content asset repository for storing and managing unstructured content such as assets and sets of assets. Content Asset Management establishes check-out and check-in procedures to serialize access to content, and prevent changes from being lost by users trying to update content simultaneously. Content can be rolled back to earlier versions if the changes made were unsatisfactory.

About Content Assets

You can use the content asset repository for storing and managing unstructured content as assets and sets of assets. Content assets are typically unstructured data such as Web pages, images, Microsoft Office documents, and text files.

Content Asset Management establishes check-out and check-in procedures to serialize access to content, and prevent changes from being lost by users trying to update content simultaneously. Content can be rolled back to earlier versions if the changes made were unsatisfactory.

Business Scenario for Content Asset Management

Content Asset Management is typically used in conjunction with other screens in the Siebel eBusiness Application, for example Microsite Management, Group News, and Info Center. For a sample scenario where Content Asset Management is used, see [“Scenario for Microsite Management” on page 213](#).

Process of Managing Content Assets

This example process represents the typical tasks in creating and managing content assets:

- [“Defining Content Sets to Contain Content Assets” on page 202](#)
- [“Adding Content Assets to a Content Set” on page 203](#)
- [“Setting the Home Page for a Content Set” on page 204](#)
- [“Viewing and Editing Content Asset Properties” on page 204](#)
- [“Checking Content Assets In and Out” on page 206](#)
- [“Editing HTML Content” on page 207](#)

Defining Content Sets to Contain Content Assets

Content sets are collections of content assets. Every content asset must belong to a content set and should have a unique name within that set. In addition to content assets, content sets can contain other content sets.

After a content set is defined, you can:

- Add content assets to the set
- Add other content sets to it
- Preview the home page asset of the set
- Review the history of the set
- Establish the locks on content assets in the set

To create a content set

- 1 Navigate to the Administration - Content Center screen > Content Sets view.
- 2 In the Content Set list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	A unique name for the content set record.
Title	A short descriptive title for the content set.
Description	Text describing the content set.
Home Page	This field cannot be filled in until there are content assets in the content set. See “Setting the Home Page for a Content Set” on page 204 .
Parent	The name of an existing content set that contains this new content set.

Adding Content Assets to a Content Set

Content assets can only be created as child records of a content set.

To add content assets to a content set

- 1 Navigate to the Administration - Content Center screen > Content Sets view.
- 2 In the Content Set list, select the content set to which you want to add an asset.
- 3 Click Add Content.
- 4 Do either of the following actions:
 - Click the File Options button and specify a local file.
 - Type in a URL or network path.
- 5 If you typed in a URL or network path, click the URL Options button and set the URL and network file options in the dialog box.

Some fields are described in the following table.

Field	Description
Follow Links	Select to have the pages that are linked-to from the specified Web page are copied, and, in turn, links to those pages copied as well.
Max Depth	Indicates the level to which links are copied. For example, if Max Depth = 1, pages that are linked-to from the specified page are copied, but not pages that they link to.
Restrict to Subdirectory	Select so that, if links are followed, only links to pages within the same directory as the specified page are copied.
Retrieve Graphics	Select to have graphics on the specified Web page copied along with the text.
URL options	
Network file options	

- 6 (Optional) Click Advanced to set the Advanced Options for the asset.

Some fields are described in the following table.

Field	Comments
Content Type	This is the Content Asset Type. Leave this field set to Auto-Detect (the default) to have the application determine the asset type, or select a type from the dialog box to set a specific type.
Lock	Select this to lock the content asset, so that others cannot edit it.
Comments	Enter comments for this version of the content asset.

Setting the Home Page for a Content Set

After adding content assets to the content set, you can specify one of these assets to be the home page. The home-page asset displays when the content set is previewed. Because links on the preview applet are active, if the content set contains a portal-style HTML page, this is the best page to choose as the home-page asset.

To set the home page for a content set

- 1 Navigate to the Administration - Content Center screen > Content Sets view.
- 2 In the Content Set list, select the content set and complete the Home Page field.
- 3 Click the Preview view tab to see the home page.

Viewing and Editing Content Asset Properties

The following procedure describes the fields in the Content Assets view and use of the Preview, Links, Referenced by, Versions, and Access Groups views.

To review and edit the properties of a content asset record

- 1 Navigate to the Administration - Content Center screen > Content Sets view, and select the content set that contains the content asset.
- 2 Click the Assets view tab.
- 3 Drill down on the content asset name.

NOTE: You can also navigate to a particular content asset record by querying in the Content Assets view or by clicking on the asset-name hyperlinks on the Content Explorer.

- 4 Click Edit.
- 5 Complete or edit the fields in the Asset Detail form as required.

Some fields are described in the following table.

Field	Comments
Name	A name for the content asset record. The name should be unique within in the content set.
Title	A descriptive title for the content asset.
Activation	Sets activation and expiration dates for the content asset.
Expiry	There is no logic associated with this date in the Content Center module, but when this content is used by other modules, such as Microsite Management, these dates are used to determine whether the content is displayed.

Field	Comments
Content (Asset) Type	This field is set when the content asset is created and cannot be modified.
Language Code	Sets the language code for the content asset.
Private	If a content asset is private, only users on the associated access groups can view the asset. If this box is not selected, the asset is public and any user can view the asset, regardless of any access groups specified for the asset.

- 6 Click the Preview view tab to preview the content asset.

If the content asset is an HTML file or an image, the asset displays directly in the Preview applet. For other types of content assets, the title of the asset appears as a hyperlink, from which you can open the asset in the application that you choose.

- 7 Click the Links view tab to review the links within a content asset.

These may be links to graphics, to HTML pages, or to email addresses. They may be external links or they may be links to other assets within the content asset repository (internal).

If the link is internal, Content Center checks whether the link is valid.

- 8 Click the Referenced by view tab to review the other content assets that contain links to this content asset.
- 9 Click the Versions view tab to view information about the versions of the asset stored in the content asset repository.

To...	Select It and Click...
Roll back to a previous version	Restore
Download a version to file	Save to File
Preview a version	Preview

- 10 Click the Access Groups view tab to view who has read and write access to the content asset:

- **Read access.** If the Private field is set, only those groups listed have read access. If the Private field is not set, there are no restrictions on who has read access to the asset.
- **Write access.** If any access groups have the Allow to Edit field checked, only they have write access. If the Allow to Edit field is blank for all, there are no write restrictions on the asset.

For information about creating access groups, see *Security Guide for Siebel eBusiness Applications*.

Checking Content Assets In and Out

Checking out a content asset downloads the asset file and locks the asset so that others cannot make changes to it.

Checking in a content asset uploads a new version of the content asset and unlocks the asset.

To check out a content asset

- 1 Navigate to the Administration - Content Center screen > Content Sets view, and select the content-asset record to check out.
- 2 Click Check Out.

Your user ID appears in the Locked by field.

To check in a content asset

- 1 Navigate to the Administration - Content Center screen > Content Sets view, and select the content-asset record to check in.
- 2 Click Check In.
- 3 In the Check In Content dialog box:
 - a Click the browse button and select a file or URL that contains the content asset you are checking in.
 - b Click Unlock to allow others to modify this content asset after check in.
 - c Add comments describing how this version differs from the last.

About the Content Asset Commands on the Menu Button

Most users only need to use the Check Out and Check In buttons. However, other content asset commands are available on the menu button of the Asset Detail form in the Content Assets view:

- **Lock.** Locks the content asset by the current user.
- **Unlock.** Unlocks the content asset. For example, you can use this command if you check out an asset, but then decide that you do not want to make any changes to it.
- **Save to File.** Downloads the content asset to a file, but does not lock the asset.
- **Replace.** Creates a new version of the content asset. The Replace command is available only when the asset is locked.
- **Delete.** Deletes the content asset record and is equivalent to the Delete Record command. This soft delete keeps past versions of the asset in the content asset repository. Deleted assets can be accessed through the Contents Sets History view.

Editing HTML Content

You can edit content assets of type HTML directly within the Siebel application using the integrated HTML editor.

NOTE: To edit large or complex HTML files, you may prefer to use a third-party HTML or text editing application.

To edit HTML content using the integrated HTML editor

- 1 Navigate to the Administration - Content Center screen > Content Sets view, and select an HTML content-asset record to edit.

- 2 Click Edit HTML.

The content asset is automatically checked out, and the integrated HTML editor opens.

- 3 Click on the edit area, and make changes as required.

For general information about the integrated HTML editor, see *Fundamentals*.

- 4 Click Save.

The content asset is automatically checked in.

About the Content Asset Types View

The Content Asset Types view contains the file types, and associated DTR (document type rules) files, extensions, and MIME types, that are recognized by Content Asset Management.

Although you can add new content asset types if necessary, it is unlikely that you will need to. Many file types are provided with the preconfigured Siebel application.

CAUTION: It is recommended that you do not edit or delete records in this view and that you do not delete any DTR files from your Siebel installation.

About Configuring Content Asset Management

Content assets can be added to the Content Center repository by specifying a filename on a shared directory or by specifying a URL. In both cases, files that are linked-to from the specified file or URL can be imported by selecting to Follow Links.

When shared network files are imported to the Content Center repository in this way, the permissions for the directory access are those of the server process account. Because the server process account typically has more extensive privileges than the user, there is a security risk of users importing content from directories to which they do not have access.

To prevent this, importing from shared directories has been disabled except for those directories that are listed in the contentbase.ini file. It is recommended that you limit this list of allowed directories to a set that you can easily monitor and manage.

On the Windows platform, the contentbase.ini file can be found in *SI EBEL_ROOT\si ebsrvr\bin*, and, on the UNIX platform, the file can be found in *SI EBEL_ROOT/si ebsrvr/lib*. The default file looks like this:

```
[Global Settings]

ImportFileEnabled=1

ImportFilePath=Siebel ContentShare
```

- **ImportFileEnabled.** If ImportFileEnabled=1, file import is allowed from directories identified in the ImportFilePath parameter. If ImportFileEnabled=0 import is allowed only from URLs (where the URL's server enforces security) and import from shared directories and followed links is disabled.

- **ImportFilePath.** The value of this parameter determines the directories from which the user can import files. This value is a string of subpath names, delimited by semicolons. The directory specified by the user for file import must contain one of the subpaths listed.

For example, if the ImportFilePath parameter is set to *Siebel ContentShare; EngShare; \\ori on; sales\content*, users can import files from these directories:

```
\\myPC\Siebel ContentShare
\\ServerA\EngShare\GroupWeb
\\ori on\users\NewsBulletin
```

However, you cannot import files from these directories:

```
\\myPC\Siebel ContentShareAll
\\ServerA\Mysales\content
```

NOTE: The network path is interpreted relative to the server machine, not the client machine. Therefore, local paths like *C:* refer to directories on the server machine. And, for example, if the server machine is running UNIX, then the UNC path syntax *\\ori on\users* is not valid; instead, it might be */net/ori on/users/*.

If you use the default (out-of-the-box) contentbase.ini file, the administrator or individual users need to set up one or more shared directories named *SiebelContentShare* to contain those files (and those files that are referenced by the specified files) that they want to import as content assets.

15 Microsite Management

This chapter describes how to use Microsite Management to create Web pages and manage Web page content.

It includes the following topics:

- [“About Microsite Management” on page 209](#)
- [“Scenario for Microsite Management” on page 213](#)
- [“Process of Microsite Management” on page 214](#)
- [“Viewing and Editing Page Information” on page 214](#)
- [“Using the Page Designer and Its Tools” on page 217](#)
- [“Managing Groups of Page Items” on page 231](#)
- [“Previewing a Page” on page 232](#)
- [“Publishing a Page” on page 233](#)
- [“Deleting a Page” on page 233](#)
- [“Creating and Applying Templates” on page 234](#)
- [“About Creating Search Indexes” on page 235](#)
- [“About Configuring Microsite Management” on page 236](#)

About Microsite Management

Many companies have multiple content managers whose responsibilities include adding and modifying data on Web pages. The layout and maintenance of data and hypertext links must be done as efficiently as possible, without requiring IT resources. The Microsite Management module is designed to simplify creation and maintenance of Web pages. Everything from site organization and creation of new pages through to editing text and graphics is carried out from the Microsite Management screen.

Unstructured and Structured Content Definitions

Both structured and unstructured *page items* can be included on pages created within the microsite management module:

- **Unstructured Content.** Such as HTML files, graphics, and links to documents. Unstructured content can be authored in a variety of environments, including Microsoft FrontPage, PowerPoint, and Word and the integrated HTML editor within the Siebel applications. Placement of structured content on pages is carried out using Page Designer in the Microsite Manager screen.

- **Structured Content.** Such as product catalogs and lists of opportunities. In general, structured content is authored in the Siebel application environment. Placement of structured content on pages is carried out in Siebel Tools, by editing applets on views.

Key Features

Key features of Microsite Management are:

- **Page Administrator Explorer Tree.** Gives a hierarchically organized view of all the pages in your Web site.
- **Page Designer.** A graphical drag-and-drop page layout tool that allows page designers and content managers to quickly create different types of content anywhere on a page.
- **Preview.** Allows you to preview pages according to content status (for example, approved or draft) and according to release and expiration dates.
- **Templates.** Grouped content items that can be placed on multiple pages and updated for all pages at once.
- **Access Control.** Is set at both the page and page item level so you can control which access groups can see and edit content.
- **Transparent Integration with Content Center.** Allows setting up and routing the tasks of creating, editing, and approving with Siebel Content Center. When a link to a file is added to a page, that file is added to the Siebel content repository as a content asset, and can be version-controlled with Content Center. For more information, see [Chapter 13, "Content Center."](#)
- **One-Click Publishing.** Publishes directly from the Microsite Management screen, creating a content project and automatically approving the page content.
- **Usage Collection.** Ability to monitor users' visits to Microsite pages. For more information, see [Chapter 16, "Usage Collection."](#)

The Page Designer and the Finished Page

Figure 14 and Figure 16 show the relationship between a finished page and Microsite Management's Page Designer layout tool that was used to create the page. The content on the page is indicated by page item icons in Page Designer. The areas of the page, such as the navigation bar, are indicated schematically in Page Designer.

The screenshot displays a web page titled "PCS Employee Benefits". On the left is a vertical navigation menu with links: "Human Resources Home", "Holiday Schedule", "Expense Reports", "Benefits", "Performance Management", "Careers at PCS Computing", "New Hire Center", and "Business Planning and Analysis". The main content area has a header image showing a group of people with the word "IMMIGRATION" overlaid. Below the image is a table with two columns: "Benefits Programs" and "Type".

Benefits Programs	Type
Frequently Asked Questions	Icon of a document with a question mark
Compensation Programs	Icon of a document with a dollar sign
Day Care and Other PCS Services	Icon of a document with a question mark
Managers Resource Guide	Icon of a document with a question mark
Guidelines and Services	Type
Relocation Guidelines (Word document)	Icon of a document with a question mark
HR Contact Information	Icon of a document with a question mark
401k Allocation	Icon of a document with a question mark
Health and Dental Providers	Icon of a document with a question mark
Family Services	Icon of a document with a question mark
Employee Awards	Icon of a document with a question mark

On the right side of the page is a "Quick Picks" section with a list of links: "HR Key Contacts", "Careers at PCS", "Employee Referral Program", "Department Numbers", "Business Cards and Nameplates", "Conferencing Services", "HR Forms", "Employee Rewards Nominations", "Health and Safety", "Single Sign-On Links", "MyYahoo", and "Authoria - Benefits Eligibility".

Figure 14. Microsite Page

If you prefer, you can revert to the older style of navigation bar (shown in [Figure 15](#)). See “[Changing the Navigation Bar Style in Microsite Pages](#)” on page 239.



Figure 15. Older Style Navigation Bar with Blue Border

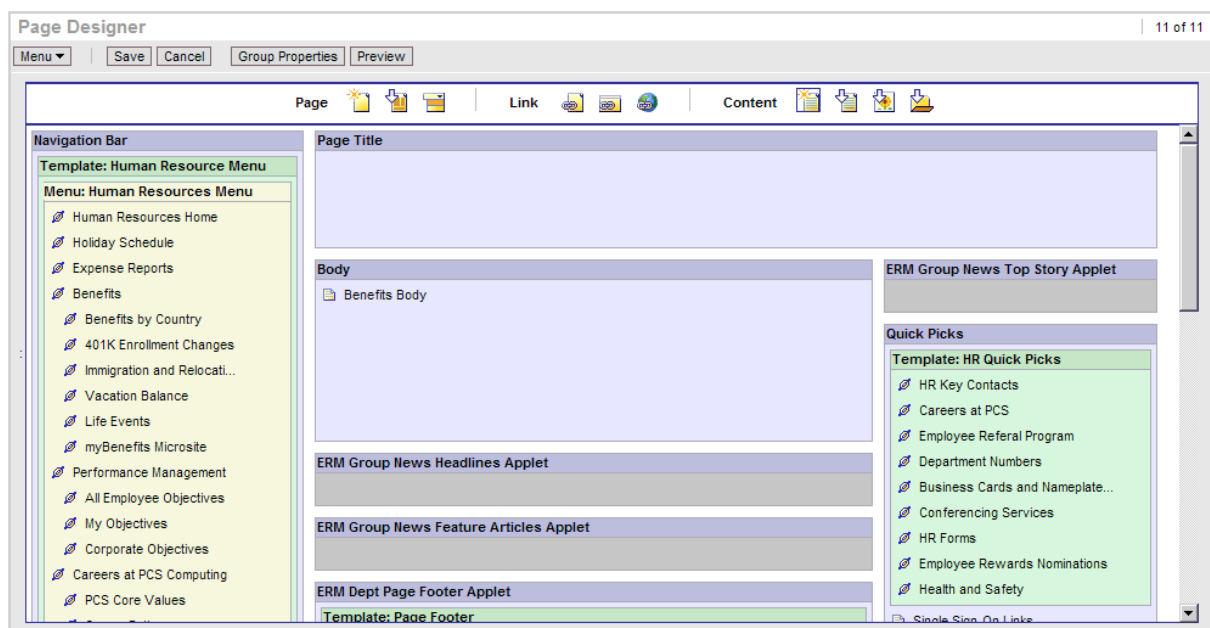


Figure 16. The Page Layout Schematic of the Microsite Page in Page Designer

About Microsite Management and Standard Activity Mode

Microsite pages can be used in both standard and high interactivity mode. But, high interactivity mode is required to create and administer microsite pages.

Scenario for Microsite Management

These scenarios provide an example of microsite management tasks performed by the microsite owner and a content author for the microsite. Your company may follow a different process according to its business requirements.

Standard Microsite Management Scenario

Introduction

The microsite owner for the analyst relations group of a large company has been asked to develop a new microsite on the company intranet. The old Analyst Relations microsite contains out-of-date information and is hard to maintain. Using Microsite Management will make setting up the site and maintaining content much easier. The new site will include links to analysts' reports, lists of key contacts, information on the company's policies, and reports on competitors.

The Microsite Owner

In cooperation with the company intranet administrator, the microsite owner reviews the existing structure of the company's Web site. Together they determine that the new Analyst Relations microsite should be available from the Sales root-level page. After the company intranet administrator has created the Sales root-level page, the microsite owner creates the new Analyst Relations page link on the Sales screen.

The microsite owner creates links to other intranet and Internet pages and to views within the Siebel application. He adds some text and graphics along with content created in applications such as Microsoft Word, Microsoft Excel, HTML, and Adobe Acrobat.

The microsite owner associates the access groups to each of the page items. He makes sure that only certain groups of end users will see the items displayed on the page and also that the right contributors are able to edit the items' content.

Date ranges are also associated with each of the page items, so that only current content appears on the page. Because a number of page items require the same access groups and dates, the microsite owner uses the group properties feature, which allows him to set the same properties for all selected items together.

At various stages in the page design, the microsite owner previews the page. Because some of the content is time sensitive, he previews the page as it will appear on several dates in the future.

In order that users can use the Siebel Search Center to find the page, the microsite owner creates search indexes on the content.

When the content is complete, the microsite owner publishes the new page directly from the Microsite Management screen and deletes the old page.

All the pages available from the Sales page contain the same set of links and images in the navigation bar. This set of page items makes up a template. When the new Analyst Relations page is complete, the microsite owner edits the template to include a link to the new page. Now, all the Sales pages contain a link to the new page.

Microsite Scenario with Content Center

Depending upon the complexity of the analyst relations microsite and the approvers (and authors) involved, the company may choose to use Content Center to streamline the production of this microsite, as outlined here:

- The corporate marketing director in charge of analyst relations creates a content project that her team uses to create the analyst relations microsite; in the project she specifies the tasks involved in producing the microsite.
- The Content Center workflow routes these tasks to the designated microsite owner who views them in his Content Inbox.
- The microsite owner drills down on the content task and creates the new analyst relations microsite.
- After content has been drafted, the microsite owner submits them for approval to the designated reviewers in the project's approval workflow.
- When the microsite and its contents have been approved, the microsite is published from the Content Center's staging environment to the production environment.

Process of Microsite Management

This is an example of a simple process flow for Microsite Management. Your company may follow a different process according to its business requirements.

- 1 ["Viewing and Editing Page Information" on page 214](#) (to review the existing structure of the Web site)
- 2 ["Creating a Root-Level Page" on page 216](#) (to create a root-level page, if necessary)
- 3 ["Using the Create New Page Tool" on page 218](#) (to create a new page linked to the root-level page)
- 4 ["Using the Page Designer and Its Tools" on page 217](#) (to edit the page, and add links and other content)
- 5 ["Managing Groups of Page Items" on page 231](#) (to set access groups and activation dates for content)
- 6 ["Previewing a Page" on page 232](#) (to preview the new page)
- 7 ["Publishing a Page" on page 233](#) (to publish the new page)
- 8 ["Deleting a Page" on page 233](#) (to delete the old page)
- 9 ["Creating and Applying Templates" on page 234](#) (to edit templates used on multiple pages)

Viewing and Editing Page Information

The Page Administration view includes:

- The Page Administration Explorer tree
- A list of pages, displaying those pages at the level selected on the tree

- A More Info form displaying fields associated with the page selected in the page list
- A templates list displaying the templates associated with a page

The *root-level* pages are the top level of the page hierarchy. All other pages are children of a root-level page or another page.

This structure helps you organize the pages. However, there are no requirements for, or restrictions on, hypertext links between child and parent pages.

The position of a page in the hierarchy is determined by the Parent Page field and the Order field.

Figure 17 shows the Page Administration Explorer tree and the Page list of the Page Administration view.

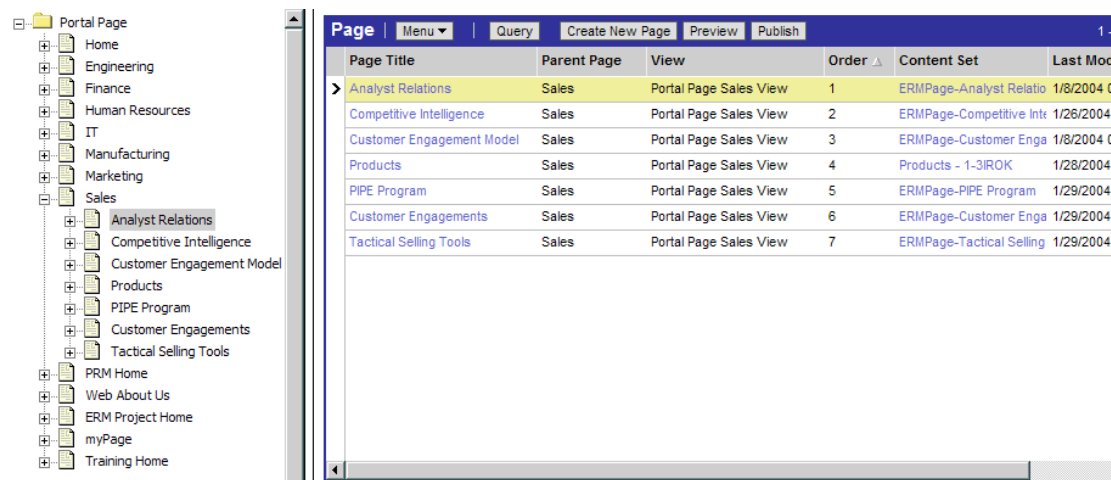


Figure 17. Page Administration Explorer Tree and Page List Applets

This task is a step in the [Process of Microsite Management on page 214](#).

To find a page in the tree and modify its properties

- 1 Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration > More Info view.
- 2 Use the Page Administration Explorer tree to find and select the page whose properties you want to modify.
- 3 In the More Info form, edit fields as required.

Some fields are described in the following table.

Field	Comments
Page Title	A title for the page, up to 90 characters long. This title is used to identify the record but does not appear on the microsite.
Parent Page	The parent page determines where the page is nested in the page hierarchy.

Field	Comments
Access Groups	<p>Use this field to restrict read and read-write (select Editor field) access to this page.</p> <p>If this field is blank, there are no restrictions on who can view and edit this page, provided they have the view responsibilities for the template view and the Page Designer view.</p> <p>If no editor is specified, all the access groups can edit this page.</p> <p>If you do not have access to this page, the Page Title hyperlink is unavailable in the Page list.</p>
View	Determines the Siebel view that the page is based on. For information about creating new views, see <i>Configuring Siebel eBusiness Applications</i> .
Order	Determines the sequence of the page in its level of the Page Administration Explorer tree.
Description	Typically used to describe the page.
Comments	Typically used to enter comments about changes made to the page.
Item Approvers	If one or more access groups are specified for this field, only users who belong can set the status of page items to approved.

Creating a Root-Level Page

The root-level pages are those pages that appear at the top of the Page Administration Explorer tree. Typically only a few employees should have the responsibilities required to access the Portal Screen Administration view where root-level pages can be created.

In general, you have a screen tab for each of the root-level pages. You can use Siebel Tools to create a screen tab for a new root-level page. For information, see the page tabs topic in *Configuring Siebel eBusiness Applications*.

Best practice is to standardize on a limited number of these pages in order to keep the top root-level of the explorer tree uncluttered and to restrict the number of screen tabs in the application.

This task is a step in the [Process of Microsite Management on page 214](#).

To create a root-level page

- 1 Navigate to the Microsite Management (or Administration - Microsite) screen > Portal Screen Administration view.

- 2 In the Portal Screen list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Screen	Name for the root-level page.
Default View Name	Determines the Siebel view that the page is based on. For information about creating new views, see <i>Configuring Siebel eBusiness Applications</i> . The view that determines the Web template used by this page.
Access Groups	Use this field to restrict read and read-write (select Editor field) access to this page. If this field is blank there are no restrictions on who can view and edit this page, provided they have the view responsibilities for the template view and the Page Designer view. If no editor is specified, all the access groups can edit this page.
Order	Determines the sequence of the page at the top level of the Page Administration Explorer tree.
Inactive	If the root-level page is inactive: <ul style="list-style-type: none"> ■ The root-level page and its child pages do not appear in the Page Administration view ■ The page is not displayed in the application

Using the Page Designer and Its Tools

The Page Designer view is the center of the Microsite Management module. The Page Designer applet contains a graphical drag-and-drop page layout and tools for adding unstructured content, such as text, graphics, links to Siebel views, and links to other pages, to the designated sections of your page.

In the Page Designer UI, applets that contain structured content (such as an Activities, Opportunities, or Calendar applet on an employee's page) are indicated by the words "Not Editable."

These sections describe the tools that you use to place page items (content and links):

- "Using the Create New Page Tool" on page 218
- "Using the Insert Template Tool" on page 220
- "Using the Create Menu Tool" on page 221
- "Using the Link Existing Page Tool" on page 223
- "Using the Link App View Tool" on page 224
- "Using the Add Web Link Tool" on page 225
- "Using the Create Content Tool" on page 226

- [“Using the Insert Content Tool” on page 227](#)
- [“Using the Insert File and the Insert Image Tools” on page 228](#)

These sections describe tasks you can do in the Page Designer:

- [“Editing Page Item Properties” on page 229](#)
- [“Deleting Page Items” on page 230](#)
- [“Saving and Canceling Changes to the Page Layout” on page 231](#)

Using the Create New Page Tool

There are two ways to create a new page:

- Using the Create New Page button in the Page Administration view
- Using the Create New Page tool in the Page Designer (see following procedure)

When using the Create New Page tool, you choose a parent page where you want to create link to the new child page. This places the page appropriately in the page hierarchy and makes sure that you do not create an *orphan* page (a page that is not accessible from any other page).

When you create a new page, it is likely that you want the page to look much like the parent page. For example, you might want to keep the same copyright information in the footer and the same list of links in the navigation bar. When you create the new page, you can select what content you want to copy from the parent to the child page.

Similarly, you can have the child page inherit the same access controls as the parent.

NOTE: If you want to create new root-level page, see [“Creating a Root-Level Page” on page 216](#).

This task is part of [Step 4](#) in the [Process of Microsite Management on page 214](#).

To create a new page

- 1 Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
- 2 In the Page list, click the Page Title hyperlink for the page that will contain a link to the new page.
- 3 From the Page Designer toolbar, drag the Create New Page tool to the position on the layout where you want the new page link to appear.

4 Complete the fields in the Create New Page dialog box.

Some fields are described in the following table.

Field	Comments
Name	This is the text that appears as the navigation link to the new page.
Release Date	Specifies the date when the link becomes active. The link appears when the date is between the release date and the expiration date and the status is Approved.
Expiration Date	Specifies the date when the link is no longer active.
Access Group	Use this field to restrict read and read-write (select Editor field) access to the navigation link. If this field is blank there are no restrictions on who can view and edit this navigation link. If no editor is specified, all the access groups can edit this navigation link.
Status	The status of the link: Approved, Designed, Draft, Final, Printed, Shipped, or Submitted. The Approved and Draft status fields determine what content is displayed in the page preview. See “Previewing a Page” on page 232 . If access groups are specified for Item Approvers field (Page Administration > More Info view), then only users who belong can set the status to Approved.
Title	A title for the page, up to 90 characters long. This title is used to identify the record but does not appear on the microsite.
Order	Determines the sequence of the page in its level of the Page Administration Explorer tree.
<input type="checkbox"/> Page Title <input type="checkbox"/> Navigation Bar <input type="checkbox"/> Body <input type="checkbox"/> Quick Picks <input type="checkbox"/> Page Footer	A check mark in these boxes indicates the content in the sections of the current page which are copied into the new page. Sections must exist on the selected page if they are to be copied to the new page.
<input type="checkbox"/> All Other Sections	If you have used Siebel Tools to configure views with new applet types that contain unstructured content, then checking All Other Sections copies content from those sections to the new page.

Field	Comments
Inherit Access Controls	<p>If selected, Access Group values for the new page and any page items copied are inherited from the current (parent) page.</p> <p>If not selected, there are no access restrictions on who can view and edit the new page.</p>
Open New Page	If selected, the new page opens in the Page Designer UI when the link is saved. If not selected, the Page Designer UI continues to display the current (parent) page after the link is saved.

NOTE: By default, the Parent Page and View are the same as those in the linked-from page chosen in [Step 2 on page 218](#). These fields as well as the Description field can be edited in the Page Administration view; see [“Viewing and Editing Page Information” on page 214](#).

Using the Insert Template Tool

Use the template tool to place templates (predefined sets of page items) on the page.

For information about templates, see [“Creating and Applying Templates” on page 234](#).

This task is part of [Step 4](#) in the [Process of Microsite Management on page 214](#).

To insert a template

- 1 Open the page you want to edit in the Page Designer:
 - a Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
 - b In the Page list, click the Page Title hyperlink.
- 2 From the Page Designer toolbar, drag the Insert Template tool to the position on the layout where you want the template to appear.
- 3 Complete the fields in the Insert Template dialog box.

Some fields are described in the following table.

Field	Comments
Name	This is the name of the template.
Release Date	<p>Specifies the date when the template becomes active.</p> <p>The template contents appear when the date is between the release date and the expiration date and the status is Approved.</p>

Field	Comments
Expiration Date	Specifies the date when the template is no longer active.
Status	<p>The status of the link: Approved, Designed, Draft, Final, Printed, Shipped, or Submitted.</p> <p>The Approved and Draft status fields determine what content is displayed in the page preview. See “Previewing a Page” on page 232.</p>

Using the Create Menu Tool

Menus are containers for links. Menus format links in three ways, as shown in [Figure 18](#):

- Hierarchical menus
- Dropdown menus
- List menus

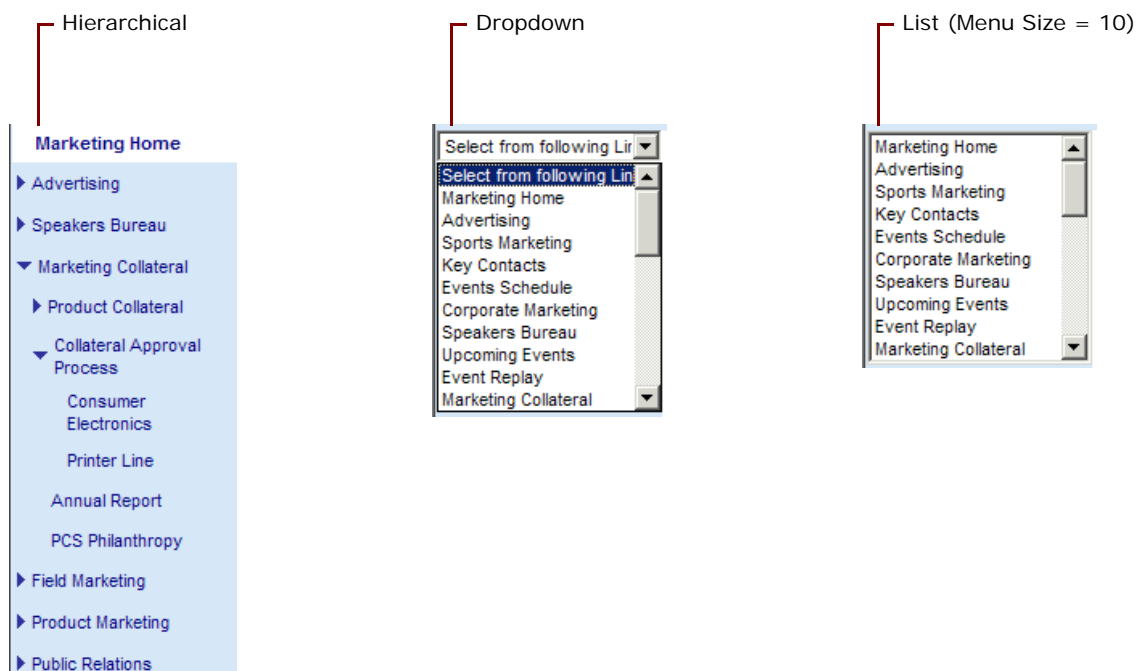


Figure 18. Types of Menu

Most typically, you want to add menus to the navigation bar of your page, but menus can be added to any page section.

This task is part of [Step 4](#) in the [Process of Microsite Management on page 214](#).

To create a menu of links

- 1** Open the page you want to edit in the Page Designer:
 - a** Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
 - b** In the Page list, click the Page Title hyperlink.
- 2** From the Page Designer toolbar, drag the Create Menu tool to the position on the layout where you want the menu to appear.
- 3** Complete the fields in the Create Menu dialog box.

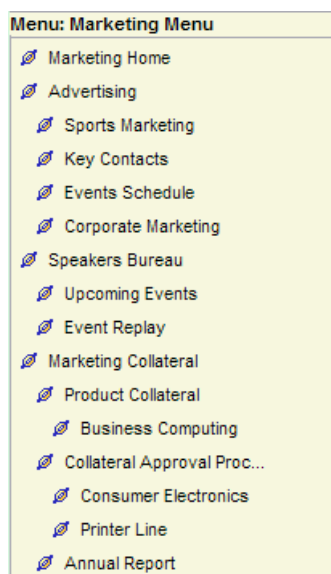
Some fields are described in the following table.

Field	Comments
Name	This is the name of the menu.
Menu Type	See Figure 18 on page 221 .
Release Date	Specifies the date when the menu becomes active. The menu appears when the date is between the release date and the expiration date and the status is Approved.
Expiration Date	Specifies the date when the menu is no longer active.
Menu Size	Only applies to menus of type Menu List. Enter the number of menu items to show in the list at one time.
Status	The status of the link: Approved, Designed, Draft, Final, Printed, Shipped, or Submitted. The Approved and Draft status fields determine what content is displayed in the page preview. See “Previewing a Page” on page 232 .

- 4** Create links for the menu using the link tools described in the following topics.
- 5** If you are creating a hierarchical menu, indent links to create the hierarchy:
 - To indent one link, right-click the link and choose Increase Indent or Decrease Indent.

- To indent multiple links, see [“Managing Groups of Page Items” on page 231](#).

This is the indentation used to produce the hierarchical menu shown in [Figure 18 on page 221](#).



For information about configuring hierarchical menus, see [“Configuring Menu Colors and Icons for Hierarchical Menus” on page 238](#).

Using the Link Existing Page Tool

Using the Link Existing Page tool, you can create navigation links to other pages *within* the Microsite Management system.

If you want to create navigation links to external pages, see [“Using the Add Web Link Tool” on page 225](#).

This task is part of [Step 4](#) in the [Process of Microsite Management on page 214](#).

To create a navigation link between Microsite Management pages

- 1 Open the page you want to edit in the Page Designer:
 - a Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
 - b In the Page list, click the Page Title hyperlink.
- 2 From the Page Designer toolbar, drag the Link Existing Page tool to the position on the layout where you want the new page navigation link to appear.

3 Complete the fields in the Link Existing Page dialog box.

Some fields are described in the following table.

Field	Comments
Name	This is the text that appears as the navigation link to the new page.
View-Page	Select the target page for the navigation link. You can select any page in the application from the Pick Parent Page dialog box.
Release Date	Specifies the date when the navigation link becomes active. The link appears when the date is between the release date and the expiration date and the status is Approved.
Expiration Date	Specifies the date when the navigation link is no longer active.
Access Group	Use this field to restrict read and read-write (select Editor field) access to this page. If this field is blank there are no restrictions on who can view and edit this page, provided they have the view responsibilities for the template view and the Page Designer view. If no editor is specified, all the access groups can edit this page item.
Status	The status of the link, for example Approved, Designed, Draft, Final, Printed, Shipped, or Submitted. The Approved and Draft status fields determine what content is displayed in the page preview. See “Previewing a Page” on page 232 .

Using the Link App View Tool

Using the Link App View tool, you can create links from a page to a particular view in the Siebel application.

For example, you might want to create a link from your sales representatives' home page to the My Expense Reports view on the Expense Reports screen.

This task is part of [Step 4](#) in the [Process of Microsite Management on page 214](#).

To create a link from a page to a view in the Siebel application

- 1** Open the page you want to edit in the Page Designer:
 - a** Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
 - b** In the Page list, click the Page Title hyperlink.
- 2** From the Page Designer toolbar, drag the Link App View tool to the position on the layout where you want the application link to appear.

3 Complete the fields in the Link Application View dialog box.

Some of the fields are described in the following table.

Field	Comments
Name	This is the text that appears as the navigation link to the new page.
View	From the Pick View dialog box, choose the application view that you want to display when the link is clicked.
Release Date	Specifies the date when the navigation link becomes active. The link appears when the date is between the release date and the expiration date and the status is Approved.
Expiration Date	Specifies the date the link is no longer active.
Access Group	Use this field to restrict read and read-write (select Editor field) access to this page item. If this field is blank there are no restrictions on who can view and edit this page item. If no editor is specified, all the access groups can edit this page item.
Status	The status of the link: Approved, Designed, Draft, Final, Printed, Shipped, or Submitted. The Approved and Draft status fields determine what content is displayed in the page preview. See “Previewing a Page” on page 232 .

Using the Add Web Link Tool

Using the Add Web Link tool, you can link to external pages, identified by a URL. For example, on your microsite, you can provide links to your partners' Web sites.

There are a number of ways that the external page can be displayed from the Microsite Management page:

- **Frame.** Within the frame of the current page.
- **In-Line.** Directly in the applet on the current page. Displaying pages in-line works best with simple pages. Large or complex pages, such as those that use JavaScript, can slow down the system and cause unexpected results. Be sure to test in-line pages.
- **New Window.** Launching a new browser window when the link is clicked; this allows the user to switch between the two pages.
- **Window.** Displaying the external page in the current browser window.

This task is part of [Step 4](#) in the [Process of Microsite Management on page 214](#).

To create a link from a page to an external page

- 1** Open the page you want to edit in the Page Designer:
 - a** Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
 - b** In the Page list, click the Page Title hyperlink.
- 2** From the Page Designer toolbar, drag the Add Web Link tool to the position on the layout where you want the external link to appear.
- 3** Complete the fields in the Add Web Link dialog box.

Some fields are described in the following table.

Field	Comments
Name	This is the text that appears as the navigation link to the new page.
URL	Enter the exact URL of the destination for the link.
Symbolic URL	<p>Instead of entering a URL, choose a symbolic URL. (Symbolic URLs can be set up in the Administration - Integration screen.)</p> <p>For example, enter the symbolic URL of an Analytics report.</p>
HTML Display	Choose how the external page is displayed: Frame, In-Line, current Window, or New Window.
Release Date	<p>Specifies the date when the link becomes active.</p> <p>The link appears when the date is between the release date and the expiration date and the status is Approved.</p>
Expiration Date	Specifies the date when the link is no longer active.
Access Group	<p>Use this field to restrict read and read-write (select Editor field) access to this page item.</p> <p>If this field is blank, there are no restrictions on who can view and edit this page item.</p> <p>If no editor is specified, all the access groups can edit this page item.</p>
Status	<p>The status of the link: Approved, Designed, Draft, Final, Printed, Shipped, or Submitted.</p> <p>The Approved and Draft status fields determine what content is displayed in the page preview. See “Previewing a Page” on page 232.</p>

Using the Create Content Tool

Using the Create Content tool, you can create rich-text content directly to the page through the integrated HTML editor.

Typically, you would use the Create Content Tool for creating short or simple content, such as captions or labels.

NOTE: To create complex HTML or large amounts of text, you may prefer to use a third-party HTML or text editing application to create an HTML file, and then place the file's contents on the page using the Insert File tool. See ["Using the Insert File and the Insert Image Tools" on page 228](#).

The formatted text entered and saved in the editor is saved as a content asset in the Content Asset Management's repository. For more information about the content assets, see [Chapter 14, "Content Asset Management."](#)

For general information about the integrated HTML editor, see *Fundamentals*.

This task is part of [Step 4](#) in the [Process of Microsite Management on page 214](#).

To add HTML directly to a page

- 1** Open the page you want to edit in the Page Designer:
 - a** Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
 - b** In the Page list, click the Page Title hyperlink.
- 2** From the Page Designer toolbar, drag the Create Content tool to the position on the layout where you want the new content type to appear.
- 3** In the Create Content dialog box, click Edit HTML.
- 4** In the editor, type and format text, and add links and graphics.
- 5** Click Save to save the HTML to the content asset repository and close the HTML Editor.
- 6** Complete the fields in the Create Content dialog box.

Some of the fields are described in the table in [Step 3 in the "To create a link from a page to an external page" procedure on page 226](#).

Using the Insert Content Tool

Using the Insert Content tool, you can add to your page content assets that stored in the content asset repository. For more information about the content assets, see [Chapter 14, "Content Asset Management."](#)

For example, there may be a content asset that is a GIF image of your corporate logo, which you want to use to brand your page. Or, a content asset may be an Adobe Acrobat file, describing departmental policies, that you want to link to your page.

This task is part of [Step 4](#) in the [Process of Microsite Management on page 214](#).

To add content assets to a page

- 1** Open the page you want to edit in the Page Designer:

- a** Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
 - b** In the Page list, click the Page Title hyperlink.
- 2** From the Page Designer toolbar, drag the Insert Content tool to the position on the layout where you want to add the content asset.
- 3** In the Insert Content dialog box, click the select button in the Asset Name field and use the Pick Content dialog box to select the content asset you want to add.

The Pick Content dialog box filters the content assets:

- The default filter shows assets in content set for the current page.
 - Click the ellipsis button to select a different content set.
 - Click Find All to list content assets in all content sets.
- 4** Complete the fields in the Insert Content dialog box.
- Some of the fields are described in the table in [Step 3 in the “To create a link from a page to an external page” procedure on page 226](#).

Using the Insert File and the Insert Image Tools

Using these tools, you can insert files (such as HTML files, MS Word files, and Adobe Acrobat) and graphics files from your local file system, from shared networks and from the Web.

The difference between using the Insert File tool and the Insert Image tool is that the HTML display for the Insert Image tool is always set to In-Line.

When these files are added to your page, they are also stored as content assets in the content asset repository. For more information about the content assets, see [Chapter 14, “Content Asset Management.”](#)

This task is part of [Step 4](#) in the [Process of Microsite Management on page 214](#).

To add a file or graphic to a page

- 1** Open the page you want to edit in the Page Designer:
 - a** Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
 - b** In the Page list, click the Page Title hyperlink.
- 2** From the Page Designer toolbar, drag the Insert File (or the Insert Image) tool to a position on the layout.

The Insert File (or the Insert Graphic) dialog box appears.
- 3** Do either of the following actions:
 - Click the ellipsis button and specify a local file.
 - Type in a URL or network path.

- 4 If you typed in a URL or network path, click the URL button and set the URL and network file options in the dialog box.

Some fields are described in the following table.

Field	Comments
Retrieve Graphics	Select to have graphics on the specified Web page copied along with the text.
Follow Links	Select to have the pages that are linked-to from the specified Web page are copied, and, in turn, links to those pages copied as well.
Restrict to Subdirectory	Select so that, if links are followed, only links to pages within the same directory as the specified page are copied.
Max Depth	Indicates the level to which links are copied. For example, if Max Depth = 1, pages that are linked-to from the specified page are copied, but not pages that they link to.

For more information about adding content assets and setting up how files are imported, see [“Adding Content Assets to a Content Set” on page 203](#) and [“About Configuring Content Asset Management” on page 207](#)

- 5 In the Insert File or Insert Image dialog box, complete the fields.

Some of the fields are described in the table in [Step 3 in the “To create a link from a page to an external page” procedure on page 226](#).

- 6 (Optional) Click the Advanced button and set the options.

Some of the fields are described in the following table.

Field	Comments
Title	Enter a descriptive title for the content set. If no title is provided, the Name of the page item is used for the content asset title. (The Name for the content asset record is the file name, not the page item name.)
Content Type	This is the Content Asset Type. Leave this field set to Auto-Detect (the default) to have the application determine the asset type, or select a type from the dialog box to set a specific type.
Lock	Select this to lock the content asset, so that others cannot edit it.
Comments	Enter comments for this version of the content asset.

Editing Page Item Properties

The preceding topics explained how to use the Page Designer UI to create new page items, for example, links to pages and graphics.

To edit page item properties, you select a page item on the Page Designer UI and modify its properties in the Page Item Properties form. The fields and buttons that are available in the Page Item Properties view depend upon the type of page item selected.

Items of type HTML, Web Content, Graphics, and File are content assets and are stored in the content asset repository. Details about these content assets can be viewed in the Asset Detail view, and these content assets can also be checked out for editing.

Some items can be edited using the integrated HTML Editor, launched from the Edit HTML button on the Page Item Properties form.

This task is part of [Step 4](#) in the [Process of Microsite Management on page 214](#).

To edit a page item

- 1** Open the page you want to edit in the Page Designer:
 - a** Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
 - b** In the Page list, click the Page Title hyperlink.
- 2** In the Page Designer UI, select the page item whose properties you want to edit.
- 3** In the Page Item Properties form, edit the fields.

NOTE: Those fields and buttons that are not appropriate for the selected page item are unavailable.
- 4** Use the Check-Out, Check-In, Lock, and Unlock buttons to open and edit content. (For more information about checking out content assets and locking content assets, see [Chapter 13, "Content Center."](#))
- 5** Click Asset Details to open the Content Assets view and to:
 - a** See information about the selected item.
 - b** Roll-back to a previous version of the content asset.
 - c** Review the content asset for broken links.

For more information about the Content Assets view, see [Chapter 13, "Content Center."](#)
- 6** To edit HTML content, click Edit HTML.

For more information about the integrated HTML editor, see *Fundamentals*.

Deleting Page Items

Deleting items from a page is done through the Web Designer UI.

NOTE: Any item that has been saved in the content asset repository remains there even after the associated page item is deleted.

This task is part of [Step 4](#) in the [Process of Microsite Management on page 214](#).

To delete a page item

- 1 Open the page you want to edit in the Page Designer:
 - a Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
 - b In the Page list, click the Page Title hyperlink.
- 2 In the Page Designer UI, select the page item and type CTRL + DEL.

Saving and Canceling Changes to the Page Layout

In the Page Designer view, page records are saved in the same way that other records are saved in the application.

Use the Cancel button to return page items to their last-saved positions, removing any just-created page items and adding back any just-deleted page items.

However, changes made to the page item properties (such as Status) are not lost when Cancel is clicked.

For example, if you move a link from the navigation bar to quick picks, change its status from Draft to Approved, and then click Cancel, the link returns to the navigation bar but its status remains Approved.

This task is part of [Step 4](#) in the [Process of Microsite Management on page 214](#).

To save a page record

- In the Page Designer view do one of the following:
 - Click Save.
 - Click Preview.
 - Select another page.
 - Navigate to a different view.

To cancel changes to the page layout

- After making changes to the page layout in the Page Designer UI, click Cancel.
The layout reverts to how it was when the record was last saved.

Managing Groups of Page Items

To make page management easier, page items can be grouped and common properties assigned to them. For example, use grouping to:

- Set the indent level for a group of menu items.
- Set a release date for a group of page items.

This task is a step in the [Process of Microsite Management on page 214](#).

To group page items

- 1** Open the page you want to edit in the Page Designer:
 - a** Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
 - b** In the Page list, click the Page Title hyperlink.
- 2** Select all of the page items you want to manage as a group.
Hold the SHIFT key while clicking on the page items to select multiple items.
- 3** Click Group Properties.
- 4** Complete the fields as required in the Page Items Group dialog box.
Only those properties that are common to all types of page items appear in this dialog box: Increase Indent, Decrease Indent, Release Date, Expiration Date, Access Group, and Status.

Previewing a Page

After laying out the content on the Page Designer UI, you can preview the page.

Whether or not content appears on the displayed page depends upon the page item's release date, expiration date, and status.

The preview feature in Page Designer allows you to:

- Set a date for the preview (content inactive on that date does not appear).
- Choose to display only approved content, only draft content, both approved and draft content, or all content regardless of status.

This task is a step in the [Process of Microsite Management on page 214](#).

To preview a page

- 1** Open the page you want to preview in the Page Designer:
 - a** Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
 - b** In the Page list, click the Page Title hyperlink.
- 2** Click Preview.
- 3** In the Preview Details dialog box, specify the Preview Status and Preview Date and click OK.
The rendered page appears in preview mode.
- 4** Return to the Page Designer UI by clicking the back button.

Publishing a Page

You can publish the page directly from the Page Administration view of the Microsite Management screen.

CAUTION: Before you can publish from the Microsite Management screen you need to set up the workflows for content projects. See Chapter 13, “Content Center.”

The Publish button on the Page Administration view:

- Creates a content project for each page.
- Names the content project: *project-prefix page-name date time*, for example MyProject Publish Folders 01/22/2004 11:03:48.
- Sets the Publication Workflow for the content project to Content Publish.
- For each page item, creates a content item of type Microsite Folder.
- Invokes the Approval Workflow for the Microsite Folder content type. (This workflow should be set to Auto Complete. It changes the status of each item to Completed so that it can be published.)
- Invokes the Content Publish workflow for the content project. (This workflow calls the Export method of the Content Project business service, which exports the project from the staging environment to the production environment or the export directory).

To publish a page

- 1 Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration > More Info view.
- 2 In the Page list, select the page or pages you want to publish.
You can only publish pages for which you have write access.
- 3 Click Publish.
- 4 Complete the fields in the Publish Project Details dialog box.

Field	Comments
Project Prefix	Enter text for the project name.
Publish Child Pages	Select to have the child pages of the selected page published.

Deleting a Page

Pages can be deleted from the Page Administration view. Root-level pages can also be deleted from the Portal Screen Administration view.

When a page is deleted:

- The status of any navigation links to that page (on other pages within Microsite Management) is changed to Draft. This prevents broken links from appearing on displayed pages.

- The Access Group field for any navigation links to the page are reset (no access restrictions).
- The target page (View-Page) for the link is set to NULL. When you edit a link where the View-Page is NULL, you must specify a valid View-Page before you can save changes to the link.

To delete a page

- 1 Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.

The hierarchical structure of screens and subordinate pages appears on the left, and the page list and detail form appear on the right. Click the + sign to expand a folder.

- 2 Select the page you want to delete, and delete the record.

Creating and Applying Templates

Templates are sets of page items that are created in the Template Designer and can be placed on page sections. Templates are best used for content that appears on multiple pages and that may require updating.

The advantages of templates are:

- Templates can be applied to many pages at once.
- When a template is updated, the updated content appears on all pages referencing that template.

Figure 19 shows the Template Administration view. Templates can be organized into folders.

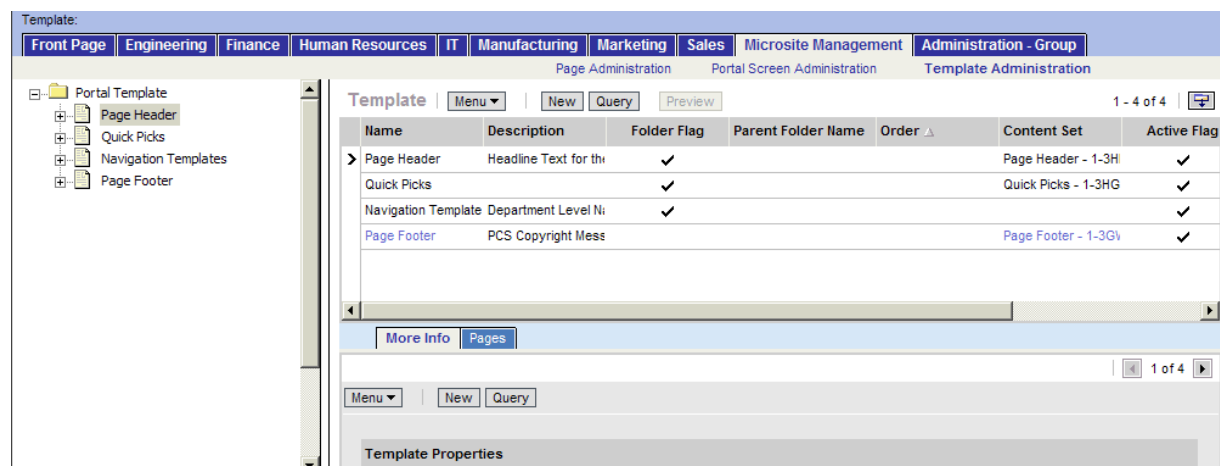


Figure 19. Template Administration View

The templates you create can be added to:

- Individual pages in the Page Designer, see [“Using the Insert Template Tool” on page 220](#)
- Many pages at once, see [“To add a templates to multiple pages” on page 235](#)

To create a template

- 1 Navigate to the Microsite Management (or Administration - Microsite) screen > Template Administration view.
- 2 In the Template list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Folder Flag	Leave blank. (Select the folder flag to create a folder to contain template items.)
Order	Determines the sequence of the template at the top level of the Portal Template Explorer tree.
Active	If the template is active it can be added to pages (using the Insert Template tool).

- 3 Drill down on the template name.
- 4 Use the Template Designer to add and edit items on the template.

The tools on the Template Designer work the same way as the tools on the Page Designer. (See [“Using the Page Designer and Its Tools” on page 217.](#))

To add a templates to multiple pages

- 1 Navigate to the Microsite Management (or Administration - Microsite) screen > Template Administration > Pages view.
- 2 In the Templates list, select the template you want to add.
- 3 In the Pages list, click Add to Pages.
- 4 Complete the fields and follow the directions given in the Add Template to Pages dialog box.

About Creating Search Indexes

Content assets on microsite pages can be integrated with the Siebel Search Center. This allows users to find pages by searching for keywords. For information about creating indexes for Search Center, see *Siebel Search Administration Guide*.

About Configuring Microsite Management

There are a number of aspects of Microsite Page Management that you can configure:

- [“Configuring Microsite Caching” on page 236](#)
- [“Adding New View Layouts to the mmlayout.txt File” on page 237](#)
- [“Configuring Menu Colors and Icons for Hierarchical Menus” on page 238](#)
- [“Changing the Navigation Bar Style in Microsite Pages” on page 239](#)

Configuring Microsite Caching

By default, page caching of microsite pages and content is turned on. However, you can configure the caching behavior of Microsite pages by editing the application’s CFG file.

The advantage of caching is that microsite pages are rendered faster.

The disadvantage of page caching is that if you make a change to a page using Page Designer, the updated page is not displayed until the caching time-out has expired.

TIP: If you have both a staging and a production environment, consider using page caching in the production environment, but not in the staging environment.

To configure caching for Microsite pages

- Create or edit the [ERM Page Rendering] section in your application’s CFG file.

See [Table 63](#) for information about the page caching parameters.

NOTE: Set time outs according to how often pages and contents are updated. If pages are updated frequently, set time outs low.

Table 63. Microsite Caching Parameters

Parameter Name	Comments	Default
EnablePageCache	Page cache caches Microsite page contents including Microsite applets and Group News applets on a per AOM (Application Object Manager) basis.	TRUE
EnableDefaultViewPageCache	The default-view page cache caches the default Microsite page for a view on a per AOM basis.	TRUE
EnablePageAccessCache	The page-access cache caches whether a page is private or public on a per AOM basis.	TRUE
EnableUserPageAccessCache	The user-page access cache caches whether a given user has access to a particular page on a per user session basis.	TRUE

Table 63. Microsite Caching Parameters

Parameter Name	Comments	Default
EnableUserPageItemAccessCache	The user-page item access cache caches whether a given user has access to a particular page item on a per user session basis.	TRUE
PageCacheSize	Size of page cache in pages. CAUTION: If PageCacheSize > 256, make sure to monitor the memory usage of the AOM. Setting to 0 disables page caching.	256
PageCacheTimeout	Lifetime, in minutes, of page cache entries. Setting to 0 disables page caching.	5
DefaultViewPageCacheTimeout	Lifetime, in minutes, for default-view page cache entries. Setting to 0 disables default-view page caching.	10
PageAccessCacheTimeout	Lifetime, in minutes, for page-access cache entries. Setting to 0 disables page-access caching.	10

Adding New View Layouts to the mmlayout.txt File

The mmlayout.txt file is used by Page Designer to schematically represent the layout of the applets in the view (Figure 16 on page 212). The file contains layout information for all Siebel preconfigured views designed to contain unstructured content.

On a Windows platform, the mmlayout.txt file can be found in *SIEBEL_ROOT\siebsrvr\bin*. On a UNIX platform, the file can be found in *SIEBEL_ROOT/siebsrvr/lib*.

If you have created new views in your Siebel application, and you want to use these views for microsite pages, you need to edit the mmlayout.txt file to schematically describe how the applets in your views are laid out.

NOTE: For information about creating views, see *Configuring Siebel eBusiness Applications*.

Configuring Menu Colors and Icons for Hierarchical Menus

You can edit the display colors, line spacing, and icons for hierarchical menu items. (See [Figure 20.](#))

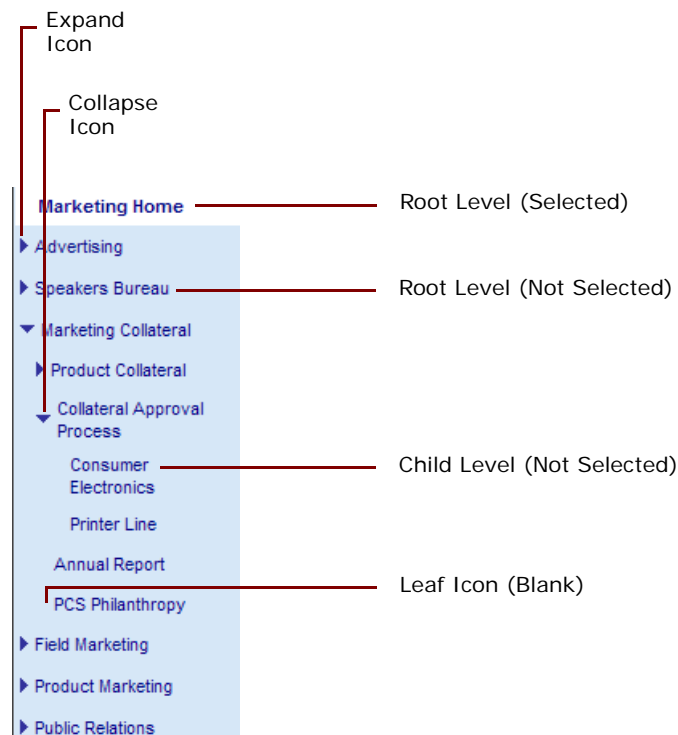


Figure 20. Menu Levels

To set colors and line spacing for hierarchical menu items

- 1 Open the ePortalNavBarAppletDeptPage_LeftNav.swt file.

- 2 Edit the file as follows:

To Change the Style for This Type of Menu Item...	Edit This Line...	In This Section of the File...
Root-level, not selected	TD.mmRootLevel TD { COLOR: Navy; HEIGHT: 20; }	Root Level Menu Items
Child-level, not selected	TD.mmChildLevel TD { COLOR: Navy; HEIGHT: 20; }	Child Level Menu Items
Selected (any level)	TD.mmSelected TD { COLOR: NAVY; HEIGHT: 20; }	Menu Item currently selected

For example, changing HEIGHT: 20 to LINE-HEIGHT: 0.8em tightens the line spacing to a fixed size.

For more information about editing Siebel Web templates, see *Configuring Siebel eBusiness Applications*.

To change the expand, collapse, and leaf icons for hierarchical menu items

- Edit the graphics in the following files found in the images directory:

- mm_expand.gif
- mm_collapse.gif
- mm_blank.gif

For more information about images, see *Configuring Siebel eBusiness Applications*.

Changing the Navigation Bar Style in Microsite Pages

Change the underlying Web template if you prefer the older blue-bordered navigation bar, you can revert to it by changing the underlying Web template used for the Microsite views.

To revert to the old blue-bordered navigation bar

- For each Microsite view:

Change the . . .	From the Newer . . .	To the Older . . .
Applet Web template	ePortalNavBarAppletDeptPage_LeftNav.swt	ePortalNavBarAppletDeptPage.swt
View Web Template	dccView_15_60_25.swt	dccView_25_50_25.swt

16 Usage Collection

This chapter describes setting up and tracking hits on microsite pages, group news articles, and views and downloading of content assets.

It includes the following topics:

- [“About Usage Collection” on page 241](#)
- [“Scenario for Usage Collection” on page 242](#)
- [“Process of Usage Collection” on page 242](#)
- [“Setting Up the Run-time Event to Collect Usage Data for Views” on page 242](#)
- [“Setting System Preferences for Usage Collection” on page 243](#)
- [“Reviewing the Usage-Tracking Log Files” on page 244](#)

About Usage Collection

The usage collection feature creates log files that record when users:

- View microsite pages
- View group news articles
- Download content assets
- (Optionally) View views in the Siebel application

Figure 21 shows an example of a usage-tracking log file.

User	IP	Session ID	Type	Row-Id	Name	View-ID	Event Start Date	Event End Date	Status
APARKER	172.22.15.82	w0krFK-Qvmt	MM Page	0-11U0X	Home	0-71I5Z	1/8/2004 8:26	1/8/2004 8:26	Success
APARKER	172.22.15.82	w0krFK-Qvmt	ViewActivated		Portal Page Home View		1/8/2004 8:26	1/8/2004 8:26	Success
APARKER	172.22.15.82	w0krFK-Qvmt	MM Page	0-71I5Z	Home	0-11U0X	1/8/2004 8:26	1/8/2004 8:27	Success
TSYMTHE	172.22.16.45	w0krFK-Qvmt	ViewActivated		Portal Page Home View		1/8/2004 8:30	1/8/2004 8:30	Success
TSYMTHE	172.22.16.45	w0krFK-Qvmt	MM Page	0-11U03	Human Resources	0-71I65	1/8/2004 8:30	1/8/2004 8:30	Success
TSYMTHE	172.22.16.45	w0krFK-Qvmt	ViewActivated		Portal Page HR View		1/8/2004 8:31	1/8/2004 8:31	Success
JRUBIN	172.22.20.32	w0krFK-Qvmt	MM Page	0-11U03	HR - Holiday Schedule	1-2BHK7	1/8/2004 8:35	1/8/2004 8:35	Success
JRUBIN	172.22.20.32	w0krFK-Qvmt	ViewActivated		Portal Page HR View		1/8/2004 8:35	1/8/2004 8:35	Success
JRUBIN	172.22.20.32	w0krFK-Qvmt	MM Page	0-6J8MB	Performance Competency Home	0-6J8RV	1/8/2004 8:35	1/8/2004 8:36	Success
JRUBIN	172.22.20.32	w0krFK-Qvmt	ViewActivated		ERM Employee View - Personal		1/8/2004 8:36	1/8/2004 8:36	Success
JRUBIN	172.22.20.32	w0krFK-Qvmt	ViewActivated		Expense List View (ePS)		1/8/2004 8:36	1/8/2004 8:36	Success

Figure 21. Sample Log File — CSV Format Displayed in a Spreadsheet Application

Usage is monitored across the database, with a separate log file for each AOM (Application Object Manager) process. New log files can be created each hour, day, week, or month. Log files can be saved in CSV, XML, or W3C format.

These log files provide structured raw data for import into reporting tools: such tools can vary from a simple spreadsheet program to a complex data warehouse application like Siebel Analytics.

Scenario for Usage Collection

This scenario provides an example of a process performed by the administrator. Your company may follow a different process according to its business requirements.

Introduction

An organization has recently installed Siebel applications and management wants to measure user adoption. They want to collect information about which employees are using the system and which views and microsite pages are accessed most often.

The Administrator

The administrator enables usage collection. He chooses to have the usage-tracking log files output in the XML format and to have new log files created each day.

Each morning the administrator reviews the log files from the previous day, imports them into a customized reporting tool, and distributes the resulting reports to others in the implementation team.

Process of Usage Collection

This example process represents the tasks that are carried out in the [“Scenario for Usage Collection” on page 242](#).

- 1 [“Setting Up the Run-time Event to Collect Usage Data for Views” on page 242](#)
- 2 [“Setting System Preferences for Usage Collection” on page 243](#)
- 3 [“Reviewing the Usage-Tracking Log Files” on page 244](#)

Setting Up the Run-time Event to Collect Usage Data for Views

If You . . .	Then . . .
Want to track hits to views in the Siebel application	You need to create a run-time event to monitor view activation. See the following procedure.
Do not want to track hits to views (but do want to track hits to microsite pages, group news articles, and content assets)	Continue to “Setting System Preferences for Usage Collection” on page 243 .

This task is a step in [Process of Usage Collection on page 242](#).

For information about how to create run-time events, see *Siebel Personalization Administration Guide*.

To create a run-time event to collect usage data for views

- 1 Create an action set.
- 2 Create an action, setting these fields as follows:

Field Name	Value
Action Type	BusService
Business Service Name	Usage Tracking Service
Business Service Method	EventType=Runtime Event

- 3 Associate an event with the action set, setting these fields as follows:

Field Name	Value
Object Type	Application
Event	ViewActivated
Action Set Name	<i>Name of the action set created in Step 1</i>

Setting System Preferences for Usage Collection

The system preferences for enabling and configuring usage collection are described in [Table 64](#).

Table 64. System Preferences for Usage Collection

System Preference	Default	Description
UsageTracking Enabled	FALSE	Set to TRUE to turn on Usage Collection.
UsageTracking Log Time Period	Hourly	<p>Specify how often a new log file is created.</p> <p>Allowed values: Hourly, Daily, Weekly, and Monthly.</p> <p>CAUTION: Set this according to the usage levels you expect. Monthly may create excessively large log files for a high-usage application.</p>

Table 64. System Preferences for Usage Collection

System Preference	Default	Description
UsageTracking LogFile Dir	N/A	Specify the directory path for the log files. Make sure that the Siebel Server has read and write access to the directory. Example: <code>\\fileserver\directory</code>
UsageTracking LogFile Encoding	ASCII	Specify encoding for the log file. This is usually set to ASCII. Some other allowed values are UNICODE, ARABIC, GREEK, and HEBREW.
UsageTracking LogFile Format	XML	Specify the log file format. Allowed values: CSV, XML, and W3C
UsageTracking Sess Cache Size	100	Specify the number of session IDs cached. Session IDs (that map to login IDs and IP addresses) are cached so that this data does not have to be looked up for each user action. Allowed values: 10 to 1000

This task is a step in [Process of Usage Collection on page 242](#).

To enable and configure system preferences for Usage Collection

- Refer to [Table 64](#) and to [“Setting System Preferences” on page 50](#).

Reviewing the Usage-Tracking Log Files

Usage-tracking log files are written to the directory that you specify in the system preferences. The log files are named:

SiebelUsageTracking_*HOST_PID_YYYY-MM-DD_HH.FF*

Where:

- *HOST* = Server host name
- *PID* = Process ID of the AOM
- *YYYY-MM-DD-HH* = Formatted date and time
- *FF* = File format (XML, W3C, or CSV)

For example, SiebelUsageTracking_sshost_2624_2004-03-15_16.XML is the log file begun at 4 P.M. on March 15, 2004.

NOTE: Log files are not created for periods when there is no activity. For example, if UsageTracking Log Time Period = Hourly but there are no users from 1:15 A.M. to 4:55 A.M., log files are not created for the 2 A.M. or 3 A.M. hours.

Table 65. Data Written to Usage-Tracking Log Files

Data Column	Comments
User	User's login ID
IP	IP address of the session
Session ID	Unique ID for the session
Type	Four possible values: <ul style="list-style-type: none"> ■ MM Page — Indicates viewing of a microsite page ■ GN Article — Indicates viewing of a group News Article ■ CB Asset — Indicates downloading of a content asset ■ ViewActivated — Indicates viewing a view in the Siebel application
Row ID	Data row ID of the microsite page, group news article, or content asset
Name	The name of the microsite page, group news article, content asset, or view
Event Start Date Time	The time the user clicked on the item
Event End Date Time	The time of the user's next event
Status	Indicates success

This task is a step in [Process of Usage Collection on page 242](#).

To review usage-tracking log files

- 1** Open or import the log files in your reporting tool of choice.
- 2** Purge log files when necessary.

17 Activities

This chapter contains information about activities. It includes the following topics:

- [“About Activities” on page 247](#)
- [“Creating Activities \(End User\)” on page 249](#)
- [“Working with Others’ Activities \(End User\)” on page 252](#)
- [“Delegating an Activity \(End User\)” on page 253](#)
- [“Viewing Activities Associated with Another Record Type \(End User\)” on page 253](#)
- [“About Configuring Owner and Employee Fields for Activities” on page 254](#)

About Activities

Siebel applications use activities to organize, track, and resolve a variety of tasks, from finding and pursuing opportunities to closing service requests. If a task requires multiple steps that one or more people may carry out, activities greatly simplify the job. Activities can help:

- Define and assign the task
- Provide information to complete the task
- Track the progress of the task
- Track costs and bill for the task

These are the major advantages of breaking down a task into one or more activities:

- The ownership of the problem can remain at the management level, when required.
- The employee looking at assigned activities can identify only the required information.
- Reporting is simplified.
- Activities can be assigned to more than one person.

Activities are used to represent tasks in many situations such as scheduling and recording meetings, appointments, and interactions with customers and prospects. If one task leads to follow-up tasks, it is possible to associate follow-up activity records with a parent activity record.

Activities can be viewed in several different locations, including the following:

- **My To Do List in the Activities screen.** This list shows all the user’s activities, regardless of status. Access this list by navigating to the Activities screen and choosing My To Do List from the Show drop-down list.
- **My To Do’s in the Calendar screen.** This list displays a subset of the data displayed in the My To Do List in the Activities screen, activities that have not been completed. For general information about using the Calendar screen, see *Fundamentals*.

Assignment Methods

Activities are assigned to employees. Activity assignment can take place in a number of ways:

- Manual assignment
- Automatic assignment to the creator of the activity (by predefaulting the Owner field to the activity's creator)
- Automatic assignment using Assignment Manager (see *Siebel Assignment Manager Administration Guide*).

Business Objects Associated with Activities

Siebel activity objects may be associated with other Siebel business objects. Some common associations are listed in [Table 66](#). In most cases, this association is with a set of activities defined by an activity plan and individual (or stand-alone) activities. In a few cases, an object is associated either with an activity template or with stand-alone activities (not both).

Table 66. Association of Activity Object with Other Siebel Objects

Screen Name	Business Object	Stand-Alone Activities	Activities from Templates
Accounts	Account	Yes	Yes
Agreements	Service Agreement	Yes	Yes
Assets	Asset Management	Yes	No
Campaigns	Campaign	Yes	No
Contacts	Contact	Yes	Yes
Messages	Messaging	Yes	No
Opportunities	Opportunity	Yes	Yes
Orders (Order Line Items view)	Order Entry	Yes	Yes
Preventive Maintenance	FS PM Plan Item	No	Yes
Programs	Program (DBM)	No	Yes
Projects	Project	Yes	Yes
Quality	Product Defect	Yes	No
Repairs	FS Repair	Yes	Yes
References	Reference	Yes	No
Service	Service Request	Yes	Yes

Creating Activities (End User)

Using activities, you can assess the investment in time and resources to maintain and grow account relationships. Sales managers also have a record of the activities of their sales representatives as they manage account relationships. Sales teams can use activities to avoid duplicating efforts across the team, and to share information about pending and completed activities.

NOTE: Activities that are assigned specific dates and times appear on both the Activities and the Calendar screens. For more information, see *Fundamentals*.

To create an activity

- 1 Navigate to the Activities screen > Activity List view.

- 2 In the Activities list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Account	The account associated with the activity.
Activity #	A default, application-generated number.
Alarm	The Alarm check box sets the activity reminder. A reminder dialog box appears when the activity is due. You can either set an alarm for an individual activity, or you can set a default alarm for all your activities. For more information, see <i>Fundamentals</i> .
Attachments	Indicates whether there are attachments associated with this activity. This field does not appear by default in the Service Activities view, but can be displayed through the use of the Columns Displayed command.
Audience	A list of values established by your company that allows you to specify which audiences can view the activity. Examples of values are employees, partners, and customers.
Billable	A check box which when selected, indicates the activity is a revenue-generating event.
Category	<p>A list of values established by your company that allows you to specify a category for the activity.</p> <p>Service related activities are often created by one individual (such as a call center agent) and completed by another (such as a service repair representative). Consequently, when a service related category value is selected (such as Diagnostic, Field Engineer Activity, Preventative Maintenance or Other), the owner of the activity is deleted so that the activity is unassigned. The user can then reassign the activity by adding a new value to the owner field. If the customer is using Siebel Assignment Manager, the activity is automatically reassigned.</p>
Comments	A text field for activity notes and information to be shared by the team.
Cost Estimate	The monetary value associated with the activity estimate.
Created	The date and time the activity was created.
Created By	The user ID of the activity creator.
Description	A text entry field that can be used for additional information about the activity.

Field	Comments
Display In	<p>A field that determines where an activity appears. The field has three values—Calendar and Activities, To Do and Activities, Activities Only. If, for example, you want an activity to appear in your calendar, you must set the Display In field to Calendar and Activities and make sure that the activity has a start time.</p> <p>If you set the Type field to To Do, the Display In field automatically changes to To Do and Activities. On the home page, To Do activities appear in the My Activities list and do not appear in the My Calendar list.</p>
Due	An editable date field that displays a date and time by which the activity must be completed.
Duration	A list of values established by your company that allows you to choose the duration of an activity. Default values are in minute segments, for example 5, 10, 15, and 20.
Employees	The User ID of the activity creator. You can select multiple employees for an activity, but only one employee can be designated as primary.
End	The proposed date and time for the activity completion.
Global Owner	The employee who is responsible for the activity.
Meeting Location	A text field that can be used for location information that is shared by the sales team. Examples of meeting locations are Conference Room B and Main Campus Facility.
New	Automatically selected when ownership is changed from the activity creator to another user. Automatically cleared when the new owner views activity details by clicking the hyperlink in the Type field.
Opportunity	A dialog box that allows you to associate an opportunity with an activity.
Owner	The primary employee associated with the activity. The default owner is the creator of the activity. Enter a new value into the field by typing the User ID directly into the field, or click the select button and choose the primary employee from the Pick Employee dialog box. The new Owner value that you enter also replaces the primary employee that appears in the Employee field. Conversely, if you add a new primary to the Employee field, this new primary also appears in the owner field.
Price List	A list of values established by your company that allows you to specify which price list is associated with a billable activity.
Priority	A list of values established by your company that allows you to assign a priority to the activity. Default values include 1-ASAP, 2-High, 3-Medium, and 4-Low.

Field	Comments
Private	When selected, the activity becomes visible only to the users listed in the Employees field and the Siebel administrator.
Project	Allows you to associate a project with an activity.
Rate List	A list of values established by your company that allows you to specify which rate list is associated with a billable activity.
Repeat Frequency	If Repeat Frequency is selected, this field displays the interval at which the activity repeats. Default values include daily, weekly, monthly, and yearly.
Repeat Until	An editable field that displays the date and time for the last interval of the final meeting in the series.
Site	A default value that is automatically entered when you associate the account with an activity.
Start	An editable field that displays the activity creation date and time.
Status	A list of values established by your company that allows you to assign a status to the activity. Default values include Acknowledged, Cancelled, Declined, Scheduled, and Completed.
Type	A list of values established by your company that allows you to define the activity type. Default values include Call, Correspondence, and Email.

NOTE: The My To Do filter allows you to view each activity that has been designated as a To Do item using the Display In field. Choose My To Do List from the Show drop-down list to access this feature. You can further refine the To Do List by using the predefined queries that appear in the Queries drop-down list. For example, if you select the Uncompleted Activities query, the To Do items that do not have a status of Done appear. You can also view uncompleted To Do items in the To Do list that appears on the calendar screen. This list, by default, only shows To Do items that are not yet complete.

Working with Others' Activities (End User)

The following procedure describes how to work with another user's activity records, if that user has granted you permission to do so.

For information about how to grant permission for another user to work with your activity records, see about granting access to your calendar in *Fundamentals*.

To work with another user's activity records

- 1 Navigate to the Activities screen > Others' Activities List view.

- 2 In the drop-down list in the header, select the user whose activities you want to work with, and click Go.

If you have add-and-modify access to the records, the New button in the Activities list is available, and you can work with these records as your own. If you have not been granted permission to make changes, the New button is inactive.

Delegating an Activity (End User)

If you work as part of a sales team or you are a sales manager, you may manage other people's activities. You can delegate an activity to another member of the sales team, an employee, or a partner.

To delegate an activity

- 1 Navigate to the Activities screen > Activity List view.
- 2 Select the activity that you want to delegate.
- 3 Edit the Owner field, selecting the individual to whom you want the activity assigned.

To reassign or remove ownership of an activity using the Employee field

- 1 Navigate to the Activities screen > Activity List view.
- 2 Select the activity that you want to reassign.
- 3 Edit the Employees field, adding or removing employees as required.
- 4 (Optional) Designate one of the employees as the Primary.

To assign an activity using Assignment Manager

- 1 Navigate to the Activities screen > Activity List view.
- 2 Select the activity that you want to reassign.
- 3 In the form, click the menu button and choose Assign.

NOTE: If the delegator uses Siebel Assignment Manager to reassign an activity, the delegator is automatically removed from the employee list.

Viewing Activities Associated with Another Record Type (End User)

For example, users researching service requests can review the activities related to the selected service request in the Service Request Detail view. This view lists the completed and scheduled activities for the service request.

The procedure below uses the Service Request screen as an example, but many other screens also have activity views.

To view activities for a service request

- 1** Navigate to the Service Requests screen > Service Request List view.
- 2** Drill down on a service request record.
- 3** Click the Activities view tab.

The Activities list represents every scheduled task for the selected service request as well as the service request history.

- 4** (Optional) Create a new activity and complete the fields.
- 5** To see more information about an activity, drill down Type field.

About Configuring Owner and Employee Fields for Activities

Depending on your business process, you may want to configure the Siebel application so that the Employees and Owner fields for activities are *always* left blank when the activity is created. (The Owner field displays the primary from the Employee field.)

To achieve this, use Siebel Tools to set the predefault value of the Primary Owned By field (which maps to the Owner field that appears in the UI) in the Action business component to blank.

18 Activity Plans and Sales Methods

This chapter contains information about activity plans, activity templates, sales methods, and sales stages. It includes the following topics:

- "About Activity Templates and Activity Plans" on page 255
- "About Sales Methods" on page 256
- "Scenarios for Activity Plans" on page 256
- "Process of Administering and Using Activity Plans" on page 257
- "Defining a Sales Methodology" on page 257
- "About Activity Assignment" on page 259
- "Creating an Activity Template" on page 260
- "Creating TAS Customer Milestone Templates in a Localized Application" on page 261
- "Deleting an Activity Template" on page 262
- "Setting a Default Sales Methodology (End User)" on page 263
- "Using an Activity Plan (End User)" on page 263

For information about creating activity templates for field service activities, see *Siebel Field Service Guide*.

About Activity Templates and Activity Plans

Activity templates are created by an administrator and are blueprints for sets of activities. Activity templates can be invoked by end users to create activity plans.

You can select an appropriate activity template for the goal you want to achieve, which generates a list of activities associated with the activity template. This generated list of activities is an *activity plan*. An activity plan saves you from creating a new list of activities for each sales call, corporate visit, and special event. Typically, activity plans incorporate a company's best practices. Using activity plans, you can locate, assign, schedule, and track the progress of related activities.

For instance, the following list of activities can serve as an activity template for a corporate visit with clients for product demonstrations:

- Book a conference room
- Set an agenda
- Confirm the date and time with the customer
- Make arrangements for presenters

This set of tasks, when defined as a template and applied to create the activity plan, helps sales team members follow the steps your company recommends to prepare for a corporate visit. The list drives critical tasks and defines the recommended lead time for each activity within the template.

Each activity template is associated (through its Type value) with a certain business object. See [Table 66 on page 248](#) for a list of business object and screens that use activity templates. In activity plans views, only activity templates that have been associated with the active business object can be invoked. For example, on the Opportunity screen, only templates for opportunity activities are visible. Selecting a template creates all the activities defined by that template.

About Sales Methods

A sales method is an approach used in the sales process. The administrator sets up sales methods and sales stages that represent the organization's desired sales process. A method may encompass every stage associated with the sales process, from prospecting to forecasting to closing deals. You can set up as many methods and sales stages as your organization needs. Sales representatives can then use the method most appropriate for their opportunities.

Sales methods can differ even within one organization. For instance, a sales method for dealing with complex multimillion dollar opportunities may include as many as fifteen stages, while a sales method of a low dollar opportunity may require only four.

Sales methods and stages are only associated with activity templates and assessment templates of type Opportunity.

Scenarios for Activity Plans

This scenario provides an example of a process performed by the administrator and the end users in a sales situation. Your company may follow a different process flow according to its business requirements.

Scenario for Sales

A sales organization has adopted a new sales methodology in order to improve the effectiveness of its salespeople. The business analyst has provided the administrator with a detailed document describing the sales method, the stages of the method, and the activities that each salesperson should perform at each stage of the deal. The outline of the document looks like this:

Our New Sales Method

- > Stage 1, Prospecting, the Lead discovery phase. (Status = Open)
- > Stage 2, Qualification of the Lead and working up the deal. (Status = Open)
- ✓ Stage 3, Closing the deal and entering the order. (Status = Won)
 - > Activity 1, Prepare the quote within 2 days
 - > Activity 2, Email the quote to manager for approval within 3 days

> Activity 3, Create the contract within 1 week

> Stage 4, Lost deal. (Status = Lost)

The administrator creates a new sales method record (New Sales Method) and four associated sales stage records (Prospecting, Qualification, Closing, and Lost).

Next, she creates four new activity templates, one for each stage. The activity template describes the activities and milestones that the salespeople should perform at that stage.

Because the salespeople enter their own opportunity records, the administrator sets up the activity template details so that the salesperson who enters the opportunity is automatically assigned ownership of the activities.

Sales people set their user preferences to specify that their default sales methodology is the New Sales Method, so that this methodology is automatically filled in when they create their opportunities.

When salespeople enter their opportunity records and specify a sales stage, the activity template for that stage automatically generates and assigns the activities appropriate for the stage. And, because lead times were set up in the activity template details, the due dates for the activities are calculated automatically, based on the date that the opportunity entered the sales stage.

Process of Administering and Using Activity Plans

This example process represents the tasks that are carried out in the course of administering and using activity plans and sales methods.

- [“Defining a Sales Methodology” on page 257](#)
- [“Creating an Activity Template” on page 260](#)
- [“Creating TAS Customer Milestone Templates in a Localized Application” on page 261](#)
- [“Deleting an Activity Template” on page 262](#)
- [“Setting a Default Sales Methodology \(End User\)” on page 263](#)
- [“Using an Activity Plan \(End User\)” on page 263](#)

Defining a Sales Methodology

There are two parts to creating a sales methodology:

- Creating the sales method record
- Creating a sales stage record for each stage in the methodology

NOTE: Sales methods and stages are associated with activity templates and assessment templates of type Opportunity. If you are not intending to create a template of this type, you do not need to define a sales methodology.

You use the Sales Methods view of the Applications Administration screen to define sales methods and to create and associate sales stages with each of those methods.

To create a sales method and associated sales stages

- 1** Navigate to the Administration - Data screen > Sales Methods view.
- 2** In the Sales Methods list, create a new record and complete the necessary fields.
- 3** In the Sales Stages list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Phase	<p>This value is used for rolling up many different stages into phases. Phases simplify management and reporting of the sales cycle. Select the one that best matches the stage you are currently adding. For example, a stage called Prospecting would best match the lead discovery phase.</p> <p>The choices in this drop-down list are configured by using the SALES_STAGE_PHASE_TYPE type in the List of Values. For more information, see Chapter 5, "Working with Lists of Values."</p> <p>The default choices are:</p> <ul style="list-style-type: none"> ■ A - Lead Discovery ■ B - Working the Deal ■ C - Closing ■ D - Lost Deal
Status	<p>The choices in this drop-down list are configured by using the SALES_STAGE_STATUS type in the List of Values. For more information, see Chapter 5, "Working with Lists of Values." The default choices are Open, Won, and Lost.</p>
Quota Factor	<p>The amount by which a sales representative's quota is multiplied by for that sales stage.</p> <p>As you move deals from one stage to another, some deals fall out of the pipeline. In order to eventually close \$1,000,000 in revenues, you might need \$10,000,000 worth of stage 01 deals, or \$5,000,000 worth of stage 04 deals, or \$1,500,000 of stage 08 deals. This means your quota factors in this case is 10 for stage 01, 5 for stage 04, and 1.5 for stage 08.</p> <p>In your Siebel application, a sales representative's quota is the sum total of his or her revenue quota objectives on all of his or her active quota plans.</p> <p>The default value is 1.</p>
Order	The sales stage's position in the list of values in the Opportunities screen.

Field	Comments
Win Probability	The probability or likelihood (out of 100) that, after successfully completing this stage, the deal is eventually won. In theory, the later the stage, the higher the win probability should be, because each stage brings the salesperson closer to winning the deal.
Duration	The number of days in a particular stage required for an average deal under average circumstances.
Stalled Deal Limit	The number of days that an opportunity can be in a particular sales stage. If the opportunity exceeds this limit, you can consider the deal to be stalled. There is no effect on the sales stage or any other aspect of the opportunity.

Before the Sales Method and Sales Stage can be used, the cache may need to be refreshed. For more information, see [“Clearing the Cache” on page 79](#).

About Activity Assignment

Activities created using activity templates can be assigned automatically to:

- The employee who is specified in the template.
- The employee who creates the activity, using activity templates (this is usual in a sales situation).
- No employee (this is recommended when Assignment Manager is used to assign the activity).

The assignment is determined by the values in the Employee and Category fields of the activity record in the Activity Template Details list, according to [Table 67](#).

Table 67. Employee and Category Values Determine Activity Assignment

If Employee Is...	and Category Is...	Then the Activity Is...
NOT NULL	<i>Any value</i> (NULL or NOT NULL)	Assigned to the employee who is specified in the Employee field of the template.
NULL	Field Engineer Activity Repair Activity, Preventive Maintenance, or Other	Not assigned. The Employee and Owner fields are blank in the created activity.
NULL	<i>Not</i> Field Engineer Activity, Repair Activity, Preventative Maintenance, or Other	Assigned to the employee who creates the activity (by applying the activity template).

NOTE: Activities created directly in the Activities screen are similarly affected by the Category value. If the Category value is changed to Field Engineer Activity, Repair Activity, Preventive Maintenance, or Other, the values of Owner and Category fields are deleted and set to NULL when the record is saved.

Creating an Activity Template

You use the Activity Templates view of the Administration - Data screen to create activity templates.

NOTE: For information about creating service activity templates using the Service Details view, see *Siebel Field Service Guide*.

To create an activity template without grandchild records

- 1 Navigate to the Administration - Data screen > Activity Templates view.
- 2 In the Activity Templates list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Sales Stage	<p>If you are creating a template of type Opportunity, select the sales stage with which you would like to associate the activity template. When the sales stage is selected, the Sales Method field is automatically filled in.</p> <p>When this sales stage (and sales method) are specified for an opportunity and Auto Trigger is selected, the activity template is used to automatically populate the Activity Plan view for that opportunity.</p> <p>For information about creating sales stages and methods, see “Defining a Sales Methodology” on page 257.</p>
Type	<p>Select the type that specifies where you would like the template to be available. For example, select Account if you want to use this template to create activity plans for accounts, or Milestone for TAS customer milestones.</p> <p>The choices in this drop-down list are configured by using the TEMPLATE_OBJECT_TYPE type in the List of Values. For more information, see Chapter 5, “Working with Lists of Values.”</p>
Sales Method	When the sales stage is selected, the Sales Method field is automatically filled in.
Public	There is no logic associated with this field. You may choose to use it in conjunction with workflows and search specifications.
Auto Trigger	If you are creating a template of type Opportunity, select this field to have the activity plan automatically generated for opportunities with this sales stage.

- 3 Click the Activity Template Details view tab.

- 4 In the Activity Templates Details list, create a new record and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Type	The choices in this drop-down list are configured by using the TODO_TYPE type in the List of Values. For more information, see Chapter 5, "Working with Lists of Values."
Duration	The time needed to complete the activity. This field determines the end time for the activity.
Lead	The lead time for the activity.
Units	Units of time to measure the lead time of the activity.
Employees	User names of the people who are to perform the activity. See "About Activity Assignment" on page 259.
Alarm	Whether an alarm should go off when it is time for the activity.
Category	See "About Activity Assignment" on page 259.
Lock Assignment	Whether the Employees field should be locked so that assignment cannot be changed by Assignment Manager. (Assignment can still be changed manually, for example, by the administrator.)
Required	This check box indicates that the activity must be completed. This is for information only; there is no associated code.
Display In	Choose to display the activity in the Calendar screen, the Activity screen, or in both. This field is not displayed by default.
Breakable	This is an input parameter to Siebel Scheduler. For more information, see <i>Siebel Field Service Guide</i> .
Lock Schedule	This field is used for service activity templates. For more information, see <i>Siebel Field Service Guide</i> .
Work Time	This field is used for service activity templates. For more information, see <i>Siebel Field Service Guide</i> .

- 5 Create a new activity template detail record for each activity associated with the activity template.

Creating TAS Customer Milestone Templates in a Localized Application

The sample TAS Customer Milestone activity template is available only in English. If you are running a localized version of the Siebel Sales application (that is, a version in a language other than English) and are using the Target Account Selling (TAS) module, you need to create an activity template of type *Milestone*, as outlined in the following procedure.

To translate a TAS Customer Milestone template for a localized application

- 1 Navigate to Application - Data screen > Activity Templates view.
- 2 In the Activity Templates list, query for records of type *Milestone* where *Milestone* is the translation of the English word in the localization language.

NOTE: For the translation, see the Interface Terminology Look-up manual for your language, or, in the List of Values, look for the Display Value that corresponds to the Language-Independent Code for Milestone. For more information about List of Values, see [Chapter 5, “Working with Lists of Values.”](#)

Six records should be found by the query:

- 1-Request Offering(s)
- 2-Evaluate Offering(s)
- 3-Approve / Select
- 4-Legal / Purchasing
- 5-Implement
- 6-Measure

- 3 For each of the six templates:
 - a Click the Activity Templates Detail view tab.
 - b Make sure that for each detail record, the Type is *Recommended Activity* where *Recommended Activity* is the translation of the English phrase in the localized language. (See note in [Step 2.](#))
 - c Optional: Translate the Description of each detail record into the localized language.
- 4 Follow the procedure for adding a milestone in [“Adding Customer Milestones” on page 555](#), and make sure that the six Activity Templates ([Step 2](#) of this procedure) appear in the Event field drop-down list.

Deleting an Activity Template

CAUTION: If you delete an activity template, *all* activities associated with activity plans that reference the template are also deleted.

To delete an activity template

- 1 Navigate to the Administration - Data screen > Activity Templates view.
- 2 In the Activity Templates list, select and delete the activity template record.

Setting a Default Sales Methodology (End User)

End users can set a default sales methodology in their preferences so that each time they create a new opportunity, their default sales methodology is filled in for the opportunity record.

To set a default sales methodology

- 1 From the application-level menu, choose Tools > User Preferences.
- 2 On the link bar, click Price List & Sales Methodology.
- 3 In the Sales Methodology field, select the methodology that you want to have as the default.

Using an Activity Plan (End User)

An activity plan defines the activities needed to implement a project or goal, or to resolve issues that frequently occur. For example, if a service-oriented activity plan is associated with a service request, the plan might include standard set of activities required to resolve the SR.

Activity plans use activity templates that establish the list of activities to be completed. Activity templates, created by administrators, may have various levels of details pertinent to each member of a team, such as requisitioning parts and tools, steps involved in the service activities, or special directions or instructions.

After an agent chooses an activity plan, the steps are in place to help diagnose and resolve the customer's issues, and the agent can move to the next customer call. Either Assignment Manager or an administrator can assign the activities to the appropriate users.

To create activities associated with an activity plan

- 1 Navigate to the Service Request screen > Service Request List view.
- 2 In the Service Request list, select the service request, and drill down on the SR #.
- 3 Click the Activity Plans view tab.
- 4 In the Activity Plans list, create a record, and in the Template field, select the appropriate activity template for the service request.
- 5 In the Planned Start field, enter the start date and time for activities related to the service request.
- 6 Save the Activity Plan.

Activities associated with the plan are automatically generated and appear in the Activities subview.

19 Assessments

This chapter contains information about assessments. It includes the following topics:

- [“About Assessment Templates” on page 265](#)
- [“Scenario for Using and Administering Assessments” on page 265](#)
- [“Process of Administering and Using Assessments” on page 266](#)
- [“Creating an Assessment Template” on page 266](#)
- [“Performing an Assessment \(End User\)” on page 268](#)
- [“Assessing an Opportunity for Target Account Selling \(End User\)” on page 269](#)

About Assessment Templates

An assessment template is a model used to generate an assessment. Assessment templates can be created to assess opportunities, contacts, and accounts, as well as other areas of the Siebel applications, such as the Ideal Customer assessment used by the Strategic Selling® module.

Assessments ask questions (in the form of attributes) and score the answers in order to determine a single total score or percentage, which measures or ranks a given opportunity, contact, account, or so on.

Assessments are made up of one or more attributes. Each attribute has a name, a weight, a set of allowable values and a description field. For example, a common attribute for an account might be Credit History. The values for this attribute might include Excellent, Good, Average, and Poor. Each of these values carries a numerical score and, optionally, instructions for the end user on how to choose the correct value.

Typically, the administrator creates assessment templates, and end users apply the templates and carry out the assessments.

Scenario for Using and Administering Assessments

This scenario provides an example of a process performed by the administrator and the end users in a sales situation. Your company may follow a different process according to its business requirements.

A sales organization has adopted a new sales methodology in order to improve the effectiveness of its salespeople. The business analyst has provided the administrator with a detailed document describing the sales method.

Because the salespeople have too many opportunities to deal with at once, they need to prioritize their opportunities. To help them to this, the business analyst has created a standardized assessment document that he recommends all salespeople use to rank their opportunities. The outline of assessment document looks like this:

Assessing a Lead at the Qualification Stage

- > Attribute 1: Adaptability to New Technology, weight = 5
- ✓ Attribute 2: Number of potential users, weight = 7
 - 0 to 50, score = 0, Too small
 - 51 to 100, score = 1, Route to telesales
 - 101 to 500, score = 2, Route to middle market
 - more than 500, score = 6, Pursue aggressively
- ✓ Attribute 3: Sponsor's stance, weight = 10
 - Adversarial, score = -5, Strongly against us
 - Weak, score = 0, Neutral or slight favor another vendor
 - Moderate, score = 5, Willing to recommend our product
 - Strong, score = 10, Believes we are the best choice
- > Attribute 4: Lead's purchase profile and history, weight = 5

The administrator uses the information in this document to create an assessment template associated with the qualification stage. When a salesperson reaches the qualification stage of the deal, the Assessments view for that opportunity is automatically populated with the questions that need to be answered in order to assess and prioritize the opportunity.

Process of Administering and Using Assessments

This example process represents the tasks that are carried out in the course of administering and using assessments.

- ["Creating an Assessment Template" on page 266](#)
- ["Performing an Assessment \(End User\)" on page 268](#)
- ["Assessing an Opportunity for Target Account Selling \(End User\)" on page 269](#)

Creating an Assessment Template

You use the Sales Assessment Templates view of the Administration - Data screen to create assessment templates.

To create an assessment template

- 1 Navigate to the Administration - Data screen > Sales Assessment Templates view.
- 2 In the Assessment Templates list, create a new record and complete the necessary fields.
Some fields are described in the following table.

Field	Comments
Assessment	The name of the template.
Type	<p>Select the type that specifies where you would like the template to be available. For example, select Contact if you want to use this template to create an assessment plan for contacts.</p> <p>The choices in this drop-down list are configured by using the TEMPLATE_OBJECT_TYPE type in the List of Values. For more information, see Chapter 5, "Working with Lists of Values."</p>
Sales Stages	<p>If you are creating a template of type Opportunity, select sales stages with which you would like to associate the assessment template.</p> <p>When one of these sales stages (and matching sales method) is specified for an opportunity, the assessment template is used to automatically populate the Assessments view for that opportunity.</p>
Sales Method	This field is filled when a sales stage is selected.

- 3 In the Assessment Attributes list, create a new record for each attribute you want to assess.
Some fields are described in the following table.

Field	Comments
Order	The attribute's position in the Assessment Attributes list.
Name	Name of the attribute.
Weight	The relative importance of the attribute.
Max Child	This field contains the maximum score from the Attribute Values list.
Weight Times Score	This is the product of the Weight and the Max Child values.

- 4 For each assessment attribute, create a record for each possible value of the attribute. Some fields are described in the following table.

Field	Comments
Order	Indicates the value's position in the Attribute Values list.
Value	The name of the value, for example, Excellent, Good, or Average.
Score	The number of points that the value represents.
Description	Additional information about the value to help the assessor.

These values appear in the Pick Attribute Value dialog box when the end user applies the template. For information about using an assessment template, see [“Assessing an Opportunity” on page 494](#).

How Assessment Scores Are Calculated

The total score for the assessment is determined by summing weighted scores for each assessment attribute:

$$\text{Total_Score} = \sum_{i=1}^n (\text{Weight}_i)(\text{Score}_i)$$

where n is the number of assessment attributes in the template.

The score is also calculated as a percentage of the maximum score possible:

$$\text{Max_Total_Score} = \sum_{i=1}^n (\text{Weight}_i)(\text{Max_Score}_i)$$

where Max_Score_i is the largest score for any value in the Attribute Values list for the i th attribute. This is the Max Child value shown in the Assessment Attributes applet. For example, in the assessment example in the [“Scenario for Using and Administering Assessments” on page 265](#), the largest score for Attribute 2 is 6 and the largest score for Attribute 3 is 10.

Performing an Assessment (End User)

The following procedure shows how to assess an opportunity, but the procedure is essentially the same for any screen where assessments can be performed.

An opportunity assessment helps you qualify opportunities and verify resource allocation. Using an assessment template, you can select values and attributes to assign a composite value to the opportunity.

NOTE: In some companies, your Siebel application automatically generates assessments, but if this process has not been automated, you can create assessments manually.

To assess an opportunity

- 1 Navigate to the Opportunities screen > List view.
- 2 In the Opportunities list, drill down on the opportunity which you want to assess.
- 3 Click the Assessments view tab, and create a new record.
- 4 In the Template Name field specify an assessment template.
- 5 Save the assessment record.

Assessment attributes associated are automatically generated and appear in the Assessment Attributes list.

- 6 In the Assessment Attributes list, specify a value and add comments for each attribute.

A composite assessment score for the opportunity appears as a percentage value in the parent Assessment list. This percentage compares the score you entered in the assessment attribute line items to the maximum possible score for the opportunity. You can use this percentage to qualify the opportunity.

Assessing an Opportunity for Target Account Selling (End User)

Sales professionals can use the Assessments view to evaluate the opportunity using criteria developed by Siebel MultiChannel Services. Assessments must be completed before determining the best strategy. An assessment focuses on the following four key questions:

- 1 Is there an opportunity?
- 2 Can we compete?
- 3 Can we win?
- 4 Is it worth winning?

Sales professionals assess their organization's position and the position of their top competitors against these criteria. As the sales campaign progresses, sales professionals repeat this assessment and then compare the results to past assessments to evaluate and monitor their position at each sales stage.

The first few times an assessment is performed, use the TAS Coach to help evaluate and answer each set of assessment questions. After a number of assessments are performed and you are familiar with the criteria and methodology, use the Assessment form to rate the criteria.

To begin an assessment

- 1 Navigate to the Opportunities screen > List view.
- 2 In the Opportunities list, drill down on the opportunity which you want to assess.
- 3 Click the Target Account Selling view tab.
- 4 In the lower link bar, click Assessments.

The Assessments list includes all the assessments you and your sales team have performed to date. Use the Assessments list to compare opportunity assessments for your company and your competitors.
- 5 In the Assessments form, click New.
- 6 In the new record, the Assessment For field defaults to Our Company for self assessments. If you are assessing a competitor's position, enter the competitor in this field.
- 7 In the Assessment form, click TAS Coach, and then complete the assessment criteria questions.

For more information, see ["Using the TAS Coach" on page 270](#).

Using the TAS Coach

The Assessment TAS Coach uses Siebel SmartScripts technology to help sales professionals evaluate opportunities. The explorer pane expands to show the individual questions in each question set, and the form at right provides information on assessment considerations and rating selection.

To perform an assessment using TAS Coach

- 1 Assess the position of each of the criteria in the Assessments list by selecting a plus (+), a minus (-), or a question mark (?) from the drop-down list.
- 2 Click Next to advance to the next set of criteria questions.
 - Click Previous to return to criteria you have already assessed.
 - Click Cancel to return to the Assessments view without saving the assessment.
 - If you want to pause in the middle of a TAS Coach assessment, and then return to the assessment at a later time, click Finish Later. The assessment does not appear in the Assessments list until it is completed.

Your assessment is saved in the SmartScripts screen's My Saved Session view. Use Site Map to navigate to the SmartScripts screen.

If you do not have enough information to answer the question, select the question mark (?).

- 3 When you have rated all criteria, click Finish to return to the Assessments list.

You must click Finish to save the criteria ratings.

20 Calendar

This chapter describes the resource and calendar access tasks performed by the administrator.

It includes the following topics:

- [“About Calendar Access and Resources” on page 271](#)
- [“Scenarios for Calendar Administration” on page 271](#)
- [“Process of Calendar Administration” on page 272](#)
- [“Setting Up Resources” on page 273](#)
- [“Adding and Modifying Calendar Access” on page 273](#)
- [“Deleting Calendar Access” on page 274](#)
- [“About Configuring the Calendar” on page 274](#)

About Calendar Access and Resources

About Resources

Resources are typically things such as conference rooms and audio-visual equipment that are reserved and used by employees for meetings and other calendar activities. Resources have availability associated with them and can be invited as participants to calendar activities in much the same way as employees and contacts are invited to calendar activities. For more information about adding participants to activities, see *Fundamentals*. The administrator is responsible for setting up and maintaining the list of resources.

About Calendar Access

Normally employees grant each other access to their calendars as described in *Fundamentals*. However, there are various situations when the administrator may be required to add, modify, or delete calendar access for employees.

Scenarios for Calendar Administration

These scenarios provide examples of calendar tasks performed by the administrator. Your company may follow a different process according to its business requirements.

Resource Administration

This topic presents two scenarios requiring resource administration:

- Before the Siebel application is rolled out to end users, the administrator creates resource records. He creates resource records for all the conference rooms for the various floors and buildings of the company's sites. He also creates resource records for the audio-visual equipment that employees may want to reserve for use at their meetings.
- After the Siebel application is rolled out, the company grows and more sites and conferences rooms are added. Old audio-visual equipment is discarded and new equipment is purchased. The administrator continues to maintain the list of resources, keeping it up-to-date.

See ["To administer resources for calendar activities" on page 273](#) for the procedure associated with these scenarios.

Calendar Access Administration

Here are three scenarios requiring calendar access administration:

- Employee A is out of the office unexpectedly. Employee B needs to view Employee A's calendar so that she can cancel his appointments. Employee B asks the administrator to give her access to Employee A's calendar. See ["To give Employee B access to Employee A's calendar" on page 273](#).
- An executive has been granted access to many of his colleagues' calendars. When the executive moves to a new division, he no longer needs to access to these employees' calendars. He asks the administrator to clear the list by removing his name from all employees' Calendar Access List views. (Alternatively, the executive could have contacted all the employees whose calendars are on his Owner drop-down list and asked each of them to remove his name from their calendar access lists.) See ["To remove all employees from an employee's Calendar Owner drop-down list" on page 274](#).
- When an employee leaves the company, the administrator removes the employee's name from the Owner lists of other employees. See ["To remove an employee \(A\) from all employees' Calendar Access List views" on page 274](#).

Process of Calendar Administration

This example process represents the tasks that are carried out in the ["Scenarios for Calendar Administration" on page 271](#).

Setting up of resources is completed before the end users begin to set up meetings. Other tasks are carried out according to the company's business needs.

- 1 ["Setting Up Resources" on page 273](#)
- 2 ["Adding and Modifying Calendar Access" on page 273](#)
- 3 ["Deleting Calendar Access" on page 274](#)

Setting Up Resources

To administer resources for calendar activities

- 1 Navigate to Administration - User screen > Resources view.
- 2 In the Resources list, create a new record and complete the necessary fields.

TIP: If the Description and Site fields are not sufficient to identify the resource, other fields can be added to the Resources list applet. For example, your company may want to add Building Number and Floor fields to help end users find and identify resources. For information on creating and exposing fields, see *Configuring Siebel eBusiness Applications*.

- 3 Edit and delete resource records as required.

Adding and Modifying Calendar Access

There are two Calendar Administration views that can be used to modify calendar access:

- Calendar Admin Access Received lists all the calendars that the selected employee can access.
- Calendar Admin Access Granted lists all the employees who can access the selected employee's calendar.

To give Employee B access to Employee A's calendar

- 1 Navigate to Administration - User > Employees > Calendar Administration > Access Granted.
- 2 In the Employees list, select the employee (Employee A).
- 3 In the Calendar Administration list, create a new record or select an existing record and complete the Last Name and Update Access fields.

Field	Comments
Last Name	This is the name of the Employee B who wants to access Employee A's calendar.
Update Access	<p>If this is selected and marked Y, Employee B has read/write access to Employee A's calendar.</p> <p>If this is marked N, Employee B has read-only access to Employee A's calendar.</p>

To view all the calendars to which an employee has access

- 1 Navigate to Administration - User screen > Employees > Calendar Administration > Access Received view.

- 2 In the Employees list, select the employee.

The Calendar Administration list shows calendars to which the employee has access.

NOTE: Records can be added, modified, and deleted from this view.

Deleting Calendar Access

For a selected employee, the administrator can delete all employees from the Access Granted or the Access Received list.

To remove all employees from an employee's Calendar Owner drop-down list

- 1 Navigate to Administration - User screen > Employees > Calendar Administration > Access Received view.
- 2 In the Employees list, select the employee.
- 3 Make sure that you have selected the employee whose Calendar view Owner drop-down list you want to clear.
- 4 From the menu button in the Access Received list, select Delete All.

This command deletes *all* records in the list. The employee selected in the Employees list no longer has access to *any* calendars other than his or her own.

NOTE: Alternatively, you can use the Delete Record command to remove just one selected employee from the employee's calendar owner drop-down list.

To remove an employee (A) from all employees' Calendar Access List views

- 1 Navigate to Administration - User > Employees > Calendar Administration > Access Granted.
- 2 In the Employees list, select the employee (Employee A).
- 3 Make sure that you have selected the employee that you want to remove from all employees' calendar access lists.
- 4 From the menu button in the Access Granted list, select Delete All.

This command deletes *all* records in the list. The calendar of the employee selected in the Employees list can no longer be accessed by *any* other employees.

NOTE: Alternatively, you can use the Delete Record command to delete the employee from one selected employee's calendar access list.

About Configuring the Calendar

This section describes some aspects of the Calendar feature that configurators or administrators can configure:

- ["Alarm Manager Load Frequency" on page 275](#)

- [“Days for Retroactive Alarms” on page 275](#)
- [“Required Fields in the eCalendar Detail Applet” on page 275](#)
- [“The To Do List from the Calendar View” on page 276](#)
- [“Calendar Activity Description and ToolTip Text” on page 276](#)
- [“Start and End Times for Calendar Activity Display” on page 278](#)
- [“Calendar Drilldown” on page 278](#)
- [“Drag-and-Drop Action for the Calendar Applet” on page 279](#)
- [“Changing Controls in the Calendar Detail View” on page 281](#)
- [“Showing or Hiding Side Applets on the Life Sciences Calendar” on page 281](#)

Alarm Manager Load Frequency

A system preference called Alarm Manager Load Frequency determines how frequently the calendar alarm queries the server for alarm-enabled appointments. The default value is 60 minutes, but you may want to change this time to better suit your business needs: querying the server less frequently results in fewer SQL calls. However, each SQL call takes longer to execute. In certain cases, this trade-off results in improved performance. (Also, if the alarm frequency is less than the session timeout set in the eapps.cfg file, sessions never time out.)

For information on how to edit system preferences, see [“Setting System Preferences” on page 50](#).

Days for Retroactive Alarms

Retroactive alarms are alarms for past events that did not display before the event because the user was not logged in. By default, the application is set to display retroactive alarms for missed events up to 14 days in the past. You can change the number of days for retroactive-alarm display by editing the RetroAlarmInterval user property of the Alarm Manager business service.

Required Fields in the eCalendar Detail Applet

In the preconfigured application, the Type field is the only required field in the Calendar Detail form in the Calendar Detail view. If you make other fields required, you must predefault these fields. This is because when users create a new record or drill into a record from the calendar grid, an implicit save of the record is triggered. If any fields are required but not predefaulted, their values are null when the implicit save is triggered and an error message will be generated.

For more information about predefaulting fields, see *Configuring Siebel eBusiness Applications*.

The To Do List from the Calendar View

You can configure the calendar view (HI Activity Calendar View) so that the Calendar To Do list applet does not appear.

You might choose to do this if your employees do not use the To Do list or if you need more space for the calendar applet on the view.

To remove the To Do list from Calendar views

- 1 Open the CCViewHIC.swt file in a text editor.

For more information about SWT (Siebel Web Template) files, see *Configuring Siebel eBusiness Applications*.

- 2 Comment out the following text (the first line is already commented):

```
<!--Column 2 -->
<td val ign="top" width="21%">
    <swe: for-each count="20" iteratorName="currentId" startValue="201">
        <swe: applet hi ntMapType="Applet" id="swe: currentId" property="Formatted...
    </swe: for-each>
</td>
```

- 3 Save and close the file.

Calendar Activity Description and ToolTip Text

Calendar Activity Description

By default, the Description field is used as the hyperlink for calendar activities, as shown in [Figure 22 on page 277](#). However, by editing the Description applet user property on the calendar applet, you can change the calendar activity hyperlink to display another field, for example, to display the Meeting Location field. See [Table 68](#) for information about this user property.

TIP: If you want to display contents of more than one field, create a calculated field that concatenates other fields and set the concatenated field name as the value of the Description user property. For example, this is done for the calendar applet (CS CG Activity HI Calendar Applet) used by the Consumer Sector application.

ToolTip Text

When you move the pointer over a calendar activity hyperlink, ToolTip text appears ([Figure 22 on page 277](#)). The contents of these ToolTips are configurable through applet user properties. See [Table 68 on page 277](#) for information about these user properties.

Figure

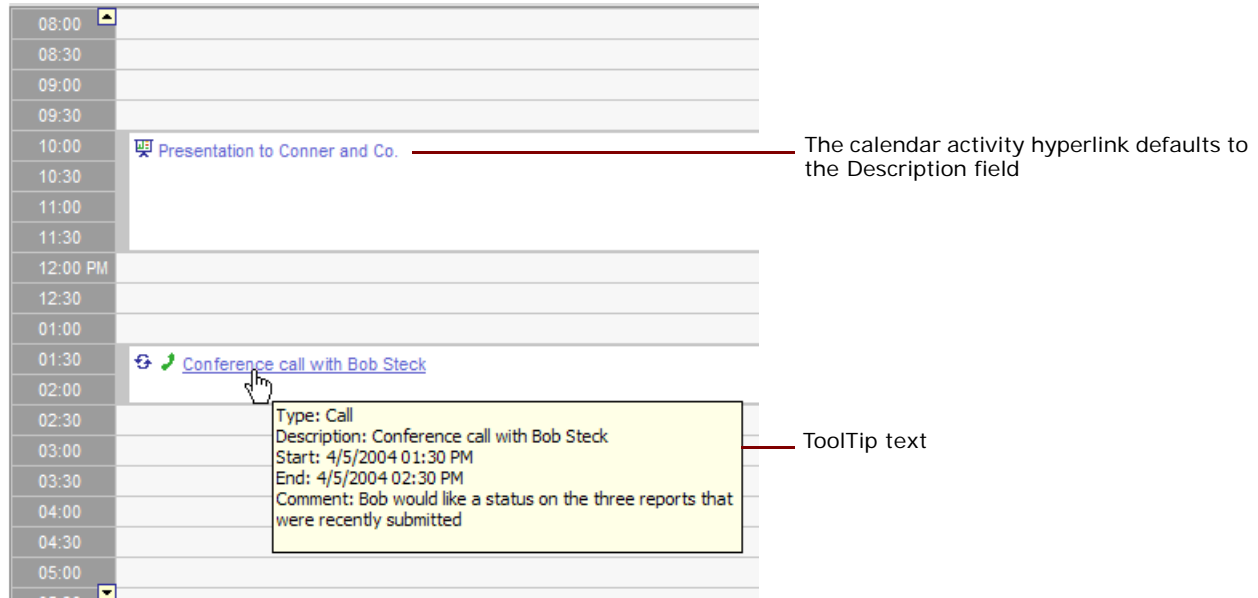


Figure 22. The Calendar Activity Hyperlink and ToolTip Text in the Activity HI Calendar Applet

User Properties for Calendar Activity Hyperlink and ToolTip Text

Table 68. Calendar Applet User Properties for Calendar Activity Hyperlink and ToolTip Text

Applet User Property	Description
Description	The value of this field is displayed as the calendar activity hyperlink. By default, this is the Description field.
Enable Dynamic Tooltip	Set this to Y to enable customized ToolTip contents through the use of the ToolTip user properties. If dynamic ToolTips are not enabled, then the ToolTip text defaults to display the field values for Type, Description, Start (Sdate), End (Edate), and Comment, as shown in Figure 22 .
Tooltip, Tooltip 1, Tooltip 2, ... Tooltip <i>n</i>	Each ToolTip user property contains the name of an applet control. The ToolTip text displayed is the applet control's caption and the value of the field. If ToolTip text is enabled but no ToolTip user properties are defined, then the default ToolTips are displayed.

Start and End Times for Calendar Activity Display

Two fields determine the start and end times for activity display in the calendar applet. By default, these fields are usually the planned start and completion dates, but other fields can be used by editing the Sdate and Edate applet user properties.

See [Table 69](#) for a list of calendar applet user properties for calendar activity start and end time.

Table 69. Calendar Applet User Properties for Calendar Activity Start and End Times

Applet User Property	Description
Sdate	The name of the field that indicates the activity start date and time for display in the calendar applet.
Edate	The name of the field that indicates the activity end date and time for display in the calendar applet.

Calendar Drilldown

By default, the calendar activity hyperlink is hard-coded to drill down to the eCalendar Detail View. However, this hard coding can be overridden to allow single or dynamic drilldowns to be configured through Siebel Tools. For example, the Consumer Sector and Pharma applications use this override to configure dynamic drilldown from their calendar applets (CS CG Activity HI Calendar Applet and LS Pharma Activity HI Calendar Applet).

If you want to configure the calendar drilldown, you can edit the Override Default Drilldown user property ([Table 70 on page 278](#)). Special requirements for configuring calendar drilldown are:

- Only the eCalendar Detail View can handle recurring calendar activities.
- There must be one drilldown object uniquely named Description.
- For all drilldown objects, the Hyperlink Field value must be Id.
- In the case of dynamic drilldowns, if none of the dynamic drilldown criteria are met, drilldown is set to the eCalendar Detail View.

Table 70. Calendar Applet User Property to Enable Drilldown Configuration

Applet User Property	Description
Override Default Drilldown	Set this to Y to override the hard-coded drilldown to the eCalendar Detail View and to allow normal drilldown configuration for the calendar applet within Siebel Tools.

Drag-and-Drop Action for the Calendar Applet

A list applet in the Calendar view can be configured so that one or more records can be dragged from the list applet and dropped onto the calendar applet. The behavior of the drag-and-drop action is configurable. For example:

- In the Pharma application: dragging a record from the Activities list to the daily calendar applet updates the Planned Start date for the activity according to where it is dropped on the calendar.
- In the Consumer Sector application: dragging records from the Activities list to the calendar applet creates a new record of type In Store Visit for the account and associates appropriate activity records to the new In Store Visit record. If multiple records are dragged, the account for the new record is based on the account of the last record in the dragged group.

User properties on the list applet determine the drag-and-drop behavior. ([Table 71](#))

Table 71. Applet User Properties for Calendar Drag-and-Drop (Set on the List Applet)

Applet User Property	Description
Calendar Default Action	<p>Set this to NewRecord to create a new calendar activity record when a record is dragged from the list applet to the calendar applet. (This is also the default behavior, unless the Calendar Drag Method user property is set.)</p> <p>Set this to UpdateTime to change the time field in the source (dragged) record according to where the record is dropped in the calendar applet. (No new record is created.) This behavior is seen in the Pharma application.</p>
Calendar UpdateTime Field	<p>If Calendar Default Action = UpdateTime, set the Calendar UpdateTime Field user property to the time field in the source applet that you want to have updated by the drag-and-drop action.</p> <p>For example, in the Pharma application (Pharma Calendar Activity List Applet), this is set to Planned.</p>
Calendar Drag Field, Calendar Drag Field1, Calendar Drag Field2, Calendar Drag Field3 ... Calendar Drag Field <i>n</i>	<p>If Calendar Default Action = NewRecord, set the Calendar Drag Field user properties to copy data from the source record to the new calendar activity (target) record.</p> <p>The format for these user properties is <i>Source_field_name,Target_field_name</i></p> <p>For example, to copy content from a field named Summary in the source record to the Description field in the calendar activity record: Calendar Drag Field = Summary,Description.</p>
Calendar Drag Associate	<p>If Calendar Default Action = NewRecord, set this user property to Y if you want to have the source records associated with the new (target) record. The dragged records become child records of the new calendar activity record.</p>

Table 71. Applet User Properties for Calendar Drag-and-Drop (Set on the List Applet)

Applet User Property	Description
Calendar Drag Child Associate Field	If Calendar Drag Associate = Y, set this user property to the name of the field in the dragged (source) records that is to associate them with the new calendar activity record. The field specified gets populated with the row ID of the new calendar activity record.
Calendar Drag Method	<p>If the default calendar action does not meet your needs, it is possible to supply your own method to control the drag-and-drop action. This is done by setting this user property to the method name.</p> <p>If this user property is set, the preceding user properties are ignored.</p> <p>For example, in the Consumer Sector application, this is set to the Drag And Drop Handler method.</p>
Calendar Drag BusComp	<p>If a method is supplied in the Calendar Drag Method user property, enter the name of the business component on which you want to invoke the method. If this user property is not specified, the method is invoked on the current business component.</p> <p>For example, in the Consumer Sector application, this is set to the In Store Visit business component.</p>
Calendar Drag BusObj	<p>If a business component is supplied in the Calendar Drag BusComp user property, enter the name of the business object to use when retrieving the Calendar Drag BusComp business component.</p> <p>If this user property is not specified, the current business object is used. However, it is better to specify a value for this business object, even if it is the same as the current business object. This is to make sure that instantiating the Calendar Drag BusComp business component does not affect other business components within the current view.</p> <p>For example, in the Consumer Sector application, this is set to the In Store Visit business object.</p>

Changing Controls in the Calendar Detail View

The Calendar Detail view (accessed by clicking the New button on the daily, weekly, or monthly calendar views) has three buttons that are managed by the specialized class `CSSSWFrameGanttHiMode` in the HI Gantt Chart applet. [Table 72](#) shows the button name and the pop-up applet invoked by the button.

Table 72. Participant Availability Buttons

Buttons Name	Popup Applet Invoked
Add Employee	HI Gantt Chart Employee Pick Applet
Add Resource	HI Gantt Chart Resource Pick Applet
Add Contact	HI Gantt Chart Contact Pick Applet

Showing or Hiding Side Applets on the Life Sciences Calendar

The calendar pages for the Siebel Life Sciences application have list applets on the right side of the calendar applet. See [Figure 23 on page 281](#).

A user property called `Suppress Side Applets Calendar Types` on the LS Pharma Activity HI Calendar Applet determines whether or not the side list applet is displayed.

For example, you can choose to have the side list applet displayed with the daily and weekly calendars but not with the monthly calendar.

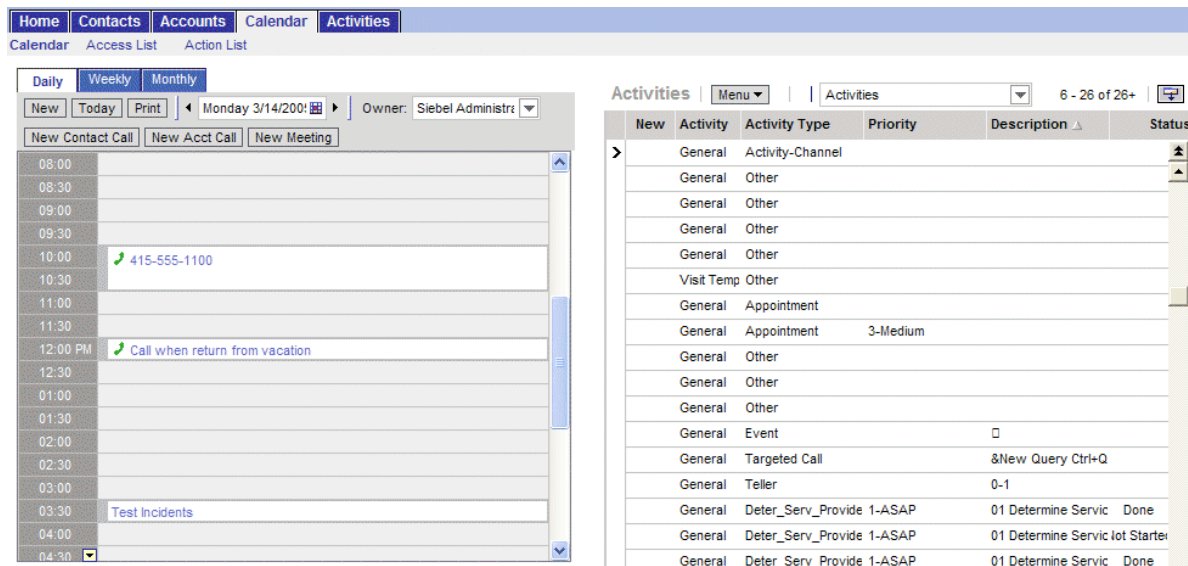


Figure 23. LS Pharma HI Activity Calendar View with Daily Calendar Applet and Side List Applet

To hide or show the side list applet on the LS Pharma HI Activity Calendar View

- For the LS Pharma Activity HI Calendar Applet, edit the Suppress Side Applets Calendar Types applet user property to include the calendars for which you want to hide the list applet.

For example, set the value to Daily, Weekly5, Weekly7, Monthly to hide the side list applet on all the calendars.

21 State Models

This chapter is about state models: how to set them up and how they work. It includes the following topics:

- [“About State Models” on page 283](#)
- [“Scenario for State Models” on page 284](#)
- [“Process of Setting Up State Models” on page 284](#)
- [“Configuring Business Components for State Models” on page 285](#)
- [“Creating State Models and State Transitions” on page 286](#)
- [“Activating State Models” on page 288](#)
- [“Configuring Child Modification for State Models” on page 289](#)

About State Models

State model functionality allows you to constrain the state of an object by prescribing allowed state values and allowed state transitions. For example, a service request object may be constrained to three states: Open, Closed, and Pending. Furthermore, the state transitions may be constrained to: Open to Pending, Open to Closed, and Pending to Closed.

For Siebel workflows, state models provide a data-driven method for extending control based on the state of the object. For general information about Siebel workflows, see *Siebel Business Process Designer Administration Guide*.

The state model functionality consists of three key elements:

- **State Model.** A blueprint of acceptable states and state transitions that are enforced by the state machine.
- **State Machine.** An engine that enforces the transitions between states for an object during its lifetime. The state represents where the object is in its lifetime. The state can also control whether the data of that object can be modified. For example, a record that is in a Closed state may be considered frozen, such that its attributes cannot be modified. The state machine reviews all required conditions defined for the state model before the state transition is completed.
- **State Transition.** Defines the allowable migration of an object from one state to the next. For instance, a record that has been closed but must be reopened may go from the Closed state to an Open state and may go from Open to Pending, but may not transition directly from Closed to Pending.

Specific conditions can be associated with state transitions. For example, you can specify that only certain individuals can initiate state transitions or that a transition can only be initiated if the object meets certain criteria.

Scenario for State Models

This scenario provides an example of a process performed by the administrator. Your company may follow a different process according to its business requirements.

A company has recently configured its Siebel application to support its case review process. To do this, they created a new business component called Case, along with a supporting Case screen and views.

The administrator's task is to set up a state model on this new business component.

First, the administrator uses Siebel Tools to check that Case business component is based on the CSSBCBase class. Then, she discovers that the configurator has already enabled the state model user property for this business component.

Within the Siebel application, she creates a state model based on the Status field (an LOV field) of the Case business component.

The state model contains three allowed states:

- **Open.** This is set as the default state, the state of any newly created cases.
- **Assigned.**
- **Closed.** This is set as a No Delete and No Update state so that a closed case is read-only and cannot be deleted.

The state model contains two allowed transitions:

- **From Open to Assigned.** Because company policy is that only managers may assign cases, this transition is restricted to the managers' positions.
- **From Assigned to Closed.** Company policy also requires that employees write a resolution summary of each case before closing. To encourage this, a condition is created so that the status cannot be changed to Closed if the Resolution-Summary field is left blank.

Finally, the administrator activates the state model by restarting the server.

Process of Setting Up State Models

This example process represents the tasks that are carried out in the ["Scenario for State Models" on page 284](#).

- 1 ["Configuring Business Components for State Models" on page 285](#). This is only required if the business component has not been enabled for state models.
- 2 ["Creating State Models and State Transitions" on page 286](#).
- 3 ["Activating State Models" on page 288](#).

Configuring Business Components for State Models

You can create state models on business components that are:

- State-model enabled in the preconfigured application
- Based directly on the CSSBCBase class and that are enabled using the procedure given in this section

Creating state models for business components based on subclasses of CSSBCBase class is not supported by Siebel Systems. In particular, do not create or modify state models on the Enterprise Service Definitions, SRM Request, and SRM Repeating Request business components. These are used for server administration.

This task is a step in [Process of Setting Up State Models on page 284](#).

To find out if a business component is already enabled for state models

- 1 Navigate to the Administration - Application screen > State Models view.
- 2 Create a new record and try to complete the Business Component field.

Some business components are described in the following table.

If the Business Component You Want	Then That Business Component	Continue with Procedure
Is listed in the Business Component dialog box	Is already enabled	"To create a new state model" on page 286
Is not listed in the Business Component dialog box	Is not enabled	"To enable a business component for state models functionality in Siebel Tools" on page 285

- 3 Delete or undo the new record.

To enable a business component for state models functionality in Siebel Tools

- 1 Make sure that the business component is based on the CSSBCBase class.
- 2 Create a new business component user property with the following properties:
 - Name=State Model
 - Value=Y

Creating State Models and State Transitions

This section describes how to create and define state models and state transitions.

To enable a state model on a business component, the field used should:

- Be an LOV (list of values) or MLOV (multilingual lists of values) field.
- Have no dependencies on other fields. (For example, do not use a constrained LOV field or a calculated field.)

This task is a step in [Process of Setting Up State Models on page 284](#).

To create a new state model

- 1 Navigate to the Administration - Application screen > State Models view.

Some fields are described in the following table.

Field	Comments
Activation	The date on which the state model begins to be enforced. NOTE: You can set up more than one state model for a given field as long as the activation to expiration periods do not overlap.
Business Component	The business component that the state model is based on. The dialog box for this field displays all of the business components that have been enabled for the state model. To enable a business component that is not enabled by default, see “Configuring Business Components for State Models” on page 285 .
Expiration	The date on which the state model is no longer enforced.
Field	The name of the field that the state transitions apply to. The dialog box for this field displays the fields that are defined for the business component.
Name	A name that uniquely identifies the state model.

- 2 Click the States view tab.
- 3 In the State list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
State Name	The dialog box for this field presents the list of values for this field.
Default	The default state name specifies a beginning value for the business component field. NOTE: If the field is predefaulted in Tools, then it cannot be overridden by the state model.

Field	Comments
No Delete ¹	If checked, records in this state cannot be deleted unless they are referenced by a parent record in which the Cascade Delete property is set to Delete. Cascade Delete always overrides the State Model restrictions. For information about how No Delete effects child records, see “Configuring Child Modification for State Models” on page 289 .
No Update ¹	If checked, records in this state are read-only and cannot be updated. NOTE: No Update also affects a record’s child records. For example, if an account becomes read-only due to use of the No Update restriction, the related contacts for the account also become read-only, so inserting and deleting contacts is not possible.
Restrict Transition	If checked, only defined transitions from this state are allowed. If checked and there are no transitions defined, the state becomes an end state, where users cannot transition from it to any other state. If not checked, this state can transition to any of the defined states.

1. *Note:* Even if No Delete and No Update restrictions are specified for the state model, MVG fields that do not have a direct parent-child link between the parent field and the MVG applet are not read-only when a record is in a No Update or No Delete state. To avoid confusion for end users, you can remove MVG fields from the child applet.

- 4 Click the Transitions view tab.
- 5 In the Transitions list, for each restricted transition, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
From State	The original field value for the state transition. NOTE: If a state transition is not defined for the default State Name value, the field that the state model is based on cannot be changed.
To State	The new field value for the state transition, changing from the value indicated in From State.
Public	Indicates that all users are allowed to make the transition. If checked, records in the Authorized Positions list are ignored. For more information, see Step 6 on page 288 .

Field	Comments										
Rule Field	These three fields allow you to specify a simple field condition that must be satisfied for the transition to occur. For example, a state transition is created that allows users to change the status of a service request from Open to Closed when the sub-status is Resolved uses a rule like this:										
Rule Operator											
Rule Value											
<table><tr><th>From State ▲</th><th>To State</th><th>Rule Field</th><th>Rule Operator</th><th>Rule Value</th></tr><tr><td>Open</td><td>Closed</td><td>Sub-Status</td><td>=</td><td>'Resolved'</td></tr></table>		From State ▲	To State	Rule Field	Rule Operator	Rule Value	Open	Closed	Sub-Status	=	'Resolved'
From State ▲	To State	Rule Field	Rule Operator	Rule Value							
Open	Closed	Sub-Status	=	'Resolved'							
The syntax for rules is the same as the syntax for calculated field values and field validation in Siebel Tools. For more information about the syntax, see about operators, expressions, and conditions in <i>Siebel Developer's Reference</i> .											
Rule Expression	Allows for the creation of complex or multiple conditions that must be satisfied for the transition to occur. The syntax for the Rule Expression field is the same as the syntax for calculated field values and field validation in Siebel Tools. For more information about the syntax, see about operators, expressions, and conditions in <i>Siebel Developer's Reference</i> .										

- To restrict a state transition to a subset of users (positions), clear the Public field for the transition and create records in the Authorized Positions list.

NOTE: If the Public Flag is not checked and no positions have been added in the Authorized Positions list, no users are able to make the transition.

Activating State Models

How Are State Models Activated?

Your new state model does not become available to users until a new Application Object Manager (AOM) server process is created. By restarting the server or the Application Object Manager (AOM) server components, you start new AOM processes that obtain your new state model from the refreshed state model cache.

How Are State Models Activated for Mobile Users?

For mobile users who connect through Siebel Remote, the state model is enforced once a user has synchronized with the database server. State models are supported on regional nodes. For more information about support for regional nodes, see the section about restricting mobile client routing in the *Siebel Business Process Designer Administration Guide* and *Siebel Remote and Replication Manager Administration Guide*.

How Are State Models Enforced?

State models are enforced on the Siebel business logic level. Thus, state models are enforced for updates made through Siebel Visual Basic, Siebel eScript, and workflow processes. However, state models are not enforced for updates made through Enterprise Integration Manager (EIM) or workflow policy programs because these do not go through the Siebel Object Managers.

How the AOM Reads State Model Objects

State model objects are read from the run-time database, not from the compiled Siebel repository file (SRF).

NOTE: If you are distributing state models to other environments, you need to migrate the run-time database tables for the state model (as well as distributing the SRF file).

Procedure

This task is a step in [Process of Setting Up State Models on page 284](#).

To activate state models

- Do one of the following:
 - Restart the server.
 - Restart the Application Object Manager (AOM) server components.

Configuring Child Modification for State Models

By default, child records cannot be created, modified, or deleted when the state of the parent record is No Delete.

You can change this behavior in two ways:

- **Globally.** At the business-service level by editing the Enable Child Modification user property for the State Model Cache business service.
- **Locally.** If child modification is enabled at the business-service level, you can disable it for individual business components using the State Model Enable Child Modification business component user property.

To enable child modification for all business components

- In Siebel Tools, set the State Model Cache business service Enable Child Modification user property to Y.

This allows you to create, modify, and delete child records, even when the parent record state is No Delete.

To disable child modification for an individual business component if child modification is globally enabled

- In Siebel Tools, set the State Model Enable Child Modification user property for the *business component* to N.

The interaction of the Enable Child Modification (business service) and the State Model Enable Child Modification (business component) user properties is summarized in this table.

If the Enable Child Modification business service user property is	And the State Model Enable Child Modification business component user property is	Then, for the business component, child modification is
Y	Y or <i>blank</i>	Enabled
Y	N	Disabled
N	<i>any value</i>	Disabled

22 Document Server

This chapter is about setting up the Document Server. It includes the following topics:

- [“About the Document Server” on page 291](#)
- [“About Obtaining the Required Hardware for the Document Server” on page 291](#)
- [“Process of Setting Up the Document Server” on page 292](#)
- [“Installing the Siebel Server for the Document Server” on page 292](#)
- [“Installing Microsoft Office Applications on the Document Server” on page 294](#)
- [“Enabling the Component Group for the Document Server” on page 295](#)
- [“Setting MaxTasks Parameters for the Document Server” on page 295](#)
- [“Synchronizing Components for the Document Server” on page 296](#)
- [“\(Optional\) Configuration for the Document Server” on page 296](#)

About the Document Server

The Document Server is required for Siebel Correspondence, Siebel Presentations, and Siebel Proposals. The Document Server is used to generate Microsoft Word and Microsoft PowerPoint documents.

About Running Document Server Functionality on Siebel Mobile Web Clients

This chapter focuses on installing and setting up the communal Document Servers that are used by (connected) Siebel Web Clients. However, the Siebel Document Server functionality is available for the Siebel Mobile Web Client as well. For example, this allows field sales representatives to generate proposals, presentations, and correspondences while traveling.

In the case of the Siebel Mobile Web Client, it is necessary that Microsoft Office be installed locally on the mobile machine to act as the Document Server.

About Obtaining the Required Hardware for the Document Server

The Document Server is supported on Windows platforms only. This is because Microsoft Office only runs on the Windows platform. See the *System Requirements and Supported Platforms* on Siebel SupportWeb for information about which Windows platforms are supported.

To maintain stability and performance, the Document Server must run on a dedicated host machine. The Siebel Server on this machine should host one instance of the Siebel Documents component group. No other components should be running other than required system components.

The Document Server can be run successfully on a machine that meets the minimum hardware requirements for a Siebel installation. For example, a two-processor machine can be used.

To support more users, you can run additional instances of the Siebel Documents component group on additional dedicated host machines.

Process of Setting Up the Document Server

To set up the Document Server in preparation for using Correspondence, Presentations, or Proposals, perform the following tasks:

- [“Installing the Siebel Server for the Document Server” on page 292](#)
- [“Installing Microsoft Office Applications on the Document Server” on page 294](#)
- [“Enabling the Component Group for the Document Server” on page 295](#)
- [“Setting MaxTasks Parameters for the Document Server” on page 295](#)
- [“Synchronizing Components for the Document Server” on page 296](#)

Installing the Siebel Server for the Document Server

This task is a step in [“Process of Setting Up the Document Server” on page 292](#).

Install the Siebel Server on the dedicated host machine of the Document Server. For general information about installing the Siebel Server, see *Siebel Server Installation Guide for Microsoft Windows*.

During installation, you have the option to enable component groups. Select the Siebel Documents and the System Management component groups. Do not enable any other component groups. (You also need to make sure that Siebel Documents component group is not enabled on your main Siebel Server.)

Enabling the Siebel Documents component group can also be performed after installation is complete, as described in the section [“Enabling the Component Group for the Document Server” on page 295](#).

NOTE: Whenever the Siebel Server is restarted, the Document Server must also be restarted *after* the Siebel Server has been brought up.

Make sure that you use the same SRF file on your Document Server as you use on your other Siebel Server. If you update one SRF file, remember to update the SRF file on all your Siebel Server machines, including the Document Server.

Installing the Siebel Server in a Heterogenous Environment

There are some special considerations for setting up the Document Server (Windows platform) when your main Siebel Server runs on a UNIX platform.

There are two approaches you can use:

- Install third-party mounting software, such as Samba, to allow the Document Server (Windows platform) to access the Siebel file system on the UNIX platform.
- Disable the File System Manager Server component on the Document Server (Windows platform)

Procedures describing both these approaches are given here.

NOTE: The Siebel File System Manager and the physical file system should be on the same platform if no cross-platform mounting tool is used.

To set up the Document Server in a heterogeneous environment using third-party mounting software

- 1 Install third-party software, such as Samba, that will allow the Windows machine to access the Siebel file system on the UNIX machine.
- 2 Make sure that the enterprise parameter Siebel File System on the Siebel Server on the Windows machine points to the Windows share for the Siebel File System on the UNIX machine.
- 3 Make sure that the Siebel Documents component group is disabled for the Siebel Server on the UNIX machine.
- 4 Before you install the Siebel Server (the Document Server) on the Windows machine, make sure that the Siebel Gateway Name Server and the Siebel Server are up and running on the UNIX machine.
- 5 During installation of the Siebel Server on the Windows machine, enable only the Siebel Documents and the System Management component groups.

To set up the Document Server in a heterogeneous environment without third-party mounting software

- 1 Make sure that the Siebel File System enterprise parameter is set to the full path of the Siebel File System on the UNIX machine.
- 2 Make sure that the Siebel Documents component group is disabled for the Siebel Server on the UNIX machine.
- 3 Before you install the Siebel Server (the Document Server) on the Windows machine, make sure that the Siebel Gateway Name Server and the Siebel Server are up and running on the UNIX machine.
- 4 During installation of the Siebel Server on the Windows machine, enable only the Siebel Documents and the System Management component groups.
- 5 On the Siebel Server (the Document Server) on the Windows machine:

- a Disable the File System Manager Server (alias FSMSrvr) component.

NOTE: For information about re-enabling components, see *Siebel System Administration Guide*.

- b In the Enterprise component definition, for the Document Server component, set the Siebel File System component parameter to *FSM*
- c Synchronize all components.

- 6 Restart the Siebel Servers on the UNIX machine and on the Windows machine.

Installing Microsoft Office Applications on the Document Server

You must install Microsoft Office on the dedicated host machine of the Document Server.

For information about which versions of Microsoft Office are supported, see *Release Notes* on Siebel SupportWeb and *System Requirements and Supported Platforms* on Siebel SupportWeb for your Siebel application.

This task is a step in [“Process of Setting Up the Document Server” on page 292](#).

To install Microsoft Office

- 1 Log on to the server machine using the same user account that the Siebel Server NT service uses. This user account must belong to the Administrators group.

NOTE: The install must use the same account to be used by the NT Service. The installer configures COM security settings so that the installing user account has the correct permissions to access and launch the application. If the install uses an account other than the Siebel Server NT service account, errors may occur when the Document Server tries to launch the application.

- 2 Install Microsoft Office using a typical or complete installation. Verify that your version of Microsoft Office installs the Web Authoring Tools (HTML) component with the typical installation. If it does not, you will need to use the custom installation option and install all of the typical components as well as the Web Authoring Tools (HTML) component.

- 3 Start the applications that will be used by the Document Server.

This forces the applications to register themselves.

- 4 If you use Siebel Proposals, make sure that the Microsoft Word option “Confirm conversion at open” option is not selected.

This option is found on the Tools menu: Tools > Options > General.

- 5 Close the applications.

Enabling the Component Group for the Document Server

This task is a step in [“Process of Setting Up the Document Server” on page 292](#).

If you have not already done so during installation, you must enable the component group named Siebel Documents. This group contains the DocServer component, which generates Correspondence, Presentations, and Proposals. For more information about enabling this group, see *Siebel System Administration Guide*.

Setting MaxTasks Parameters for the Document Server

Due to Siebel design limitations, third-party Microsoft Office applications run in a single-threaded environment. This means the document server is only capable of processing a single document at a time on the server. To increase the number of documents being printed at any one time, it is recommended you increase the number of servers.

This task is a step in [“Process of Setting Up the Document Server” on page 292](#).

There are two Siebel Application Object Manager parameters that need to be set:

- **MaxTasks.** This parameter should be set to 1. If MaxTasks is greater than 1, an error message is sent to the log file as an alert. Processing of the request continues, but results are unpredictable when two requests arrive at the same time.
- **Honor MaxTasks.** This parameter affects the queuing process and the performance of Document Server. For more information, see [Table 73](#).

Table 73. Honor MaxTasks Parameter for the Document Server

Setting	Behavior
TRUE	All requests to Document Servers queue on the SRM_REQUEST table; requests are not assigned to a Document Server until one is free to take the request. (This is the recommended value.)
FALSE	Requests are queued on the DocServer component's internal queue. If the Document Server stops processing (for example, crashes) all queued processes on that server are lost.

To set MaxTasks parameters

- 1 Set MaxTasks to 1.
- 2 Set Honor MaxTasks to TRUE.

For information about setting parameters, see the section about Siebel Application Object Manager parameters in the *Siebel System Administration Guide*.

Synchronizing Components for the Document Server

This step is not specific to the Document Server, but is a required post-installation step for the server infrastructure.

To synchronize components for the Document Server

- See general information about synchronizing components in the *Siebel System Administration Guide*.

(Optional) Configuration for the Document Server

This topic describes a number of optional configurations for the Document Server:

- [“\(Optional\) Configuring Report Generation” on page 296](#)
- [“\(Optional\) Enabling HTML Generation for Correspondence” on page 297](#)
- [“\(Optional\) Configuring Application Recycle Period” on page 297](#)
- [“\(Optional\) Specifying the Target Server” on page 298](#)
- [“\(Optional\) Enabling Additional Logging” on page 298](#)

(Optional) Configuring Report Generation

If you plan to include report sections in proposals, you must specify the Actuate connect string. Set this parameter on each object manager that will be submitting document requests. The value of the parameter will be included in the request sent by the object manager to the DocServer. When DocServer begins processing the request, it will use the parameter to connect back to the object manager to retrieve data for the report.

To specify the Actuate connect string

- 1 Start the Server Manager.
- 2 Modify the server parameter ActuateConnStr to contain the following information:

```
si ebel . tcpi p: //gatewayserver: port/enterpri seserver/objectmgr/si ebel server
```

For example, if `\\gtwy` is the gateway server host, `Si eb01` is the Siebel Server, `si ebel` is the Enterprise Server, and you want to run your proposal with report section on Siebel Call Center, whose object manager is `SCCObj Mgr`, you should enter the following command:

```
srvrmgr> change param ActuateConnStr=si ebel . tcpi p: //gtwy/si ebel /SCCObj Mgr/Si eb01  
for comp SCCObj Mgr
```


The parameter `ProposalReportTimeoutInSeconds` also affects the generation of reports. This is the time-out setting that controls how long the Document Server component will wait for a report to be generated. The default value is 1800 seconds.

(Optional) Enabling HTML Generation for Correspondence

By default, correspondence is only saved in document format, not in HTML format. In the My Correspondence Requests view, the View HTML command is unavailable, and the user cannot view the correspondence in HTML format.

The server parameter `DocumentServerViewHTML` specifies whether the Document Server generates HTML versions of documents. The default value is FALSE. By default, the Document Server only generates documents in their native format, and not in HTML. To allow the user to display correspondence in HTML format, you must edit the parameter `DocumentServerViewHTML` to give it the value True instead of False. Any documents generated after the parameter is enabled is saved in both formats.

When you generate HTML documents, a copy of the generated document is created in HTML and stored in the Siebel File System. This may affect performance, and it will increase the storage space required in the File System. The clarity of the HTML document depends on your Office application's ability to translate its native format into HTML.

Entering the following command allows generation of HTML versions of Correspondence, Proposals, and Presentations.

To enable generation of HTML versions of documents

1 Start the Server Manager.

2 Enter the following command:

```
Srvrmgr> change param DocumentServerViewHTML=True for comp DocServer
```

NOTE: While this procedure uses the Server Manager, parameters can also be changed using the Administration - Server Configuration screen.

(Optional) Configuring Application Recycle Period

You use the parameter `MSWordLiveCount` to control how often the Office applications are restarted.

Each parameter can be set to a positive integer that specifies the number of documents to be processed before it shuts down and restarts the corresponding Office application. A value of 0 (the default) indicates that the applications will not be shut down. If the parameter value is set to any integer other than 0 and the Document Server fails to launch, the corresponding application will be shut down and then restarted again.

To change the values of these parameters

1 Start the Server Manager.

2 To change the application recycling period for Microsoft Word, which is used by Correspondence and Proposals, enter the following command:

```
Srvrmgr> change param MSWordLiveCount=5 for comp DocServer
```

- 3 To change the application recycling period for Microsoft PowerPoint, which is used by Presentations, enter the following command:

```
Srvrmgr> change param MSPPLiveCount=5 for comp DocServer
```

(Optional) Specifying the Target Server

If you are running multiple Document Servers within the same enterprise, then the server infrastructure will route document requests to different Document Servers in order to achieve load balancing.

However, it sometimes may be useful to specify that all requests be routed to one Document Server. For example, you can do this to help diagnose a server problem.

To route all requests to one document server

- 1 Start the Server Manager.
- 2 Enter the following command:

```
srvrmgr> change param DocumentServerName=DocSrvr1
```

(Optional) Enabling Additional Logging

You may want to enable additional logging. This can be helpful for debugging.

The event logging system writes events to the log file based on the log level for each event type. The number you specify indicates the filtering level for logging. The default value is 3, which means that events with a level of 1, 2, or 3 will be logged, while events with a level of 4 or 5 will be suppressed. Setting the filtering level to 5 means that all events will be logged.

NOTE: In the final command on the list, the parameter must be in quotation marks, because it has a space in it. In the other commands, quotation marks are optional and are not included in the list.

To enable additional logging

- 1 Start the Server Manager.
- 2 Enter the following commands:

```
srvrmgr> change evtloglvl GenericLog=5 for comp Docserver
```

```
srvrmgr> change evtloglvl ProposalDebug=5 for comp Docserver
```

```
srvrmgr> change evtloglvl ProposalDetail=5 for comp Docserver
```

```
srvrmgr> change evtloglvl PresentationDebug=5 for comp Docserver
```

```
srvrmgr> change evtloglvl PresentationDetail=5 for comp DocServer
```

```
srvrmgr> change evtloglvl DocServerDebug=5 for comp DocServer
```

```
srvrmgr> change evtloglvl DocServerDetail=5 for comp DocServer
srvrmgr> change evtloglvl CorrespDebug=5 for comp DocServer
srvrmgr> change evtloglvl CorrespDetail=5 for comp DocServer
srvrmgr> change evtloglvl MSProjectDebug=5 for comp DocServer
srvrmgr> change evtloglvl "MS ProjectDetail "=5 for comp DocServer
```

For more information about event logging, see *System Monitoring and Diagnostics Guide for Siebel eBusiness Applications*.

23 Correspondence

This chapter is about administering and using Siebel Correspondence. It includes the following topics:

- "About Siebel Correspondence" on page 301
- "Scenario for Correspondence" on page 303
- "Process of Setting Up and Using Correspondence" on page 304
- "Creating and Updating the SIEBEL.HTML File" on page 304
- "Creating Correspondence Templates in Microsoft Word (Admin and End User)" on page 306
- "(Optional) Inserting Files into Correspondence Templates" on page 307
- "Creating Correspondence Template Records in the Siebel Application" on page 308
- "Generating Correspondence (End User)" on page 309
- "Configuring Additional Merge Fields For Correspondence Templates" on page 312

For information about the Documentation Server and other software that is required for Siebel Correspondence, see [Chapter 22, "Document Server."](#)

About Siebel Correspondence

Siebel Correspondence allows employees and partners to generate correspondence from any location with access to the Web. It also makes it easy for them to direct correspondence to fulfillment centers that print and mail it, so they can produce and send correspondence even if they are on the road and do not have access to a printer.

For example, if sales representatives want to do mass mailings to customers in cities where they are giving presentations, Siebel Correspondence allows them to log on from any location where they have Web access. Then they can create personalized form letters to invite customers in a specific city to a specific presentation, and direct these letters to be printed and mailed by a fulfillment center.

First, an administrator creates templates (usually form letters and labels) that employees and partners can use for their everyday correspondence. Then, employees and partners can automatically generate correspondence based on this template and on data from the Contact business component.

About Correspondence Templates

Siebel correspondence templates are created and edited in Microsoft Word (DOC file format). Correspondence templates contain fixed text and one or more merge fields. The merge fields are placeholders that are populated with variable information from your Siebel database, such as a Contact's name and address, when users generate a correspondence for one or more recipients.

Users can create their own personal templates, and administrators can create correspondence templates for users.

About Correspondence with Multiple Languages and Locales

The fixed text of each correspondence template is written using specific locale conventions and language. In order to support Global Deployment, the author of the correspondence template can explicitly indicate the locale and language using the Locale and Language fields in the correspondence template record. The Document Server then uses these settings to substitute correctly localized data into the merge fields of the correspondence template. The following types of fields are affected:

- MLOV fields
- Global data fields
- Locale-sensitive fields, such as dates and currencies

Correspondence Terms Defined

Definitions of terms used in this chapter are given in [Table 74](#).

Table 74. Correspondence Terminology

Term	Definition
correspondence template	<p>This is a Microsoft Word file (DOC or HTM). It usually contains one or more merge fields. It should not contain code (including field codes such as ASK) or macros.</p> <p>Typically, this file contains a form letter where the address and salutation are merge fields that can be automatically filled in for multiple recipients.</p>
label template	The label template is a correspondence template specifically for a mailing label. Label templates are created much the same way as other correspondence templates, but are generated using the Generate Label command instead of the Generate Correspondence command.
insertion template	This is a Word, text, or HTML file. It may not contain any merge fields.
personal correspondence template	A correspondence template that users create for their own use. It cannot be used by others, although the administrator can view, edit, and delete it.

Table 74. Correspondence Terminology

Term	Definition
correspondence template record	This is the record in the Siebel database that contains the correspondence template. (The correspondence template is stored in the Siebel File System.) These records appear in the Correspondence Templates and the Personal Templates views.
correspondence record	This is the record in the Siebel database that contains the generated correspondence. A correspondence record must have a correspondence template record associated with it. In addition, it can have a label template record associated with it.
merge field	Merge fields are placeholders in the correspondence template that are populated with information from records in the Siebel database, such as a contact's last name. (These are also called mail merge fields.)
merge data	Data from the Siebel database that is copied into the merge fields when correspondence is generated.
SIEBEL.HTML file	Lists the database columns used as merge fields in the most recently generated correspondence. (The file is updated each time correspondence is generated.) When correspondence templates are created in Microsoft Word, the SIEBEL.HTML file is used as the data source file.

Scenario for Correspondence

This scenario provides an example of a business process performed by an administrator and sales representatives managing correspondence. Your company may follow a different process according to its business requirements.

A company has already installed the Documentation Server and wants to make Siebel Correspondence available to its sales representatives so that they can send literature with personalized cover letters to customers who request product information.

The administrator sets up the cover letter (correspondence) template and mailing label template that the sales representatives will use.

When customers request product literature, the sales representatives generate personalized cover letters and mailing labels and specify what literature needs to be included in the mailing. The customers' name and address details are taken from the contacts list in the Siebel database.

The sales representatives review and sometimes modify the cover letter before submitting the correspondence to a fulfillment center where it is printed and mailed. The changes made to the cover letter can be saved back to the Siebel File System by saving the document.

Process of Setting Up and Using Correspondence

To set up and use correspondence, perform the following tasks:

- [“Creating and Updating the SIEBEL.HTML File” on page 304](#)
- [“Creating Correspondence Templates in Microsoft Word \(Admin and End User\)” on page 306](#)
- [“\(Optional\) Inserting Files into Correspondence Templates” on page 307](#)
- [“Creating Correspondence Template Records in the Siebel Application” on page 308](#)
- [“Generating Correspondence \(End User\)” on page 309](#)
- [“Configuring Additional Merge Fields For Correspondence Templates” on page 312](#)

Creating and Updating the SIEBEL.HTML File

About the SIEBEL.HTML File

The SIEBEL.HTML file is the data interface between the Siebel application and Microsoft Word. During the document generation process, the Document Server exports merge data into the SIEBEL.HTML file. Microsoft Word then reads this file and inserts the data into the merge fields in the correspondence template.

When you create correspondence templates, the SIEBEL.HTML file that you generate from a blank template is used as the data source file, determining which merge fields can be added to the correspondence template.

[Figure 24 on page 304](#) shows a portion of a SIEBEL.HTML file. The column headers represent database fields and the cells contain the values of those fields for the mostly recently generated correspondence.

Administrators can augment the set of merge fields available using Siebel Tools. For information, see [“Configuring Additional Merge Fields For Correspondence Templates” on page 312](#).

The SIEBEL.HTML file is not installed (out of the box). It is created in the \REPORTS directory the first time correspondence is generated.


Address  \7.7\web client\REPORTS\SIEBEL.HTML			
PRIMARY_POSITION_ID_X	FAX_PHONE_NUM_X	WORK_PHONE_NUM_X	STREET_ADDRESS_X
1-1JD	(415) 491-2200	(415) 491-2360 x334	99 Crestview Ave.

Figure 24. Part of the SIEBEL.HTML File

Procedure for Creating or Updating the SIEBEL.HTML File

This procedure should be carried out in the following situations:

- By the administrator before correspondence templates are created for the first time (in order to create the SIEBEL.HTML file)
- By end users who use disconnected Siebel Mobile Web Clients and want to create personal correspondence templates on their local machines (in order to create the local SIEBEL.HTML file)
- By the administrator after additional merge fields have been configured (See [“Configuring Additional Merge Fields For Correspondence Templates”](#) on page 312.)

This task is a step in [“Process of Setting Up and Using Correspondence”](#) on page 304.

To initially create (or update) the SIEBEL.HTML file by generating a blank correspondence template

- 1** In Microsoft Word, create and save a blank document.
- 2** Navigate to the Correspondence screen > Personal Templates view.
- 3** In the Templates list, create a new record and, in the Template field, specify the blank correspondence template that you created in [Step 1](#).
- 4** On the link bar, click My Correspondence Requests.
- 5** In the Correspondence list, create a new record.
- 6** In the Template field, select the template record that you created in [Step 3](#).
- 7** Click Generate.

The SIEBEL.HTML file that is created in the \REPORTS directory contains all the database columns that are for use as merge fields.

Creating Correspondence Templates in Microsoft Word (Admin and End User)

There are a number of starting points for creating a correspondence template in Microsoft Word:

- An existing Microsoft document, for example a company form letter. (Make sure that the document does not contain any merge fields not defined in SIEBEL.HTML, or any code, or any macros.)
- A new, blank Microsoft Word document

Two procedures are given in the following section: one for Microsoft Word 2000 and one for Microsoft XP. Both procedures explain how to add merge fields (defined in the SIEBEL.HTML file) to Microsoft Word documents.

This task is a step in [“Process of Setting Up and Using Correspondence” on page 304.](#)

To create a template and add merge fields in Microsoft Word 2000

- 1 Copy the current version of the SIEBEL.HTML file to your local hard drive, for example, to the My Documents directory.
- 2 In Microsoft Word, create a new document or open the document that you want to use as the starting point for your correspondence template.
- 3 From the Tools menu, choose Mail Merge.
- 4 In the Mail Merge Helper dialog box, click Create > Form Letters. (Or, if you are creating a label template, choose Create > Mailing Labels.)
- 5 Click Active Window to use the current document.
- 6 In the Mail Merge Helper dialog box, click Get Data > Open Data Source and open the SIEBEL.HTML file.
- 7 Close the Mail Merge Helper dialog box.

If the template file does not yet contain merge fields, an information box states this. Click Edit Main Document in the box.

- 8 Add and edit the text in the document as required.
- 9 Add merge fields as required:
 - a Position the insertion point where you want the merge data to appear.
 - b Click the Insert Merge Fields button and insert the appropriate merge field.
- 10 When you have finished adding merge fields, exit from mail merge mode:
 - a Click the Mail Merge Helper button on the Mail Merge toolbar.
 - b In the Mail Merge Helper dialog box, click Create > Restore to Normal Word Document.

CAUTION: If you do not restore the document to normal mode, the Document Server can hang when correspondence is generated.
 - c Click Yes to continue.

d Close the Mail Merge Helper dialog box.

11 Save the file with a .doc extension and close.

To create a template and add merge fields in Office XP

- 1 Copy the current version of the SIEBEL.HTML file to your local hard drive, for example, to the My Documents directory.
- 2 In Microsoft Word, create a new document or open the document that you want to use as the starting point for your correspondence template.
- 3 From the Tools menu, choose Letter and Mailings > Show Mail Merge Toolbar.
- 4 In the toolbar, click the Main document setup button.
- 5 In the Main Document Type dialog box, select Letters. (Or, if you are creating a label template, select Labels.)
- 6 On the Mail Merge toolbar, click the Open Data Source button and open the SIEBEL.HTML file.
- 7 Add and edit the text in the document as required.
- 8 Add merge fields as required:
 - a Position the insertion point where you want the merge data to appear.
 - b Click the Insert Merge Fields button and insert the appropriate merge field.
- 9 When you have finished adding merge fields, click the Main document setup button on the Mail Merge toolbar and, in the Main Document Type dialog box, select Normal Word Document.

CAUTION: If you do not restore the document to normal mode, the Document Server can hang when correspondence is generated.

10 Save the file with a .doc extension and close.

(Optional) Inserting Files into Correspondence Templates

The Siebel Correspondence file insertion feature allows you to insert one or more files (called insertion templates) into a correspondence template. These insertion templates can be in Word, text, or HTML files.

You can add insertion templates containing generic content into one or many correspondence templates. For example, you can create a company description in a separate insertion template and then include it in several correspondence templates. If the description changes, you only have to modify the insertion template instead of every correspondence template.

You may add as many insertion templates into a correspondence template as necessary. The file name for each insertion template must be unique and each insertion template must be inserted into the correspondence template independently. Insertion templates may not be nested. For example, you may insert File1.doc, File2.doc, and File3.doc into a template named FollowUp.doc. But, you may not insert File1.doc into File2.doc, and then insert File2.doc into FollowUp.doc.

TIP: Remember to create correspondence template records for your insertion templates as well as for your correspondence templates.

This task is a step in [“Process of Setting Up and Using Correspondence” on page 304.](#)

To add an insertion template into a correspondence template

- 1 If it does not already exist, create the insertion template using Microsoft Word. (Make sure that your insertion template does not contain merge fields, code, or macros.)
- 2 Open the correspondence template to which the insertion template is to be added.
- 3 Insert a separate line with the following command at the location where the insertion template is to be displayed:

`[[File Name]]`

Do not include the file extension. For example, if insertion template is File1.doc, enter `[[File1]]`.

- 4 Save the file with a .doc extension and close.

Creating Correspondence Template Records in the Siebel Application

In order to make the correspondence templates available to the Siebel application, they must be added to the Siebel File System by creating a correspondence template record. There are two views in the Siebel application where correspondence template records can be added:

- Administration - Document screen > Correspondence Templates view. This view is used by the administrator who creates correspondence templates for multiple employees.
- Correspondence screen > Personal Templates view. This view is used by employees who create correspondence templates that are only for their personal use.

TIP: Remember to create correspondence template records for your insertion templates as well as for your correspondence templates.

NOTE: You should always perform system administration tasks, such as administration of correspondence templates, against the server database. Although you can perform these tasks against your local database and synchronize, doing so has the potential to cause errors, including data conflicts. In addition, performance problems can result from a large local database, and from routing large numbers of transactions.

This task is a step in [“Process of Setting Up and Using Correspondence” on page 304.](#)

To add a template record

- 1 Navigate one of the following:
 - Administration - Document screen > Correspondence Templates view
 - Correspondence screen > Personal Templates view
- 2 In the Templates list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Active	Indicates whether or not the correspondence template is available for use. NOTE: It is recommended that you make the template inactive before modifying it to prevent other users from attempting to use it while you are modifying it. After you have finished your modifications, check the Active field again.
Update File (or Update)	A check mark in this field indicates that mobile users will have their copy of the template to be updated automatically each time the original file is changed.
Template Name	The name of a correspondence template, label template, or insertion template.
Personal	A check mark in this field specifies that the correspondence template is a personal correspondence template, which can only be used by the creator.
Download File	Allows users to request templates from the server. When a check mark appears in this field, the document is retrieved during the next synchronization session. This field applies only to Siebel Remote users.
Language	The language used by the Document Server to render merge fields based on MLOV and Global Data Business Component fields.
Locale	The locale used by the Document Server to format merged data based on locale-sensitive business component fields, such as phone numbers. If no locale is specified, the application's locale is used.

Generating Correspondence (End User)

End users generate correspondence using the administrator-defined correspondence templates or the personal templates that they create themselves.

Using Microsoft Word, they can edit the template for a selected correspondence record (Modified Template), and they can edit the generated correspondence document. The edits made to the correspondence document can be saved back to the Siebel File System by saving the merged Word document.

Literature can be attached to the correspondence. (For general information about Literature, see [Chapter 28, "Literature."](#))

This task is a step in ["Process of Setting Up and Using Correspondence"](#) on page 304.

To generate correspondence

- 1 Navigate to the Correspondence screen > My Correspondence Requests view.

NOTE: You can navigate to this screen from anywhere in the application by choosing **File > Send Letter** from the application-level menu.

- 2 In the Correspondence list, create a new record and complete the Template field.

Some fields are described in the following table.

Field	Comments
Document Status	See Step 6 .
Template	Specify the name of the correspondence template that you want to use for the correspondence.
Fulfillment Center	Specify a fulfillment center that can produce and distribute the document and enclosures on your behalf. For more information, see Chapter 26, "Fulfillment Centers."
Generated Document	After the correspondence has been generated, you can drill down on the hyperlink in this field to preview the document merged with the name and address of the selected recipient in the Recipients list.
Generated Label	Drill down on the hyperlink in this field to preview the label merged with the name and address of the selected recipient in the Recipients list.
Label Status	The system status for the label during generation. Default values include In Progress, Generating, Completed, and Failed.
Label Template	The name of the label template defined by your company and created by your Siebel administrator, or your personal template.
Modified Template	See Step 5 .
Opportunity	Specify the name of the opportunity associated with the correspondence. Drill down on the hyperlink in the opportunity name field to open the Opportunity details form.

- 3 In the Recipients list, add records for the contacts or employees who you want to receive the correspondence.

Specifying large numbers of recipients affects performance and time required to generate the correspondence.

If you create a new record in the Add Recipients dialog box, the individual is added to the Contacts list.

- 4 If you want to include literature in the correspondence, add records to the Enclosures list. Literature must be of type Sales Tool* and cannot be marked as internal.

NOTE: If you are working in a Mobile Web Client environment (remote), you must have the literature files available in your local environment. If the Local check box is selected, you can work with the file in a remote environment. To download the file from the server the next time you synchronize, select the Request check box for the Literature record in the Enclosures list.

- 5 If you want to make edits to the correspondence template that will apply to all recipients but only for this correspondence record, edit the file in the Modified Template field.

This file (like the correspondence template) is stored in the Siebel File System.

- 6 Click Generate.

For Web Client (network connection): Because the Document Status field does not automatically update, click the Update button to refresh the record and see the current status of your correspondence. The following table lists the status values you may see.

Status	Meaning
In Queue	Request sent to available document server.
Generating	Document server is creating the Word merge document.
Completed	Document is available and can be accessed from the Generated Document field.
Failed	Document server encountered errors. Check the Document Error and Label Error fields for error messages.

- 7 *For Web Client (network connection):* Drill down on the Merged hyperlink in the Generated Document field.

Or, if you do not have Microsoft Word installed locally and do have enabled HTML generation, click the menu button and choose View (HTML) to display a document in your Web browser.

NOTE: If you are using the Mobile Web client, the generated correspondence opens automatically.

- 8 (Optional) Make edits to individual pages of the generated correspondence and save the changes back to the Siebel File System before printing, batch printing, or submitting to a fulfillment center.

- For information about fulfillment centers, see [Chapter 26, "Fulfillment Centers."](#)
- For information about batch printing, see ["About Batch Printing" on page 381.](#)

- 9 (Optional) Generate labels for the correspondence:

- a Complete the Label Template field.
- b From the menu button, choose Generate Label.

For information about printing correspondence, see [Chapter 26, "Fulfillment Centers."](#)

Configuring Additional Merge Fields For Correspondence Templates

The exported data is taken from two places:

- If the correspondence was created from a view based on service requests, the data is taken from the Service Request Recipient business component.
- If the correspondence was created from the Correspondence list view, or from a view not based on service requests (such as the Opportunities screen), the data is taken from the Recipients business component.

New fields in the Recipients business component are restricted to those based on columns in the S_CONTACT table or those obtained through join relationships. Joins can be added for tables that have a master-detail relationship with S_CONTACT, where S_CONTACT is the detail table. You need to add the join to the Recipients business component.

New fields in the Service Request Recipient business component are restricted to those based on columns in the S_CONTACT table, the S_SRV_REQ table, or columns available through joins to these tables.

Table 75 summarizes the contents of the two business components and the contexts in which they are used. For more information on adding fields, see *Developing and Deploying Siebel eBusiness Applications* and *Configuring Siebel eBusiness Applications*.

Table 75. Summary of Merge Fields Sources and Uses

Source Business Component	Source Tables	Used In
Recipients	<ul style="list-style-type: none"> ■ S_CONTACT ■ Joins with tables that have a master-detail relationship with S_CONTACT (with S_CONTACT as the detail table). 	Correspondence created: <ul style="list-style-type: none"> ■ Directly in the Correspondence List View ■ From any view not based on service requests
Service Request Recipient	<ul style="list-style-type: none"> ■ S_CONTACT ■ S_SRV_REQ ■ Joins with tables that have a master-detail relationship with one of these two (with S_CONTACT or S_SRV_REQ as the detail table). 	Correspondence created from views based on service requests.

To configure an additional merge field

- 1 In Siebel Tools, add the new field to either the Recipients business component or the Service Request Recipient business component.

CAUTION: Make sure that the field's database column name does not exceed 38 characters. (This is because Microsoft Word cannot handle merge fields with long names.)

- 2 Add the name of the new field to the business component's user property called Export Field #, where # is an integer.

If necessary, you can create additional user properties by incrementing the integer.

- 3 Update the SIEBEL.HTML file (["Creating and Updating the SIEBEL.HTML File" on page 304](#)) before creating a correspondence template containing the new field.

NOTE: You can have up to 63 merge fields in the SIEBEL.HTML file; Microsoft Word does not display fields beyond this limit.

24 Presentations

This chapter is about administering and using Siebel Presentations. It includes the following topics:

- [“About Siebel Presentations” on page 315](#)
- [“Process of Creating Presentation Templates” on page 316](#)
- [“About Generating Presentations \(End User\)” on page 334](#)
- [“Scenario for Generating Presentations \(End User\)” on page 334](#)
- [“Process of Generating Presentations \(End User\)” on page 335](#)
- [“Sample Presentation Templates” on page 342](#)

For information about the Documentation Server and other software that is required for Siebel Presentations, see [Chapter 22, “Document Server.”](#)

About Siebel Presentations

Siebel Presentations allows your sales representatives to create presentations (and other types of documents) based on templates that you create in Microsoft PowerPoint.

Traditionally, salespeople create presentations by starting with a presentation that worked in the past and then modifying it for the current prospect. Salespeople must not only change such basic information as the customer’s name, but also possibly restructure the presentation so that it fits this new prospect’s unique needs. For example, the original presentation may have been focused on price, whereas the new prospect is more concerned with other decision criteria, such as speed or extra functionality.

With Siebel Presentations, once the presentation administrator has created the right templates, the salesperson can click one button to build the correct presentation for a specific account or opportunity. Siebel Presentations uses information that salespersons have entered in the early stages of an opportunity to create the presentation.

Salespeople can add deal-specific information to the presentation without worrying about formatting or presentation. Using the Presentation Library, salespeople can find any additional information and automatically insert it into the presentation.

System Requirements for Siebel Presentations

Certain system requirements must be met to use Siebel Presentations.

System Requirements for the Siebel Web Client

To use Siebel Presentations, you must have:

- All of the components that are required to use the Siebel application installed on the server, such as a Siebel Server and a Web Server.
- The Document Server installed on one or more Windows machines.
- Microsoft Office.

NOTE: If you are deploying the Siebel Server in UNIX and want to use Presentations, a separate Windows machine is required for the Document Server.

Siebel Presentations uses the Document Server, which is a component of the Siebel Server which lets users on the Web work with Word, and PowerPoint documents on the server.

For more information on installing the components required to use the Siebel application, see *Siebel Installation Guide* for the operating system you are using.

Your employees or partners who use Siebel Presentations need:

- A Web browser to use the product.
- Optionally, Microsoft Office to edit documents.

For information on the Web browsers that are supported by Siebel applications, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

System Requirements for the Siebel Remote Web Client

Siebel Presentations is available for the Siebel Remote Web Client as well as for the Siebel Web Client. The user interface for Presentations is identical in the Siebel Remote Web Client and the Siebel Web Client.

Siebel Remote Web Client processes requests to generate documents locally, so field sales representatives can generate correspondences, proposals, and presentations when they are out of the office. To run Siebel Presentations on the Siebel Remote Web Client, you must have Microsoft Office installed on the same machine as the Siebel Remote Web Client.

Process of Creating Presentation Templates

To create presentation templates, perform the following tasks:

- [“Creating Template Slides in Microsoft PowerPoint” on page 317](#). To create the slides needed by the template, you must write their content and insert bookmarks for such variables as company, contact name, address.
- [“Creating a Record for the Presentation Template” on page 320](#). Use your Siebel application to create a single record for the template.
- [“Defining Presentation Template Sections” on page 321](#). Specify which sections the presentation should contain.

- [“Adding Components to Presentation Template Sections” on page 327](#). Specify which components each section should contain.
- [“Using Conditions in Presentation Templates” on page 328](#). Optionally, you can add conditions to specify that sections or components are included in the presentation only under certain circumstances.
- [“Defining Presentation Field Mappings” on page 329](#). Specify which Siebel objects correspond to each bookmark in your PowerPoint component slides. You also specify the name of this mapping in the template record.
- [“Creating the Presentation Library” on page 331](#). In this optional step, which can be done at any time, you create a separate library of slides that salespeople can draw upon to customize their presentations.
- [“Allowing Users to Display Presentations in HTML Format” on page 334](#). Update settings on the document server to allow end users to view presentations in HTML.

Creating Template Slides in Microsoft PowerPoint

The first step is to create slides in Microsoft PowerPoint. These slides consist of one style slide and multiple component slides, as shown in [Figure 25](#).

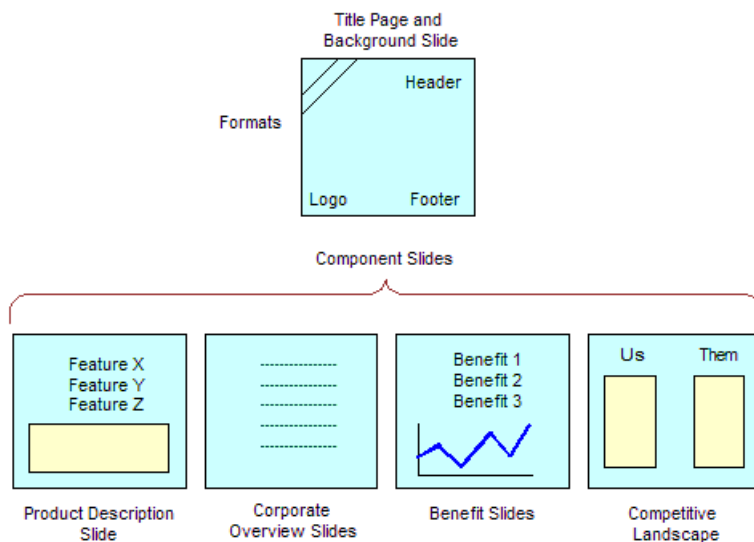


Figure 25. PowerPoint Slides That Can Make Up a Presentation Template

The components shown in [Figure 25 on page 317](#) are only examples. You could have other components, such as a table of contents or a set of collateral, and you could omit the quotes or product descriptions. However, a template must have a presentation background slide and one or more component slides.

NOTE: See *Release Notes* on Siebel SupportWeb for information about which versions of Microsoft PowerPoint are supported.

NOTE: Presentations can only use fields from one business object. If you want to include additional fields, you must use Siebel Tools to add the business components that include these fields to the business object that is the basis of the presentation.

To create the template slides, you go through the following stages:

- **Planning the template.** Decide what components the template should have.
- **Creating the style slide.** Create the slide that gives all the template components a standard formatting.
- **Creating the component slides.** Create a slide for each component of the template.

These tasks are a step in [“Process of Creating Presentation Templates” on page 316](#).

Planning the Presentation Template

Before you create the slides in PowerPoint, you must determine how the presentation should look and what type of information it should contain. Begin by looking at previous successful presentations to see what sections they contained. For example, did they all contain an agenda, an executive overview slide, and a product summary slide? Next, look to see what current slides you have on hand, and what customer questions these pieces answer. Then decide how to organize your information. What topics could be standard across all presentations? What topics are specific to certain presentations? What is the best order for the pieces in the presentation you are creating? Finally, decide what fields to insert to customize their presentations (for example, contact name, account name, industry). You will use this information to create bookmarks in your PowerPoint slides.

Creating a Presentation Background Slide

After you plan your templates, work on the presentation background slide for this template, which is the slide that serves as your title slide and also specifies the background layout and formatting of the entire presentation. This background slide may contain your company logo, special colors and background designs, and headers and footers.

NOTE: The following procedure may vary slightly, depending on your version of Microsoft PowerPoint.

To set up styles for your presentation template

- 1 Create a new slide in Microsoft PowerPoint.
- 2 Since this slide will also serve as your title slide, you may want to select the title slide layout template and enter the title of the presentation.
- 3 Select the background colors and font size.

- 4 Choose View > Header and Footer, and create and apply a header and a footer for your template.
- 5 Switch to the Master Slide view, and select formatting options that will apply to your whole presentation.
- 6 Close the Master Slide view, and return to the Slide view (choose View > Slide).
- 7 Save the file:
 - Choose a name that uses only alphanumeric characters.
 - Use the .ppt extension for PowerPoint.
- 8 Close the file.

Creating Presentation Template Components

The next step in developing your template is to create components, the slides that make up the body of your presentation.

A *component* is the Siebel Presentations term for a Microsoft PowerPoint presentation that includes standard text and personalized data.

To create a component, you type the standard text and then create *bookmarks*, or Microsoft PowerPoint placeholders for custom data. When a salesperson generates a presentation, these bookmarks will be replaced with data from the Siebel application.

NOTE: The following procedure may vary slightly, depending on your version of Microsoft PowerPoint.

To create a component with bookmarks

- 1 Create a new slide in Microsoft PowerPoint.
- 2 Type the standard text, pictures, bulleted information, and so on that belongs in this component.
- 3 Place the cursor where you want to create a bookmark.
- 4 Enter the following text:


```
[[" name of bookmark"]]
```

For example, to create a bookmark for the company name, type:

```
[["Company"]]
```
- 5 Write down the name of the bookmark, because you will need it later when you map the bookmark to a Siebel field name.
- 6 Repeat [Step 3](#) through [Step 5](#) for every bookmark you want to insert.

NOTE: If the same field is being inserted in several places, you can copy its bookmark and paste it into other parts of the document.
- 7 Save the component slide as a PPT file.

Creating a Record for the Presentation Template

After you have created your template slides in PowerPoint, you can use Siebel Presentations to specify how they are assembled in the template.

This task is a step in [“Process of Creating Presentation Templates”](#) on page 316.

To create a record for the presentation template

- 1 Navigate to the Administration - Document screen > Presentation Templates view.
- 2 In the Templates list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	Enter a name for the template.
Default	If you want this template to be the default presentation template, place a check mark in the Default field. When the user clicks Auto Presentation, Siebel Presentations uses the default template if there are no decision issues that match the theme of a presentation. You can only select one Opportunity Presentation default and one Account Presentation default.
Category	Select one of the following types of templates: <ul style="list-style-type: none"> ■ Opportunity Presentation. These templates are available only when you are working with Opportunities. ■ Account Presentation. These templates are available only when you are working with Accounts.
Mapping Name	Used to indicate the group of bookmark fields to be used with this template. You can leave this field blank for now, until you create a mapping.
Template File Name	Attach the template file.
Theme	<p>If you want to associate the template with a particular decision issue, click the select button in the Theme field, and select a theme from the Pick Decision Issue dialog box. When you give your presentation template a theme, you associate it with a particular decision issue that is important for your opportunity. When a presentation theme matches the number one decision issue for the current opportunity, Siebel Presentations automatically selects the correct template when the user clicks Auto Presentation. Users can also select a theme template if they want.</p> <p>Because accounts do not relate to decision issues, the Theme field is not applicable for Account Presentation templates. It only applies to Opportunity Presentation templates.</p>
Description	Enter a description of the template.

Field	Comments
Language	The language in which the template was written.
Locale	Only the templates specific to this locale will be shown.

Defining Presentation Template Sections

Once you have created your PowerPoint slides and a record for your template, define the structure of your presentation template.

A presentation is made up of *sections*, which divide and subdivide your presentation. Depending on your needs, a single section might contain multiple components or a single component.

The type of a section depends on what type of data it contains. For example, file sections contain slides, chart sections reference Siebel charts, and so on.

You define the structure of the presentation template by creating sections in the Administration - Document screen > Presentation Templates view, which are associated with the Template record you created for this template.

These tasks are a step in [“Process of Creating Presentation Templates” on page 316](#).

Creating Top-Level Sections for the Presentation Template

First you must create top-level sections, then you can add subsections to these top-level sections. Your presentation structure can have multiple levels of sections, since a subsection can contain other subsections.

To create top-level sections

- 1 Navigate to the Administration - Document screen > Presentation Templates view.
- 2 In the Template Explorer, in the left frame, click the plus sign (+) next to the icon representing this template.
The Sections folder appears in the list.
- 3 In the Explorer list, click the plus sign (+) next to the Sections folder.
The Sections list appears in the right frame.
- 4 In the Sections list, create a new record.
- 5 In the Name field, enter a name for this section.
The section name is the title of the slide for some types, such as Bullet Slide.
- 6 In the Sequence field, specify the order in which this section should appear in the presentation.

- 7** In the Section Type field, indicate the type of section you are creating. The following table describes the different section types available to you.

Type	Comments
Bullet Slide	Creates a slide and inserts a list of Siebel data in bullet format—for example, a list of products the opportunity is interested in. This section name is used as the slide title.
Chart	Creates a slide and inserts a Siebel chart. The chart is automatically centered, and you can change x, y, and z axes.
File	Contains only presentation slides or text. If you are using PowerPoint, they must be in PPT, DOC, or TXT format. If you indicate text, it creates a slide and inserts the text.
Locator	Pulls in slides or text (PPT slides or TXT files) from the Siebel Encyclopedia. If you create a locator section, Siebel Presentations can dynamically pull in slides from the marketing encyclopedia that relate to the products the opportunity is interested in. For example, if you want the presentation to dynamically insert slides related to the products on the opportunity, use a Locator. The file types must be PPT, TXT, or RTF. If more than one marketing slide meets the Locator criteria you specify, Siebel Presentations inserts each.
Organization Chart	Creates a slide and pulls in Organization charts for the Account or Opportunity associated with the template. Charts are automatically centered.
Table	Creates a slide and pulls Siebel data into a table format. You select fields to be included, the sequence of the fields, and the column length. Tables are automatically centered. By selecting a Table Section, you also enable creation of a Related Table section. See “Adding Related Table Subsections to the Presentation Template” on page 326 .
Two-Column Slide	Creates a slide that puts two sections next to each other. You can, for example, show a list of key features of a product (a Bullet Slide section) next to a picture of the product (a File section). You specify the two subsections, which can be any of the other section types.

- 8** Complete the fields applicable to your section type. [Table 76 on page 323](#) describes the fields that you should complete for each type of section.

- 9 Repeat [Step 4 on page 321](#) through [Step 8](#) to add all the top-level sections that are needed.

Table 76. Selected Fields for the Presentation Template Administration View

Section Type	Field	Comments
Bullet Slide	BusinessObject	The Siebel business object from which the information is taken. Select from the list, which contains all available business objects from your repository, or enter the name in the field. For example, to include a Bullet List of products offered with the quantity and ship date for the opportunity, the business object is Opportunity.
File	N/A	You do not need to complete any fields for this type of section.
Chart	Business Object	The Siebel business object the chart information is coming from (for example, Opportunity). Select from the Business Object list, which lists all available business objects from your repository.
	Chart or Table Name	The name of the chart applet you want to insert into this section. For example, "Opportunity Chart Applet - Current Opportunity Analysis." The list also contains all available applets from your repository.
	Search Spec	Any search criteria you want to use to restrict data for the chart (for example, Revenue > 500000).
	Category	With charts that contain multiple X-axis options, this field allows you to set which option to use for the X-axis. For example, in the Lead Analysis by Rep chart, the X-axis can be Sales Representative or Quality.
	Function	With charts that contain multiple Y-axis options, this field allows you to set which option to use for the Y-axis. For example, in the Lead Analysis by Rep chart, the Y-axis can be Number of Opportunities, Opportunity Revenue, or Average Opportunity Revenue.
	Series	This field allows you to set the Z-axis you wish to use for charts that contain multiple Z-axis options.

Table 76. Selected Fields for the Presentation Template Administration View

Section Type	Field	Comments
Locator	Information Retrieval Method	<p>Select which relationship to use to find the literature. For example, Oppty Competitor, which are the slides on competitors associated with the opportunity.</p> <p>To associate literature with a product, competitor, or partner, use the Literature Administration view (or the Decision Issue, Competitor, or Product Administration views).</p>
	Retrieved Literature Category	<p>Indicate what type of literature you are looking for (for example, brochures, specification sheets, and so on).</p> <p>This helps you to filter out the slides from the rest of the documents in the marketing encyclopedia, to be included in your presentation.</p>
Organization Chart	Business Object	<p>The Siebel object from which the information is taken. Select from the Business Objects dialog box, which contains all available business objects from your repository.</p>
	Chart or Table Name	<p>The name of the applet that contains the organization chart data. For example, the Opportunity Organization Analysis applet.</p>

Table 76. Selected Fields for the Presentation Template Administration View

Section Type	Field	Comments
Table	Business Object	<p>This is the Siebel business object from which the information is taken. Select from the Business Objects dialog box, which contains all available business objects from your repository.</p> <p>For example, if you want to include a table of products being offered, with the quantity and ship date for the opportunity, the business object is Opportunity.</p>
	Chart or Table Name	<p>The name of the applet where the table data is stored.</p> <p>In the example used for Business Object, the applet is Opportunity Product Applet.</p>
	Table Fields	<p>Open the Table Fields dialog box and then, for each field you want in the table, click New and enter the following information:</p> <ul style="list-style-type: none"> ■ The Field Name of the field; for example, Product. ■ The Sequence in which you want the field listed. ■ The Width of the column; the default (and minimum) width is 100 pixels. A second way to define column width is by percentage of the table width. When a value is entered into table width, column width equates to percentage of total table width. For example, if there are three fields and table width is set to 100, field widths of 25, 65, and 35 would equate to 25%, 65%, and 35% of the total width of the table. In this example, if the table width was not set, the field widths would equate to 25, 65, and 35 pixels. ■ The Alignment of the data in the field: Left, Center, or Right.
Two-Column Slide	N/A	<p>Create two subsections under the section you have designated as Two-Column Slide. For each subsection, complete the fields appropriate to that type of section. For example, if you want to show a Chart section next to a Table section, create a subsection of the Chart section type (and complete the Chart-related fields shown in this table) and create a subsection of the Table type (and complete the Table-related fields shown in this table).</p>

Adding Subsections to the Presentation Template

After adding top-level sections, you may want to add subsections to one or more of them.

To add subsections to an existing section

- 1** Navigate to the Administration - Document screen > Presentation Templates view.
- 2** In the Template Explorer, in the left frame, click the plus sign (+) next to the template to which you want to add a subsection.
The template's Sections folder appears.
- 3** In the Template Explorer, click the plus sign (+) next to the Sections folder for this template.
The Explorer displays the sections for this template, and the Sections list is displayed to the right.
- 4** In the Template Explorer, click the plus sign (+) next to the section to which you want to add a subsection.
The Sections and Components folders appear for this template.
- 5** Click the plus sign (+) next to the Sections folder for this section.
The Sections list appears, listing all subsections under this section.
- 6** Use the Sections list to add a subsection in the same way you used it to add a top-level section, as described in ["Creating Top-Level Sections for the Presentation Template" on page 321](#).

NOTE: When a presentation generates, a section generates before any of its subsections and is displayed prior to a subsection in the finished presentation.

Adding Related Table Subsections to the Presentation Template

After adding a Table Name subsection, you can add related tables that provide detailed information for the first table. For example, if the tables subsection contains a quote record, the related table can contain the quote line items. The relationship between the information is essentially a *parent-child-grandchild* relationship; the opportunity is the *parent* record, the quote table is the *child*, and the related table containing the quote line items is the *grandchild*.

To add a related table

- 1** Navigate to the Administration - Document screen > Presentation Templates view.
- 2** In the Template Explorer list, in the left frame, click the plus sign (+) next to the template to which you want to add a related table.
The Sections folder appears in the list.
- 3** In the Explorer list, click the plus sign (+) next to the Sections folder.
The Sections list appears in the right frame.
- 4** In the Sections list, add a new section or edit an existing section.
- 5** In the Section Type field, select Table and enter the Table Name.
- 6** Complete all necessary fields.

- 7 In the Explorer list, click the plus sign (+) next to the Related Tables folder.

NOTE: The Related Table folder in the Template Explorer is used only for the Table section type. This folder can be edited only if a table is already added.

- 8 In the Related Tables dialog box, complete the fields as described in the following table.

Field	Comments
Business Object	Select the Siebel object to which this table is related.
Table Name	Select the name of the related table applet.
Field Name	Select the fields that will be displayed in this table. If none are selected, all fields appear.

Adding Components to Presentation Template Sections

Now that you have defined the structure of your document, you must specify the location of the component slides that will probably make up the bulk of your presentation.

For sections that draw upon data from a Siebel database (such as Chart and Report), you have specified all the information necessary for Siebel Presentations to generate the appropriate contents. However, the component documents, which you created earlier in PowerPoint, are not part of the presentation until you add them to the appropriate sections.

NOTE: Components can be added to any kind of section (not just a File section), and a section can contain multiple components.

Components can be PPT or DOC, TXT, or RTF files. When they are not PPT files, Siebel Presentations creates a slide (with your template background) and imports the text into the slide. PowerPoint inserts the TXT and DOC files based on how you have formatted the documents. For example, PowerPoint inserts TXT or DOC paragraphs in the slide as paragraphs, but if your file contains TXT or DOC indented or bulleted paragraphs, PowerPoint attempts to create a slide for each bullet point, or one slide for all bullet points, depending on the formatting and carriage returns in your document.

To make sure that TXT or DOC files are inserted correctly in your PowerPoint presentation, open the text or PowerPoint document itself in PowerPoint and verify that the format is correct. The format you see when you open the file in PowerPoint will be the same format Siebel applications use in the presentation.

This task is a step in ["Process of Creating Presentation Templates"](#) on page 316.

To add a component to a presentation template

- 1 Navigate to the Administration - Document screen > Presentation Templates view.
- 2 In the Templates Explorer, in the left frame, select the template to which you want to add a component.

The Sections and Components folders appear for the template.

- 3 Click the plus sign (+) for the Components folder.
The Components list appears on the right.
- 4 In the Components list, create a new record.
The Add Sales Tools dialog box appears.
- 5 In the Add Sales Tools dialog box, perform one of the following actions:
 - Select the component you want to add and click Add.
 - If your component does not appear in the dialog box, click New.
- 6 Complete the component fields as described in the following table.

Field	Comments
Name	Enter a name for the component.
Sequence	Specify the order in which this component should appear in the section.
Attachment Name	This field was filled in automatically when you selected a file from the Add Sales Tool dialog box.
Condition	Enter a condition and this component will be displayed only when the condition is true.

Using Conditions in Presentation Templates

You can add query conditions to a section or a component to specify the conditions under which the section or component will be used in the presentation. For example, if you have two executive summaries—one for deals of over \$100,000 and another for smaller deals—you can use the condition field in each Executive Summary section to allow Siebel Presentations to insert the appropriate executive summary based on which condition is true.

These tasks are a step in [“Process of Creating Presentation Templates” on page 316](#).

Entering Criteria

You can enter query criteria in a section or component record's Condition field (such as [Revenue] > 100000). If the condition is TRUE, the section or component is included. If the condition is FALSE, the section or component is not included.

If you do not specify a condition, the section or component is always used.

You can create conditions for any field that relates to the business object of your presentation; use Opportunity fields for opportunity presentations, and Account fields for account presentations. If the definition of a condition needs to be based on fields from another business object, then you must add those fields to the Opportunity or Account business object through either a link or a join. The syntax for conditions is similar to the syntax for Siebel queries. For more information about the syntax of Siebel queries, see *Fundamentals* and *Siebel Developer's Reference*.

Examples of Criteria

The following examples illustrate the syntax for conditions:

- If the opportunity is for a Pentium computer, you want to insert a component about the advantages of the Pentium chip. In the Condition field for this component, type the following condition:

```
EXISTS [Product] LIKE "Pentium*"
```

This condition would look at the products listed for the opportunity. If the product name begins with Pentium, Siebel Presentations would insert the component. Otherwise, Siebel Presentations would leave out this component.

NOTE: To use a product in a condition, the product must have been entered using the Products view of the Opportunities screen. The condition will not work with products that were entered as Quote line items.

- If the account is located in Georgia, you want to enter a section with terms and conditions limited to that state. In the section's Condition field, you would enter the following:

```
EXISTS ([State] = "GA")
```

or

```
[State] = "GA"
```

You would use the first line if the account is located only in GA, and the second line if the account is located in GA and another location.

This condition will look at the state for the account, and if the state is GA then the section would be included in the presentation; otherwise, Siebel Presentations would skip this section and move on to the next.

- If the opportunity has a revenue amount greater than \$1,000,000 and it is expected to close this year, you want to insert a component on a special program for this type of customer. Enter the following condition in the Condition field for the component:

```
[Revenue] > 1000000 AND [Close Date] <= ("12/31/02") AND [Close Date] >= ("1/1/02")
```

After you enter a condition, test it as a query on the view you are going to use it on. For example, the above example involving Revenue and Close Date can be tested as a query on the My Opportunities view. If the query returns the data you expect, the query is probably in the correct format for your condition field.

Defining Presentation Field Mappings

When you created the component slides of your presentation, you probably included bookmarks for personalized fields. You must map the bookmarks in the template's components to Siebel fields.

This mapping tells Siebel Presentations which Siebel field to use for substituting data for a particular bookmark in your presentation template. For example, by mapping the bookmark Company to the Account field, you tell Siebel Presentations to replace each Company bookmark with the value of the Account field.

You cannot map fields to a bookmark in the template's header or footer, unless that bookmark is also somewhere else in the content of the template, other than in the footer or header.

Since you may be working with multiple presentation templates, you can have multiple sets of bookmarks. You could have one mapping for one presentation template and another mapping for another presentation, or you could use a single mapping for several presentation templates. In either case, you must specify a mapping name in your template record to associate the template with a specific mapping.

If you map a bookmark to a multi-value field, the primary record of the group is retrieved. If you want to retrieve multiple values from a multi-value field, you can add a Table section to the document template. This section type will retrieve multiple values from the multi-value field in table format.

To map the bookmarks in a template's components to fields, you must:

- Create a mapping.
- Associate a template with the mapping.

These tasks are a step in [“Process of Creating Presentation Templates” on page 316](#).

Creating a Mapping

To create a field mapping, first create a record for the mapping, and then map the fields.

NOTE: For Siebel Tools objects to be accessible in the Siebel application, the Siebel repository must be updated in the appropriate database.

To create a record for a mapping

- 1 Navigate to the Administration - Document screen > Presentation Field Mappings view.
- 2 In the Business Objects list, create a new record.
- 3 Complete the fields as described in the following table.

Field	Comments
Mapping Name	Enter a name for the mapping.
Business Object	Use the Business Objects dialog box to select the business object that contains fields used in the presentation, and then click OK. For example, if you are creating an opportunity presentation, select Opportunity in the Business Object field.
Description	Enter a description of the mapping for your own use.

- 4 In the Business Objects Explorer, in the left frame, click the plus sign (+) next to the business object for which you created a mapping.
- 5 Select the Business Components folder.

- 6 In the Business Component list, create a new record and complete the fields.

NOTE: You can associate more than one business component mapping with an object. For example, if you are creating an opportunity presentation, you would select the Opportunity business component. You could also select the TAS Account business component to create mappings for views under the Opportunity TAS view.

Mapping the Fields

Now that you have created a record for the mapping, the next step is to map the fields.

To map the fields

- 1 Navigate to the business component that contains the fields to be mapped.
- 2 Click the plus sign (+) next to the Business Component name.
The Business Component Fields folder appears.
- 3 Click the plus sign (+) next to the Business Component Fields folder.
The Business Component Fields list appears.
- 4 In the Business Component Fields list, create a new record and complete the necessary fields.
- 5 Repeat [Step 4](#) for each field that needs to be mapped.

Associating a Mapping with a Presentation Template

After you have created a mapping, you must associate it with a template to make it apply to all the components in that template. You can associate a mapping with one or more templates.

To associate a mapping with a presentation template

- 1 Navigate to the Administration - Document screen > Presentation Templates view.
- 2 In the Templates list, select the template record with which you want to associate the mapping.
- 3 In the Mapping Name field, select the mapping you created earlier.

Creating the Presentation Library

As a presentation administrator, you create and maintain the Presentation Library, which consists of slides that sales representatives can add to their presentations.

Slides in the Presentation Library are different from the other components you created earlier, because components are part of the presentation template, which are automatically included in presentations generated from that template. Slides in the Presentation Library are available to sales representatives only on an as-needed basis. As an administrator, you can also recommend documents to include in the templates.

After sales representatives create a default presentation automatically, they can add more slides from the Presentation Library or use the Edit Layout command to customize the presentation. The Presentation Library allows multiple presentations created from the same template to have different contents.

As an administrator, you place the various components in the Presentation Library and maintain the information. When the sales representatives need additional slides to add to a presentation, they review the Presentation Library, select the component they want to insert, and automatically insert it into the presentation.

The sales force cannot update the information in the Presentation Library. The only sections and components available to sales representatives are those you provide for them.

To prepare the Presentation Library, you must:

- Create Microsoft PowerPoint files for the Presentation Library.
- Add sections for the Presentation Library.
- Add components to the Presentation Library sections.
- Recommend documents to be included in templates.

These tasks are a step in [“Process of Creating Presentation Templates” on page 316](#).

Creating Presentation Files for the Presentation Library

You create presentation files for the Presentation Library in the same way that you create the presentation templates themselves. Use Microsoft PowerPoint to enter text, graphics, and bookmarks, and then map these bookmarks to fields in your Siebel database.

NOTE: The only type of component that can be included in the Presentation Library is the File section type. Other section types (Charts, Reports, and so on) can be included only in the initial template.

Adding Sections to the Presentation Library

Sections are used to organize slides in the Presentation Library. For example, if some of the slides in the Presentation Library are marketing pieces and others are technical, you may want to create a section for each of these. Then the users will be able to browse through the marketing pieces and through the technical pieces separately. You must add at least one section to the Presentation Library. For more information about creating presentation sections, see [“Defining Presentation Template Sections” on page 321](#).

To add sections to the Document Library

- 1 Navigate to the Administration - Document screen > Presentation Library view.

- 2 In the Library Explorer, in the left frame, click the plus sign (+) of Presentation Library.
The Sections folder appears under the Library.
- 3 Add the sections to this folder as needed.

Adding Components to the Presentation Library

After adding sections to the presentation library, you add components to them.

For more information about adding presentation components, see [“Adding Components to Presentation Template Sections” on page 327](#).

To add components to the Presentation Library

- 1 Navigate to the Administration - Document screen > Presentation Library view.
- 2 Use the Library Explorer to navigate to the section to which you want to add a component.
- 3 Add the component to the library just as you would add a component to a presentation.

Recommending Content for a Presentation

As the administrator, you can simplify the process of creating a quick presentation by associating recommended content with the presentation template.

To associate recommended content with a presentation

- 1 Navigate to the Administration - Document screen > Presentation Library view.
- 2 Use the Library Explorer to navigate to the section to which you want to add recommended content.
- 3 Open the selected section folder.
- 4 Click on the plus sign (+) of the Components folder.
- 5 Select a component.
- 6 In the Components record, click in the Recommended Template field.
- 7 Add a Recommended Template to the Component record. You can recommend a component to one template or to many templates. For example, a legal clause might be required in all templates.
- 8 Repeat [Step 5](#), [Step 6](#), and [Step 7](#) for each component that needs recommended content.

NOTE: Recommended templates are displayed when a presentation is edited using the Edit Layout command and the Show Recommended Only box is selected.

Allowing Users to Display Presentations in HTML Format

By default, presentations are only saved in document format, and not in HTML format. The user's View HTML button is unavailable, and the user cannot view the presentations in HTML format.

To allow the user display presentations in HTML format, you must edit the parameter DocumentServerViewHTML to give it the value True instead of False.

NOTE: Users of the Remote Client cannot view presentations in HTML format.

To allow users to display presentations in HTML format

1 Start the Server Manager.

2 Enter the command:

```
Srvrmgr> change param DocumentServerViewHTML=True for comp DocServer
```

NOTE: While this procedure uses the Server Manager, parameters can also be changed in the Administration - Server Configuration screen. For more information, see *Siebel System Administration Guide*.

About Generating Presentations (End User)

Using template slides created by the presentation administrator, sales professionals can create, modify and print presentations for an opportunity, using the Opportunities screen > Presentations view.

Presentations automatically take details you have recorded about an account or opportunity and combine them with a predefined template to create a Microsoft PowerPoint presentation.

The administrator at your company creates presentation templates that include consistently formatted components, such as text, tables, and diagrams, that are designed to address specific issues. When you generate a presentation, you merge details about a specific account or opportunity in these predefined templates.

After generating a presentation, you can modify it to meet your customer's requirements by changing the order of slides and adding slides from the Presentation Library. If the presentation generated by a template is adequate, you can create and print it.

Scenario for Generating Presentations (End User)

This scenario provides an example of the business process performed by a sales representative creating presentations for prospective accounts. Your company may follow a different process according to its business requirements.

A sales representative is asked by a prospective customer to deliver a presentation on service offerings. The sales representative has already recorded the opportunity and its related details in Siebel Sales, including the number one decision issue—price.

The sales representative navigates to the Opportunities screen's Presentations view and creates a new presentation record. Because price is the most important decision issue, the presentation is based on a template that includes slides that address price issues.

When the sales representative generates a draft of the presentation, the presentation is formatted according to standards established by the sales representative's company, and includes the relevant slides. The sales representative makes some minor adjustments to the presentation, and saves it.

Process of Generating Presentations (End User)

To generate presentations, perform the following tasks:

- ["Creating a Presentation \(End User\)" on page 335](#)
- ["Generating a Presentation Draft \(End User\)" on page 336](#)
- ["Modifying Presentation Structure and Adding Content \(End User\)" on page 336](#)
- ["Printing a Presentation \(End User\)" on page 341](#)
- ["Locking a Presentation \(End User\)" on page 342](#)

Creating a Presentation (End User)

Because presentations can include details about an account or an opportunity, presentations can be created from either the Accounts screen or the Opportunities screen.

This task is a step in ["Process of Generating Presentations \(End User\)" on page 335](#).

To create a presentation

- 1 Navigate to the Opportunities screen, and in the Opportunities list, select the opportunity associated with the presentation.
- 2 Click the Presentations view tab, and in the Presentations list, click Auto Presentation.

A presentation is automatically generated based on the default template. The new presentation record appears in the Presentations list.

NOTE: To generate a presentation using an alternate template, click New in the Presentation list and complete the necessary fields in the form.

Generating a Presentation Draft (End User)

You can generate a presentation draft as a starting point for creating the presentation you deliver to a customer. The draft is a Microsoft PowerPoint presentation.

If you have Microsoft PowerPoint installed on your local computer, you can edit this presentation. If you do not have Microsoft PowerPoint installed, you can view the presentation, and you can add sections and change the order of sections, but you cannot edit slides.

If you are creating a presentation in a Siebel Web Client environment (network), follow [Step 1](#) through [Step 4](#) in the following procedure.

If you are creating a presentation in a Mobile Web Client environment (remote) and have the Mobile Web Client installed locally on your computer, follow [Step 1](#) through [Step 3](#) in the following procedure.

This task is a step in “[Process of Generating Presentations \(End User\)](#)” on page 335.

To generate a presentation draft

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the presentation.
- 3 Click the Presentations view tab, and in the Presentations list, select the presentation, and then click Generate Draft.

In Queue appears in the Status field.

A draft of the presentation is created if you are using Siebel Mobile Client (remote environment).

- 4 Click Update to generate a presentation from the server if you are working in a Siebel Web Client (network) environment.

The status of the presentation refreshes when you click Update. Status values include In Progress, Generating, Completed, and Failed.

Modifying Presentation Structure and Adding Content (End User)

After creating and viewing a draft of a presentation, end users may decide that they want to change the order of the sections or add new sections.

The following tasks describe how to view, modify, and add content to the presentation:

- [“Viewing the Structure of a Presentation” on page 337](#)
- [“Adding Content to the Presentation” on page 337](#)
- [“Changing the Order of Sections in a Presentation” on page 338](#)
- [“Adding Components to a Presentation” on page 339](#)

- [“Modifying a Presentation Component” on page 341](#)

These tasks are a step in [“Process of Generating Presentations \(End User\)” on page 335](#).

Viewing the Structure of a Presentation

End users can view the structure of a presentation in the Presentation Table of Contents view, which allows viewing of the hierarchy of sections and components that make up the presentation.

Sections represent the main points of a presentation, and each section can consist of subsections and components. Components are the slides used in each section. In some cases, sections can also be set up to generate slides.

To view the structure of a presentation

- 1 Navigate to the Opportunities screen, and in the Opportunities list, select the opportunity associated with the presentation.
- 2 Click the Presentations view tab, and in the Presentations list, drill down on the hyperlink in the Name field.

The Presentation Table of Contents appears showing the structure of the presentation.

- 3 In the Presentation Table of Contents explorer, click the plus sign (+) next to each section to expand sections and components.

Adding Content to the Presentation

If an administrator has created slides and included them in the Presentation Library, end users can customize the presentation by adding one or more of these slides using the Edit Layout command.

To add content to the presentation

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the presentation.
- 3 Click the Presentations view tab, and in the Presentations list, select the presentation, and then click Edit Layout.

The Template Layout dialog box appears, displaying two columns:

- The Content Library lists the components in the Presentation Library that can be included in the presentation.
- The Table of Contents column lists the components in the Presentation Library that are selected for the presentation and the order in which they will be displayed.

- 4 In the Content Library column, use the directional buttons to move selected sections from the Content Library column into the Table of Contents column. If you make a mistake, click Reset Layout to undo all changes to the Table of Contents column. When you are finished, click Save.

NOTE: If the Show Recommended Only check box is selected, only those components recommended by the administrator are displayed. If this box is empty, all available components are displayed. For more information, see [“Allowing Users to Display Presentations in HTML Format” on page 334](#).

- 5 In the Presentations list, select the presentation, and then in the presentation record, drill down on the hyperlink in the Name field to view the new content.

Changing the Order of Sections in a Presentation

When end users add a section to a presentation, the section numbers are not automatically resequenced. If a section is inserted within the current sequence, end users must modify each sequence number. The sequence numbers in the Presentations list determine the order in which sections and components appear.

There are two methods that can be used to resequence presentation sections and components:

- Edit Layout.
- Presentation Table of Contents.

To use Edit Layout

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the presentation.
- 3 Click the Presentations view tab, select the presentation in the Presentations list, and then click Edit Layout.
- 4 In the Template Layout dialog box, use the sequencing arrows to change the order of the sections, and then click Save.

To use Presentation Table of Contents

- 1 Navigate to Opportunities screen, and in the Opportunities list, select the opportunity associated with the presentation.
- 2 Click the Presentations view tab, and in the Presentations list, drill down on the hyperlink in the Name field of the presentation you want to edit.
- 3 In the Presentation Table of Contents explorer, click the plus sign (+) to expand each section.
- 4 In the Sections list, select a section, and change the number in the Sequence field.

To remove sections in a presentation

- 1 Navigate to the Opportunities screen > Opportunities List view.

- 2 Drill down on the opportunity associated with the presentation.
- 3 Click the Presentations view tab, and in the Presentations list, drill down on the hyperlink in the Name field of the presentation you want to edit.
- 4 In the Presentation Table of Contents explorer, click the plus sign (+) to expand the sections.
- 5 In the Sections list, select the section and click Delete.

NOTE: You can also use the **Edit Layout** command to remove content from a presentation. For more information, see ["To use Edit Layout" on page 338](#).

Adding Components to a Presentation

Components are the slides that make up presentations. Components can be added to sections from the Presentation Library, the Siebel Encyclopedia, or from another location, such as a local hard drive. More than one component can be added to a section.

The Presentation Library offers a hierarchical structure that administrators can use when designing literature components that can be associated with a presentation. Using the Presentation Library, end users can navigate to a section or subsection and select the component file associated with the section.

To add a component to a presentation

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the presentation.
- 3 Click the Presentations view tab, and in the Presentations list, drill down on the hyperlink in the Name field of the presentation you want to edit.
- 4 In the Presentations Table of Contents explorer, click the plus sign (+) next to the presentation you want to change.

The Sections folder appears.

- 5 Click the plus sign (+) next to the Sections folder.

Each section associated with the presentation appears in the Sections list.

- 6 Click the plus sign (+) next to the section to which you want to add a component.
- 7 In the Sections list, click Library.

The Presentation Library view appears.

- 8 In the Presentation Library explorer, click the plus sign (+) for Presentation Library.
 - a Click the plus sign (+) next to the Sections folder.
 - b Click the plus sign (+) next to the section where the presentation is located.
 - c Click the plus sign (+) next to the Components folder.

The list of components for that section appears.

- 9 In the Components list, select the component and then click Add Components.
The component file is added to the Components folder located in the section you selected.

To add a Siebel Encyclopedia component

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the presentation.
- 3 Click the Presentations view tab, and in the Presentations list, drill down on the hyperlink in the Name field of the presentation you want to edit.
- 4 In the Presentation Table of Contents explorer, click the plus sign (+) next to the presentation.
 - a Click the plus sign (+) next to the Sections folder.
 - b Click the plus sign (+) next to the section where you want to add a new file from the Encyclopedia.
 - c Click the plus sign (+) next to the Components folder.
- 5 In the Components list, click New.
- 6 In the Add Sales Tools dialog box, select each record you want to add and then click Add.

NOTE: Only PPT files can be added as components directly into a template section.

To add a component from another location

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the presentation.
- 3 Click the Presentations view tab, and in the Presentations list, drill down on the hyperlink in the Name field of the presentation you want to edit.
- 4 In the Presentation Table of Contents explorer, click the plus sign (+) next to the presentation.
 - a Click the plus sign (+) next to the Sections folder.
 - b Click the plus sign (+) next to the next to the section where you want to add a new file.
 - c Click the plus sign (+) next to the Components folder.
- 5 In the Components list, click New.
- 6 In the Add Sales Tools dialog box, click New.
- 7 In the Components list, enter a name and sequence for the file, and then click the select button in the File Name field to attach the file.
- 8 Attach the file using the Add Attachment dialog box.

Modifying a Presentation Component

End users can modify a component file if they have Microsoft PowerPoint installed locally on their computer. End users must have the application that was used to create the component.

To modify a presentation component

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the presentation.
- 3 Click the Presentations view tab, and in the Presentations list, drill down on the hyperlink in the Name field of the presentation you want to edit.
- 4 In the Presentation Table of Contents explorer, click the plus sign (+) next to the presentation.
 - a Click the plus sign (+) next to the Sections folder.
 - b Click the plus sign (+) next to the section where you want to add a new file from the Encyclopedia.
 - c Click the plus sign (+) next to the Components folder.
- 5 In the Components list, drill down on the hyperlink in the File Name field.
- 6 In the File Download dialog box, click Open to begin editing the file. Make any necessary edits and do one of the following:
 - a Click Save to save the file. If the Local check box is selected for this component, the file will be updated in the Siebel application.
 - b Click Save As to save the file to your local hard drive and then:
 - ☐ In the Components list, select the component (saved locally), click Edit, and locate the modified component.
 - ☐ Select the modified component, and then add it.

The old component is replaced with the new one.

Printing a Presentation (End User)

After generating a presentation, and the status is Completed, end users can print the presentation.

This task is a step in [“Process of Generating Presentations \(End User\)” on page 335](#).

To print a presentation

- 1 Navigate to the Opportunities screen, and in the Opportunities list, select the opportunity associated with the presentation you want to print.
- 2 Click the Presentations view tab, and in the Presentations list, drill down on the hyperlink in the Draft Name field of the presentation you want to print.

The presentation appears in the application in which it was created.

- 3 From the application, print the presentation.

Locking a Presentation (End User)

Lock allows end users to secure the completed presentation, making the presentation read-only and unable to be edited. Only the presentation's author, the author's manager, that manager's manager, and so on, can unlock or modify the presentation.

This task is a step in ["Process of Generating Presentations \(End User\)"](#) on page 335.

To lock the presentation

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the presentation.
- 3 Click the Presentations view tab, and in the Presentations list, select the presentation.
- 4 In the presentation record, select the check box in the Locked field.

NOTE: If the Locked check box does not appear, click the menu button in the Presentations list, and then choose Columns Displayed. For more information about using Columns Displayed, see *Fundamentals*.

Sample Presentation Templates

Siebel Business Applications come with a sample database. The Administration - Document screen > Presentation Templates view includes several sample document templates.

These sample presentations can be used as a reference when defining your own presentation template. In this sample database you will find the following Siebel Presentations sample presentations:

- Corporate Presentation (Opportunity category)
- Corporate Presentation - Account (Account category)

25 Proposals

This chapter is about administering and using Siebel Proposals. It includes the following topics:

- "About Siebel Proposals" on page 343
- "System Requirements for Siebel Proposals" on page 344
- "Process of Creating Proposal Templates" on page 345
- "Creating Proposal Template Documents in Microsoft Word" on page 346
- "Creating Records for Proposal Templates" on page 351
- "Defining Proposal Template Sections" on page 352
- "Adding Components to Proposal Template Sections" on page 358
- "Using Conditions in Proposal Templates" on page 359
- "Defining Proposal Field Mappings" on page 360
- "Associating a Mapping with a Proposal Template" on page 363
- "Creating the Proposal Library" on page 363
- "Allowing Users to Display Proposals in HTML Format" on page 365
- "Scenario for Generating Proposals (End User)" on page 366
- "Process of Generating Proposals (End User)" on page 366
- "Creating a Proposal (End User)" on page 367
- "Generating a Proposal Draft (End User)" on page 367
- "Modifying and Adding Content to a Proposal (End User)" on page 368
- "Printing a Proposal (End User)" on page 372
- "Locking a Proposal (End User)" on page 373
- "Sample Proposal Data: Field Mappings and Templates" on page 373

For information about the Documentation Server and other software that is required for Siebel Proposals, see [Chapter 22, "Document Server."](#)

About Siebel Proposals

Siebel Proposals allows your sales representatives to create proposals (and other types of documents) based on templates that you create in Microsoft Word.

Traditionally, sales representatives create proposals by starting with a proposal that worked in the past and then modifying it for the current prospect. Sales representatives must not only change such basic information as the customer's name, but also possibly restructure the proposal so that it fits the new prospect's unique needs. For example, the original proposal may have been focused on price, whereas the new prospect is more concerned with other decision criteria, such as speed or extra functionality.

With Siebel Proposals, after the proposal administrator has created the right templates, the sales representative can click one button to build the correct proposal for a specific account or opportunity. Siebel Proposals uses information that sales representatives have entered in the early stages of an opportunity to create the proposal.

Sales representatives can add deal-specific information to the proposal without worrying about formatting or presentation. Using the Proposal Library, sales representatives can find any additional information and automatically insert it into the proposal.

NOTE: The Siebel proposal document engine is also used to create agreement documents. Administrators who create the agreement templates can follow the steps in this chapter for creating proposals. Users can then select the agreement template and generate an agreement document.

System Requirements for Siebel Proposals

Certain system requirements must be met to use Siebel Proposals.

System Requirements for the Siebel Web Client

To use Siebel Proposals, you must have:

- All of the components that are required to use the Siebel application installed on the server, such as a Siebel Server and a Web Server.
- The Document Server installed on one or more Windows machines.
- Microsoft Office installed on the Document Server machine.

NOTE: If you are deploying the Siebel Server in UNIX and want to use Siebel Proposals, a separate Windows machine is required for the Document Server.

Siebel Proposals uses the Document Server, which is a new component of the Siebel Server that lets users on the Web work with Word documents that are on the server.

Your employees or partners who use Siebel Proposals need:

- A Web browser to use the product
- Optionally, Microsoft Office to edit documents

For information on the Web browsers that are supported by Siebel applications, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

System Requirements for the Siebel Remote Web Client

Siebel Proposals is available for the Siebel Remote Web Client as well as for the Siebel Web Client. The user interface for Proposals is identical in the Siebel Remote Web Client and the Web Client.

Siebel Remote Web Client processes requests to generate documents locally, so that field sales representatives can generate correspondences, proposals, and presentations while traveling. To run Siebel Proposals on the Remote Web client, you must have Microsoft Office installed on the same machine as the Remote Web Client.

Process of Creating Proposal Templates

To create templates, you perform the tasks shown in [Figure 26](#):

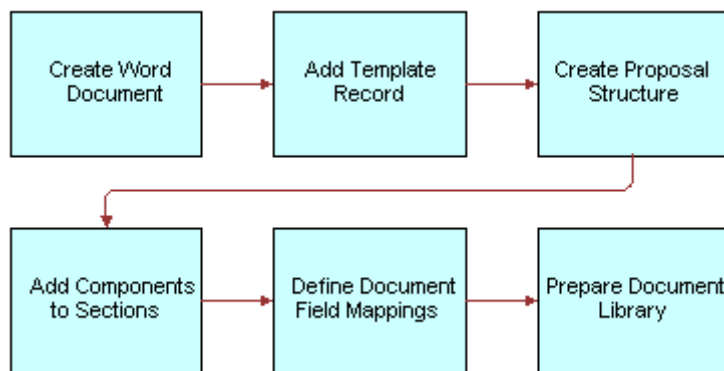


Figure 26. Siebel Proposal Process Flow

- 1 [“Creating Proposal Template Documents in Microsoft Word” on page 346](#). To create the documents needed by the template, you must write the text and insert bookmarks for such variables as company, contact name, and address.
- 2 [“Creating Records for Proposal Templates” on page 351](#). Use your Siebel application to create a single record for the template.
- 3 [“Defining Proposal Template Sections” on page 352](#). Specify which sections the proposal should contain.
- 4 [“Adding Components to Proposal Template Sections” on page 358](#). Specify which components each section should contain.
- 5 [“Using Conditions in Proposal Templates” on page 359](#). Optionally, you can add conditions to specify that sections or components are included in the proposal only under certain circumstances.
- 6 [“Defining Proposal Field Mappings” on page 360](#). Specify which Siebel objects correspond to each bookmark in your Word component documents. You also specify the name of this mapping in the template record.
- 7 [“Associating a Mapping with a Proposal Template” on page 363](#). Associate the mapping with a template to make it apply to all the components in that template.

- 8 “Creating the Proposal Library” on page 363. In this optional step, which can be performed at any time, you create a separate library of documents that sales representatives can draw upon to customize their proposals.
- 9 “Allowing Users to Display Proposals in HTML Format” on page 365. Update settings on the document server to allow end users to view proposals in HTML.

Creating Proposal Template Documents in Microsoft Word

The first step for creating proposal templates is to create documents in Microsoft Word. These documents consist of one style document and multiple component documents, as shown in [Figure 27](#).

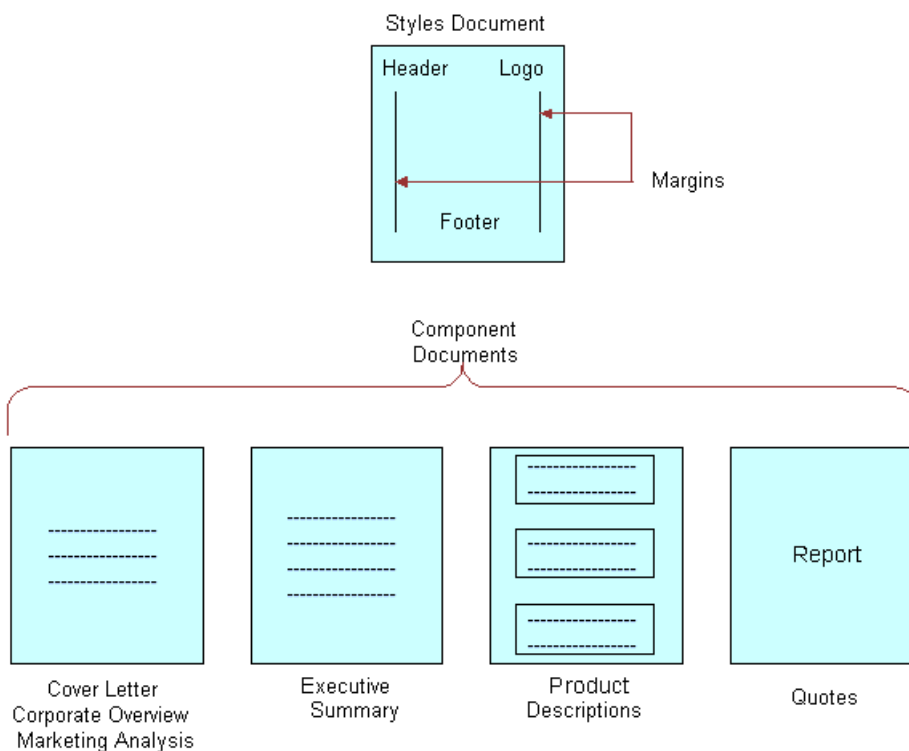


Figure 27. Word Documents That Can Make Up a Proposal Template

The components shown in [Figure 27](#) are only examples. You could have other components, such as a table of contents or a set of collateral, and you could omit the quotes or product descriptions, for example. However, a template must have a style document and one or more component documents.

NOTE: See *Release Notes* on Siebel SupportWeb for information about which versions of Microsoft Word are supported.

To create the template documents, you perform the following tasks:

- **Planning the template.** Decide what components the template should have.
 - **Creating the style document.** Create the document that gives all the template's components a standard format.
 - **Creating the component documents.** Create a document for each component of the template.
- These tasks are a step in ["Process of Creating Proposal Templates" on page 345](#).

Planning the Proposal Template

Before you create the documents in Word, you must determine how the proposal should look and what type of information it should contain.

Begin by looking at previous successful proposals to see what sections they included. For example, did they all have a cover letter, an executive summary, and a quote? Also, look at the documents your company currently has on hand, and the customer questions these pieces answer. Then decide how to organize your information. What topics could be standard across all proposals? What topics are specific to certain proposals? What is the best order for the pieces in the proposal you are creating? Finally, decide what fields to insert to customize their proposals (for example, contact name, account name, and industry). You will use this information to create bookmarks in your Word documents.

As part of your planning, you should look at the sample templates that come with Siebel Proposals, which are described in ["Sample Proposal Data: Field Mappings and Templates" on page 373](#).

NOTE: Proposals use fields from only one business object. If you want to include additional fields, you must use Siebel Tools to add the business components that include these fields to the business object that is the basis of the proposal.

Creating a Styles Document

After you plan your template, you work on the styles document for the template. This Word document will define the layout of your proposal and may include such things as headers, footers, your logo, and special margins.

The layout options you specify will automatically be applied to all the components used in the proposal.

NOTE: Do not type any content into this document. The content will come from the individual component documents that you will create later.

To set up styles for your template

- 1 Create a new document in Microsoft Word.
- 2 Set up margins, headers, footers, fonts, and other layout options for your template.
- 3 When you are finished creating styles, save the file:
 - Choose a name that uses only alphanumeric characters.
 - Use the .doc extension for Microsoft Word.
- 4 Close the file.

Creating Components for Proposal Templates

The next step in developing your template is to create components, which are the text pieces that make up the body of your proposal.

A component is a Microsoft Word document that includes standard text and personalized data. For example, a cover letter component includes your standard cover-letter text and personalized data such as the name and address of the contact to whom the letter is addressed.

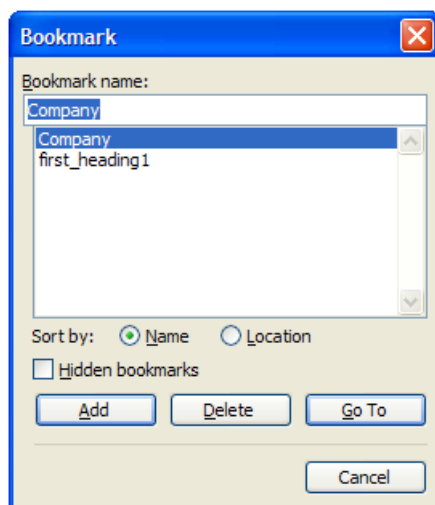
To create a component, you type the standard text and then create *bookmarks*, or Microsoft Word placeholders for custom data. When a sales representative generates a proposal, these bookmarks will be replaced with data from the Siebel application.

NOTE: The following procedures may vary slightly, depending on your version of Microsoft Word. Microsoft Word 2003 is supported for Siebel 7.5.3, 7.7.2 and 7.8. If you are using Microsoft Word 2003, begin with the procedure [“To create a component with bookmarks in Microsoft Word 2003” on page 348](#). If you are not using Microsoft Word 2003, begin with the procedure [“To create a component with bookmarks in Microsoft Word versions other than 2003” on page 350](#).

To create a component with bookmarks in Microsoft Word 2003

- 1 In Microsoft Word, create a new document and do one of the following:
 - a Select an item to which you want to assign a bookmark.
 - b Click where you want to insert a bookmark.
- 2 From the Insert menu, choose Bookmark.
- 3 In the Bookmark dialog box, in the Bookmark name field, enter or select a name for the bookmark.

NOTE: Bookmark names must begin with a letter and may contain numbers if desired. They cannot include spaces. You can use the underscore character to separate words.



- 4 Click Add.

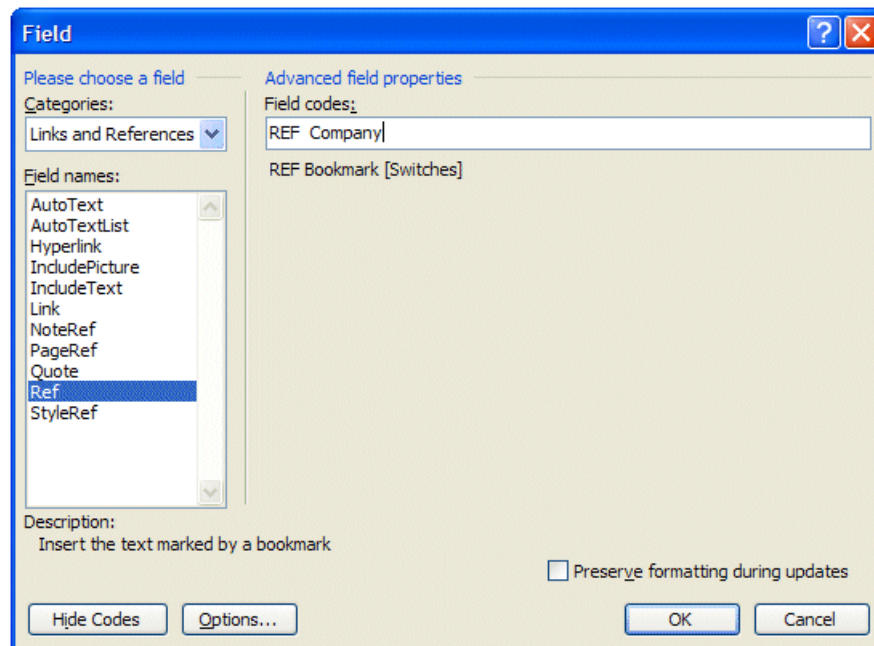
- 5 From the Insert menu, choose Field.
 - 6 From the Categories drop-down list, click Links and References, and then click Ref in the Field names list.
 - 7 Click the Field Codes button.
- REF appears in the Field codes field.
- 8 In the Field codes field, enter the name of your bookmark after REF.

For example, you might type Company for company name, so that the Field codes field contains:

REF Company

NOTE: If the text inserted into a bookmark contains double quotes ("), the inserted text will automatically be preceded by a backslash (\). If you do not want the backslash to appear in the inserted text, change the double quotes to single quotes in the Siebel software.

- 9 Note the name of the bookmark; you will need it when you map the bookmark to a Siebel field name.



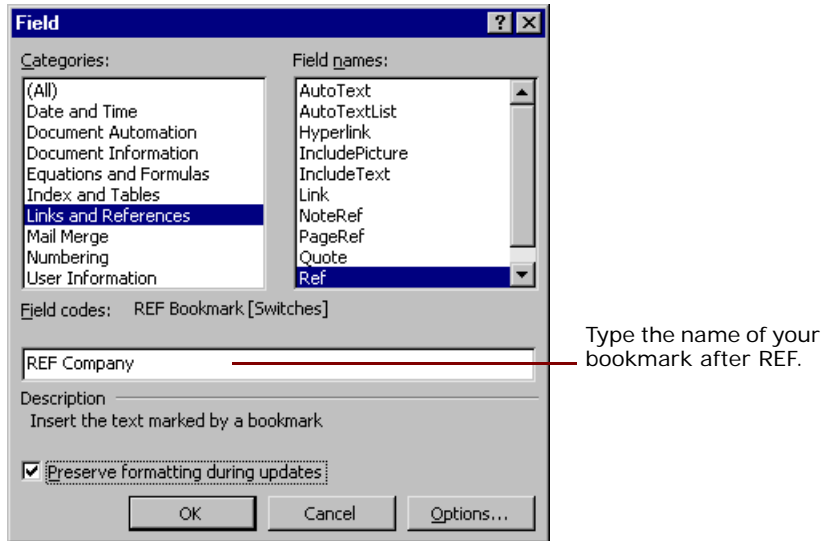
- 10 Select the Preserve formatting during updates check box if you want to maintain the format of the merged text.
- 11 Click OK to insert the field.
- 12 Repeat [Step 2 on page 348](#) through [Step 11](#) to add bookmarks for every field you want to insert in the text.

NOTE: If the same field is being inserted in several places, you can copy its bookmark and paste it into other parts of the document.

- 13 Save the component document as a DOC file.

To create a component with bookmarks in Microsoft Word versions other than 2003

- 1 In the Microsoft Word document, enter the standard text that belongs in this component.
- 2 Place the cursor where you want to create a bookmark, and choose Insert > Field.



- 3 Click Links and References in the Categories list, and then click Ref in the Field Names list. REF appears in the Description field.
- 4 In the Comments box, enter the name of your bookmark after REF.
For example, you might type Company for company name, so that the Comments box contains:

REF Company

The bookmark name must begin with a letter; it cannot begin with a number.

NOTE: If the text inserted into a bookmark contains double quotes ("), the inserted text will automatically be preceded by a backslash (\). If you do not want the backslash to appear in the inserted text, change the double quotes to single quotes in the Siebel software.

- 5 Note the name of the bookmark, because you will need it when you map the bookmark to a Siebel field name.
- 6 Select the Preserve formatting during updates check box if you want to maintain the format of the merged text.
- 7 Click OK to insert the field.

In your document, the following message appears:

Error! Reference source not found.

This message is Word's normal bookmarking convention. The error text will be replaced by appropriate data at the time of draft generation.

- 8 Repeat [Step 2 on page 350](#) through [Step 7](#) to add bookmarks for every field you want to insert in the text.

NOTE: If the same field is being inserted in several places, you can copy its bookmark and paste it into other parts of the document.

- 9 Save the component document as a DOC file.

Creating Records for Proposal Templates

After you have created your template documents in Word, you can use Siebel Proposals to specify how they are assembled in the template.

This task is a step in [“Process of Creating Proposal Templates” on page 345](#).

To create a record for the proposal template

- 1 Navigate to the Administration - Document screen > Proposal Templates view.
- 2 In the Templates list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	Enter a name for the template.
Default	If you want this template to be the default proposal template, select this check box. When the user clicks Auto Proposal, Siebel Proposals uses the default template if there are no decision issues that match the theme of a proposal. You can select only one Opportunity Proposal default and one Account Proposal default.
Category	<p>Select one of the following types of templates:</p> <ul style="list-style-type: none"> ■ Opportunity Proposal. These templates are available only when you are working with Opportunities. ■ Account Proposal. These templates are available only when you are working with Accounts. ■ Agreement. These templates are available when you are working with Siebel Professional Services Agreements. ■ Quote. These templates are available only when you are working with Quotes. ■ Order. These templates are available only when you are working with Orders.
Mapping Name	Used to indicate the group of bookmark fields to be used with this template. Leave this field blank until you create a mapping.

Field	Comments
Template File Name	The Word template document. (This is the style document.)
Theme	<p>If you want to associate the template with a particular decision issue, click the select button to open the Pick Decision Issue dialog box and then pick a theme. When you give your proposal template a theme, you associate it with a particular decision issue that is important for your opportunity. When a proposal theme matches the number one decision issue for the current opportunity, Siebel Proposals automatically selects the correct template when the user clicks Auto Proposal. Users can also select a theme template if they want.</p> <p>Because accounts and agreements are not related to decision issues, the Theme field is not applicable for Account Proposal, Agreement, Quote, or Order templates. It is used only for Opportunity Proposal templates.</p>
Description	Enter a description of the template.
Language	The language in which the template was written.
Locale	Only the templates specific to this locale will be shown.

Defining Proposal Template Sections

After you have created your Word documents and a record for your template, define the structure of your proposal template.

A proposal is made up of *sections*, which divide and subdivide your proposal. Depending on your needs, a single section might contain multiple components or a single component.

The type of a section depends on the nature of the data it contains. For example, file sections contain documents, chart sections reference Siebel charts, report sections reference Siebel reports, and so on.

You define the structure of the proposal template by creating sections in the Administration - Document screen > Proposal Templates view, which are associated with the template record you created for this template. You must create top-level sections. Optionally, you can add subsections to these. Your proposal structure can have multiple levels of sections, because a subsection can contain other subsections.

These tasks are a step in [“Process of Creating Proposal Templates” on page 345](#).

Creating Top-Level Sections for Proposal Templates

First, you must create top-level sections.

To create top-level sections

- 1 Navigate to the Administration - Document screen > Proposal Templates view.

- 2 In the Template Explorer list, in the left frame, click the plus sign (+) next to the template record that you created for this proposal.

The Sections folder appears in the Explorer list.

- 3 In the Explorer list, click the plus sign (+) next to the Sections folder.

The Sections list appears in the right frame.

- 4 In the Sections list, create a new record.

- 5 In the Name field, enter a name for the section, which will not appear in the proposal itself.

- 6 In the Sequence field, specify the order in which this section should appear in the proposal.

- 7 In the Section Type field, indicate the type of section you are creating.

The following table describes the section types available.

Type	Comments
Chart	Inserts a Siebel chart. The chart can be placed in the left margin, right margin, or centered, and you can change the x, y, and z axes.
File	Contains only proposal text in DOC or TXT format.
Locator	Pulls in documents from the Siebel Encyclopedia. For example, if you create a locator section, Siebel Proposals can dynamically pull in documents from the encyclopedia that are related to the products the opportunity is interested in. For instance, if you want the proposal to dynamically insert text related to the products on the opportunity, use a locator. The file types must be DOC, TXT, or RTF. If more than one marketing document meets the locator criteria you specify, Siebel Proposals inserts each.
Organization Chart	Creates a slide and pulls in organization charts for the account or opportunity associated with the template. Charts are automatically centered.
Report	<p>Dynamically inserts a Siebel report (such as Siebel Quote).</p> <p>When inserting reports, the Proposal engine converts the Actuate report to HTML and inserts the HTML version as a table in your proposal. When designing reports to be included in Siebel Proposals, you may want to review headers and footers, because HTML sometimes crops these.</p> <p>Only Actuate reports can be included. Microsoft Access reports cannot be included.</p>
Table	Pulls Siebel application data into a table format. You select fields to be included, the sequence of the fields, and the column length. By selecting a table section, you also allow creation of a related table section. See "Adding Related Table Subsections to Proposal Templates" on page 357 .

- 8 Complete the fields applicable to your section type.

[Table 77](#) describes the fields that you should complete for each type of section.

- 9 Repeat [Step 4 on page 353](#) through [Step 8](#) to add all the top-level sections that are needed.

Table 77. Selected Fields in the Proposal Template Administration View

Section Type	Field	Comments
All	Condition	Conditions can be applied to all section types. For information about conditions, see “Using Conditions in Proposal Templates” on page 359 .
File	N/A	Only the Condition field is applicable.
Chart	Business Object	The Siebel business object from which the chart information is coming (for example, Opportunity). Select from the Business Objects dialog box, which lists all available Siebel business objects.
	Chart or Table Name	The name of the chart applet you want to insert into this section (for example, “Opportunity Chart Applet - Current Opportunity Analysis”). The list contains all available applets.
	Search Spec	Any search criteria you want to use to restrict data for the chart. For example, Revenue > 500000.
	Width	How wide the chart should be in the proposal document. The default width is 400 pixels.
	Height	How high the chart should be in the proposal document. The default height is 300 pixels.
	Category	With charts that provide multiple X-axis options, this field allows you to set the option to use for the X-axis. For example, in the Lead Analysis by Rep chart, the X-axis can be Sales Representative or Quality.
	Function	With charts that provide multiple Y-axis options, this field allows you to set the option to use for the Y-axis. For example, in the Lead Analysis by Rep chart, the Y-axis can be Number of Opportunities, Opportunity Revenue, or Average Opportunity Revenue.
	Series	This field allows you to set the Z-axis you wish to use for charts that provide multiple Z-axis options.
	Chart Location	Location of the chart on the proposal page: Left, Right, or Center. Any text components you include in your chart section will wrap around the chart. For example, if you put your chart on the left, the text component will be inserted to the right of the chart.

Table 77. Selected Fields in the Proposal Template Administration View

Section Type	Field	Comments
Locator	Information Retrieval Method	Select the relationship to use to find literature. For example, Opppty Competitor Lit, which is the literature on competitors associated with the opportunity.
	Retrieved Literature Category	Indicate the type of literature you are looking for (for example, brochures, or specification sheets). This helps you to filter out the documents from the encyclopedia that you want to include in the proposal.
Organization Chart	Business Object	The Siebel object from which the information is taken. Select from the Business Objects dialog box, which contains all available business objects from your repository.
	Chart or Table Name	The name of the applet that contains the organization chart data. For example, the Opportunity Organization Analysis applet.
Report	Business Object	The Siebel business object from which the report information is coming (for example, Opportunity). Select from the Business Objects dialog box, which lists all available Siebel business objects. For example, to include a quote report in your proposal, you would select Quote.
	Report Name	The name of the report you want to insert in this section. Select from the Reports dialog box, which shows all available reports. For example, you might choose Proposal Quote.
	Link Spec	<p>Specifies the data to insert in your report. In the previous quote example, the Link Spec is Opportunity, Id/Quote, Opportunity Id. The syntax of the Link Spec is:</p> <pre><Parent Business Component Name><Comma><Parent-ID Field Name><Slash><Child Business Component Name><Comma><Child-ID Field Name></pre> <p>Descriptions of these fields can be found in <i>Siebel Tools Online Help</i>. The Child-ID-Field-Name may vary, depending on whether the relationship between your parent business component and child business component is one-to-many or many-to-many. You or your system administrator can find Link Spec information in the Siebel Repository.</p> <p>You can include only Actuate reports.</p>
	Search Spec	The search criteria. For example, if you want to insert only the Active Quotes for the Opportunity, your Search Spec is Active = 'Y'.

Table 77. Selected Fields in the Proposal Template Administration View

Section Type	Field	Comments
Table	Business Object	This is the Siebel object from which the information is taken. Select from the Business Objects dialog box, which contains all available business objects from your repository. For example, if you want to include a list of products being offered to the opportunity, the business object is Opportunity.
	Chart or Table Name	This is the name of the applet where the table data is stored. In the example used for Business Object, the applet is Opportunity Product Applet.
	Width	Width represents a percentage of the space available between the template margins. If you choose 100, that equates to 100% of the space between the template margins. If you enter 125, that represents 125% of the space between the borders. If left blank, the width of the columns in the table is based on pixels.
	Table Fields	Click the select button to open the Table Fields dialog box; then, for each field you want in the table, add a new record and enter the following information: <ul style="list-style-type: none"> ■ The Field Name of the field; for example, Product. ■ The Sequence in which you want the field listed. ■ The Width of the column in the table; column Width is measure in pixels. The default (and minimum) column width is 100 pixels. A second way to define column width is by percentage of the table width. When a value is entered into table width, column width equates to percentage of total table width. For example, if there are three fields and table width is set to 100, field widths of 25, 65, and 35 would equate to 25%, 65%, and 35% of the total width of the table. In this example, if the table width was not set, the field widths would equate to 25, 65, and 35 pixels. ■ The Alignment of the data in the field: Left, Center, Right.

Adding Subsections to Proposal Templates

After adding top-level sections, you may want to add subsections to one or more of them.

To add subsections to an existing section

- 1 Navigate to the Administration - Document screen > Proposal Templates view.
- 2 In the Template Explorer list, in the left frame, click the plus sign (+) next to the template to which you want to add a subsection.
The Sections folder appears in the list.
- 3 In the Template Explorer, click the plus sign (+) next to the Sections folder for this template.
The Explorer list shows the sections for this template, and the Sections list appears to the right.
- 4 In the Template Explorer, click the plus sign (+) next to the section to which you want to add a subsection.
The Sections, Related Table, and Components folders for this section appear in the list.
- 5 Click the plus sign (+) next to the Sections folder for this section.
The Sections list appears, listing all subsections under this section.
- 6 Use the Sections list to add a subsection in the same way you used it to add a top-level section, as described in [“To create top-level sections” on page 352](#).

NOTE: When a proposal is generated, a section is generated before any of its subsections and is displayed above a subsection in the finished document.

Adding Related Table Subsections to Proposal Templates

After adding a Table Name section, you can add related tables that provide detailed information for the first table. For example, if the tables subsection contains a quote record, the related table can contain the quote line items. The relationship between the information is essentially a parent-child-grandchild relationship; the opportunity is the *parent* record, the quote table is the *child*, and the related table containing the quote line items is the *grandchild*.

To add a related table

- 1 Navigate to the Administration - Document screen > Proposal Templates view.
- 2 In the Template Explorer list in the left frame, click the plus sign (+) next to the template to which you want to add a related table.
The Sections folder appears in the list.
- 3 In the Explorer list, click the plus sign (+) next to the Sections folder.
The Sections list appears in the right frame.
- 4 In the Sections list, add a new section or edit an existing section.
- 5 In the Section Type field, select Table and enter the table name.
- 6 Complete all necessary fields.

- 7 In the Explorer list, click the plus sign (+) next to the Related Table folder.

NOTE: The Related Table folder in the Template Explorer is used only for the Table section type. This folder can be edited only if a table has already been added.

- 8 In the Related Tables dialog box, complete the fields as described in the following table.

Field	Comments
Business Object	Select the Siebel object to which this table is related.
Table Name	Select the name of the related table applet.
Field Name	Select the fields to be displayed in this table. If none are selected, all fields appear. The width is interpreted the same way as the parent table section. If the width of the table section is set, the width of the fields is used as percentages instead of pixels.

Adding Components to Proposal Template Sections

Now that you have defined the structure of your document, you must specify the location of the component documents that will probably make up the bulk of your proposal.

For sections that draw on data from a Siebel database (such as Chart and Report), you have specified all the information necessary for Siebel Proposals to generate the appropriate contents. However, the component documents, which you created earlier in Word, are not part of the proposal until you add them to the appropriate sections.

NOTE: Components can be added to any kind of section (not just a File section), and a section can contain multiple components.

This task is a step in [“Process of Creating Proposal Templates” on page 345](#).

To add a component to a proposal template

- 1 Navigate to the Administration - Document screen > Proposal Templates view.
- 2 In the Templates Explorer, in the left frame, click the plus sign (+) next to the template to which you want to add a component.
- 3 Click the plus sign (+) next to the Sections folder.
- 4 Click the plus sign (+) next to the particular section that will include a component.
The Sections, Related Table, and Components folders appear.
- 5 Click the plus sign (+) next to the Components folder.
The Components list appears on the right.
- 6 In the Components list, create a new record.

- 7 In the Add Sales Tools dialog box, select the component you want to add and click Add.
- 8 If your component does not appear in the list, click New and complete the fields as described in the following table.

Field	Comments
Name	Enter a name for the component.
File Name	This field was filled in automatically when you selected a file from the Add Sales Tool dialog box.
Sequence	Specify the order in which this component should appear in the section.
Condition	Enter a condition and this component will be displayed only when the condition is true.

Using Conditions in Proposal Templates

You can add query conditions to a section or a component to specify the conditions under which the section or component will be used in the proposal. For example, if you have two executive summaries—one for deals of over \$100,000 and another for smaller deals—you can use the Condition field in each Executive Summary section to allow Siebel Proposals to insert the appropriate executive summary based on the condition that is true.

These tasks are a step in [“Process of Creating Proposal Templates” on page 345](#).

Entering Criteria

You can enter query criteria in a section or component record’s Condition field (such as [Revenue] > 100000). If the condition is TRUE, the section or component is included. If the condition is FALSE, the section or component is not included.

If you do not specify a condition, the section or component is always used.

You can create conditions for any field that is related to the business object of your proposal; use Opportunity fields for opportunity proposals, and Account fields for account proposals. If the definition of a condition needs to be based on fields from another business object, you must add those fields to the Opportunity, Account, Order, or Quote business object through either a link or a join.

The syntax for conditions is similar to the syntax for Siebel queries.

For more information about the syntax of Siebel queries, see *Fundamentals* and *Siebel Developer’s Reference*.

Examples of Criteria

The following examples illustrate the syntax for conditions:

- If the opportunity is for a Pentium computer, you want to insert a component about the advantages of the new Pentium II chip. In the Condition field for this component, type the following condition:

EXISTS [Product] LIKE "Pentium*"

This condition would look at the products listed for the opportunity. If the product name began with Pentium, Siebel Proposals would insert the component. Otherwise, Siebel Proposals would leave out this component.

NOTE: For you to use a product in a condition, the product must have been entered using the Products view of the Opportunities screen. The condition will not work with products that were entered as Quote line items.

- If the account is located in Georgia, you should enter a section with terms and conditions limited to that state. In the section's Condition field, you enter the following:

EXISTS ([State] = "GA")

or

[State] = "GA"

You use the first line if the account is located only in Georgia, and the second line if the account is located in Georgia and another location.

This condition will look at the state for the account. If the state is Georgia, then the section is included in the proposal. Otherwise, Siebel Proposals skips this section and moves on to the next.

- If the opportunity has a revenue amount greater than \$1,000,000 and it is expected to close this year, you should insert a component on a special program for this type of customer. Enter the following condition in the Condition field for the component:

[Revenue] > 1000000 AND [Close Date] <= ("12/31/2003") AND [Close Date] >= ("1/1/2003")

After you enter a condition, test it as a query in the view you are going to use it in. For example, the above example involving Revenue and Close Date can be tested as a query in the My Opportunities view. If the query returns the data you expect, the query is probably in the correct format for your Condition field.

Defining Proposal Field Mappings

When you created the component documents of your proposal, you probably included bookmarks for personalized fields. You must map the bookmarks in the template's components to Siebel fields.

This mapping tells Siebel Proposals which Siebel field to use for substituting data for a particular bookmark in your proposal template. For example, by mapping the bookmark Company to the Account field, you tell Siebel Proposals to replace each Company bookmark with the value of the Account field.

You cannot map fields to a bookmark in the template's header or footer unless that bookmark is also somewhere else in the content of the template, other than in the footer or header.

Because you may be working with multiple proposal templates, you can have multiple sets of bookmarks. Therefore, you might have one mapping for one proposal template and another mapping for another proposal. Or you might use a single mapping for several proposal templates. In either case, you must specify a mapping name in your template record to associate the template with a specific mapping.

If you map a bookmark to a multi-value field, the primary record of the group is retrieved. If you want to retrieve multiple values from a multi-value field, you can add a Table section to the proposal template. This section type will retrieve multiple values from the multi-value field in table format.

To map the bookmarks in a template's components to fields, you must perform the following tasks:

- Create a mapping
- Associate a template with the mapping

These tasks are a step in [“Process of Creating Proposal Templates” on page 345](#).

NOTE: You may want to base your mappings on the sample mappings that come with Siebel Proposals, which are described in [“Sample Field Mappings” on page 374](#).

Creating a Mapping

To create a field mapping, first create a record for the mapping, and then map the fields.

NOTE: For Siebel Tools objects to be accessible in the Siebel application, the Siebel repository must be updated in the appropriate database.

To create a record for a mapping

- 1 Navigate to the Administration - Document screen > Proposal Field Mappings view.
- 2 In the Business Objects list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Mapping Name	Enter a name for the mapping.
Business Object	Select the business object that contains fields used in the proposal. For example, if you are creating an opportunity proposal, select Opportunity from the Business Objects dialog box.
Description	Enter a description of the mapping for your own use.

- 3 In the Business Objects Explorer, click the plus sign (+) next to the business object for which you just created a mapping.

The Business Components folder for this business object appears.

- 4 Click the plus sign (+) next to this Business Components folder.

The Business Components list for this business object appears.

- 5 In the Business Component list, create a new record and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Business Component	The business components must be related to the business object.
Search Specification	The search specification limits the records returned from the business component. If the search specification is not entered, all records from the business component will be returned.

NOTE: You can associate more than one business component mapping to an object. For example, if you are creating an Opportunity proposal, you select the Opportunity business component. You can also select the TAS Account business component to create mappings for views under the Opportunity TAS view.

Mapping the Fields

Now that you have created a record for the mapping, the next step is to map the fields.

To map the fields

- 1 Navigate to the Business Component that contains the fields to be mapped.
- 2 Click the plus sign (+) next to the Business Component name.
The Business Component Fields folder appears.
- 3 Click the plus sign (+) next to the Business Component Fields folder.
The Business Component Fields list appears.
- 4 In the Business Component Fields list, create a new record and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Bookmark	The bookmark you have added to the Word document.
Business Component Field	The fields contained in the business component.

- 5 Repeat [Step 4](#) for each field that needs to be mapped.
For samples, see [“Sample Field Mappings” on page 374](#).

Associating a Mapping with a Proposal Template

After you have created a mapping, you must associate it with a template to make it apply to all the components in that template. You can associate a mapping with one or more templates.

This task is a step in [“Process of Creating Proposal Templates” on page 345](#).

To associate a mapping with a template

- 1 Navigate to the Administration - Document screen > Proposal Templates view.
- 2 In the Templates list, select the record for the template with which you want to associate the mapping.
- 3 In the Mapping Name field, select the mapping you created earlier.

Creating the Proposal Library

As a proposal administrator, you create and maintain the Proposal Library, which consists of pieces of text that sales representatives can add to their proposals. In the Siebel File System, these pieces of text are components of the File section type.

Documents in the Proposal Library are different from the other components you created earlier, because components are parts of the proposal template, which are automatically included in proposals generated from that template. Documents in the Proposal Library are available to sales representatives only on an as-needed basis. As an administrator, you can also recommend documents to include in the templates.

After sales representatives create a default proposal automatically, they can add more documents from the Proposal Library or use the Edit Layout command to customize the default proposal. The Proposal Library allows multiple proposals created from the same template to have different contents, and it can help sales representatives find answers to specific Request for Proposal (RFP) questions.

As an administrator, you place the various components in the Library and maintain the information. When the sales representatives need additional text to add to a proposal, they review the documents in the Library, select the component they want to insert, and automatically insert it into the proposal.

The sales force cannot update the information in the Library. The only sections and components available to sales representatives are those you provide for them.

To prepare the Proposal Library, you must:

- Create document files for the Proposal Library
- Add sections for the proposal Proposal Library
- Add components to the Proposal Library sections
- Recommend documents to be included in templates

These tasks are a step in [“Process of Creating Proposal Templates” on page 345](#).

Creating Document Files

You create document files for the Proposal Library in the same way that you create the proposal templates themselves. Use Microsoft Word to enter text and bookmarks, and then map these bookmarks to fields in your Siebel database.

NOTE: The only type of section that can be included in the Proposal Library is of the File section type. Other section types (Charts, Reports, and so on) can be included only in the template as described in [“Defining Proposal Template Sections” on page 352](#).

Adding Sections to the Proposal Library

Sections are used to organize documents in the Proposal Library. For example, if some of the documents in the Proposal Library are white papers and others are specifications, you may want to create a section for each of these. Then the users will be able to browse through the white papers and through the specifications separately. You must add at least one section to the Proposal Library. For more information about adding sections, see [“Defining Proposal Template Sections” on page 352](#).

To add sections to the Proposal Library

- 1 Navigate to the Administration - Document screen > Proposal Library view.
- 2 In the Library Explorer, in the left frame, click the plus sign (+) next to the Library folder, if that folder is not already open.
- 3 Click the plus sign (+) next to the Proposal Library.
The Sections folder appears under it.
- 4 Click the plus sign (+) next to the Sections folder.
- 5 Add sections to this folder just as you added sections for the proposal.

Adding Components to the Proposal Library

After adding sections to the Proposal Library, you add components to them.

To add components to the Proposal Library

- 1 Navigate to the Administration - Document screen > Proposal Library view.
- 2 Use the Library Explorer to navigate to the section to which you want to associate a component.
- 3 Add the component to the library just as you would add a component to a proposal.

Recommending Content for a Proposal

As the administrator, you can simplify the process of creating a quick proposal by associating recommended content with the proposal template.

To associate recommended content with a proposal

- 1 Navigate to the Administration - Document screen > Proposal Library view.
- 2 Use the Library Explorer to navigate to the section to which you want to add recommended content.
- 3 Open the selected section folder.
- 4 Click the plus sign (+) next to the Components folder.
- 5 Select a component.
- 6 In the Components record, click the Recommended Templates field.
- 7 Add a Recommended Template to the Component record. You can recommend a component to one template or to many templates. For example, a legal clause might be required in all templates.
- 8 Repeat [Step 5](#), [Step 6](#), and [Step 7](#) for each component that needs recommended content.

NOTE: Recommended contents are displayed when a proposal is edited using the Edit Layout command and the Show Recommended Only check box is selected.

Allowing Users to Display Proposals in HTML Format

By default, proposals are saved only in document format, not in HTML format. The user's View HTML button is unavailable, and the user cannot view the proposals in HTML format.

To allow the user display proposals in HTML format, you must edit the parameter DocumentServerViewHTML to give it the value True instead of False.

NOTE: Users of the Remote Client cannot view proposals in HTML format.

To allow users to display proposals in HTML format

- 1 Start the Server Manager.
- 2 Enter the command:

```
Srvrmgr> change param DocumentServerViewHTML=True for comp DocServer
```

NOTE: While this procedure uses the Server Manager, parameters can also be changed in the Administration - Server Configuration screen. For more information, see *Siebel System Administration Guide*.

Scenario for Generating Proposals (End User)

This scenario provides an example of the business process performed by a sales representative creating proposals for accounts. Your company may follow a different process according to its business requirements.

A software company receives a Request for Proposal (RFP) from a prospect interested in outsourcing part of the information technology department. The sales representative assigned to the RFP selects the opportunity in Siebel Sales, and then creates a new proposal record based on the organization's standard template for proposals.

The sales representative composes a draft of a proposal that meets the requirements of the RFP, adding sections such as a cover letter, executive summary, the proposal body, and sections that outline the company's experience, and references. After conferring with sales team members, the sales representative modifies the proposal, changing the order of some of the sections, and adding other sections from the Proposal Library.

Process of Generating Proposals (End User)

Using proposal templates created by the proposal administrator, sales representatives can create, modify and print proposals for an opportunity, using the Opportunities screen > Proposals view.

A proposal is an offer to sell products or services with specific terms and conditions. A proposal can be long or short, simple or complex. Even a simple proposal consists of several sections such as a cover letter, an executive summary, and a price quotation.

A proposal takes the details you have recorded about an account or opportunity and combines them with a predefined template to create a document tailored to the customer's needs. The template defines the initial formatting and structure of your proposal and can include predefined components, such as text, tables, and diagrams. It can also be set up to include files from the Proposal Library, such as product descriptions and standard terms and conditions. After generating a proposal, you can modify it to meet your customer's requirements.

To generate proposals, perform the following tasks:

- ["Creating a Proposal \(End User\)" on page 367](#) (Required)
- ["Generating a Proposal Draft \(End User\)" on page 367](#) (Required)
- ["Modifying and Adding Content to a Proposal \(End User\)" on page 368](#) (Optional)
- ["Printing a Proposal \(End User\)" on page 372](#) (Optional)
- ["Locking a Proposal \(End User\)" on page 373](#) (Optional)

Creating a Proposal (End User)

Before end users can generate a draft of the proposal, they must create a proposal and associate the proposal with an opportunity or account. The following procedure explains how to create a proposal using the Opportunities screen as an example. The Accounts screen could be used as well.

This task is a step in [“Process of Generating Proposals \(End User\)”](#) on page 366.

To create a proposal

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the proposal.
- 3 Click the Proposals view tab, and in the Proposals list, click Auto Proposal.

Auto Proposal automatically generates a proposal based on a default template or Decision Issue associated with the opportunity.

NOTE: To generate a proposal based on a different template, in the proposal record select a different template from the Template drop-down list.

Generating a Proposal Draft (End User)

After creating a proposal, end users can generate a proposal draft. The draft is a standard word processing document that can be edited if Microsoft Word is installed on the end user's computer.

End users creating a proposal in a Siebel Web Client environment (network connection) should follow [Step 1](#) through [Step 4](#).

End users creating a proposal in a Mobile Web Client environment (remote) who have the Mobile Web Client installed locally should follow [Step 1](#) through [Step 3](#).

This task is a step in [“Process of Generating Proposals \(End User\)”](#) on page 366.

To generate a proposal draft

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the proposal.
- 3 Click the Proposals view tab, and in the Proposals list, select the proposal and click Generate Draft.

In Queue appears in the Status field.

A draft of the proposal is created if you are in Mobile Web Client environment (remote).

- 4 Click Update to generate a proposal from the server if you are working in a Siebel Web Client network environment.

The status of the proposal refreshes when you click Update. Status values include In Progress, Generating, Completed, and Failed.

Modifying and Adding Content to a Proposal (End User)

After creating and viewing a draft of a proposal, end users may decide to change the order of the sections, or add new sections.

The following tasks describe how to view, modify, and add content to the proposal:

- [“Viewing the Structure of a Proposal” on page 368](#)
- [“Adding Content to the Proposal” on page 368](#)
- [“Changing the Order of Sections in a Proposal” on page 369](#)
- [“Adding Components to a Proposal” on page 370](#)
- [“Modifying a Proposal Component” on page 372](#)

These tasks are a step in [“Process of Generating Proposals \(End User\)” on page 366](#).

Viewing the Structure of a Proposal

End users can view the structure of a proposal in the Proposal Table of Contents view, which allows viewing of the hierarchy of sections and components that make up a proposal when it is generated.

Sections are the headings that appear in the proposal. Sections can contain subsections and components. Components consist of the actual written information that appears in the proposal. A component can contain multiple files.

To view the structure of a proposal

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the proposal.
- 3 Click the Proposals view tab, and in the Proposals list, select the proposal and drill down on hyperlink in the Name field.

The Proposal Table of Contents appears, showing the structure of the proposal.

- 4 In the explorer pane, click the plus sign (+) next to each section to expand sections and components.

Adding Content to the Proposal

If an administrator has created optional sections in the Proposals Library, end users can customize the proposal by adding one or more of these sections. The Edit Layout command allows end users to add content to a proposal using the Proposal Library.

To add content from the Proposal Library

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the proposal.
- 3 Click the Proposals view tab, and in the Proposals list, select the proposal and click Edit Layout.
- 4 In the Template Layout dialog box, to display more items in the Content Library list, clear the Show Recommended Only check box.

NOTE: If the Show Recommended Only check box is selected, only those component templates recommended by the administrator are displayed. If this check box is cleared, all available components are displayed. For more information, see [“Sample Proposal Data: Field Mappings and Templates” on page 373](#).

- 5 In the Template Layout dialog box, move items from the Content Library pane to the Table of Contents pane, and then click Save.
- 6 In the Proposals list, drill down on the proposal name to open the Proposal Table of Contents view to see the new content.

Changing the Order of Sections in a Proposal

When end users add a section to a proposal, the sequence numbers are not automatically regenerated. If a section is inserted within the current sequence, each sequence number must be modified. The sequence numbers in the Proposals list determine the order in which sections and components appear. There are two methods that can be used to resequence proposal sections and components:

- Edit Layout.
- Proposal Table of Contents.

To use Edit Layout

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the proposal.
- 3 Click the Proposals view tab, and in the Proposals list, select the proposal and click Edit Layout.
- 4 In the Template Layout dialog box, use the sequencing arrows to change the order of the sections.

NOTE: The Show Recommended Only check box is automatically selected in the Template Layout dialog box only if there are recommended components in the list. Otherwise, the check box is cleared.

To use Proposal Table of Contents

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the proposal.

- 3 Click the Proposals view tab, and in the Proposals list, drill down on the hyperlink in the Name field of the proposal you want to edit.
- 4 In the Proposal Table of Contents explorer, click the plus sign (+) to expand each section.
- 5 In the Sections list, change the number in the Sequence field for each selected section.

To remove sections in a proposal

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the proposal.
- 3 Click the Proposals view tab, and in the Proposals list, drill down on the hyperlink in the Name field of the proposal you want to edit.
- 4 In the Proposal Table of Contents explorer, click the plus sign (+) to expand each section.
- 5 In the Sections list, select the section and click Delete.

NOTE: You can also use the [Edit Layout](#) command to remove content from a proposal. For more information, see ["To use Edit Layout" on page 369](#).

Adding Components to a Proposal

Section components are the boilerplate text that make up a proposal. To add components, components must already be associated with the section. End users can add components to sections from the Proposals Library, from the Siebel Encyclopedia, or from another location, such as a local hard drive. More than one component can be added to a section.

The Proposal Library offers a hierarchy structure that administrators can use when designing literature components that can be associated with a proposal. Using the Proposal Library, end users can navigate to a section or subsection, and then select the component file associated with the section.

To add a component to a proposal

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the proposal.
- 3 Click the Proposals view tab, and in the Proposals list, drill down on the hyperlink in the Name field of the proposal you want to edit.
- 4 In the Proposals Table of Contents explorer, click the plus sign (+) next to show the hierarchy of the proposal you want to change.

The Sections folder appears.

- 5 Click the plus sign (+) to expand the Sections folder.
Each section associated with the proposal appears in the Sections list.
- 6 Click the plus sign (+) to expand the section that will contain the new component.

- 7 In the Sections list, click Library.
The Proposals Library view appears.
- 8 In the Proposals Library Explorer, click the plus sign (+) for Proposals Library.
 - a Click the plus sign (+) next to the Sections folder.
 - b Click the plus sign (+) next to the section where the proposal is located.
 The list of components for that section appears.
- 9 In the Components list, click the plus sign (+) next to the Components folder, select the component in the list, and then click Add Components.
The component file is added to the Components folder located in the section you selected.

To add a Siebel Encyclopedia component

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the proposal.
- 3 Click the Proposals view tab, and in the Proposals list, drill down on the hyperlink in the Name field of the proposal you want to edit.
- 4 In the Proposal Table of Contents explorer, click the plus sign (+) to expand the proposal contents.
 - a Click the plus sign (+) next to the Sections folder to expand the folder.
 - b Click the plus sign (+) next to the section where you want to add a new file from the Encyclopedia.
 - c Click the plus sign (+) next to the Components folder.
- 5 In the Components list, click the menu button, and then choose New Record.
The Add Sales Tools dialog box appears.
- 6 In the Add Sales Tools dialog box, select each record you want to add, and then click Add.
NOTE: Only DOC and TXT files can be added as components directly into a template section.

To add a component from another location

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the proposal.
- 3 Click the Proposals view tab, and in the Proposals list, drill down on the hyperlink in the Name field of the proposal you want to edit.
- 4 In the Proposal Table of Contents explorer, click the plus sign (+) next to the proposal to expand the proposal.
 - a Click the plus sign (+) next to the Sections folder.
 - b Click the plus sign (+) next to the section where you want to add a new file.

- c** Click the plus sign (+) next to the Components folder.
- 5** In the Components list, click the menu button, and then choose New Record.
- 6** In the Add Sales Tools dialog box, click New.
- 7** In the Components form, enter a name and sequence for the file, and then click the select button in the File Name field to attach the file.
- 8** Attach the file using the Add Attachment dialog box.

Modifying a Proposal Component

End users can modify a component file if they have Microsoft Word for Proposals installed locally on their computer. End users must have the same application that was used to create the component.

To modify a component

- 1** Navigate to the Opportunities screen > Opportunities List view.
- 2** Drill down on the opportunity associated with the proposal.
- 3** Click the Proposals view tab, and in the Proposals list, drill down on the hyperlink in the Name field of the proposal you want to edit.
- 4** In the Proposal Table of Contents explorer, click the plus sign (+) next to the proposal.
 - a** Click the plus sign (+) next to the Sections folder.
 - b** Click the plus sign (+) next to the section where you want to add a new file from the Encyclopedia.
 - c** Click the plus sign (+) next to the Components folder.
- 5** In the Components list, select the component, and then drill down on the File Name hyperlink.
- 6** In the File Download dialog box, click Open to begin editing the file. Make any necessary edits and do one of the following:
 - a** Click Save to save the file. If the Local check box is selected for this component, the file will be updated in the Siebel application.
 - b** Click Save As to save the file to your local hard drive and then:
 - ☐ In the Components list, select the component (saved locally), click Edit, and locate the modified component.
 - ☐ Select the modified component, and then add it.

The old component is replaced with the new one.

Printing a Proposal (End User)

After generating a proposal, and the status is Completed, end users can print the proposal to send to the prospective customer.

This task is a step in [“Process of Generating Proposals \(End User\)”](#) on page 366.

To print a proposal

- 1 Navigate to the Opportunities screen, and in the Opportunities list, select the opportunity associated with the proposal you want to print.
- 2 Click the Proposals view tab, and in the Proposals list, drill down on the hyperlink in the Draft Name field of the proposal you want to print.

The proposal opens in Microsoft Word.

- 3 Print the proposal using Microsoft Word.

Locking a Proposal (End User)

Lock allows end users to secure the completed proposal, making the proposal read-only and unable to be edited. Only the proposal author, the author’s manager, and that manager’s manager, and so on, can modify or unlock the proposal.

This task is a step in [“Process of Generating Proposals \(End User\)”](#) on page 366.

To lock the proposal

- 1 Navigate to the Opportunities screen > Opportunities List view.
- 2 Drill down on the opportunity associated with the proposal.
- 3 Click the Proposals view tab, and in the Proposals list, select the proposal.
- 4 In the proposal record, select the check box in the Locked field.

NOTE: If the Locked check box does not appear, click the menu button in the Proposals list, and then choose **Columns Displayed**.

Sample Proposal Data: Field Mappings and Templates

To help you create your first proposal, your Siebel application includes sample data.

Sample Field Mappings

The Administration - Document screen > Proposal Field Mappings view includes two mappings: Opportunity and Account. These mappings list common fields you can use in creating your proposal. Table 78 and Table 79 show these mappings.

Table 78. For Business Object: Opportunity, Business Component: Opportunity

Bookmark	Business Component Field
Company	Account
Address	Street Address
City	City
State	State
ZipCode	Postal Code
Country	Country
Industry	Industry

Table 79. For Business Object: Account, Business Component: Account

Bookmark	Business Component Field
Company	Account
Address	Street Address
City	City
State	State
ZipCode	Postal Code
Country	Country
Industry	Industry
Account Type	Type

Use the Bookmark name in your Word document when you create a bookmark (for example, REF Company) and select this mapping for the Proposal Templates you create. It will match to the Siebel Business Component field (for example, Account) in your proposal draft with that assigned mapping.

Sample Templates

Siebel Business Applications come with a sample database. Both the Opportunities screen > Proposals view and the Accounts screen > Proposals view include several sample proposal templates for Microsoft Word.

These sample proposals can be used as a reference when you define your own proposal template. In this sample database, you will find the following Siebel Proposals sample proposals:

- Standard
- Standard Account
- Strategic
- Quality Strategic Account

The sample templates fall into the following categories:

- Standard: Oppty Ppsl
- Standard Account: Acct Ppsl
- Strategic: Oppty Ppsl
- Opportunity Account Plan: Oppty Ppsl
- Quality Strategic Account: Acct Ppsl

Seed Templates

Customers using the Target Account Selling Module (TAS) can run an Opportunity Plan report in Microsoft Word using the TAS Opportunity Plan template. This proposal template is available in the seed database. For more information on setting up the TAS Opportunity Plan template, see the *Upgrade Guide* for the operating system you are using.

26 Fulfillment Centers

This chapter is about setting up and using fulfillment centers to print and distribute documents generated through Siebel Correspondence or Siebel Proposals. It includes the following topics:

- [“About Fulfillment Centers” on page 377](#)
- [“Process of Setting Up and Using Fulfillment Centers” on page 377](#)
- [“Adding Fulfillment Center Records” on page 378](#)
- [“Giving the Fulfillment Center Access to Siebel Correspondence and Siebel Proposals” on page 378](#)
- [“Sending Correspondence to a Fulfillment Center” on page 379](#)
- [“Monitoring Fulfillment Requests” on page 379](#)
- [“Recalling Submitted Correspondence” on page 380](#)

About Fulfillment Centers

When your users have completed correspondence and want to send it to the recipient, either they can print out and mail the letter themselves, or they can direct their correspondence to a fulfillment center that prints and mails it for them. A fulfillment center might be a division of your company, such as your marketing department.

You might want to use a fulfillment center for several reasons:

- To allow your users to produce correspondence in any location where they can access the Internet, even if they do not have a printer.
- To save your users time, since they do not have to print out and mail their correspondence.
- To create consistency in your company's outgoing correspondence.
- To allow one location to fulfill all requests for collateral and literature materials included with correspondence as enclosures.

If you have set up fulfillment centers, the user can generate correspondence and then click Submit to submit the correspondence for fulfillment. When the user clicks Submit, the Status Field of the correspondence request changes to Submitted, and the request becomes read-only. You cannot make any further changes in it without using the Recall command.

Process of Setting Up and Using Fulfillment Centers

To set up and use a fulfillment center, perform the following tasks:

- [“Adding Fulfillment Center Records” on page 378](#)

- [“Giving the Fulfillment Center Access to Siebel Correspondence and Siebel Proposals” on page 378](#)
- [“Sending Correspondence to a Fulfillment Center” on page 379](#)
- [“Monitoring Fulfillment Requests” on page 379](#)
- [“Recalling Submitted Correspondence” on page 380](#)

Adding Fulfillment Center Records

You must create one or more fulfillment center records, so users can select a fulfillment center when they create a correspondence request.

This task is a step in [“Process of Setting Up and Using Fulfillment Centers” on page 377](#).

To add a fulfillment center

- 1 Navigate to the Administration - Data screen > Fulfillment Centers view.
- 2 In the Fulfillment Centers list, create a new record and complete the fields. Some fields are described in the following table.

Field	Comments
Name	Enter the name of the fulfillment center.
Main Phone #	Enter the telephone number of the fulfillment center.
Main Fax #	Enter the fax number of the fulfillment center.
Fulfillment Team	Use the Fulfillment Team dialog box to select one or more employees at the fulfillment center. If necessary, click New to add employees to this dialog box. After you have selected the employees, click Close. These people will be able to view correspondence submitted to this fulfillment center. If there is no one on a fulfillment team, no one will be able to see correspondence submitted to this fulfillment center.
Description	Enter a description of the fulfillment center.

Giving the Fulfillment Center Access to Siebel Correspondence and Siebel Proposals

The fulfillment team at the fulfillment center must monitor pending fulfillment requests. Everything submitted by a requestor is visible to the fulfillment team in the Fulfillment screen.

Fulfillment center employees fulfill the request by viewing and printing the correspondence request and including the enclosures listed. The fulfillment center employees may either print the enclosure, or get an already-printed copy (if the enclosure is a glossy brochure, for instance).

If you have licensed Siebel Workflow, you can create a workflow to send email to the fulfillment center automatically whenever there is a new request for it to fulfill.

This task is a step in [“Process of Setting Up and Using Fulfillment Centers” on page 377](#).

To give the fulfillment center access to Siebel Correspondence

- 1 Set up fulfillment center employees as Siebel Correspondence users, in the same way that you set up your own employees or your channel partners as Siebel Correspondence users. For more information about setting up users of Siebel applications, see *Security Guide for Siebel eBusiness Applications*.
- 2 Give fulfillment center employees a responsibility that lets them see the Fulfillment screen. Use the responsibility in the seed data named Fulfillment Center Employee. For more information about responsibilities, see [Chapter 3, “Initial Setup.”](#)
- 3 Tell fulfillment center employees what URL they should use to view correspondence through the Internet.

Sending Correspondence to a Fulfillment Center

When the fulfillment center has access to Siebel Correspondence, you can submit fulfillment requests from the Correspondence list.

This task is a step in [“Process of Setting Up and Using Fulfillment Centers” on page 377](#).

To send correspondence to a fulfillment center

- 1 Navigate to the Correspondence screen > My Correspondence Requests view.
- 2 In the Correspondence list, select the correspondence that you want to submit to your fulfillment organization.
- 3 Select the appropriate fulfillment center from the correspondence record’s Fulfillment Center drop-down list.
- 4 Click Submit.

The Document Status changes to In Queue.

Monitoring Fulfillment Requests

When you submit correspondence to a fulfillment center, the status of the correspondence is set to Submitted. When your correspondence request is fulfilled, the fulfillment center updates the status to Completed, which associates an activity with each recipient (contact). You can monitor the status to determine the date and time that your correspondence was sent and time your follow-up calls and sales visits accordingly.

This task is a step in [“Process of Setting Up and Using Fulfillment Centers” on page 377](#).

To monitor fulfillment requests

- 1 Navigate to the Correspondence screen > My Correspondence Requests view.
- 2 In the Correspondence list, select the correspondence record, and then verify that Completed appears in the Status field.

Similarly, a fulfillment center manager monitors the status of pending requests by looking at the entry in the Status column of records in the Fulfillment screen.

Recalling Submitted Correspondence

You can recall correspondence records that you have submitted, as long as the correspondence records have not been fulfilled. You can recall correspondence to modify it and resubmit it for fulfillment.

This task is a step in [“Process of Setting Up and Using Fulfillment Centers” on page 377](#).

To recall correspondence

- 1 Navigate to the Correspondence screen > My Correspondence Requests view.
- 2 In the Correspondence list, select the correspondence you want to recall.
- 3 Click the menu button, and then click Recall.

The Status field value reverts from Submitted to In Progress.

27 Batch Printing

This chapter is about setting up and using batch printing for documents generated by the Document Server (Correspondence, Proposals, and Presentations). It includes the following topics:

- [“About Batch Printing” on page 381](#)
- [“Setting Up Batch Printing for Administrators and Users” on page 382](#)
- [“Batch Printing Instructions for Administrators” on page 382](#)
- [“Configuring Printers for Server-Based Batch Printing” on page 383](#)
- [“Batch Printing Instructions for End Users” on page 384](#)

About Batch Printing

Batch printing simplifies the task of printing multiple correspondence items. The user first selects one or more correspondence items, and then selects the Print option from the menu button. The documents are then printed on the appropriate printer.

Siebel applications support two types of batch printing, server-based and client based. Initially, the print menu item appearing in the Correspondence and Fulfillment screens is configured to perform client-based batch printing. However, the administrator can use Siebel Tools to reconfigure these menus to use server-based batch printing, either in addition to, or instead of, client-based batch printing.

Client-Based Batch Printing

When a user prints a document using client-based batch printing, the Siebel application launches Microsoft Word on the user’s client system. It then retrieves the document from the Siebel File System and prints it to the default printer configured for the user’s desktop session.

For this feature to work correctly, the end user must configure the browser to allow the Siebel application to launch Microsoft Word. This requires changing the security option called “Initialize and script ActiveX controls not marked safe” to either *Enable* or *Prompt* for the security zone containing the Siebel application URL. Typically, this is either the “Local intranet” zone or the “Trusted” zone. Users should verify that any other URL in this zone can be trusted with this security privilege.

Server-Based Batch Printing

When a user prints a document using server-based batch printing, a request is sent to the DocServer server component. This component then prints the document to the printer specified by the user in User Preferences. If the user has not specified a preference, the document is printed on the default printer configured on the Document Server machine by the system administrator.

Setting Up Batch Printing for Administrators and Users

Table 80 lists procedures for setting up batch printing for both administrators and end users. Administrators need to set up server-based batch printing; end users need to set up both server-based and client-based batch printing.

Table 80. Procedures for Setting Up Batch Printing

Setup Procedures for Administrators	Setup Procedures for End Users
Add server Print menu items to the Correspondence and Fulfillment screens.	Verify system requirements for client-based batch printing.
Set up the printer configuration.	Configure Internet Explorer to permit client-based batch printing.
Add a printer connection to the Document Server machine.	Add a printer connection to the desktop for client-based batch printing.
Change the default printer (if necessary).	Change the default printer (if necessary).
	Specify a printer for server-based batch printing.

Batch Printing Instructions for Administrators

As an administrator, you need to set up the server-based batch printing function.

To add server Print menu items to the Correspondence and Fulfillment screens

- 1 Start Siebel Tools.
- 2 In the Object Explorer window, under Siebel Objects, select Applet.
- 3 In the Applets window on the right, enter “Correspondence List Applet” in the Name column and click Query.
- 4 In the Object Explorer, select Applet Method Menu Item.
- 5 In the Applet Method Menu Item window, enter “Server Printer” in the Menu Text column and click Query.
- 6 Highlight the record and clear the Inactive check box in the Inactive column.
- 7 In the Applet Method Menu Item window, enter Server Print Label in the Menu Text column and click Query.
- 8 Highlight the record, and clear the Inactive check box in the Inactive column.
- 9 In the Application menu, click Tools and select Compile Projects, and then in the Project Selection window, pick project Corresp (SSE).

- 10 Browse and select the appropriate siebel.srf file, and click Compile.
- 11 Repeat [Step 3](#) to [Step 10](#) for the Fulfillment screen, querying for Fulfillment List Applet in the Applet window.
- 12 Verify that Server Printer and Server Print Label menu items appear in the applet menus of the Correspondence and Fulfillment screens.

Configuring Printers for Server-Based Batch Printing

When a user invokes server-based batch printing on a correspondence document, a request is sent to the DocServer component. This request contains the values for the Default Printer and Printer Driver preferences the user has selected in the Siebel Correspondence User Preferences screen. After receiving the request, Document Server uses Microsoft Word to convert the document into a PostScript file. The style of PostScript generated is determined by the value for the Printer Driver user preference. This parameter specifies the name of a network printer. The PostScript file generated by Microsoft Word is suitable for this printer and all other printers of the same model. After the PostScript file is generated, Document Server sends the file to the printer specified in the Default Printer user preference.

As an administrator, you need to complete the following tasks to support server-based batch printing.

- 1 Identify the printer models within your enterprise that will be used for server-based batch printing.
- 2 For each model, select one network printer and add a printer connection to it on the Document Server machine.
- 3 Designate one configured printer as the default printer for the Document Server machine.
- 4 Provide the list of configured printers to end users, who will use this list to select a Printer Driver in User Preferences.

For example, an organization has five Xerox Model A printers, named xrx001 to xrx005, and five Canon Model B printers, named cnn001 to cnn005. A printer server named hqsrvr is used to route requests to all of the printers. The administrator decides to use xrx005 to represent the Xerox Model A printers and cnn005 to represent the Canon Model B printers, then adds printer connections on the Document Server machine for each. The xrx005 printer is chosen as the default printer. These connections are used by the DocServer component to generate PostScript files. Only one printer for each model is actually configured on the Document Server machine. After creating the printer connections, the administrator notifies the end users of the network names of the configured printers (in this case: \\hqsrvr\xrx005 and \\hqsrvr\cnn005).

Continuing the example, a user now wants to use the cnn003 printer for personal batch printing requests. To do this, the user navigates to the User Preferences screen > Correspondence View and enters \\hqsrvr\cnn003 in the Default Printer field and \\hqsrvr\cnn005 in the Printer Driver field. All subsequent batch printing requests the user submits are sent to the cnn003 printer.

NOTE: If a user does not specify a default printer in the User Preferences screen > Correspondence view, then batch printing requests (submitted by that user) are sent to the Document Server's default printer. In this case, printing is directly through Microsoft Word; no intermediate PostScript file is created.

To add a printer connection to the Document Server machine

- 1** Login to the Document Server machine using the same User ID used by the Windows Service running the Siebel Server.
- 2** Select Start > Settings > Printers.
- 3** Double-click the Add Printer icon.
- 4** On the Welcome screen, click Next.
- 5** On the Local or Network Printer screen, select Network Printer and click Next.
- 6** On the Locate Your Printer screen, select Network Printer and click Next.
- 7** On the Default Printer screen, select either Yes or No and click Next.
- 8** Click Finish.

To change the default printer

- 1** Login to the Document Server machine using the same User ID used by the Windows Service running the Siebel Server.
- 2** Navigate to Start > Settings > Printers.
- 3** In the printer list, right-click the desired printer and choose Set as Default.

Batch Printing Instructions for End Users

To batch print, end users select correspondence items in the Correspondence screen list, click the menu button, and then click Print. The Print menu item is only active if the selected correspondence record has a value of Completed in the Document Status field.

The Print menu item in the Correspondence and Fulfillment screens is configured for client-based printing. However, administrators can configure server-based printing in addition to (or instead of) client-based printing.

Check with the system administrator to determine which print method is available.

Preparing for Client-Based Batch Printing

To prepare for client-based batch printing, complete the following tasks:

- ["To configure Internet Explorer to allow client-based batch printing" on page 385](#)
- ["To add a printer connection to your desktop" on page 385](#)
- ["To change the default printer" on page 386](#)
- ["To print documents using client-based printing" on page 386](#)

When you use client-based batch printing, the Siebel application launches Microsoft Word on your client system. The application retrieves the document from the Siebel File System and prints it to the default printer configured for your desktop session. Before using client-based batch printing, verify that the following prerequisites have been completed:

- Install Microsoft Word on the client system.
- Configure Internet Explorer to start Microsoft Word.
- Configure the default printer for your desktop system.

NOTE: The options in the following procedures may vary depending on which version of Microsoft Office you are running.

To configure Internet Explorer to allow client-based batch printing

- 1 Start Internet Explorer and log in to the Siebel Sales application.
- 2 In Internet Explorer, select Tools > Internet Options.
- 3 Select the Security tab, and click Custom Level.

The security zone used by Siebel is highlighted (either Local intranet, or Trusted). Verify that any other URL in this zone can be trusted with extra security privileges.

- 4 In the Security Settings dialog box, locate the following option:
Initialize and script ActiveX controls not marked safe
- 5 Change the option setting to either Enable or Prompt, and click OK.
- 6 Click Yes to answer the question, Are you sure you want to change the security for this zone?
- 7 In the Internet Options dialog box, click OK.

To add a printer connection to your desktop

- 1 Select Start > Settings > Printers.
- 2 Double-click the Add Printer icon.
- 3 Click Next in the Welcome screen.
- 4 In the Local or Network Printer screen, select network printer, and then click Next.
- 5 In the Locate Your Printer screen, select Type the Printer Name.
- 6 Enter the network name of the printer, or click Browse and select the printer, and then click Next.

- 7 In the Default Printer screen, choose either Yes or No, and then click Next.
- 8 In the Completing the Add Printer Wizard screen, click Finish.

To change the default printer

- 1 Select Start > Settings > Printers.
The current default printer is marked with a check mark.
- 2 Select a new default printer by right-clicking the desired printer and choosing Set as Default.

To print documents using client-based printing

- 1 Close files that are open in Microsoft Word.
- 2 Navigate to either the Correspondence screen or Fulfillment screen.
- 3 In the Correspondence list, select one or more records.
Each selected correspondence record must have a Document Status of Completed.
- 4 In the Correspondence list, click the menu button, and then click Print.
The selected documents are printed to the default printer.

Preparing for Server-Based Batch Printing

To prepare for server-based batch printing, complete the following tasks:

- ["To specify a printer for server-based batch printing" on page 386](#)
- ["To print documents using server-based printing" on page 387](#)

Server-based batch printing sends a printing request to the Siebel Document Server. The document is then sent to the printer specified in User Preferences. If you do not specify a printer, the document is printed on the default printer configured by the system administrator.

To specify a printer for server-based batch printing

- 1 Navigate to the User Preferences screen > Correspondence view.
- 2 In the Default Printer field, enter the network name of the printer used for Correspondence.
The network name should contain both the printer server name and the printer name as shown in the following example.
`\\printer_server_name\printer_name`
- 3 In the Printer Driver field, enter the name of the printer driver used to generate an intermediate file during the printing process, and then click Save.
The system administrator should provide you with a list of printer drivers and their associated printer types. Select the Printer Driver associated with the printer you previously specified in [Step 2](#).

To print documents using server-based printing

- 1** Navigate to either the Correspondence screen or Fulfillment screen.
- 2** Select one or more records in the Correspondence list.
Selected correspondence must have a Document Status of Completed.
- 3** In the Correspondence list, click the menu button and then click Print.
The selected documents are printed to the default printer specified in User Preferences.

28 Literature

This chapter describes the use of Literature in the Siebel application. It includes the following topics:

- "About Siebel Literature" on page 389
- "About Setting Up Literature Files" on page 390
- "Creating and Modifying Literature Files" on page 390
- "Creating Literature Records" on page 391
- "Creating Translation Records" on page 393
- "Creating Literature Item Kits" on page 394
- "About Making Literature Visible to Users" on page 395
- "Sharing Literature Through the Products Screen" on page 396
- "Sharing Literature Through the Competitors Screen" on page 396
- "Sharing Literature Through the Decision Issues Screen" on page 397
- "Sharing Literature Through the Correspondence Screen" on page 398
- "Sharing Literature Through eBriefings" on page 398
- "Sharing Literature Through Literature or Infocenter" on page 399

About Siebel Literature

Siebel Literature allows you to give your users access to sales and marketing literature, such as product brochures, white papers, data sheets, and other types of literature items. Users view these documents using the application that created them, for example, Microsoft Word, Lotus Word Pro, or Adobe Acrobat.

Literature items may also be grouped into literature kits. Literature kits may include items not normally thought of as literature, such as promotional hats, coffee mugs, or T-Shirts. These kits may then be made available for distribution through fulfillment centers. Literature kits are covered later in this chapter. Fulfillment is covered in [Chapter 23, "Correspondence."](#)

After you create literature records and associate documents with them, your employees can use literature in several ways:

- Employees can use the Literature or Infocenter screen to search through all the literature that is available to them.
- You can associate literature with business objects such as products or decision issues. Then users can display the literature when they are looking at the record for the associated business object. For example, the user can navigate to the Product screen, select a product, and click the Product Literature view tab to find all literature items associated with that product.

- When your employees use the Correspondence screen to create correspondence, they can include literature as enclosures. The user or fulfillment center may print out this literature document, or it may use preprinted copies of literature such as glossy brochures. It may also enclose promotional items that are parts of literature kits.
- Employees can track literature associated with products, industries, accounts and competitors so that they appear on your Briefing pages.

About Setting Up Literature Files

To set up a literature file, you must

- Create the document in another program
- Create a Literature record that includes the document in your Siebel application

NOTE: You may want to create a literature record without associating a document with it. For example, if the record represents an item such as a hat or cup, which is part of a literature kit, you need not associate a document with it.

Creating and Modifying Literature Files

Literature files can be created or saved using many kinds of software. The following file types are among the most common:

- Adobe Acrobat (PDF)
- Excel (XLS)
- Word (DOC)
- PowerPoint (PPT)
- Bitmap (BMP)
- JPEG (JPG)

To create a new literature file

- 1 Create a literature file in the appropriate software application.
- 2 Save the file on your hard drive.

To modify an existing literature file

- 1 Navigate to the Administration - Document screen > Literature view.
- 2 Click the literature file that you want to modify.

Information about the file is displayed in the More Info form. You can use this form to change existing comments or characteristics; for example, Distribution Method.

The actual literature file opens in the type of tool that was used to create it; for example, Word.

- 3 Modify the file, and save it locally.
- 4 Upload the modified file to the existing Literature record.

Creating Literature Records

After you have created a literature file, you need to create a literature record in the Siebel database, in order to make the file available to Siebel applications users.

To create a literature record

- 1 Navigate to the Administration - Document screen > Literature view.
- 2 In the Literature list, create a new record and attach the literature file.
The new file is added to the available literature. Appropriate information is displayed in the Literature list and the More Info form.
- 3 Enter the rest of the information required in the Literature list blank row and the More Info form of the new record.

Some fields are described in the following table.

Field	Comments
Name	Enter a name for the literature record.
Description	Enter a description of the document. Because literature items can be in any language, you may want to indicate the language of the item in this field (or in the Name field).
Literature Type	Select the type of the literature. You can create new literature types in the List of Values Administration view. Because the Literature Type field is used to filter literature items in various applets (by setting the Search Specification property for the applet in Siebel Tools), you should be careful when editing the Literature Type field.
Size	The size of the literature file. The information is automatically entered based on the size of the file that you select.
File Type	The file type of the literature file, for example DOC or PDF. The information is automatically entered based on the type of the file that you select.
Modified	The date that the literature file was last modified. The information is automatically updated whenever the file is updated.
Update File	A check mark in this field indicates that users' copies of the literature are updated automatically each time the original file is updated.
File Name	Click Browse and, in the Choose File dialog box, select the document file. You can also enter the file name manually.

Field	Comments
Synopsis	Optionally, enter a synopsis of the document's content.
Release Date	The release date when the document is first displayed in My Briefings. For more information about eBriefings, see <i>Siebel eBriefings Administration Guide</i> .
Expiration Date	The expiration date when the document will no longer be displayed in My Briefings. For more information about eBriefings, see <i>Siebel eBriefings Administration Guide</i> .
Author	Optionally, click the select button and select the document's author.
Accounts	Select accounts with which the literature is associated. The literature is displayed in the Account Briefing if this account is tracked by the user. For more information, see <i>Siebel eBriefings Administration Guide</i> .
Competitors	<p>Select competitors with which the literature is associated. Use this field to allow the user to display the literature using the Competitors screen.</p> <p>If you also select the Internal field, this literature is displayed in the Comparative Literature view of the Competitors screen. If you do not select the Internal field, this literature is displayed in the Competitor's Literature view of the Competitors screen.</p> <p>The literature is also displayed in a Competitor Briefing, if this competitor is tracked by the user. For more information, see <i>Siebel eBriefings Administration Guide</i>.</p>
Internal	<p>Select this field if the document is internally sensitive and not intended for public distribution.</p> <p>If Internal is selected, the literature is not available as an enclosure in the Correspondence screen, and it is displayed in the Comparative Literature list of the Competitors screen.</p> <p>If Internal is not selected, the literature is available as an enclosure in the Correspondence screen, and it is displayed in the Competitive Literature list of the Competitors screen.</p>
Local	For users of the Remote Client, this field specifies whether the document is available on the local File System. If a document is not available locally, the user can request it by selecting the Request field.
Request	For users of the Remote Client, if this check box is selected, the literature is downloaded during each synchronization session.

Field	Comments
Distribution Method	<p>Use this drop-down list to specify whether or not the file is automatically downloaded to users of the Remote Client.</p> <p>Publish: During each synchronization session, if your user does nothing, the file is downloaded automatically. If your user explicitly skips the file, the file is not downloaded in that synchronization session.</p> <p>By Request: During synchronization, the user receives the record, but not the actual file. To receive the file, the user must select the Request field.</p>
Industries	Select any industries associated with the literature. The literature is displayed in My Briefing if the user tracks the industry.
Products	Select any products associated with the literature. Use this field to allow the user to display the literature using the Products screen. The literature is displayed in My Briefing if the user tracks the product.
Organization	Select organizations that will have visibility to this data.
Web Display	<p>If you are linking to a Web page, use this field to determine how to display it.</p> <p>Frame. Displays a link to the Web page. When the user clicks the link, the page appears in the current frame.</p> <p>Window. Displays a link to the Web page. When the user clicks the link, the page appears in an expanded window. The user must use the Web browser's Back button to return to Siebel ERM.</p> <p>New Window. Displays a link to the Web page. When the user clicks the link, the page is displayed in a new browser window, allowing the user to switch between Siebel ERM and the Web page.</p> <p>In-Line. Displays the entire Web page in the selected section of the portal page.</p> <p>Displaying Web pages in-line works best with simple Web pages. Large or complex pages, such as those that use JavaScript, can slow down the system and cause unexpected results. Be sure to test in-line pages before distributing them to users.</p>

Creating Translation Records

Translated literature files can be created using any of the previously listed software tools. (See [“Creating and Modifying Literature Files” on page 390.](#)) You can create a record in the Siebel application for any translated file associated with your document.

To associate a translated document with a literature record

- 1 Navigate to the Administration - Document screen > Literature view.
- 2 In the Literature list, select an existing record.
- 3 Click the Translations view tab.
- 4 In the Translation list, create a new record and attach the translated document.

Make sure that the file name clearly indicates that this is the translated file.

Creating Literature Item Kits

After you have created more than one literature file, you can combine individual files and other material to create literature item kits. This feature allows you to combine individual literature items into groups, so you can work with the group instead of with the individual files. Literature item kits are used only as enclosures in correspondence.

For instance, you might have a set of literature items for prospective customers, including promotional brochures for your most popular products. You might also include items that are not documents: for example, a promotional kit for one of your products might include a brochure, a specifications sheet, a coffee cup, and a T-shirt.

Creating a literature item kit makes it easier to send this information out. When the user adds an attachment to correspondence, the user only has to select one literature item kit instead of all the individual items. Then the fulfillment center can mail all the items with the correspondence.

When you create a literature item kit, you create a Literature record that represents the entire kit, and you associate Literature Item records with it that represent the items in the kit. The fulfillment center can view the Literature record, but cannot view the Literature Item records. To let the fulfillment center know which items make up the kit, you can:

- **Pack kits together at the fulfillment center.** For example, you have a kit named Sales Promo that includes a brochure and a hat. The brochure and hat might be shrink wrapped together at the fulfillment center or they might be stored in one bin at the fulfillment center, so the fulfillment center can select one of each item in the bin. Then, when the fulfillment center sees that they must fulfill the Sales Promo literature record, they would mail out this shrink-wrapped package or the items from this bin.
- **Make the Literature record a bill of materials.** You can include a document in the Literature record that describes all the Literature Items in the kit, or use the Literature records Description or Synopsis field to list all the Literature Items in the kit. For example, if the kit consists of a sales brochure and a hat, you would create a Literature record that represents the entire kit, you would attach two Literature Item records to it that represent the brochure and the hat, and you might also use the description field of the Literature record to say the kit includes a brochure and a hat. Then the fulfillment center would read the description field and mail out the items listed.

To create a literature item kit

- 1 Navigate to the Administration - Document screen > Literature view.

- 2 In the Literature list, create a new record or select an existing record.

This record represents the literature item kit, so you should give it a name that indicates the kit contents.

- 3 Click the Literature Items tab.

The fields previously displayed in More Info are shown under the Literature list at the top. The fields in the Literature Items list, in the middle of the view, display specific item information. The Component Items list appears at the bottom of the view.

- 4 In the Literature Items list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Primary	Indicates whether this is the primary item in the kit.
Physical Form	A description of the item's physical form. This field supports multiple values to allow for multiple physical forms. For a document, you might choose 8 1/2 x 11 and Microfiche.
# of Pages	The number of pages in the document, if applicable.
In Stock	Select the check box to specify whether the item is in stock, if applicable.
Part #	The item's part number, if applicable.

- 5 In the Component Items list, create a new record.
- 6 Select the record to be added and click Add.
- 7 In the Component Items list, create any other new records that are needed to create the kit.

About Making Literature Visible to Users

You can make literature visible to users in the following ways:

- **The Products Screen.** You can associate literature with a product, and the user can display it using the Products screen.
- **The Competitors Screen.** You can associate literature with a competitor, and the user can display it using the Competitors screen.
- **The Decision Issues Screen.** You can associate literature with a decision issue, and the user can display it using the Decision Issues screen.
- **The Correspondence Screen.** You can deselect the Internal field of a literature record and the user can select it as an enclosure in correspondence.
- **eBriefings.** You can associate literature with an account competitor, product, or industry. Literature is displayed in the Account Briefing, Competitor Briefing, or My Briefing page as a hyperlink.

- **The Literature Screen or Infocenter.** You can make literature visible to users, so it is included in the list of literature that they display in the Literature or Infocenter screen.

Sharing Literature Through the Products Screen

End users who are salespeople find it useful to view literature about your products when they are viewing other information about the products. If you associate literature with a product, end users can view this literature when they view the product record in the Products screen.

To share literature through the Products screen

- 1 Navigate to the Administration - Document screen > Literature view.
- 2 In the Literature list, select a literature record or create a new literature record.
- 3 In the More Info form, click the select button in the Products field.
- 4 In the dialog box, select a Product and Part # to be associated with the literature record, and then click OK.

If no Products were previously associated with the literature record, you can use the Associated Products dialog to set up a new association.

Sharing Literature Through the Competitors Screen

Salespeople find it useful to view their competitors' literature or to view literature that your company has prepared that compares your products with your competitors. If you associate literature with a competitor, end users can view this literature when they view the competitor record in the Competitors screen.

To share literature through the Competitors screen, you must associate it with a competitor. You must also decide whether to select the Internal flag, which determines whether it is displayed in the Comparative Literature List or the Competitive Literature list of the Competitors screen:

- If you select the Internal flag, the literature appears in the Comparative Literature list, and it is not available as an enclosure in the Correspondence screen.
- If you do not select the Internal flag, the literature appears in the Competitive Literature list, and it is available as an enclosure in the Correspondence screen.

Whether you select Internal depends on what type of literature it is:

- **Competitors' literature.** Your salespeople may want to use literature produced by competitors, such as sales brochures, to help them compare your products with what the competition is offering. However, you would not want to distribute this literature outside your company. You should select Internal, so the literature is not available in the Enclosures list of the Correspondence screen, but it appears in the Comparative Literature in the Competitors screen.

- **Comparative literature for internal use.** You may develop comparative literature internally, such as competitive intelligence, that is meant for use by your salespeople and that you do not want to distribute outside your company. You should select Internal, so the literature is not available in the Enclosures list of the Correspondence screen, but it appears in Comparative Literature in the Competitors screen.
- **Comparative literature for external use.** You may develop comparative literature internally that is aimed at your customers, or you may have third party comparative reports that you want to distribute to your customers. You should not select Internal, so the literature is available in the Enclosures list of the Correspondence screen, and it also appears in Competitive Literature in the Competitors screen.

To share literature through the Competitors screen

- 1 Navigate to the Administration - Document screen > Literature view.
- 2 In the Literature list, select a literature record or create a new literature record.
- 3 In the More Info form, click the select button in the Competitors field.
- 4 If the competitors that you want to list appear in the dialog box, select the competitors, and then click Close.
- 5 If the specific competitors are not listed in the dialog box, click New.
The Competitors dialog box changes, now listing all possible competitors. You can use the Find button to locate a specific company.
- 6 In the Competitors dialog box, select the competitors and click OK.
When users display this competitor record in the Competitors screen, they are able to display the literature in Comparative Literature list if you selected Internal or in the Competitive Literature list if you did not select Internal.

Sharing Literature Through the Decision Issues Screen

End users who are salespeople find it useful to view literature about a decision issue when they are viewing other information about the decision issue. If you associate literature with a decision issue, end users can view this literature when they view the decision issue.

To share literature through the Decision Issues screen

- 1 Navigate to the Administration - Data screen > Decision Issues view.
- 2 In the Decision Issues list, select the decision issue that you want to associate the literature with.
The More Info list shows information about the issue. Existing literature records are listed under the Literature tab.
- 3 In the Literature list, create a new record.

- 4 Select the literature item that you want to associate with the decision issue, and click OK.

The Literature list shows the selected literature item.

Sharing Literature Through the Correspondence Screen

End users may want to use literature as enclosures in correspondence. They may also use literature records that represent literature item kits as enclosures in correspondence.

Literature is available to users in the correspondence screen if the Internal field of the Literature record is not selected.

To share literature through the Correspondence screen

- 1 Navigate to the Administration - Document screen > Literature view.
- 2 In the Literature list, select a literature record or create a new literature record.

Make sure the Internal field of this record is not selected.

When users create correspondence, they are able to add this literature as an enclosure.

Sharing Literature Through eBriefings

Siebel eBriefings are personalized pages that combine information from the Siebel database, such as links with a user's new opportunities or new service requests, with background information about businesses the user works with. The user can choose which customer accounts and competitors to track, and information about those businesses appear in the Account Briefing and Competitor Briefing view of that user's eBriefings screen. You can include links to literature about the account or competitor.

To share literature through eBriefings, you can associate it with Accounts, Competitors, Industries, or Products.

For more information about Briefings, see *Siebel eBriefings Administration Guide*.

To share literature through eBriefings

- 1 Navigate to the Administration - Document screen > Literature view.
- 2 In the Literature list, select a literature record or create a new literature record.
- 3 If you want to display the literature in Account Briefings, in the More Info Accounts field, select the accounts with which the literature is associated. The end users who are tracking that account see the literature item in the Account Briefing.
- 4 If you want to display the literature in Competitor Briefings, in the More Info form's Accounts field, select the competitors with which the literature is associated. End users must track that competitor for it to appear in Competitor Briefing.

- 5 In the Release Date field, enter the first date when the literature will appear in briefings. Literature associated with products or industries appears in My Briefing if the end user tracks those products and industries.
- 6 In the Expiration Date field, enter the last date that you want the literature to appear in briefings.

Sharing Literature Through Literature or Infocenter

Your end users may work with literature by displaying the Literature screen or Infocenter screen and searching the Literature list in that screen for the piece of literature they need.

You generally share literature with users by associating the user with access groups and associating literature with categories. Before you can do this, you must create categories that include literature, create access groups that include end users, and associate the categories with the access groups. For more information, see *Security Guide for Siebel eBusiness Applications*.

After you have completed this preliminary work, you can assign literature to end users as follows:

- When you produce new literature, associate it with the appropriate category and it is visible to all end users in access groups associated with that category.
- When you hire new employees, associate them to with the appropriate access group and so that they have visibility to all the literature in categories associated with that category.

A business manager who administers literature makes it visible to users by associating it with the appropriate category in either the Literature Administration screen or the Catalog Administration screen. After it is assigned in either of these ways, users in access groups associated with this category are able to display it in the Literature screen.

To associate literature with a category using the Literature Administration screen

- 1 Navigate to the Administration - Document screen > Literature view.
 - 2 In the Literature list, select the record for the literature you want to associate with a category.
 - 3 In the Category form, create a new record.
 - 4 In the dialog box, select the item to be associated with the category, and then click OK.
- The literature is associated with the category.

To associate literature with a category using the Catalog Administration screen

- 1 Navigate to the Administration - Catalog screen > Catalog Administration view.
- 2 In the Catalogs list, drill down on the Name of the catalog to be associated with the literature.
A Categories list appears.
- 3 Click the Literature view tab.
- 4 In the Literature list, create a new record.

- 5 In the dialog box, enter identifying information about the literature (for example, the document Name), and then click Go.
- 6 When the dialog box reappears listing the needed literature, select the literature item and click OK.

The literature is associated with the category.

29 Global Target List Management

This chapter is about Global Target List Management. It includes the following topics:

- [“About Global Target List Management” on page 401](#)
- [“Scenario for Global Target List Management” on page 402](#)
- [“Process of Global Target List Management” on page 403](#)
- [“Creating Target Lists by Querying \(End User\)” on page 403](#)
- [“Editing Target Lists \(End User\)” on page 404](#)
- [“Creating Target Lists By Combining Lists \(End User\)” on page 404](#)
- [“Applying Target Lists \(End User\)” on page 405](#)
- [“Creating Activities From Target Lists \(End User\)” on page 405](#)
- [“About Configuring Target Lists” on page 406](#)

About Global Target List Management

Global Target List Management Is For SIA Only

The Global Target List Management only applies to Siebel Industry Applications (SIA) such as Siebel Life Sciences and Siebel Financial Services. Global Target List Management does not apply to non-SIA applications such as Siebel Sales or Siebel Call Center.

What Is Global Target List Management?

Global Target List Management is used to create reusable lists of party entities (accounts, contacts, employees, positions, and prospects) from many different views in the application. These lists can be applied in various views and can be used to create activities.

Target lists differ from PDQs (saved queries) in that target lists are static; the saved list contains a specific set of records. Whereas, the records returned by a PDQ can vary over time as edits are made to the database.

Global Target List Management builds on the general List Management features that are available for both SIA and the non-SIA applications.

Things you can do with Global Target List Management that you cannot do with general List Management are:

- Create lists in many views (not just in the List Management view)
- Apply lists in many views

- Create lists of accounts and positions
- Generate activities for records in a list

What Kind of Lists Can Be Created?

In the preconfigured application, you can create and apply target lists for contacts, accounts, positions, and employees.

However, the application can be configured for lists of prospects.

Where to Find More Information

Topic	See
General List Management functionality, including field descriptions and instructions for importing and exporting lists	<i>Siebel Marketing User Guide</i>
Call List functionality, which is unique to Financial Services	<i>Siebel Finance Guide</i>
Professional and account targeting, which is unique to Siebel Pharma	<i>Siebel Life Sciences Guide</i>

Scenario for Global Target List Management

This scenario provides one simple example of a process performed by an administrative assistant. There are many ways that target lists can be used in your company's business processes.

An administrative assistant has been asked to send personalized birthday gifts to all of the company's top clients who have birthdays in the upcoming month, March. She uses Global Target List Management to help her create a set of activities, one for each gift she needs to purchase and send.

First, she notices that the company administrator has already prepared a list of the top clients. This top-client list is not a private list and so the list can be used by the administrative assistant.

Next, she queries for company contacts who have birthdays in March and saves these records to a private list, which she calls March-birthdays.

Then, she combines her March-birthdays list and the company's top-client list. The list resulting from this intersection contains the company's top clients who have birthdays in March.

The last step is to create an activity for each client in the final list. Each activity can be marked completed when the client's gift has been sent.

Process of Global Target List Management

This example process represents the tasks that are carried out in the [“Scenario for Global Target List Management” on page 402](#).

- [“Creating Target Lists by Querying \(End User\)” on page 403](#)
- [“Editing Target Lists \(End User\)” on page 404](#)
- [“Creating Target Lists By Combining Lists \(End User\)” on page 404](#)
- [“Applying Target Lists \(End User\)” on page 405](#)
- [“Creating Activities From Target Lists \(End User\)” on page 405](#)

Creating Target Lists by Querying (End User)

The most usual way to create a target list is by querying and then saving to a target list some or all of the party records returned by the query.

The records you save can be...	For example...
Those records returned by the query	If you query contacts, you can save those contact records to a target list
The records <i>associated</i> with those records returned by the query	If you query opportunities, you can save the positions on the opportunities' sales teams to a target list (You cannot save the opportunity records to a target list.)

This task is a step in [Process of Global Target List Management on page 403](#).

To create a target list by querying

- 1** Navigate to a screen where target lists are enabled.
- 2** Perform a query.
- 3** On the toolbar, click the Save Target List button.

- 4 Complete the fields in the Save to List dialog box.

Some fields are described in the following table.

Field	Comments
Based On	You can save the records themselves, for example contacts or accounts. Or, you can save the contacts or positions (team) associated with the records. If multiple contacts or positions can be associated with the records, you can choose to save all or only the primary. The choices available depend on the view.
Private	If this check box is selected, only you can view and apply this list. If this check box is cleared, all users can view and apply this list.

Editing Target Lists (End User)

You can add and delete records from saved target lists.

This task is a step in [Process of Global Target List Management on page 403](#).

To edit a target list

- 1 Navigate to the List Management screen > Lists view.

You can also navigate to this view by clicking the Save and Edit button in the Save to List dialog box as in [Step 4 on page 404](#).

- 2 Drill down on the target list record.

- 3 Click the appropriate view tab.

If the Target List Contains...	Use This View to Add or Delete from the List...
Accounts	Accounts
Team members	Positions
Contacts	All Contacts, My Contacts, or List Contacts and Prospects NOTE: The My Contacts view filters the list to show only your contacts.
Employees	Employees

Creating Target Lists By Combining Lists (End User)

You can create new lists by combining existing lists. Lists can be combined as unions or intersections.

This task is a step in [Process of Global Target List Management on page 403](#).

To create a target list by combining other lists

- 1 Navigate to the List Management screen > Lists view.
- 2 Select the lists you want to combine.
- 3 Click Create Union or Create Intersection.

Applying Target Lists (End User)

Once you or an administrator have created target lists, you can apply them. For a target list to be applied, you must be in a target list-enabled view.

This task is a step in [Process of Global Target List Management on page 403](#).

To apply a target list

- 1 Navigate to a screen where target lists are enabled.
- 2 On the toolbar, click the Apply Target List button.
- 3 In the Apply Target List dialog box:
 - a Select one or more lists
 - b Click Available to preserve the current query (That is, records are displayed only if they are in both the list and the current query.)
 - c Click OK, Union, or Intersection to apply the list(s)

Creating Activities From Target Lists (End User)

From the List Management screen, you can create activities for each member in a list.

How fields for the activities are completed, including which fields are copied from the list member records, is determined by “activity templates.” These templates are set up by the Siebel administrator; see [“Setting Up Data Map Object “Activity Templates” for Target Lists” on page 406](#). In the preconfigured application, the “activity templates” can only be applied for lists of contacts.

This task is a step in [Process of Global Target List Management on page 403](#).

To create an activity for each party in a list

- 1 Navigate to the List Management screen > Lists view.
- 2 Select a list record.
- 3 Click Create Activity.

- 4 In the Create Activity dialog box, select an “activity template.”

“Activity Template”	For each contact in the list, creates a ...
Customer Status Call	High priority activity of type Call - Outbound
Customer Status Email	High priority activity of type Email - Outbound
End Information Email	Medium priority activity of type Email - Outbound
Targeted Call	Activity of type Targeted Call

NOTE: These “activity templates” are data map objects created through the Data Transfer Utilities. They are not the same as the activity templates used to create activity plans.

About Configuring Target Lists

This section discusses some aspects of configuring Global Target List Management:

- “Setting Up Data Map Object “Activity Templates” for Target Lists” on page 406
- “About Workflows for Global Target List Management” on page 407
- “Configuring Global Target List Management to Create Activities Asynchronously” on page 407
- “Enabling Application of Target Lists on an Applet” on page 408
- “Enabling Saving of Target Lists in an Applet” on page 409

Setting Up Data Map Object “Activity Templates” for Target Lists

Some activity template data map objects are provided in seed data. (These are listed in [Step 4 on page 406](#).) You can edit these objects or create your own objects, using those provided as a model. For more information about Data Map Objects, see *Siebel Finance Guide*.

About Workflows for Global Target List Management

Four workflows for Global Target List Management are provided in seed data. These are described in [Table 81](#).

Table 81. Workflows for Global Target List Management

Workflow	Description
SLM Create Activity From List	This workflow can be used to create activities asynchronously. See “Configuring Global Target List Management to Create Activities Asynchronously” on page 407.
SLM Edit Call List Workflow	This workflow is triggered by the Save and Edit button on the Save to List dialog box. This workflow takes the user to the List Mgmt Lists View of the List Management screen.
SLM List Operation - Generic	Modification of this workflow is not recommended. This workflow is triggered when the Create Union and Create Intersection buttons are clicked.
SLM Update Parent	Modification of this workflow is not recommended. This workflow is triggered when a new member (such as a contact or an account) is added to a list. The workflow checks the content type of the new member and updates the Content field for the list if necessary. For example, if an account is added to a list of contacts, the Content field is changed to Hybrid.

Configuring Global Target List Management to Create Activities Asynchronously

In the preconfigured application, when the Create Activities for List command (Create Activity button) is invoked, activities are created synchronously. If your users typically create activities for long lists, the response time for synchronous creation can be slow. To resolve this, you can configure the application to create the activities asynchronously.

To configure asynchronous activity creation from target lists

- 1 In Siebel Tools:

For This Applet	Change This Applet User Property	From the Default Value of	To This Value
SLM Create Activity Popup	On Close Invoke Parent Method	ContinueCreateActivity	ContinueCreateActAsync

- 2 Activate the SLM Create Activity From List workflow.

For general information about Siebel workflows, see *Siebel Business Process Designer Administration Guide*.

Enabling Application of Target Lists on an Applet

You can configure list applets so that target lists can be applied to them.

In order for a list applet to be configurable, the business component on which the applet is based must contain an multi-value id field for the list category (accounts, contacts, employees, positions, or prospects).

To configure a list applet so that target lists can be applied

- 1 Create a multi-value link between the applet's business component and the List Mgmt Lists business component where:

- Destination Business Component = List Mgmt Lists
- Destination Link is one of the following (as appropriate for the list category that will be applied in the applet):
 - SLM Account/List Mgmt Lists
 - Contact/List Mgmt Lists
 - Employee/List Mgmt Lists
 - Position/List Mgmt Lists
 - Prospects/List Mgmt Lists

For example, the SIS Account List Applet is based on the Account business component; it contains a multi-value link called List Mgmt Lists, where Destination Link = SLM Account/List Mgmt Lists.

- 2 Create a multi-value field for the applet's business component where:

- Multivalue Link = *The multi-value link created in [Step 1](#)*
- Field = Id

- 3 For the applet's business component, create a user property called TargetProp (or TargetProp 1, TargetProp 2, and so on), and enter a value for the user property in the form:

"Entity Display Name", "Multi-Value Field Name", "List Category"

For example, "Accounts", "List Mgmt List Id", "Accounts"

The following table describes each term.

Term in User Property Value	Description
Entity Display Name	This must be one of the Language-Independent Code values defined for the SLM_FIELD_DISPLAY LOV.
Multi-Value Field Name	The name of the field created in Step 2 .
List Category	This must be one of the display values defined for the SLM_LST_CATEGORY LOV: Account, Contact, Employee, Position, or Prospect.

- 4 Repeat [Step 1](#) to [Step 3](#) for each category of list that you want to be able to apply to the applet.

- 5 (Optional) Add an "Apply List" item to the applet's menu button.

- a Create an Applet Menu Method Item for the applet.
- b If the applet's business component contains
 - ☐ Only one TargetProp user property, set Command to Apply List Popup—Simple.
 - ☐ Multiple TargetProp user properties for the applet, set the command property to Apply List Popup.
- c Set Menu Text to Apply List.

NOTE: If you do not carry out this step, target list can still be applied using the Apply Target List button in the toolbar or using the application-level menu Edit > Apply List.

Enabling Saving of Target Lists in an Applet

You can configure list applets so that target lists can be saved from them.

In order for a list applet to be configurable, the business component on which the applet is based must contain an id field for the party entity that you want to save to the list.

To enable target list saving for a list applet

- 1 In Siebel Tools, create a user property for the applet called Save Target List Source *n*, where *n* is a consecutive integer starting from 1.

For example, the first user property that you create for the applet is named Save Target List Source 1, the second is named Save Target List Source 2, and so on.

2 Find or create the list column for the party entity that you want to save:

- a** On the applet's business component, locate the id field of the party entity.
- b** If the applet does not have a List Column that maps to that id field, create one.

3 Enter a value for the user property of the form:

"List Column", "Saved Entity Name", "PrimaryOnly", "Extra Src Field 1", "Extra Dst Field 1", "Extra Src Field 1", "Extra Dst Field 2"

For example, these properties applied to the SIS Account List Applet:

- Save Target List Source 1 = "SLM Position - Primary", "Position", "PrimaryOnly"
Saves the primary team member on the accounts.
- Save Target List Source 2 = "SLM Contact", "Contact", " ", "Main Phone Number", "Acct Phone Number"
Saves all contacts and the main phone number of the account with each contact.

NOTE: For the preceding example, the destination list member business component (SLM List Member - Contact) needs to have a field that can store the account phone number.

The following table describes each term for the Save Target List Source user property.

Term in User Property Value ¹	Required or Optional	Description
List Column	Required	The name of a list column identified in Step 2 . The Field value for this list column is the source business component field for the target list. This field must be an id field. The Display Name value for this list column is used in the List Name drop-down list in the Save to List dialog box. See Figure 28 on page 411 .
Saved Entity Name	Required	The content of target list that you are saving: Contact, Employee, Account, Position, or Prospect.
PrimaryOnly	Required ²	If the list column corresponds to a multi-value id field, then use the "PrimaryOnly" term to save only the primary record of the multi-value group to the target list. If this term is not specified or empty, then all records in the multi-value group are saved to the target list.
Extra Src Field 1	Optional	If you want to save an additional field to the target list, specify the field name of this source.
Extra Dst Field 1	Optional ³	If you specify an Extra Src Field 1, then specify a destination field name. This field must exist in the list member's applet and corresponding business component so that it can be seen in the List Management screen.

Term in User Property Value ¹	Required or Optional	Description
Extra Src Field 2	Optional	If you want to save an additional field to the target list, specify the field name of this source.
Extra Dst Field 2	Optional ⁴	If you specify an Extra Src Field 2, then specify a destination field.

1. Terms must be enclosed in double quotes and separated by commas.
2. Optional if no Extra Src Field 1 is specified and not "PrimaryOnly".
3. Required if Extra Src Field 1 is specified.
4. Required if Extra Src Field 2 is specified.

- 4 Repeat [Step 1](#) and [Step 3](#) to create a user property for each type of list that you want users to be able to create in that applet.

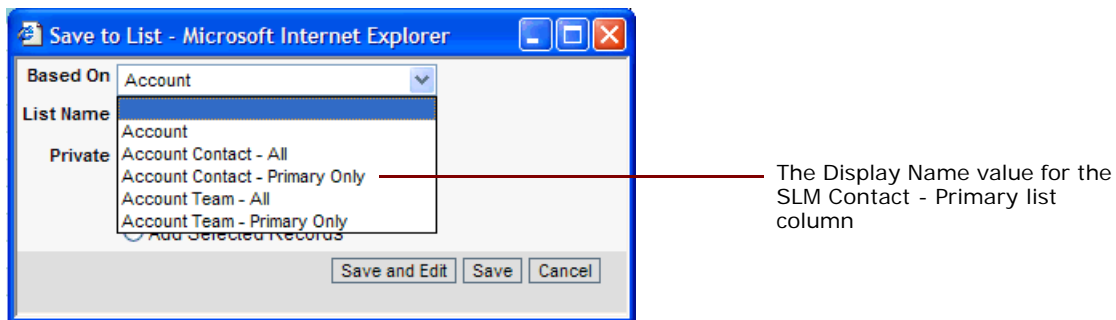


Figure 28. Save to List Dialog Box for the SIS Account List Applet

30 D&B Integration

This chapter describes the integration of D&B data with your Siebel application. It includes the following topics:

- [“About D&B Data” on page 413](#)
- [“Business Scenarios for D&B” on page 414](#)
- [“About the D&B D-U-N-S Number” on page 415](#)
- [“Process of Integrating D&B Data” on page 415](#)
 - [“Obtaining D&B Data” on page 416](#)
 - [“Loading D&B Data” on page 416](#)
 - [“Loading D&B Data Using Sample Scripts” on page 417](#)
 - [“About Siebel Update Server Components” on page 420](#)
 - [“Running the Siebel Update Server Components” on page 424](#)
- [“Setting Up the Symbolic URL for Access to the D&B Database” on page 428](#)
- [“Configuring D&B Integration” on page 429](#)
- [“Field Mappings for Configuration of D&B Integration” on page 433](#)

About D&B Data

D&B is a leading provider of business information. D&B’s information and technology solutions help businesses find profitable customers, reduce credit risk, manage receivables, and manage vendors. D&B’s database of commercial information consists of over 75 million records world wide.

For connected users, you can use your Siebel application to integrate with D&B data and reports. As a mobile client, you can access D&B data for accounts and contacts that have been promoted from D&B marketing data.

This allows you to:

- Use D&B marketing data within your Siebel application.
- Access D&B business and credit reports from within your Siebel application.

You can use this D&B data to support the following:

- **New Business or Customer Acquisition.** By querying on company size, line of business, and other criteria provided by D&B, you can generate lists of prospects to add to the sales pipeline or to support outbound marketing programs. By using the D&B corporate family linkage information, you can identify new prospects and opportunities within a company’s extended family.

- **Customer Segmentation and Penetration.** You can profile specific market segments such as geography, industry, size, and other criteria to identify untapped opportunities or better align sales territories.
- **Customer Qualification.** Use your access to D&B business and credit reports to obtain detailed background and risk information on a company in order to focus sales efforts on higher-probability accounts and shorten the sales cycle.

NOTE: This chapter describes how the administrator loads and updates D&B data. For information about viewing and using D&B data within the Siebel application, see [Chapter 30, “D&B Integration.”](#)

Business Scenarios for D&B

The following scenarios describe how you can use D&B data in your company.

Build and Grow Current Customer Relationships

A company can increase market penetration across its existing customer base by determining how many relationships the company already has within a corporate family structure. Sales managers and representatives can use D&B D-U-N-S numbers to view the organizational hierarchies of clients and aggregate account attributes at each level.

For instance, a sales representative plans to sell computers to 20 business locations and he discovers that there are locations for this company that he has not yet contacted. In another situation, the sales manager may want to see a rollup of opportunities and the potential revenue for each subsidiary and location for a specific company on a worldwide basis.

New Business or Customer Acquisition

Because a sales organization is always looking for more leads to new business, sales professionals can access company information in the Siebel D&B database, allowing them to generate prospects in their territories.

With D&B, the sales representative can query the Siebel D&B database using criteria to target new leads. The sales representative can query using demographic data, revenue profiles, or other criteria. After generating a list of leads, the sales representative can automatically add the companies and contacts to their company's accounts list. These promoted accounts and contacts are automatically updated when D&B updates occur.

Customer Satisfaction and Account Planning

Standardizing customer information on the D&B D-U-N-S number gives you a means for house-holding your customer data and eliminating duplicate customer records. This increases your ability to manage existing customer relationships because all opportunities for a customer are linked to the same customer record.

Add D&B's corporate family linkage, and you have the ability to manage and plan for customers at a local and global level. For example, you may want to see a roll up of all opportunities and potential revenue for all companies and locations related to a particular company worldwide.

D&B Search for New Account Information

Sales professionals can access the D&B database in real time to find and retrieve new D&B account information that is immediately available for use within Siebel Sales. This information includes company demographic, corporate linkage, and address data maintained by D&B.

For example, a sales representative discovers a new opportunity, but the representative cannot find the account in either the Siebel account list or the D&B account list. Instead of creating a new account, the sales manager performs a real-time D&B search to obtain up-to-date, quality information that can be used to automatically establish a new Siebel account. This provides the sales team with valuable information that they can use when working on the new opportunity.

About the D&B D-U-N-S Number

The D-U-N-S (Data Universal Numbering System) number is a crucial component of D&B data. A D&B D-U-N-S number is a nonindicative, nine-digit number assigned to each business location in the D&B database. Each D-U-N-S number has a unique, separate, and distinct operation and is maintained solely by D&B. Industries and organizations around the world use the D&B D-U-N-S number as a global standard for business identification and tracking.

Each company has a unique D&B D-U-N-S number associated with it. It acts as a unique identifier for a company in the D&B database.

To uniquely identify the association between different companies in the D&B database, each company also has associated D&B D-U-N-S numbers.

Several categories of D&B D-U-N-S numbers exist:

- D&B D-U-N-S Number—each unique business location listed in the D&B database is assigned a D&B D-U-N-S number. This column is called simply DUNS Number in your Siebel application.
- Global Ultimate D-U-N-S—the D&B D-U-N-S number belonging to a business's worldwide ultimate parent company.
- Domestic Ultimate D-U-N-S—the D&B D-U-N-S number belonging to the highest-level family member within a specific country.
- Parent/HQ D-U-N-S—the D&B D-U-N-S number belonging to a business's immediate headquarters or parent.

These numbers allow D&B to establish the relationships between different companies.

Process of Integrating D&B Data

The process of integrating D&B data into the D&B Account tables and the Siebel Account tables in the Siebel database involves the following steps:

- 1 [Obtaining D&B Data](#)
- 2 [Loading D&B Data](#) into staging tables in the Siebel database
- 3 [Running the Siebel Update Server Components](#)

Obtaining D&B Data

You must obtain three data files from D&B:

- The Marketing Data file
- The MRC file
- The SIC file

Request these files in *Siebel format*, also referred to as 2202 or GDMDI data file format. D&B should be able to provide files in this format without difficulty.

To obtain MRC and SIC files, send email to:

`dnb4siebel@dnb.com`

In addition to these files, you can request D&B data layout documentation from D&B.

The Marketing Data File. This file contains detailed company information, such as the company's legal name, address, contact information, and so on.

The MRC and SIC Files. These are both reference files required by the Siebel D&B modules. Both files contain information referenced by the demographic company data provided by D&B.

MRC stands for Management Responsibility Code. The MRC file contains a list of lookup values for the contacts and their positions such as CEO, Vice President of Marketing, and so on. Each contact has an associated numerical code that is referenced by the D&B marketing data to determine the title or position of a company contact.

SIC stands for Standard Industrial Classification and is a code developed by the Federal government to describe the type of activity performed by the business at this location. The SIC file contains a list of SIC codes assigned and maintained by D&B along with their definitions. D&B's Primary SIC code indicates the line of business that provides the largest revenue contribution to the business. D&B also maintains and assigns six levels of subsidiary SIC codes to describe in greater detail additional lines of business activity for a given company. By default, the SIC code provided in the SIC file and the Marketing Data file is the 4-digit SIC code.

Loading D&B Data

After you have obtained the three D&B data files, you can start to load the data into the Siebel database. You can load the files in any order, but you must load all three files before running the Siebel update server component.

When creating your data loading scripts, refer to the documentation provided by D&B and to *Siebel Data Model Reference*.

The scripts and processes differ according to your database platform.

NOTE: When you integrate D&B data for the first time, you may want to contact Siebel Professional Services to obtain sample loading scripts for use as templates. See ["Loading D&B Data Using Sample Scripts"](#) on page 417.

The scripts load D&B data into staging tables in the Siebel database, as shown in [Table 82](#).

Table 82. Staging Tables for Uploading D&B Data

File	Upload Location
Marketing Data file	S_DNB_UPDATE table This table is used as a staging area for the un-normalized D&B Marketing data.
SIC file	S_DNB_SIC table
MRC file	S_DNB_MRC table

NOTE: Definitions of these tables can be found in *Siebel Data Model Reference*.

Because SIC and MRC files change only rarely, updating D&B data usually requires deleting and reloading the D&B marketing data in the S_DNB_UPDATE table alone.

If you need to load new versions of the SIC and MRC files, you must delete the previously used staging tables.

[Table 83](#) lists what D&B data to delete and what to load.

Table 83. Loading or Reloading D&B Data

If You Are...	Then...
Loading D&B data for the first time	<ul style="list-style-type: none"> ■ Load the three D&B data files: Marketing Data file, SIC file, and MRC file.
Updating D&B data with a new Marketing Data file, but the SIC and MRC files have not changed	<ul style="list-style-type: none"> ■ Delete data from the S_DNB_UPDATE table. ■ Load the Marketing file.
Updating D&B data with new Marketing Data, SIC, and MRC files	<ul style="list-style-type: none"> ■ Delete data from the S_DNB_UPDATE, the S_DNB_SIC, and the S_DNB_MRC tables. ■ Load the three D&B data files: Marketing Data file, SIC file, and MRC file.

After loading files, you must run the D&B Update Manager (D&B) and the D&B Update Manager (Siebel) as described in [“About Siebel Update Server Components” on page 420](#).

Loading D&B Data Using Sample Scripts

This section provides some guidance on how to use sample scripts for:

- [“Loading D&B Data on Oracle” on page 418](#)
- [“Loading D&B Data on DB2” on page 418](#)

■ “Loading D&B Data on Microsoft SQL Server” on page 419

The sample scripts are not provided as part of the Siebel product, but may be obtained from Siebel Professional Services.

CAUTION: Before running scripts, you should check them against the D&B data layout documentation and against the S_DNB_UPDATE table columns documented in *Siebel Data Model Reference*. Then, modify the scripts as required.

Loading D&B Data on Oracle

Oracle installations require you to run SQLLOADER control files. You need the following control files:

- s_dnb_update.ctl (for loading Marketing Data file into S_DNB_UPDATE table)
- s_dnb_sic.ctl (only required if loading the SIC file)
- s_dnb_mrc.ctl (only required if loading the MRC file)

NOTE: This procedure is based on the assumption that you understand how to run SQLLOADER. SQLLOADER is described in the Oracle documentation.

To load D&B data if you are using Oracle

- 1 Verify that the column order of your D&B file matches the column requirements in the CTL file before running the loading script.
- 2 Truncate the appropriate staging tables (see [Table 83 on page 417](#)).

To optimize loading performance, drop all indexes on the S_DNB_UPDATE table and re-create them after the scripts have completed. This can be done using Siebel utilities ddlexp (to back up the indexes before dropping) and ddlimp (to re-create them).
- 3 Modify the SQL file as appropriate for:
 - The name of your database
 - The D&B filename and directory location
 - The database table owner
 - The user ID and password (with loading privileges) that you are using to load the data
- 4 Run SQLLOADER.

Loading D&B Data on DB2

DB2 installations require you to run DB2 IMPORT. You need the following SQL files:

- imp_update_new.sql (for loading Marketing Data file into S_DNB_UPDATE table)
- imp_sic_new.sql (only required if loading the SIC file)
- imp_mrc_new.sql (only required if loading the MRC file)

NOTE: This procedure is based on the assumption that you understand how to run DB2 IMPORT. DB2 IMPORT is described in the DB2 documentation.

To load D&B data if you are using DB2

- 1 Verify that the column order of your D&B file matches the column requirements in the SQL file before running the loading script.
- 2 Truncate the appropriate staging tables (see [Table 83 on page 417](#)).
To optimize loading performance, drop all indexes on the S_DNB_UPDATE table and re-create them after the scripts have completed. This can be done using Siebel utilities ddlexp (to back up the indexes before dropping) and ddlimp (to re-create them).
- 3 Modify the SQL file as appropriate for:
 - The name of your database
 - The D&B filenames and directory location
 - The database table owner
 - The user ID and password (with loading privileges) that you are using to load the data
- 4 Run DB2 IMPORT.
- 5 Optional: After running the import scripts, update the DB2 catalog statistics by executing RUNSTATS on the three tables that received the D&B data (S_DNB_MRC, S_DNB_SIC, S_DNB_UPDATE).

Loading D&B Data on Microsoft SQL Server

Microsoft SQL Server installations require you to run SQL scripts. You need the following format files and SQL scripts:

- For loading the Marketing Data file:
 - S_DNB_UPDATE.fmt—a format file to load the data into the tempS_DNB_UPDATE table
 - S_DNB_UPDATE.sql—an SQL script that loads the data into S_DNB_UPDATE table
- For loading the SIC file:
 - S_DNB_SIC.fmt—a format file to load the data into the tempS_DNB_SIC table
 - S_DNB_SIC.sql—an SQL script that loads the data into the S_DNB_SIC table
- For loading the MRC file:
 - S_DNB_MRC.fmt—a format file to load the data into the tempS_DNB_MRC table
 - S_DNB_MRC.sql—an SQL script that loads the data into the S_DNB_MRC table

NOTE: This procedure is based on the assumption that you understand how to run bcp (bulk copy process) or similar data-loading utility. The bcp utility is described in the Microsoft SQL Server documentation.

To load D&B data if you are using Microsoft SQL Server

- 1 Verify that the column order of your D&B file matches the column requirements in the SQL file before running the loading script.

- 2 Truncate the appropriate staging tables (see [Table 83 on page 417](#)).

To optimize loading performance, drop all indexes on the S_DNB_UPDATE table and re-create them after the scripts have completed. This can be done using Siebel utilities ddlexp (to back up the indexes before dropping) and ddlimp (to re-create them).

- 3 Modify the SQL file as appropriate for:

- The name of your database
- The D&B filename and directory location
- The database table owner
- The user ID and password (with loading privileges) that you are using to load the data

- 4 Run bcp or another data loading utility.

About Siebel Update Server Components

Whenever you load or reload D&B data, you must update the D&B Account tables and the Siebel Account tables in the Siebel database. This update is accomplished by running server components:

- D&B Update Manager (D&B): Moving D&B marketing data from the staging table (S_DNB_UPDATE) into the normalized D&B Account tables, which are the basis for the D&B All Accounts View ([Figure 29 on page 421](#)).
- D&B Update Manager (Siebel): Updating the records in the Siebel Account tables for accounts with matching D-U-N-S numbers ([Figure 30 on page 422](#)).
- A third component, D&B Update Manager MultiTask, is also provided. This component can be used in place of D&B Update Manager (D&B) or D&B Update Manager (Siebel) to run the update using multiple, parallel processes ([“Multiple Task Siebel Update Server Component” on page 422](#)).

Overview of the Update Process

This section outlines the process of loading D&B data from the staging tables to the D&B Account tables through to updating the Siebel account tables.

This process recommends using the D&B Update Manager MultiTask server component to run server component tasks in parallel. However, use of the single task D&B Update Manager (D&B) and D&B Update Manager (Siebel) server components is also documented in this chapter.

- 1 Make sure you have loaded the D&B data into the staging tables as discussed in [“Loading D&B Data” on page 416](#) and [“Loading D&B Data Using Sample Scripts” on page 417](#).
- 2 Update the D&B Account tables with data from the staging tables:
 - a To optimize performance, you may choose to do one of the following:
 - For first time data loading, that is, when there are no D&B records in the database, drop the indexes on these D&B Account tables: S_DNB_ORG, S_DNB_ORG_SIC, S_DNB_CON_MRC, and S_PRSP_CONTACT.

- ❑ For subsequent updates, drop the indexes on the S_DNB_ORG table only, all except for the indexes S_DNB_ORG_U1 (DUNS_NUM), S_DNB_ORG_P1 (ROW_ID), and S_DNB_ORG_M01 (the clustered index) on this table.
 - b Create a search specification on the D-U-N-S number to set up your preferred batch sizes and determine the corresponding D-U-N-S number ranges per batch for loading the data from the staging tables to the D&B Account tables.
 - c Execute concurrent D&B Update Manager (D&B) server tasks by running the D&B Update Manager MultiTask server component. See [“Multiple Task Siebel Update Server Component” on page 422](#) and [“Running the Siebel Update Server Components” on page 424](#).
 - d Continue to execute the concurrent D&B Update Manager (D&B) server tasks until all data is loaded into the D&B Account tables.
 - e If you dropped indexes on the D&B Account tables, re-create them. This can be done using Siebel utilities ddlexp (to back up the indexes before dropping) and ddlimp (to re-create them).
- 3 Update the Siebel Account tables from the D&B Account tables for accounts with matching D-U-N-S numbers by executing concurrent D&B Update Manager (Siebel) server tasks using the D&B Update Manager MultiTask server component. See [“Multiple D&B Update Manager \(Siebel\) Processes” on page 423](#) and [“Running the Siebel Update Server Components” on page 424](#).

Single Task Siebel Update Server Components

The update server components are part of the Dun and Bradstreet Enterprise Component Group. This group and each of its D&B Batch Components must be enabled. Once enabled, each component can be run as a batch task. [Figure 29](#) shows how the staging tables are mapped to the D&B Account tables.

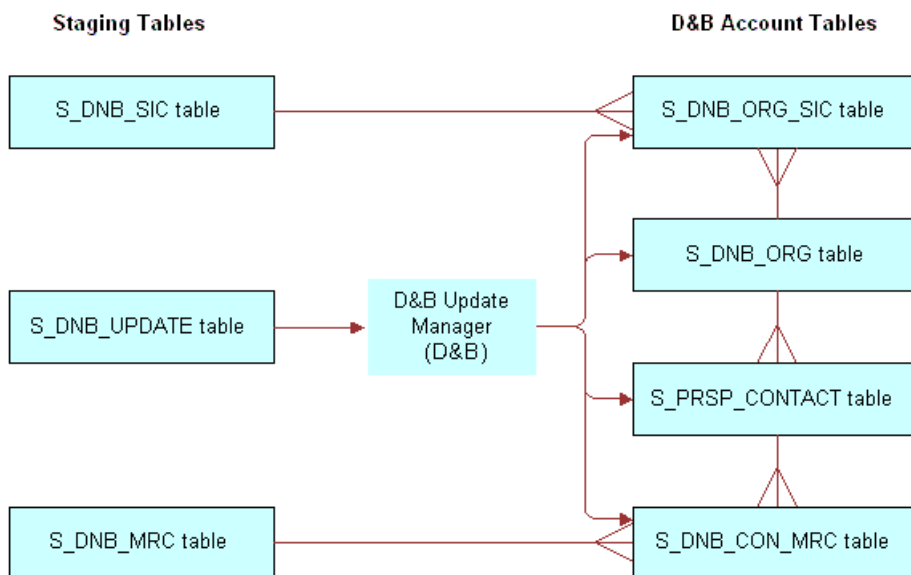


Figure 29. D&B Update Manager (D&B) Table Names

Figure 30 shows how the D&B Account tables are mapped to the Siebel Account tables.

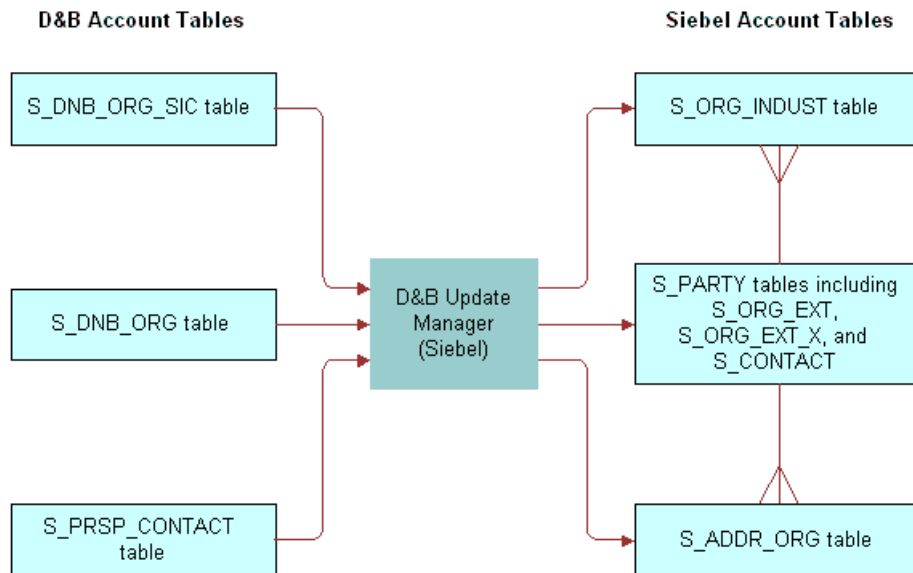


Figure 30. D&B Update Manager (Siebel) Table Names

“Field Mapping for the D&B Update Manager Process” on page 433 lists the default table mapping from the D&B Account tables to the Siebel Account tables that are used by the D&B Update Manager (Siebel) server component.

Multiple Task Siebel Update Server Component

You can use the server component DNBUpMgrMultiTask to spawn multiple Update Manager processes. Running several parallel processes helps you maximize your performance with large data loads and gives you greater scheduling flexibility. You can control the number of processes that are created by editing the dnbtask.cfg file. The dnbtask.cfg file contains two sections, one to set tasks for the D&B Update Manager (D&B) process and the second to set tasks for the D&B Update Manager (Siebel) process.

The dnbtask.cfg file is located in the sqltempl subdirectory, in the server installation directory.

Multiple D&B Update Manager (D&B) Processes

By default the dnbtask.cfg file sets up three simultaneous tasks, based on D-U-N-S number ranges. The DNBUpMgrDNB portion of the file looks like this:

```
[DNB]
```

```
Task1 = , 100000000
```

```
Task2 = 100000000, 200000000
```

Task3 = 200000000,

These three ranges translate into three DNBUmgrDNB tasks, each taking care of loading records within a particular D-U-N-S number range:

,100000000 means D-U-N-S numbers < 100000000

100000000,200000000 means D-U-N-S numbers >=100000000 and < 200000000

200000000, means D-U-N-S numbers >=200000000

Edit the file to change the number of parallel processes created or the range of D-U-N-S numbers updated.

CAUTION: If you use DNBUmgrMultiTask to run multiple UpdateMgr processes, you must make sure that processes running at the same time have *mutually exclusive* ranges. Unpredictable results occur if multiple processes collide.

Multiple D&B Update Manager (D&B) Processes with First Time Data Loading

The first time you load D&B data, that is, when there are no D&B records in the database, you may use a special SQL file (dnbinitial.sql) which is optimized to do only inserts. This results in faster loading of data than using the dnbmaps.tsq file.

To use the dnbinitial.sql file, set the server component parameter DNBConfigFile to dnbinitial.sql. For examples, see [“Running the Siebel Update Server Components” on page 424](#).

For subsequent updates, the DNBConfigFile should be set to dnbmaps.tsq.

NOTE: The dnbinitial.sql file assumes that you dropped the indexes on the D&B Account tables when loading data ([“Loading D&B Data Using Sample Scripts” on page 417](#)).

Multiple D&B Update Manager (Siebel) Processes

By default the dnbtask.cfg file sets up five simultaneous tasks, based on tables updated. The DNBUmgrSieb portion of the file looks like this:

[Siebel]

Task1 = UPDATE_SIEBEL_ACCOUNT

Task2 = UPDATE_INDUSTRY, COMMIT, UPDATE_SIEBEL_INDUSTRY, COMMIT,
UPDATE_SIEBEL_SYNONYM

Task3 = UPDATE_SIEBEL_ADDR_PHY, COMMIT, UPDATE_SIEBEL_ADDR_MAIL

Task4 = UPDATE_SIEBEL_CONTACT

Task5 = UPDATE_SIEBEL_LOC1, COMMIT, UPDATE_SIEBEL_LOC2, COMMIT, UPDATE_SIEBEL_LOC3

You may edit the file to change the number of parallel processes created. However, note that the order of the updates within individual tasks is important; for example UPDATE_INDUST should be done before UPDATE_SIEBEL_INDUST. Use caution when updating the DNBUpMgrSieb portion of the dnbtask.cfg file.

CAUTION: If you have modified the RTI configuration file to insert new accounts into the Siebel Accounts table, do not run the multiple task process. Instead you must run the single task D&B Update Mgr (Siebel) server component. Make sure you have modified the dnbmaps.sql file used by the single task server component. The order of the updates is critical to data integrity if new accounts are being added.

Running the Siebel Update Server Components

There are two ways to run the Siebel update server components:

- From within the Siebel application
- From a command line interface, using Siebel Server Manager

The procedures for running the update processes from both within the Siebel application and from the command line are shown in [Table 84](#). Whatever procedures you choose to follow, make sure that the D&B Update Manager (D&B) process is complete before you start the D&B Update Manager (Siebel) process.

Table 84. Procedures for Running Siebel Update Server Components

Process	From Within the Application	From the Command Line Interface ¹
D&B	<p>"To run the D&B Update Manager (D&B) server component from within your Siebel application (single task process)" on page 425</p> <p>OR</p> <p>"To run the D&B Update Manager (D&B) server component from within your Siebel application (multiple task process)" on page 426</p>	<p>"To run the D&B Update Manager (D&B) server component from a command line (single or multiple task process)" on page 427</p>
Siebel	<p>"To run the D&B Update Manager (Siebel) server component from within your Siebel application (single task process)" on page 426</p> <p>OR</p> <p>"To run the D&B Update Manager (Siebel) server component from within your Siebel application (multiple task process)" on page 426</p>	<p>"To run the D&B Update Manager (Siebel) server component from a command line (single or multiple task process)" on page 427</p>

1. For general information about using Siebel Server Manager, see *Siebel System Administration Guide*.

NOTE: If you have just installed the Siebel Server or if you have made changes to the Siebel Name Server, you need to synchronize before running the Siebel update server component. For more information about synchronizing server components, see *Siebel System Administration Guide*.

TIP: If you are going to run the D&B Update Mgr (Multi-task) component, make sure that the maximum number of tasks (MaxTasks parameter) is set correctly to accommodate the number of tasks that you specified in the dnbtask.cfg file. For information about MaxTasks, see *Siebel System Administration Guide*.

To run the D&B Update Manager (D&B) server component from within your Siebel application (single task process)

- 1 Check that the Dun and Bradstreet component group is enabled.
- 2 Submit a component job for D&B Update Mgr (D&B); make sure to set the Mode to Asynchronous.

- 3 When the D&B Update Mgr (D&B) is done, open the log directory. If there have been problems with the process, there will be a log file, which you should review. The log file is named `DNBUpMgrDNB_TaskNumber.log`.

For information on running server components, see *Siebel System Administration Guide*.

To run the D&B Update Manager (D&B) server component from within your Siebel application (multiple task process)

- 1 Check that the Dun and Bradstreet component group is enabled.
- 2 Prepare a component job for D&B Update Mgr (Multi-task):
 - Make sure to set the Mode to Asynchronous.
 - Create a job parameter where Name is Task Code (Abbreviation is `DNBTaskCode`) and Value is `DNB`.
 - If the data is being loaded for the first time, create a job parameter where Name is Configuration File Name (Abbreviation is `DNBConfigFile`) and Value is `dnbinitial.sql`.
- 3 Submit the component job.
- 4 When the process is done, open the log directory. If there have been problems with the process, there will be a log file, which you should review.

For information on running server components, see *Siebel System Administration Guide*.

To run the D&B Update Manager (Siebel) server component from within your Siebel application (single task process)

- 1 Check that the Dun and Bradstreet component group is enabled.
- 2 Submit a component job for D&B Update Mgr (Siebel); make sure to set the Mode to Asynchronous.
- 3 When the D&B Update Mgr (Siebel) is done, open the log directory. If there have been problems with the process, there will be a log file, which you should review. The log file is named `DNBUpMgrDNB_TaskNumber.log`.

For information on running server components, see *Siebel System Administration Guide*.

To run the D&B Update Manager (Siebel) server component from within your Siebel application (multiple task process)

- 1 Check that the Dun and Bradstreet component group is enabled.
- 2 Prepare a component job for D&B Update Mgr (Multi-task):
 - Make sure to set the Mode to Asynchronous.
 - Create a job parameter where Name is Task Code (Abbreviation is `DNBTaskCode`) and Value is `Siebel`.
- 3 Submit the component job.

- 4 When the process is done, open the log directory. If there have been problems with the process, there will be a log file, which you should review.

For information on running server components, see *Siebel System Administration Guide*.

To run the D&B Update Manager (D&B) server component from a command line (single or multiple task process)

- 1 Log in to the server using Server Manager. Use a command with this format:

```
SIEBEL_ROOT\si ebsrvr\bin>srvmgr /g gateway /e enterprise_name /u db_username /p password /s siebserver
```

Examples:

```
>srvmgr /g evlab6 /e siebel /u sadmin /p sadmin /s evlab6
```

- 2 At the srvmgr prompt, enter one of the following commands:
 - start task for comp DNBUpmgrDNB (for single task process)
 - start task for comp DNBUpmgrMultiTask with DNBTASKCODE=DNB (for multitask process)
 - start task for comp DNBUpmgrMultiTask with DNBTASKCODE=DNB, DNBCONFIGFILE=dnbinital.sql (for initial data loading; see [“Multiple D&B Update Manager \(D&B\) Processes with First Time Data Loading” on page 423](#))
- 3 During the DNBUpmgrDNB or DNBUpmgrMultiTask server process, monitor the status by entering the list task command:


```
list task for comp DNB%
```
- 4 When the D&B Update Mgr (D&B) or D&B Update Mgr (Multi-task) server process is finished, open the log directory. If there have been problems with the process, there will be a log file, which you should review. The log files are named DNBUpmgrDNB_TaskNumber.log or DNBUpmgrMultiTask_TaskNumber.log.

For information on running server components, see *Siebel System Administration Guide*.

To run the D&B Update Manager (Siebel) server component from a command line (single or multiple task process)

- 1 Log in to the server using Server Manager. Use a command with this format:

```
SIEBEL_ROOT\si ebsrvr\bin>srvmgr /g gateway /e enterprise_name /u db_username /p password /s siebserver
```

Examples:

```
>srvmgr /g evlab6 /e siebel /u sadmin /p sadmin /s evlab6
```

- 2 At the srvmgr prompt, enter one of the following commands:
 - start task for comp DNBUpmgrSIEB (for single task process)
 - start task for comp DNBUpmgrMultiTask with DNBTASKCODE=Siebel (for multitask process)

- 3 During the DNBUpmgrDNB or DNBUpmgrMultiTask server process, monitor the status by entering the list task command:

list task for comp DNB%
- 4 When the D&B Update Mgr (D&B) or D&B Update Mgr (Multi-task) server process is finished, open the log directory. If there have been problems with the process, there will be a log file, which you should review. The log files are named DNBUpmgrDNB_*TaskNumber*.log or DNBUpmgrMultiTask_*TaskNumber*.log.

For information on running server components, see *Siebel System Administration Guide*.

Setting Up the Symbolic URL for Access to the D&B Database

When you have a connection to the Internet and have a D&B account set up already (with a user ID and password), you can:

- Obtain the most current account information by invoking real-time searches of the D&B database and online purchase
- Access and order D&B business and credit reports

For more information about D&B reports and about searching D&B for new accounts, see [“Accessing Company Data and Reports with D&B” on page 439](#).

To access D&B data live from your Siebel application through the D&B Web site, you must first contact D&B for a user ID, password, and payment options. Then you can set up your Siebel application to access the D&B database.

To set up the symbolic URL for D&B real-time search and update

- 1 Navigate to the Administration - Integration screen > WI Symbolic URL List.
- 2 From the Show drop-down list, choose Symbolic URL Administration.
- 3 In the Symbolic URL list, select DNBGlobalAccess.
- 4 Make sure the URL is `https://globalaccess.dnb.com/access/scripts/broker.asp`
- 5 In the Symbolic URL Arguments list:
 - a Select the USERID record, and enter the user ID provided by D&B in the Argument Value field.
NOTE: This field is not case-sensitive.
 - b Select the USERPASS record, and enter the password provided by D&B in the Argument Value field.

To set up the symbolic URL for D&B report ordering

- 1 Navigate to the Administration - Integration screen > WI Symbolic URL List.

- 2 From the Show drop-down list, choose Symbolic URL Administration.
- 3 In the Symbolic URL list, select DNBReport.
- 4 Make sure the URL is `https://reportserver/scripts/ProductRetrieve` and that the Host Name is `www.dnb.com`.
- 5 In the Symbolic URL Arguments list:
 - a Select the USERID record, and enter the user ID provided by D&B in the Argument Value field.
NOTE: This field is not case-sensitive.
 - b Select the USERPSWD record, and enter the password provided by D&B in the Argument Value field.
- 6 From the Show drop-down list, select Host Administration.
- 7 In the HTTP Host list, make sure that there is a record where Name is `www.dnb.com` and Virtual Name is `reportserver`.

NOTE: If you are using Siebel eBriefings and want to enable a link from briefing documents to the D&B report ordering site, see *Siebel eBriefings Administration Guide*.

Configuring D&B Integration

For general guidance on configuration, refer to [Table 85](#).

Table 85. What to Configure?

If You Need to Customize the...	Then...
Single task server processes for D&B Update Manager (D&B) or D&B Update Manager (Siebel)	■ Edit the <code>dnbmaps.sql</code> file in the <code>...\\siebel server\\SQLTEMPL</code> directory.
Multiple task server processes for D&B Update Manager (D&B) or D&B Update Manager (Siebel)	■ Edit the <code>dnbmaps.tsq</code> file in the <code>...\\siebel server\\SQLTEMPL</code> directory.
Account promotion	■ Configure the maps listed in Table 91 . ■ Determine and make, if necessary, corresponding changes in the update server processes.

A number of specific configuration topics are discussed in this section:

- [Update Server Process Configuration on page 430](#)
- [Account Promotion and Prospect List Creation Configuration on page 430](#)
- [Running the D&B Update Manager \(D&B\) Process Without Updating or Deleting Existing Data on page 431](#)

■ Running the D&B Update Manager (Siebel) Process Without Updating Account Name or Account Location on page 432

TIP: When debugging in your test environment, increase the event log level to 4 to see more details in the log file. However, it is strongly recommended that you set the level to 1 (the default) when you run in a production environment in order to prevent the log file from overflowing. For information on event logging, see *System Monitoring and Diagnostics Guide for Siebel eBusiness Applications*.

Update Server Process Configuration

The D&B update server processes use the Batch Real-Time Integration (RTI) technology and the RTI configuration files (dnbmaps.sql for single task and dnbmaps.tsq for multiple tasks). You can edit the RTI configuration files to suit your business requirements.

The general syntax of the RTI maps specified in the configuration files is as follows:

UPDATE_SOME_TABLE.MOD1TABLE = [Target Table to update]

UPDATE_SOME_TABLE.MOD1WHERE = [A WHERE clause]

UPDATE_SOME_TABLE.MOD1INSERT = [TRUE/FALSE]

UPDATE_SOME_TABLE.MOD1UPDATE = [TRUE/FALSE]

UPDATE_SOME_TABLE.MOD1DELETE = [TRUE/FALSE]

UPDATE_SOME_TABLE.MOD1SQL = [A Valid SQL Query]

The RTI configuration files are located in the ...\\siebel server\\SQLTEMPL directory.

[“Field Mapping for the D&B Update Manager Process” on page 433](#) lists the default mapping for the D&B Update Manager (Siebel) server component.

Use caution when making changes to these RTI configuration files. It is recommended that you engage a qualified professional for your customization process.

CAUTION: Do not change the default DELETE setting in the existing UPDATE* sections. Do not set DELETE to TRUE. If your business need necessitates deleting rows in the target table as part of the D&B Update Manager process, consult Siebel Professional Services for help with this customization process.

Account Promotion and Prospect List Creation Configuration

You can select specific fields that will be populated by the D&B promotion to a Siebel account or by the D&B list-creation process. These are controlled by maps in the business component user properties within the DNB Account and DNB Contact business components. These maps are listed in [Table 91 on page 437](#).

Using Siebel Tools, you can change, add, or delete source and destination field mapping. Reference the map descriptions given in [Table 91 on page 437](#) to determine which map to use for a given set of source and destination fields.

Use caution when making changes to these maps. It is recommended that you engage a qualified professional for your customization process.

CAUTION: Although the delete capability is available, it is recommended that you deactivate unwanted map entries instead of deleting them. This is safer and can be accomplished by checking or clicking the deactivate column for the undesired entry.

You can create an entry using the following syntax:

Name Column: [MAP NAME]: [DESTINATION FIELD]

Value Column: [D&B SOURCE FIELD]

NOTE: Each map works only with a specific Destination Business Component and a specific Source Business Component.

Running the D&B Update Manager (D&B) Process Without Updating or Deleting Existing Data

Depending on your business process, you may want to run the D&B Update Manager (D&B) server component without updating or deleting any existing data in the S_DNB_ORG table. This is done by editing the RTI configuration file.

To edit the RTI configuration file so that existing data in the S_DNB_ORG table is not updated or deleted

- 1 Open the RTI configuration file (dnbmaps.sql for single task or dnbmaps.tsq for multiple task) in a text editor.
- 2 Search for the UPDATE_DNB_ACCOUNT section under [Common] heading.
- 3 Modify the section to look like the following (If you are using the default file, you need only to change UPDATE_DNB_ACCOUNT.MOD1UPDATE from TRUE to FALSE):

```
UPDATE_DNB_ACCOUNT.Function = NONE
```

```
UPDATE_DNB_ACCOUNT.MOD1TABLE = S_DNB_ORG
```

```
UPDATE_DNB_ACCOUNT.MOD1WHERE = WHERE 1 = 1
```

```
UPDATE_DNB_ACCOUNT.MOD1INSERT = TRUE
```

```
UPDATE_DNB_ACCOUNT.MOD1UPDATE = FALSE
```

```
UPDATE_DNB_ACCOUNT.MOD1DELETE = FALSE
```

```
UPDATE_DNB_ACCOUNT.MOD1TXNLOG = FALSE
```

- 4 Save and close the file.

Running the D&B Update Manager (Siebel) Process Without Updating Account Name or Account Location

Depending on your business process, you may want to run the D&B Update Manager (Siebel) server component without updating the existing account names and account locations. This is done by editing the RTI configuration file.

To edit the RTI configuration file so that account names are not updated

- 1 Open the RTI configuration file (dnbmaps.sql for single task or dnbmaps.tsq for multiple task) in a text editor.
- 2 Search for UPDATE_SIEBEL_ACCOUNT. MOD1SQL under the Oracle, Oracle 8, Microsoft SQL Server, or DB2 statements.
- 3 Search for dnb.BUSINESS_NAME within the UPDATE_SIEBEL_ACCOUNT. MOD1SQL SELECT statement.
- 4 Comment out the line that begins dnb.BUSINESS_NAME... as shown.

```
UPDATE_SIEBEL_ACCOUNT. MOD1SQL =

    SELECT acct. ROW_ID          ROW_ID,

    ; dnb. BUSINESS_NAME        NAME,
```

- 5 Save and close the file.

To edit the RTI configuration file so that account locations are not updated (single task)

- 1 Open the dnbmaps.sql file in a text editor.
- 2 Search for the UPDATE_SIEBEL = UPDATE_SIEBEL_ADDR_PHY... statement. This statement specifies the Siebel Table Groups to be updated when D&B Update Manager (Siebel) server component is run.
- 3 Within this statement, remove COMMIT, UPDATE_SIEBEL_LOC1, COMMIT, UPDATE_SIEBEL_LOC2, COMMIT, UPDATE_SIEBEL_LOC3.
- 4 Save and close the file.

To edit the RTI configuration file so that account locations are not updated (multiple task)

- 1 Open the dnbtask.cfg file in a text editor.
- 2 Under the [Siebel] section, comment out the line that begins Task5... as shown.


```
;;Task5 = UPDATE_SIEBEL_LOC1, COMMIT, UPDATE_SIEBEL_LOC2, COMMIT,
UPDATE_SIEBEL_LOC3
```
- 3 Save and close the file.

Field Mappings for Configuration of D&B Integration

This section provides field mapping information for three types of D&B integration processes:

- [Field Mapping for the D&B Update Manager Process](#)
- [Field Mapping for D&B Real-Time Updates](#)
- [Field Mapping for Account Promotion and Prospect Lists](#)

Field Mapping for the D&B Update Manager Process

D&B Update Manager (D&B) server component. For the table mapping for the D&B Update Manager (D&B) component, examine the appropriate tables ([Figure 29 on page 421](#)) using Siebel Tools. The default field mappings can be determined by examining the UPDATE_DNB* sections of the RTI configuration file (dnbmaps.sql or dnbmaps.tsq).

D&B Update Manager (Siebel) server component. When the D&B Update Manager (Siebel) server component is run ([Figure 30 on page 422](#)), the fields listed in [Table 86](#), [Table 87 on page 434](#), and [Table 88 on page 435](#) are mapped. The field mappings can also be determined by examining the UPDATE_SIEBEL* sections of the RTI configuration file.

For information about changing these default mappings, see [“Update Server Process Configuration” on page 430](#).

Table 86. S_DNB_ORG Table Mapping for D&B Update Manager (Siebel)

From Column	To Table	To Column
DUNS_NUM	S_ORG_EXT	DUNS_NUMBER
BUSINESS_NAME	S_ORG_EXT	NAME
TRADESTYLE	S_ORG_SYN	NAME
SCND_TRADESTYLE	S_ORG_SYN	NAME
PHYS_STREET_ADDR	S_ADDR_ORG	ADDR
SECOND_STREET_ADDR	S_ADDR_ORG	ADDR
PHYSICAL_CITY	S_ADDR_ORG	CITY
PHYSICAL_STATE	S_ADDR_ORG	PROVINCE or STATE
PHYSICAL_ZIP	S_ADDR_ORG	ZIPCODE
COUNTRY_NAME	S_ADDR_ORG	COUNTRY
COUNTY_NAME	S_ADDR_ORG	COUNTY
MAIL_ADDRESS	S_ADDR_ORG	ADDR
MAIL_ADDRESS_2	S_ADDR_ORG	ADDR
MAIL_CITY	S_ADDR_ORG	CITY

Table 86. S_DNB_ORG Table Mapping for D&B Update Manager (Siebel)

From Column	To Table	To Column
MAIL_STATE	S_ADDR_ORG	STATE
MAIL_ZIP	S_ADDR_ORG	ZIPCODE
TELEPHONE	S_ORG_EXT	PH_NUM
FAX_NUMBER	S_ORG_EXT	FAX_PH_NUM
ANNL_SLS_AMT	S_ORG_EXT_X	ATTRIB_14
CURRENCY_CODE	S_ORG_EXT	BASE_CURCY_CD
EMPLOYEES_TOTAL	S_ORG_EXT_X	ATTRIB_26
EMPLOYEES_HERE	S_ORG_EXT	EMP_COUNT
YEAR_STARTED	S_ORG_EXT_X	ATTRIB_27
LOC_TYPE_STAT_IND	S_ORG_EXT	included in LOC
PUBLIC_PRIVATE_IND	S_ORG_EXT_X	ATTRIB_08
GLBLULT_DUNS_NUM	S_ORG_EXT	GLBLULT_DUNS_NUM
DOM_ULT_DUNS_NUM	S_ORG_EXT	DOM_ULT_DUNS_NUM
PAR_DUNS_NUM	S_ORG_EXT	PAR_DUNS_NUM
LINE_OF_BUSINESS	S_ORG_EXT_X	ATTRIB_03
PCT_GROWTH_SLS_3YR	S_ORG_EXT_X	ATTRIB_15

The S_PRSP_CONTACT table contains information about the D&B contacts such as the name of the CEO and various company executives. D&B provides up to four contacts per D&B account.

Table 87. S_PRSP_CONTACT Table Mapping for D&B Update Manager (Siebel)

From Column	To Table	To Column
LAST_NAME	S_CONTACT	LAST_NAME
FST_NAME	S_CONTACT	FST_NAME
MID_NAME	S_CONTACT	MID_NAME
PER_TITLE	S_CONTACT	PER_TITLE
PER_TITLE_SUFFIX	S_CONTACT	PER_TITLE_SUFFIX
JOB_TITLE	S_CONTACT	JOB_TITLE
SEX_MF	S_CONTACT	SEX_MF

The S_DNB_ORG_SIC table contains the Standard Industrial Classification (SIC) code developed by the US Government. The code is assigned to businesses and other organizations by classifying and subdividing the activity performed by that establishment at that location. D&B provides up to six SICs per D&B account. In the D&B Update Manager process, the primary SIC code is mapped to the S_INDUST table and all SIC codes are mapped to the S_ORG_INDUST table.

Table 88. S_DNB_ORG_SIC Table Mapping for D&B Update Manager (Siebel)

From Column	To Table	To Column
ROW_ID	S_INDUST	PR_INDUST_ID
	S_ORG_INDUST	INDUST_ID

Table 89 describes how address and contact information is updated by the D&B Update Manager (Siebel) process.

Table 89. Update Rules for Addresses and Contacts

If This D&B Information Changes...	Then...
Street address City (Abbreviated) state	A new address record is added to the Address table.
Address information other than street address, city, or state	The address record is updated in the Address table.
Phone number Fax number	The address record is updated in the Address table.
Contact first name or Contact last name	A new contact record is added to the Contact table.
Contact information other than first or last name	The contact record is updated in the Contact table.

Field Mapping for D&B Real-Time Updates

When you purchase account information through the D&B Web site using the D&B real-time search and update feature in the Siebel application, certain fields in the Siebel business components are populated. These fields are a subset of the fields that are populated by the D&B Update Manager (D&B) server component. For example, D&B does not provide the contact first, last, and middle names fields in the real-time update.

Table 90 lists the fields that may be populated or updated when you purchase account information using the D&B real-time search and update feature.

Table 90. Fields Populated by D&B Real-Time Search and Update

D&B WorldBase Marketing Plus with Linkage	Siebel <i>Business Component Name.Field Name</i>
Business Structure Code (Location Type)	DNB Account.Location Type
Domestic Ultimate Name	DNB Account.Domestic Ultimate Business Name
Global Ultimate Name	DNB Account.Global Ultimate Business Name
Parent/HQ Business Name	DNB Account.Parent HQ Name
Physical State	DNB Account.State Name
Business Name	DNB Account.Business Name
Trade Style	DNB Account.Trade Style
Street Address	DNB Account.Physical Address
Mail Address	DNB Account.Mail Address
City Name	DNB Account.Physical City
Mail City Name	DNB Account.Mail City
Physical State/Province Abbreviation	DNB Account.Physical State
Mailing State/Province Abbreviation	DNB Account.Mail State
ZIP/Postal Code	DNB Account.Physical Zip
Mail Postal/ZIP Code	DNB Account.Mail Zip
Country Name	DNB Account.Country Name
D&B D-U-N-S Number	DNB Account.DUNS Number
Telephone Number	DNB Account.Main Phone 2
Cable/Telex Code	DNB Account.Cable Telex Number
Facsimile Number	DNB Account.Main Fax 2
National ID	DNB Account.National Identification Number 2
SIC Code	DNB Account.SIC Code
Primary Local Activity Code	DNB Account.Primary Local Activity Code
Year Started	DNB Account.Year Started 1
Employees Here	DNB Account.Employee Here
Employees Total	DNB Account.Employee Total
Annual Sales US Dollars	DNB Account.Sales Volume
Annual Sales Local	DNB Account.Annual Sales Local Currency

Table 90. Fields Populated by D&B Real-Time Search and Update

D&B WorldBase Marketing Plus with Linkage	Siebel <i>Business Component Name.Field Name</i>
Legal Status	DNB Account.Legal Status
Subsidiary Code	DNB Account.Subsidiary Indicator
Import / Export / Agent Ind.	DNB Account.Import Export Code
Global Ultimate D&B D-U-N-S Number	DNB Account.Global Ultimate DUNS
Global Ultimate Indicator	DNB Account.Global Ultimate Indicator
Global Ultimate WorldBase Country Code	DNB Account.Global Ultimate Country Code
Domestic Ultimate D&B D-U-N-S Number	DNB Account.Domestic Ultimate DUNS
Headquarter/Parent D&B D-U-N-S Number	DNB Account.Parent HQ DUNS
HQ/Parent WorldBase Country Code	DNB Account.Parent/HQ Country Code

Field Mapping for Account Promotion and Prospect Lists

When end users promote D&B accounts or create prospect lists from the D&B screen, fields in the DNB Account and DNB Contact business components are mapped to fields in other business components. These maps are listed in [Table 91](#) and can be viewed in detail in the Business Component User Properties window of Siebel Tools.

For information about promoting accounts and creating prospect lists, see [Chapter 38, "Opportunities \(End User\)."](#)

Table 91. Maps of D&B to Siebel Fields for Promotion and List Creation

User Property Prefix and Map Name	D&B Source Business Component	Siebel Destination Business Component	Process and Description
Account Map	DNB Account	Account	Promotion Specifies the fields in DNB Account that is copied to Account business component
Contact Map	DNB Contact	Contact	Promotion Specifies the fields in DNB Contact that is copied to Contact business component
Mailing Address Map	DNB Account	Business Address	Promotion Specifies the mailing address fields in DNB Account that is copied to Business Address

Table 91. Maps of D&B to Siebel Fields for Promotion and List Creation

User Property Prefix and Map Name	D&B Source Business Component	Siebel Destination Business Component	Process and Description
Physical Address Map	DNB Account	Business Address	Promotion Specifies the physical address fields in DNB Account that is copied to Business Address
Prospect Info Map	DNB Contact	List Mgmt Prospective Contact	Create Prospect List Specifies the biological information (such as last name, first name, and so on)
Prospect Contact Info Map	DNB Account	List Mgmt Prospective Contact	Create Prospect List Specifies the contact information (such as company, address, phone number, and so on) fields in the DNB Account that is copied into the List Mgmt Prospective Contact

31 D&B Integration (End User)

This chapter describes how to use D&B data and reports to manage customer relationships, acquire new customers, and create high quality new account records. It includes the following topics:

- [“Accessing Company Data and Reports with D&B” on page 439](#)
- [“Viewing D&B Aggregate Data for a Company” on page 439](#)
- [“Promoting a D&B Account” on page 440](#)
- [“Creating a Prospect List from D&B Data” on page 440](#)
- [“Viewing a D&B Report” on page 441](#)
- [“Using Global Integration to Add New D&B Accounts” on page 441](#)

Accessing Company Data and Reports with D&B

The D&B screen allows you to access D&B marketing data as well as business and credit reports from within your Siebel application.

You can directly access D&B data for use in prospecting, qualifying leads, and generating marketing lists. You also can integrate D&B data and reports into your Siebel application, allowing you to perform the following tasks:

- Use D&B information to standardize data for your customer accounts
- Access D&B business and credit reports
- Search D&B for new accounts
- Generate prospect lists based on D&B relationships and demographic data
- View account hierarchies and related opportunities across a corporate family structure

Viewing D&B Aggregate Data for a Company

When you have the D&B account information loaded into your Siebel application, a number of views allow you to use the data and view company hierarchies. The following procedure explains how to view aggregate data for a company using the D&B screen.

NOTE: D&B data for a company is read-only until the company is promoted to a Siebel account. For more information, see [“Promoting a D&B Account” on page 440](#).

To view aggregate data

- 1 Navigate to the D&B screen.
- 2 In the D&B Accounts list select the account for which you want to view the aggregate data.
- 3 In the More Info form, click Query.
- 4 In the query form, enter the query criteria, and then click Go.

A list of D&B accounts that meet your criteria appear.

NOTE: If the DUNS # field does not appear in the list, click the menu button, choose Columns Displayed, and adjust the list of displayed columns.

Promoting a D&B Account

You can use the D&B list to locate accounts that are potential sales leads. After you identify accounts that meet your criteria, you can promote the accounts into your accounts list.

To promote a D&B account

- 1 Navigate to the D&B screen.
- 2 In the D&B Accounts list select the company or companies that you want to add to your accounts list.
 - To select a sequence of account records, hold down the SHIFT key and click the account records.
 - To select multiple accounts that are not in sequence, hold down the CTRL key and click the account records.
- 3 In the D&B Accounts list, click Promote as Siebel Account.

A check mark appears in the Promoted field and the company is added to your Siebel application.

Drill down on the hyperlink in the Business Name field to view the account profile and related contacts.

Creating a Prospect List from D&B Data

You can use D&B data to generate sales leads. One way to use sales leads is to create a prospect list for your telesales or sales team to contact.

To create a prospect list

- 1 Navigate to the D&B screen.
- 2 In the D&B Accounts list select the company or companies that you want to include in your list, and then click Create D&B Lists.

The contacts associated with the company or companies are added to a prospect list.

- 3 To view the prospect list, select D&B Lists from the Show drop-down list.
- 4 In the D&B Lists list, select the list and drill down on the list name hyperlink to view accounts on the list.

Viewing a D&B Report

After a D&B report order is set up by your administrator, you can view business and credit reports from within your Siebel application. This information can also be viewed from the Accounts screen's D&B Reports view tab.

To view a D&B report

- 1 Navigate to the D&B screen.
- 2 In the D&B Accounts list select the company for which you want to view reports.
- 3 Click the Reports view tab.

The D&B report for the selected company appears.

Using Global Integration to Add New D&B Accounts

After a D&B Global Integration access is set up by your administrator, you can access D&B real-time within your Siebel application and enter criteria to locate new accounts in the D&B database. Search criteria can include the business name with state/province and country information, D&B D-U-N-S number, local business ID, and telephone number.

When you execute a search for new D&B accounts, the search criteria is sent to D&B's Global Integration, along with the user's D&B account name and password. When D&B receives the information, Global Integration automatically selects the single best search method to execute based on the criteria. D&B calculates the criteria matches and returns the number to Siebel. If there are no matches for the criteria, the requestor is notified.

At this point, you can opt to purchase the account information, or cancel the Global Integration search process. If an account is purchased, data received from D&B is added to the Siebel D&B tables and is available in D&B All Accounts view.

NOTE: If the selected account already exists in your Siebel D&B database, the account is not purchased.

To initiate D&B's Global Integration search

- 1 Navigate to the D&B screen > D&B Accounts List view.
- 2 Click Search D&B for New Account.

3 In the Search D&B dialog box, complete the fields for the query.

The following illustration shows an example of the search criteria form.

You must enter sufficient data to initiate a query in the United States. For example, as the following figure shows, in the Search D&B form you can enter Business Name, State/Province and Country as criteria, or just the D-U-N-S number, or the Local Business ID and Country, or the Phone number and Country. If you only enter the Business Name, the search fails because the data is insufficient.

The following table describes the Search D&B query fields.

Field	Comments
Business Name	The Name/Address search is the most commonly used search method. At a minimum, the business name and country must be supplied. For Canadian businesses, the province must also be included.
Street Address	
City	
State/Province	When you are searching for a business by name, do not use wildcard characters, (*) for unknown characters in the name.
Country Name	
ZIP Code	Additional information such as town, street address, and postal code, can be included to increase the chances of finding an exact match.
DUNS #	This search method allows you to enter a known D&B D-U-N-S number to verify the identity of a business. The D&B D-U-N-S number should contain only nine numeric characters (no spaces, dashes, and so on).

Field	Comments
Local Business ID	<p>Many countries have their own numbering schemes to identify local businesses. Normally, this is a government-sponsored schema for the purpose of business registration and tax filing.</p> <p>The local business ID submitted in a search should only contain numeric characters (no spaces, dashes, and so on). A country code must also be included with the request.</p> <p>D&B Global Integration supports searching by the following local business identifiers.</p> <p>Australia—CAN</p> <p>Belgium—BTW/TVA</p> <p>France—SIREN</p> <p>Germany—Hr. Number</p> <p>Ireland—Company House</p> <p>Italy—CCIAA</p> <p>Netherlands—KvK Nr</p> <p>Portugal—Fiscal</p> <p>Spain—CIF/NIF</p> <p>Sweden—Company House</p> <p>United Kingdom—Company House</p>
Phone #	<p>If using a telephone number search, enter the telephone number as dialed from <i>within</i> the country, including the area code or city code if required. The international long distance code (country code) should not be included.</p> <p>For example 9086655000 for a search in New Jersey, US; 9055686000 for a search in Ontario, Canada; 01494422000 for a search in High Wycombe, England; 0104009400 for a search in Rotterdam, Netherlands.</p> <p>The telephone number should contain only numeric characters (no spaces, dashes, and so on).</p>

- 4 After you have entered the criteria, click Search D&B.

The following figure shows sample search results, with the business name, city, and state in the Search Results list.

- 5 In the Search D&B list of results, select an account, and then click Purchase.

Click Refine Query to modify the query criteria. Click Cancel to return to the D&B Accounts list without purchasing.

The purchased account is highlighted in the D&B Accounts list.

32 Integration Using ASIs

This chapter describes setting up ASIs for accounts, contacts, and households. It includes the following topics:

- [“About ASIs for Accounts, Contacts, and Households” on page 445](#)
- [“Setting Up Account, Contact, and Household ASIs” on page 446](#)
- [“ASI Workflow Descriptions” on page 448](#)

About ASIs for Accounts, Contacts, and Households

ASIs allow you to integrate Siebel applications with other applications in real time.

The Accounts, Contacts, or Households screens use ASIs to exchange data with any external system such as a back-office application. These are listed in [Table 92](#).

You must set up these ASIs shipped with your Siebel application before they can be used. This chapter provides the procedures that you must perform to set up these ASIs. Depending on your business needs, you may choose to set up ASIs and activate workflows for some or all of the GUI commands listed in [Table 92](#).

For general information about ASIs, see *Application Services Interface Reference*.

Table 92. ASIs for Accounts, Contacts, and Households

Screen	GUI Command	Workflow	Outbound and Inbound ASI Pairs
Accounts	Update External System	Synchronize Account ASI	External Account
Accounts (Credit Profile view)	Refresh	Get Account ASI	Siebel Account
Contacts	Update External System	Synchronize Contact ASI	External Contact Siebel Contact
Households	Update External System	Synchronize Household ASI	External Household Siebel Household

Setting Up Account, Contact, and Household ASIs

This section describes how to set up the prebuilt ASIs for Accounts, Contacts, and Households:

- 1 **Set up outbound and inbound Web services.** See [“Setting Up Web Services for Account, Contact, and Household ASIs”](#) on page 446.
- 2 **Activate workflows.** See [“Activate Workflows for Account, Contact, and Household ASIs”](#) on page 447.

Other tasks you may want to perform are:

- **Extending ASIs.** See *Application Services Interface Reference*.
- **Deactivating fields in the ASIs.** See *Application Services Interface Reference*.
- **Customizing ASI workflows.** See *Siebel Business Process Designer Administration Guide*.

Setting Up Web Services for Account, Contact, and Household ASIs

To set up the Web services, you must set up both outbound and inbound Web services for the ASIs. The procedures that follow show you the steps required for each ASI.

To set up an outbound Web service

- 1 Navigate to the Administration - Web Services screen > Outbound Web Services view.
- 2 In the Outbound Web Services list, create a query to display the record with External Account, External Contact, or External Household in the Name field.
- 3 Verify that the fields in the Outbound Web Services list match those in the following table.

Namespace	Name	Status
http://siebel.com/asi/	One of the following: External Account External Contact External Household	Active

- 4 In the Service Ports list, click New, and enter the following values in the fields of the new record.

Field	Comments
Name	Enter a name for the port.
Port Type	Enter External Account, External Contact, or External Household.
Transport	Select from the drop-down list.

Field	Comments
Address	When you select a transport, the field will be populated with a template address. Edit the address based on where you are sending the data.
Binding	If a SOAP header is expected by the receiving application, select SOAP_RPC.

To set up an inbound Web service

- 1 Navigate to the Administration - Web Services screen > Inbound Web Services view.
- 2 In the Inbound Web Service list, create a query to display the record with Siebel Account, Siebel Contact, or Siebel Household in the Name field.
- 3 Verify that the fields in the Inbound Web Services list match those in the following table.

Namespace	Name	Status
http://siebel.com/asi/	One of the following:	Active
	Siebel Account	
	Siebel Contact	
	Siebel Household	

- 4 In the Service Ports list, review the information in the fields for the service port and make any changes required for your system.
- 5 In the Operations list, review the information shown and make any changes required for your system.

Activate Workflows for Account, Contact, and Household ASIs

You must activate the following workflow processes used for real-time integration of account, contact and household data:

- Synchronize Account ASI
- Get Account ASI
- Synchronize Contact ASI
- Synchronize Household ASI

For a description of these workflows, see [“ASI Workflow Descriptions” on page 448](#).

To activate workflows used by Account, Contact, and Household ASIs

- See *Siebel Business Process Designer Administration Guide*.

ASI Workflow Descriptions

This section describes the workflow processes that are used to invoke the ASIs for account processes. It is not necessary to modify these workflows, but you can modify them to suit your business model.

Synchronize Account ASI

This workflow submits the account information to the outside system to synchronize the information between the two systems.

- **Query For Account By Id:** Queries for the account on the current system using the object ID. Returns an account property set containing the account information.
- **External Account Proxy:** Calls the Synchronize method on the outside system, passing in the account property set. This step returns an account property set, which will contain any changes the outside system made to the account.
- **Synchronize Account:** Takes the account property set returned by the previous step and synchronizes it with the account in the current system.

Synchronize Contact ASI

The Synchronize Contact ASI process is essentially the same as the Synchronize Account ASI process, except that contact replaces account.

Synchronize Household ASI

The Synchronize Household ASI process is essentially the same as the Synchronize Account ASI process, except that household replaces account.

Get Account ASI

This workflow queries the outside system to retrieve the latest information on the account. It returns the new information and synchronizes the account on the current system.

- **Query Account By Id:** Queries for the account on the current system using the object ID. Returns an account property set containing the account information.
- **Isolate Integration Id:** In the next step, the workflow uses a query by example. Query by example takes the property set and looks for an account with exactly the same values for the fields in the property set. If the account has changed on the outside system, those values will no longer match. The workflow needs to query by a value that does not change, that is, the integration ID. Isolate Integration Id takes in a property set and removes all the fields, except the integration ID.
- **External Account Proxy:** Using the property set, which only has an integration ID now, this step queries by example on the outside systems. Once it finds the account with that integration ID, it returns an account property set containing the account information.
- **Synchronize Account:** Takes the account property set returned by the previous step and synchronizes it with the account in the current system.

33 Contacts

This chapter describes using contacts in the Siebel application. It includes the following topics:

- [“About Contacts” on page 449](#)
- [“Scenario for Contacts” on page 449](#)
- [“Adding a Contact” on page 450](#)
- [“Associating a Contact with an Account” on page 452](#)
- [“Associating a Contact with an Opportunity” on page 452](#)
- [“Associating Attachments with a Contact” on page 452](#)
- [“Promoting a Personal Contact to a Sales Contact” on page 453](#)
- [“Creating a Profile for a Contact” on page 453](#)
- [“Adding a Contact to a Synchronization List” on page 453](#)
- [“Updating Contact Information in External Systems” on page 454](#)

About Contacts

Contacts are individuals with whom your company conducts business or expects to conduct business in the future. These individuals can be employees of other companies, independent consultants, vendors, or personal acquaintances. Contacts can be associated with several accounts, but a contact is the primary on only one account. Contacts can also be associated with a number of opportunities.

This chapter describes how sales professionals can use the Contacts screen to record information about individuals who interact with their company.

Scenario for Contacts

This scenario provides an example of a business process performed by a sales representative managing new and existing contacts. Your company may follow a different process according to its business requirements.

In the course of a business day, a sales representative interacts with other professionals. These formal and informal exchanges can result in potential leads or sales opportunities.

A sales representative determines if her company has done business with a particular company by reviewing account and contact records. In cases where contacts are not listed, the sales representative creates new contact records in the Siebel Sales application, and associates the contacts with new or existing accounts.

If the possibility of doing business—an opportunity—arises, the sales representative creates the opportunity and associates activities and contacts with the opportunity. This helps the sales representative track important milestones for obtaining and closing deals.

Adding a Contact

When a sales representative identifies an individual as a possible source for leads, that individual's information is added to Siebel Sales as a contact. Team members can access this contact information while they are working on potential business opportunities.

A contact team is a group of employees or partners who can view the contact information in the My Contacts view. If you work in a Mobile Web Client environment and are a member of the contact team, the contact information is downloaded to your local database the next time you synchronize.

Use the following procedure to create a contact record.

To add a contact

- 1 Navigate to the Contacts screen > Contacts List view.
- 2 In the Contacts list, create a new record and complete the necessary fields.

A contact record only appears on the My Contacts view if you are on the contact team for the contact.

- 3 Drill down on the record and click the More Info view tab to display additional fields in the More Info form.

Some fields are described in the following table.

Field	Comments
Account	Displays the account with which the contact is associated.
Address Line 1	Inherits the primary address for the account associated with the contact. You cannot add address information in this field.
Comments	A text field that shows any additional information associated with the contact.
Contact Method	A list of values established by your company that is used to define the contact's preferred method of interaction. Default values include Email, Fax, Pager, and Phone.
Contact Team	A default value based on your user ID. After you create a contact, you are automatically listed as the primary team member. You can add individuals to the contact team by selecting them from the employee list. Only a manager or administrator can change the primary contact team member, or can delete the primary contact team member.
Disable Cleansing	A check box which, when selected, does not allow data cleansing.

Field	Comments
Employee Flag	If checked, this flag indicates that the contact is an employee of your company.
First Name	A required field that displays the contact's first name.
Global Owner	Displays the name of the team member who is the global account owner. In cases of multinational or global companies, this designates one main account team member to oversee the account.
Households	Displays the household to which the contact is affiliated. Households allow you to track and target contact affiliations, and often these contacts share an address. For more information on Households, see Chapter 39, "Households."
Job Title	A text field that displays the contact's professional title.
Last Name	A required field that displays the contact's last name.
Lock Assignment	A check box which, when selected, locks the contact team assignment from reassignment by Siebel Assignment Manager.
Manager Last Name	Displays the manager's last name. This field must be populated before you can perform an organizational analysis.
Middle Initial	An optional field that displays the contact's middle initial.
Never Call	A check box which, when selected, indicates that the contact should not be telephoned as a method of contact.
Never Email	A check box which, when selected, indicates the contact does not want to receive email.
Never Mail	A check box which, when selected, indicates that the contact does not want to receive mail from your company.
Organization	A default value displaying the name of the organization to which you belong. Your system administrator sets up organizations in your Siebel application. You can associate multiple organizations with an opportunity, but your organization is listed as the default organization.
Send Email Updates	A check box which, when selected, indicates that the contact is willing to receive email updates about products and services.
Status	Examples are Active, Qualified, Marked for Deletion.
Sync	A read-only check box, which indicates the user has included the contact record in the user's Sync List. Requires Siebel Server Sync.
Sync List	A dialog box that displays the User IDs of users who synchronize the contact with a personal information manager (PIM) such as Lotus Notes or Microsoft Outlook. Requires Siebel Server Sync.
Time Zone	Displays the time zone in which the contact works or lives.

Associating a Contact with an Account

A contact can be associated with one or more accounts, although the contact is designated as the primary on only one account. Use the Accounts view to list accounts associated with a contact.

To associate a contact with an account

- 1 Navigate to the Contacts screen > Contacts List > Accounts view.
- 2 Query for the contact and create records in the Accounts list.

Associating a Contact with an Opportunity

A contact can be a source of revenue for the organization. Potential revenue-generating events are called opportunities. You can associate a contact with an opportunity to track information about both the opportunity and the contact.

To associate a contact with an opportunity

- 1 Navigate to the Contacts screen > Contacts List view.
- 2 In the Contacts list, drill down on the contact, and then click the Opportunities view tab.
- 3 In the Opportunities list, click New.
- 4 In the Add Opportunities dialog box, select the opportunity to associate with the contact, and then click OK.

Associating Attachments with a Contact

An attachment is a file created in another application that you can associate with a contact record. Documents can be attached to contact records to maintain an interaction history for the contact or the opportunity. Attachments can include email correspondence, pending contracts, and product data sheets. Associating attachments with a contact record allows the sales team to share information about the contact.

To associate an attachment with a contact

- 1 Navigate to the Contacts screen > Contacts List view.
- 2 In the Contacts list, drill down on the contact, and then click the Attachments view tab.
- 3 In the Attachments list, click New.

The Update File check box is automatically selected as a default. If you do not want the attached file automatically updated as the source file changes, clear the check box.

- 4 In the Attachment Name field, click the select button.

- 5 In the Add Attachment dialog box, click Browse.
 - 6 In the Choose File dialog box, select the file, and then click Open.
 - 7 In the Add Attachment dialog box, click Add.
- The attachment appears in the Attachments list.

Promoting a Personal Contact to a Sales Contact

Contact records can be promoted from the My Personal Contacts view to the My Contacts view.

To promote a contact from My Personal Contacts to My Contacts

- 1 Navigate to the Contacts screen > Personal Contacts List view.
 - 2 In the Contacts list, select the contact for promotion.
 - 3 In the Contact form, clear the check box in the Private field.
- The Contact record appears in the My Contacts list.

NOTE: You cannot designate a contact as Private (My Personal Contacts) from the My Contacts list.

Creating a Profile for a Contact

A profile consists of information that is collected about a contact. This information can include a contact's expenditure approval, hobbies, education, and the name of the contact's spouse.

To create a profile

- 1 Navigate to the Contacts screen > Contacts List > Profile view.
- 2 Query for the contact.
- 3 In the Profile form, complete the fields.

Adding a Contact to a Synchronization List

A contact can be added to a list for synchronization with a personal information manager (PIM), for example, Microsoft Outlook, using Siebel Server Sync. For more information about synchronizing contacts, see *Siebel Server Sync Guide*.

To add a contact to a sync list

- 1 Navigate to the Contacts screen > Contacts List view.

2 In the Contacts list, select the contact to be added to the Sync List.

3 Click the menu button, and then select Add to Sync List.

A check mark appears in the Sync check box in the Contact form.

A contact can also be added to a different Sync List by clicking the select button in the Sync List field in the contact form.

To remove a contact from a sync list

1 Navigate to the Contacts screen > Contacts List view.

2 In the Contacts list, select the contact to be removed from the Sync List.

3 Click the menu button, and then select Remove from Sync List.

The check mark is removed from the Sync check box in the Contact form.

Updating Contact Information in External Systems

If the Siebel administrator has set up real-time integration of contacts between Siebel Sales and a back-office system or other systems in your organization, you can use the Update External System command to send new and modified contact information from Siebel Sales to another system.

This Application Services Interface (ASI) feature allows a real-time contact data update between Siebel and a third-party external system, maintaining consistent customer information across the enterprise and eliminating manual entry of customer data in multiple systems.

The Update External Systems command also can be used to synchronize account data with external systems. For more information, see [“Updating Account Information in External Systems” on page 462](#).

This procedure assumes that the Siebel administrator has completed the work necessary to allow real-time contact integration through ASI. For information about how to set up the Web services administration to communicate with the external system, ASI structures, configuring and customizing the ASI, see *Application Services Interface Reference* and [Chapter 32, “Integration Using ASIs.”](#)

To update contact information in an external system

1 Navigate to the Contacts screen > Contacts List view.

2 In the Contacts list, create a new record and complete the necessary fields.

3 (Optional) Navigate to the Contacts screen > Contacts List > Accounts view.

4 (Optional) In the Accounts list, click New, and then complete the fields to associate an account with the contact.

5 In the Contacts applet, click the menu button, and then choose Update External System.

34 Using Accounts in Siebel Sales

An account represents the relationship between a company and the companies or individuals with whom it conducts business. Sales representatives use the Accounts screen and its associated views as the primary navigation tool for customer interactions.

This chapter describes how sales professionals can use the Accounts screen to create new customer accounts, modify and add account information for existing customers, respond to customer inquiries, and view account information.

This chapter includes the following topics:

- [“Scenario for Accounts” on page 455](#)
- [“Creating an Account” on page 456](#)
- [“Associating a Contact with an Account” on page 459](#)
- [“Associating an Account with an Activity” on page 459](#)
- [“Associating an Account with an Opportunity” on page 460](#)
- [“Performing Account Assessments” on page 461](#)
- [“Updating Account Information in External Systems” on page 462](#)
- [“Viewing Account Credit Profiles” on page 462](#)

Scenario for Accounts

This scenario provides an example of the business process performed by a sales representative managing new and existing accounts. Your company may follow a different process according to its business requirements.

At a vendor site, a sales representative meets a prospect. After a brief discussion, the sales representative determines that the prospect is interested in learning more about the products and services that the sales representative’s company sells. The sales representative sets up a sales call with the prospect.

During the sales call, the sales representative asks a number of questions to determine the account structure of the prospect’s business and to decide how best to meet the prospect’s needs.

The sales representative learns that the prospect’s business has four locations, and that each service is billed through the main office, and each location receives a billing statement.

After the meeting, the sales representative returns to the office and begins creating the account structure for the prospect’s business.

Creating an Account

After a business relationship is identified, you can enter the details about the account. As account details evolve or change, you can update the account information. Before adding a new account, search the accounts list to make sure the account does not already exist.

To create an account

- 1 Navigate to the Accounts screen > Accounts List view.

- 2 In the Accounts list, create a new record and complete the necessary fields.

Drill down on the account record and click the More Info view tab to see more fields.

Some fields are described in the following table.

Field	Comments
Account Type	A list of values established by your company defines the type of account. Default values include Commercial, Competitor, Consultant, and Customer.
Assignment Area Code	Displays an area code for the account. This indicates that a sales representative from the same area code should be assigned to the account.
Assignment Country Code	Displays a country code for the account. This indicates that a sales representative from the same country code should be assigned to the account.
PO Auto-Approval Limit	The amount for which a Purchase Order can be automatically approved.
Competitor	A check box which, when selected, indicates the account is a competitor.
Current Volume	Displays a monetary amount that represents the account's current sales volume.
Disable Cleansing	A check box which, when selected, does not allow data cleansing.
Domestic Ultimate DUNS	Displays the D-U-N-S number for the domestic ultimate, which is the highest member in the hierarchy for the same business entity within the same country. A case can be its own domestic ultimate.
DUNS#	The Data Universal Numbering System (D-U-N-S) numeric serial number for a company. The D-U-N-S number is unique for each company.
Expertise	A list of values established by your company that defines the area of expertise for the account. Default values include Technology, Quality Control, and Client Management.
Global Owner	Displays the ID of the team member who is the global account owner. In cases of multi-national or global companies, this designates one main account team member to oversee the account.
Global Ultimate DUNS	Displays the D-U-N-S number for the global ultimate, which is the highest member in the hierarchy for the same business entity worldwide.
Inventory Location	Displays the physical location of the inventory.
Lock Assignment	A check box which, when selected, locks the sales team assignment from reassignment by Siebel Assignment Manager.
Name	A required value that identifies the account.

Field	Comments
Organization	Displays the name of the organization with which the account is associated in your Siebel application.
Parent	Displays a parent account if the account is a subsidiary of a larger company.
Parent/HQ DUNS	D&B number for the account's parent account.
Partner	A check box which, when selected, indicates the account is a business partner.
PO Approval Limit	Displays a monetary limit up to which a PO is approved.
PO Approved	A check box which, when selected, indicates the Purchase Order (PO) has been approved.
Potential Volume	Displays a monetary amount that represents the account's potential sales volume.
Price List	Displays a price list associated with the account. Your application administrator establishes price lists based on criteria defined by your company.
Reference	A check box which when selected indicates the account offers a reference for your company's products or services.
Referenceable as of	Displays the date when the account first became a reference
Shipping Information	A text field for additional shipping details.
Shipping Terms	A list of values established by your company that defines the terms for shipping. Default values include Due, FOB, TBD, and No Charge.
Stage	A list of values established by your company that defines the account stage according to your sales or other methodology. Default values include Project Planning and Strategy, Analysis and Design, Testing and Production Pilot, Rollout, and On Hold.
Status	A list of values established by your company that defines the account status. Default values include Active, Contract Pending, Gold, and Inactive.
Synonyms	Displays a synonym for the account.
URL	Displays the Universal Resource Locator (URL) for the account Web site.

NOTE: When a company change names or merges with another company, you must transfer account names and contacts to the new account name. Contact Siebel Technical Support or your implementation team for more information on how to rename an account.

Associating a Contact with an Account

As you work with a prospective account, you develop business relationships with the contacts associated with an account.

Contacts can belong to multiple accounts, only one of which can be the primary account. Deleting a contact record in the Accounts screen's Contacts view only removes the contact's association with the account. The original contact record is still available in the Contacts list.

To associate a new contact with an account

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 In the Accounts list, drill down on the account, and then click the Contacts view tab.
- 3 In the Contacts list, click New, and complete the fields for the contact.

To associate an existing contact with an account

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 In the Accounts list, drill down on the account, and then click the Contacts view tab.
- 3 In the Contacts list, click Add.
- 4 In the Add Contacts dialog box, enter query criteria for the contact, and then click Go.
- 5 Select the contact to add, and then click OK.

To update an external system with an account contact

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 In the Accounts list, drill down on an existing account, and then click the Contacts view tab.
To create a new account, see ["Creating an Account" on page 456](#).
- 3 In the Contacts list, select the contact.
- 4 In the contact record, drill down on the contact name hyperlink, and then in the contact form, complete any additional fields.
- 5 In the Contact form, click the menu button, and then choose Update External System.

Associating an Account with an Activity

An activity is a task or event that is generally, but not always, performed for a contact, an account, or an opportunity. You will most likely attend meetings, calls, presentations, and perform other activities associated with an account. You can use the Activities list to enter and track account-related activities. If the activity has a time associated with it, the activity appears in the Activities list and Calendar.

An account can have a number of activities associated with it. You can associate an activity with an account to track which activities you have completed and track those you want to accomplish in the future as you manage the account relationship.

To associate an account with an activity

- 1** Navigate to the Accounts screen > Accounts List view.
- 2** In the Accounts list, drill down on the account associated with the activity, and then click the Activities view tab.
- 3** In the Activities list, create a new record and complete the necessary fields.
 - a** In the Type field, drill down on the hyperlink for the default value to change the type of activity.
 - b** In the Display In field, choose the display method for the activity.

For example, the activity can appear in Calendar and Activities, To Do and Activities, and Activities Only.

Associating an Account with an Opportunity

Accounts are a source of business for your company. An opportunity is a potential revenue-generating event and the opportunity record stores information that you can use to manage accounts.

To associate an account and an opportunity

- 1** Navigate to the Accounts screen > Accounts List view.
- 2** In the Accounts list, drill down on the account.
- 3** Click the Opportunities view tab.
- 4** In the Opportunities list, create a new record and complete the necessary fields.

The Account field and the Primary (team member) field are automatically populated. The Close Date field value defaults to the opportunity creation date.
- 5** To display more fields, in the Opportunities list click the menu button and then choose Columns Displayed.

The following table describes some of the fields.

Field	Comments
Account	A value inherited from the selected account.
Close Date	Allows you to enter the expected date on which the opportunity closes. The default date is the opportunity creation date. Modify the close date if the opportunity closes on a different date, because this date is used in revenue forecasting.

Field	Comments
Name	Displays the name of the opportunity.
Primary	Displays your User ID when you create the opportunity. This value can be changed.
Priority Flag	A check box which indicates that an account is a high priority (urgency for sales team). When the priority is set by selecting the check box, a flag appears in the priority column.
Revenue	Allows you to enter the currency amount of the opportunity. This field defaults to zero.
Sales Stage	A list of values established by your company that defines the sales stages associated with the sales method you selected.

Performing Account Assessments

Account assessments can be used to compare accounts to one other, compare them to a model, or to determine what information is present or not for an account. You complete the assessment by selecting the appropriate values for the different opportunities.

To perform an account assessment

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 In the Accounts list, drill down on the account, and click the Assessments view tab.
- 3 In the Assessments list, create a new record and complete the necessary fields.
 - a In the Template Name field, click the select button.
The Select Assessment Template dialog box appears.
 - b Select the template, and then click OK.
- 4 Click the Assessment Attribute subview tab, and then click the show more button.
 - In the Value field, click the select button and then select the appropriate value for the account.

A composite assessment score for the account appears as a percentage value in the parent Assessment list. This percentage compares the score you entered in the assessment attribute line items to the maximum possible score for the account. You can use this percentage to profile the account.

Updating Account Information in External Systems

If your Siebel administrator has set up real-time account integration between Siebel Sales and a back-office system or other systems in your organization, you can use the Update External System command to send new and modified account information from Siebel Sales to another system in real-time.

This Application Services Interface (ASI) feature allows you to initiate a real-time account data update between Siebel and external system, maintaining consistent account information across the enterprise and eliminating manual entry of account data in multiple systems.

By default, in the Accounts screen, the Update External System command triggers the business process Synchronize Account ASI. This business process sends account information to the external system, and updates Siebel with the response from the external system. This business process can be viewed by navigating to the Business Processes screen from the Site Map, and querying for the business process name.

The following procedure explains how to send account information from Siebel Sales to another system. The contacts that are associated with the account must sent separately to the external system. For more information, see [“Updating Contact Information in External Systems” on page 454](#).

This procedure assumes that your Siebel administrator has completed the work necessary to allow real-time account integration through ASI. For information about how to set up the Web services administration to communicate with the external system, ASI structures, configuring and customizing the ASI, see *Application Services Interface Reference* and [Chapter 32, “Integration Using ASIs.”](#)

To synchronize account information with an external system

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 In the Accounts list, select an account record.
To create a new account record, see [“Creating an Account” on page 456](#).
- 3 In the Account list, click the menu button, and then choose Update External System.

Viewing Account Credit Profiles

If your organization uses back-office software or another external credit management system to store customer credit information, you can use the Credit Profile read-only view to get the most current account credit profile information.

The Accounts screen's Credit Profile view allows you to improve employee productivity by providing visibility to complete customer information within your Siebel application, and streamlines the quote-to-cash process by allowing the sales professional to identify potential credit problem early.

This procedure assumes that your Siebel administrator has completed the work necessary to allow real-time account integration through Application Service Interfaces (ASI). For information about how to set up the Web services administration to communicate with the external system, ASI structures, configuring and customizing the ASI, see *Application Services Interface Reference* and [Chapter 32, "Integration Using ASIs."](#)

To view account credit profile information

1 Navigate to the Accounts screen > Accounts List view.

2 In the accounts list, drill down on the account, and then click the Credit Profile view tab.

The Credit Profile form appears, and includes information on credit status, risk category, credit limit, and so on.

Fields in this form are read-only, except for the Skip Credit flag check box and Credit Auto Approval Limit. For more information on how to use these fields, see *Siebel Order Management Guide*.

3 Click Refresh to update the information in the Credit Profile form.

35 Using Accounts in Siebel Call Center

This chapter describes how call center agents can use the Accounts screen to record information about companies and other organizations that interact with your company.

Account information is closely related to information about contacts and prospects, and is similar to information about households. Later chapters in this guide provide more detailed information about how to use the Contacts, Prospects, and Households screens.

This chapter includes the following topics:

- [“Managing Business Data with the Accounts Screen” on page 465](#)
- [“Scenario for Accounts” on page 466](#)
- [“End-User Procedures for Accounts” on page 466](#)
- [“Creating an Account” on page 466](#)
- [“Adding Contacts to an Account” on page 469](#)
- [“Sending Account Information to an External System” on page 470](#)

Managing Business Data with the Accounts Screen

An account can be a company representing a customer, a prospective customer, a partner, a supplier, or a competitor.

Call center agents can use the Accounts screen to organize and track data when performing the following tasks:

- Creating accounts
- Creating and associating activities with an account
- Associating contacts with an account
- Researching the following kinds of account information:
 - Service Requests
 - Contractual Agreements
 - Product Issues
 - Activity History
 - Account Status

If your organization serves mostly businesses, the Accounts screen is a good screen to use when answering general inbound phone calls. If your organization serves mostly individual consumers, or if you are answering inbound calls related to a marketing campaign, the Contacts screen is a better screen to use when answering inbound calls.

Scenario for Accounts

The Accounts screen and views often provide the central navigation point to help call center agents research customers and respond to inbound calls. The type of call determines which view is used by the agent in the application. The following scenarios provide examples of how the Accounts screen is used:

- The call center agent needs to see existing account information, including the products owned by the account, to assist a caller with a service request or to follow up on a service request.
- A caller contacts the call center in response to a sales campaign. Assuming the caller is unknown, the call center agent creates a new account. First, the agent records the account name, address, and other important information. Then, the agent adds a contact or enters other information about the new account. Finally, the agent associates the contact with the campaign that resulted in the call.
- A call center agent wants to enter information about a prospective account. For example, the agent may call a prospective customer to find out if the customer located requested information on the company's Web site, and whether the customer requires any additional information. The agent adds notes that can be used by a sales representative or schedules follow-up activities to help manage the account relationship.

End-User Procedures for Accounts

This section includes the following end-user procedures for working with the Accounts screen:

- [Creating an Account on page 466](#)
- [Adding Contacts to an Account on page 469](#)
- [Sending Account Information to an External System on page 470](#)

Creating an Account

As a central object for managing customer relationships, an account record must be created for each prospective or customer account before other supporting information can be entered about the account. After an account is created, an agent can begin to add and track important details such as individual contacts, opportunities, and service requests.

To create an account

- 1 Navigate to the Accounts screen.

- 2 In the More Info form, click New, and complete the fields for the new record.

To view additional fields, click the show more button.

The following table describes some of the fields.

Field	Visible by Default?	Comments
Account Team	Yes	Employees assigned to work with this account. If a call center user is not a member of the Account Team, that user will not receive information about this account during Mobile Web Client synchronization.
Account Type	Yes	Indicates the relationship of the account to your company. Typical values include Customer, Competitor, Consultant, Partner, Vendor, and so on.
Address Line 1	No	First line of account address. This value appears in some Contacts screen views, as well as Account screen views, for contacts that are associated with this account.
Address Line 2	No	Second line of account address. This value appears in some Contacts screen views, as well as Account screen views, for contacts that are associated with this account.
Assignment Area Code	No	Indicates account area code for Siebel Assignment Manager to use when automatically setting attributes such as Account Team memberships. Assignment Manager checks this value for matches to assignment rules.
Assignment Country Code	No	Indicates account country code for Siebel Assignment Manager to use when automatically setting attributes such as Account Team memberships. Assignment Manager checks this value for matches to assignment rules.
Currency	No	Monetary unit to be used in transactions with the account.
Current Volume	Yes	Value of the products and services that a customer has purchased, so far.
Disable Cleansing	No	When selected, prevents data quality cleansing, which verifies that the address is real and standardizes address formatting.
Domestic Ultimate DUNS	No	D&B D-U-N-S (Data Universal Numbering System) number belonging to the highest-level related member within a specific country.

Field	Visible by Default?	Comments
DUNS #	No	D&B D-U-N-S number for the account. If the account has separate operations at multiple sites, this number applies to the current site.
Expertise	Yes	Indicates expertise level or type required by the account. Siebel Assignment Manager checks this value for matches to assignment rules when automatically setting attributes such as Account Team memberships.
Global Ultimate DUNS	No	The D&B D-U-N-S number belonging to the worldwide ultimate parent company of the account.
Industries	No	Types of business engaged in by the account.
Location Type	No	Type of facility operated by the account at the specified site.
Lock Assignment	No	When selected, prevents Assignment Manager from making changes to the Account Team.
Name	Yes	Name of the account.
Organization	No	Organization within your company that is assigned to work with the account.
Parent	Yes	Company of which the account is a subsidiary.
Parent/HQ DUNS	No	D&B D-U-N-S number belonging to the company of which the account is a subsidiary or to the headquarters site of the account.
Parent Site	No	Location of the company of which the account is a subsidiary.
Partner	Yes	When selected, indicates that the account selected represents an external enterprise that is a partner of your company.
PO Approved	Yes	When selected, indicates that the account may use purchase orders to buy goods or services from your company.
PO Auto-Approval Limit	No	Maximum value of goods or services the account can buy from your company using purchase orders, unless further approvals are obtained.
Potential Volume	Yes	Total estimated value of goods and services that a customer will buy.
Price List	No	List of prices to be quoted to this account.
Reference	Yes	Indicates that the account can be used as a reference for potential customers to contact.

Field	Visible by Default?	Comments
Referenceable as of	No	Date the account became a reference.
Shipping Information	No	Text field for any special information about shipping to the account.
Shipping Terms	No	Type of shipping charges to be used with this account.
Site	Yes	Location of the account.
Stage	Yes	Phase customer has reached in the planning and deployment life cycle of the products they have purchased.
Status	Yes	The current stage in the customer interaction life cycle. Defaults to Active for a new account record. If set to Candidate, only Account Team members will get information concerning this account during Mobile Web Client synchronization.
Synonyms	No	Text field for alternate names for the account. For example, an account record for International Business Machines might have IBM as an entry in the Synonym field. Helpful when querying or when using Siebel Data Quality.
Territories	No	Sales territories associated with the account.

Adding Contacts to an Account

As agents work closely with prospective or customer accounts, they need to accurately maintain the contacts associated with the account. The following procedure describes how to add one or more new contacts for an account.

To add contacts to an account

- 1 Navigate to the Accounts screen, and select the account in the Accounts list.
- 2 Click the Contacts view tab.
- 3 In the Contacts list, create a new record and complete the necessary fields.
- 4 Click the hyperlink in the Last Name field to navigate to the Contacts screen to add additional information about the contact.

Sending Account Information to an External System

If the Siebel administrator has set up real-time account integration between Siebel Call Center and another system in your organization, you can use the Update External System command to send new and modified account information from Siebel Call Center application to the other system.

By default, in the Accounts screen, the Update External System command triggers the business process Synchronize Account ASI. This business process sends account information to the external system, waits for a response from the external system, and then updates the Siebel database with the response.

The following procedure describes how to send information about an account from Siebel Call Center to another system. This procedure assumes that your Siebel administrator has completed the necessary work to enable real-time account integration through Application Service Interfaces (ASI). For information about ASI structures, see *Application Services Interface Reference*. For information about setting up ASIs, see [Chapter 32, "Integration Using ASIs."](#)

To send account and contact information to an external software system

- 1** Navigate to the Accounts screen, and in the Accounts list, select an account.
- 2** Click the Contacts view tab, and in the Contacts list, add the contacts that are associated with the account.

If account contacts are not yet listed, follow the instructions in ["To add contacts to an account" on page 469](#) to specify account contacts.
- 3** In the Contacts list, click the hyperlink in the Last Name field to display the Contact form and an Activities list for the selected contact.
- 4** In the Contact form, click the menu button, and then choose Update External System.

You may observe a slight pause while the information is sent and the response from external system is received.
- 5** Click the thread bar to return to the Account form.
- 6** In the Account form, click the menu button, and then choose Update External System.

Siebel Call Center can also receive account credit information from an external system, using the Account Credit Profile view.

36 Global Accounts

This chapter describes the administration and management tasks associated with Siebel Global Accounts. It includes the following topics:

- [“About Global Accounts” on page 471](#)
- [“Scenario for Using and Administering Global Accounts” on page 471](#)
- [“Process of Using and Administering Global Accounts” on page 472](#)
- [“Generating a Default Hierarchy” on page 473](#)
- [“Creating a Custom Hierarchy” on page 473](#)
- [“Assigning a Custom Hierarchy to an Organization” on page 474](#)
- [“Updating a Custom Hierarchy” on page 474](#)
- [“Viewing Global Accounts \(End User\)” on page 475](#)

About Global Accounts

Siebel Global Accounts is a module that provides sales professionals with global account-level visibility into the interactions that the company’s sales organization and partner’s sales organizations have had with the account. Users can view all accounts, opportunities, activities, contacts, and account team members across the account hierarchy on one screen, allowing sales professionals to build a deep understanding of target accounts.

Global Account hierarchies are not provided preconfigured with your Siebel eBusiness Application. They must be set up by an administrator. There are two kinds of account hierarchies that can be set up by the administrator:

- **Default.** This type of account hierarchy is based solely on the accounts’ Parent fields. This account hierarchy is self-maintaining in that whenever the Parent field of any account is updated, the default hierarchy is also updated. Once set up, the default hierarchy is applied to all organizations that do not already have an organization.
- **Custom.** This type of hierarchy is created by the administrator, either by modifying the default hierarchy or from the beginning. Once set up, this hierarchy is independent of the accounts’ Parent fields, and as such must be updated by the administrator when changes occur.

Scenario for Using and Administering Global Accounts

This scenario provides an example of a process flow performed by the accounts administrator. Your company may follow a different process flow according to its business requirements.

A large company, Corp 123, wants to view consolidated data at the global account level. This company has two organizations set up in its Siebel application: a sales organization and a financial organization. The accounts administrator sets up two account hierarchies, one for each organization. These hierarchies allow end users to view the opportunities and contact information associated with parent accounts.

The sales organization uses the default hierarchy, which is based on the Parent account field. For various reasons, the financial organization requires a modified version of the account hierarchy. One of these reasons is that some accounts' billing structures are different from the accounts' purchasing structures. For example, in the case of XYZ Inc. there are four XYZ accounts who are customers of Corp 123: the XYZ Holding company, two regional subsidiaries, and a financial company. The 123 sales organization wants to view the account hierarchy where all accounts report to the parent holding company. Because all account billing for the XYZ companies is funneled through XYZ Financial, Corp 123's financial organization wants to view the account hierarchy where all accounts report to the XYZ Financial. [Figure 31](#) shows the two hierarchies.

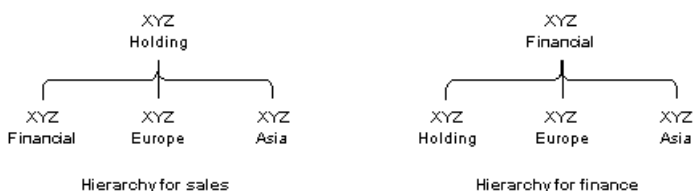


Figure 31. Examples of Account Hierarchies

The default hierarchy used by the sales organization updates automatically when new accounts are added or Parent fields are changed. However, the accounts' administrator updates the finance hierarchy on a weekly basis as new accounts are added and the structure of existing accounts changes.

The global accounts manager wants to review all opportunities at Corp 123. The global accounts manager navigates to the Accounts screen, and selects the Global Accounts view tab. In this view, the manager can see the opportunities for Corp 123.

The global accounts manager can use the Enterprise Selling process (ESP) module to develop global account strategies. See [Chapter 44, "Enterprise Selling Process"](#) for a discussion of how to use ESP with global accounts.

Process of Using and Administering Global Accounts

The process for global accounts administration requires four tasks. These tasks should be carried out in the order presented:

- 1 "Generating a Default Hierarchy" on page 473
- 2 "Creating a Custom Hierarchy" on page 473
- 3 "Assigning a Custom Hierarchy to an Organization" on page 474

- 4 [“Updating a Custom Hierarchy” on page 474](#)
- 5 [“Viewing Global Accounts \(End User\)” on page 475](#)

Generating a Default Hierarchy

Follow this procedure to set up a default hierarchy. Once generated, this default hierarchy is automatically assigned to organizations without an account hierarchy.

To change the account hierarchy assigned to an organization, see [“Assigning a Custom Hierarchy to an Organization” on page 474](#).

To create a default hierarchy

- 1 Navigate to the Accounts screen > Global Accounts Administration view.
- 2 In the Account Hierarchy list, click Generate Hierarchy.

A new account hierarchy is created.

Some fields are described in the following table.

Field	Comments
Name	A default name is generated based on your user ID and the date.
Default	Select so that the account hierarchy is the default. The default hierarchy is assigned to all organizations without an account hierarchy and is updated when new Parent fields on the account records are added or modified.

TIP: If the generated hierarchy does not appear in the Account Relationships lists, refresh the view by navigating to a different view and then returning to the Global Accounts view.

- 3 In the Account Relationships list, review the hierarchy records.

NOTE: If end users are using the application when you generate the account hierarchy, they must log off and log on again to see the default account hierarchy in the rollup views.

Creating a Custom Hierarchy

You can create a custom hierarchy by generating a hierarchy as described in the preceding section or by starting from the beginning and creating a series of new records in the Account Relationships list.

To create a custom hierarchy

- 1 Navigate to the Accounts screen > Global Accounts Administration view.
- 2 In the Account hierarchy list, create a new record and complete the necessary fields. Do not check Default.

- 3 In the Accounts Relationship list:
 - a Create new records for each of the top level parent accounts. Leave the Parent Account field blank for each of these.
 - b Create new records for the child accounts, entering the Parent Account for each.

To create a custom hierarchy based on the default hierarchy

- 1 Create an account hierarchy as described in ["To create a default hierarchy" on page 473](#).
- 2 Select the account hierarchy record and make sure that the Default field is not selected.
- 3 In the Account Relationships list, edit the Parent Account field for existing accounts and create new relationship records as required.

Accounts without Parent Accounts are at the top of the hierarchy and must be entered before their child records can be completed.

Assigning a Custom Hierarchy to an Organization

An organization uses the default hierarchy unless a custom hierarchy has been assigned to it.

To assign a custom hierarchy to an organization

- 1 Navigate to the Administration - Group screen > Organizations view.
- 2 Select the organization whose account hierarchy you want to change.
- 3 In the More Info form, in the Account hierarchy field, select the custom hierarchy that you want the organization to use when viewing global accounts.

Updating a Custom Hierarchy

Custom hierarchies are static and must be updated by the administrator. There are two approaches to updating an account hierarchy:

- Edit the account relationships in the current hierarchy.
- Restore the hierarchy to the default (parent account) hierarchy, and then edit the account relationships in the hierarchy.

To update a custom hierarchy

- 1 Navigate to Accounts screen > Global Accounts Administration view.
- 2 Select the account hierarchy record.
- 3 Do one of the following:

- In the Account Relationships list, edit the Parent Account fields for existing accounts and create new relationship records as required.
- In the Account Relationships list, click Restore Hierarchy to return the hierarchy to the default, and then edit the Parent Account fields for existing accounts and create new relationship records as required.

Viewing Global Accounts (End User)

Available as an option, Global Accounts allow users to see opportunities, activities, contacts, and account team information for an account and its subsidiary accounts.

Global Accounts consist of a parent account, the child accounts, the child accounts' children, and so on. These hierarchies are determined in one of two ways:

- Hierarchies are determined by the value in the parent field on the Account Record.
- Hierarchies are determined by the administrator who creates custom hierarchies.

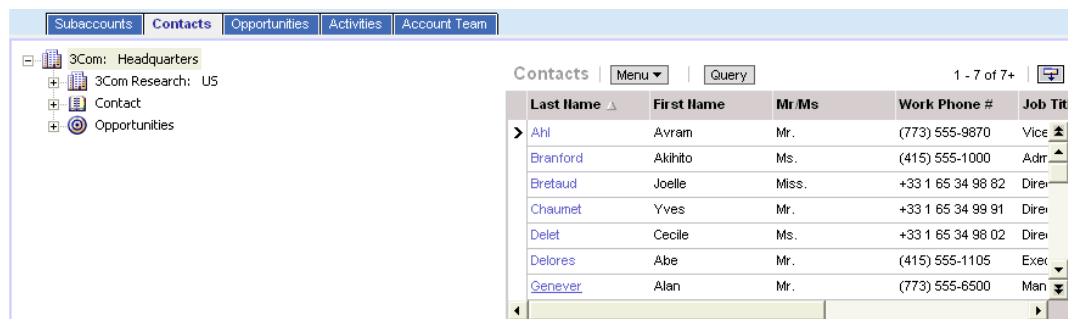
Global Accounts are created and maintained by the administrator. If an account has no child account or the administrator has not defined a hierarchy for an account, then a message appears advising you that the selected record is not included as part of your defined hierarchy. For more information on how global-account hierarchies are created, see [“Creating a Custom Hierarchy” on page 473](#).

To view global accounts information

- 1 Navigate to the Accounts screen > Global Accounts Hierarchy List view.
- 2 From the Show drop-down list, choose My Global Accounts.

Other Show drop-down list options include All Global Accounts, and Global Accounts Across Organizations.

The Global Accounts subviews appear, as shown in the following figure, with the explorer at left showing the hierarchy of account, subaccounts, contacts, and opportunities, and the list at right showing records associated with each subview.



- 3 Click the individual view tabs for Subaccounts, Contacts, Activities, Opportunities, and Account Team.

Records associated with these subviews appear in a list at the right of the explorer.

37 Opportunities

The Opportunities screen allows you to manage and track information associated with a potential revenue-generating event. Using the Opportunities screen, you can gather customer requirements, review information about the customer, assemble a sales team, review and update information about competitors, track activities, track private notes and team notes, create quotes, and automatically generate presentations and proposals.

This chapter contains the following topics:

- [“About Opportunity Workflows” on page 477](#)
- [“Setting Up Opportunity Notification Workflows” on page 478](#)
- [“Setting Up the Communications Profile” on page 478](#)
- [“Activating the Opportunity Notification Workflow Processes and Policies” on page 479](#)
- [“Rerouting an Opportunity” on page 481](#)
- [“Modifying Opportunity Workflows” on page 481](#)
- [“Setting Up the Get Manager Email” on page 482](#)
- [“Opportunity Audit Trail” on page 482](#)
- [“Setting Up Lead Sources for Opportunities” on page 483](#)

About Opportunity Workflows

Opportunity workflows enhance lead routing and provide sales professionals with greater visibility into their sales activities. These workflows are executed from the Opportunities screen. An opportunity record describes important information about the opportunity such as the account, potential revenue of the deal, the probability of closure, the lead status and sales stage, the sales team primary, and the expected close date.

The predefined opportunity workflows allow you to use email to capture information related to the opportunity and distribute timely notifications to key members of the sales team. These workflows help improve the efficiency and effectiveness of the sales cycle while also providing sales representatives and sales managers greater visibility into sales activities. The email notification process is activated only if the opportunity has a possible revenue of more than \$50,000.

The seven predefined opportunity workflows are:

- Opportunity Assigned Notification Process
- Opportunity Inactive Notification Process
- Opportunity Lost Notification Process
- Opportunity Pending Notification Process

- Opportunity Won Notification Process
- Create rerouted Oppty Activity
- Get Manager Email

For information about configuring, implementing, testing, and monitoring workflows, see *Siebel Business Process Designer Administration Guide*.

Setting Up Opportunity Notification Workflows

Follow these steps to correctly set up the opportunity workflows:

- Revise all Siebel workflows so that they are editable and have a status of *In Progress*. All Siebel workflows are initially inactive and cannot be edited. Make any necessary changes and activate the workflows.
- Verify that the Workflow Server component and the Communication Manager component are enabled and running. For detailed instructions, see the system requirements and supported platform documentation for your Siebel application.
- Set up the communication profile. See [“Setting Up the Communications Profile” on page 478](#).
- Set up and activate the workflows and policies.
 - Activate the opportunity workflow processes. See [“Activating the Opportunity Notification Workflow Processes and Policies” on page 479](#).
 - Modify Opportunity workflows, as necessary. See [“Modifying Opportunity Workflows” on page 481](#).
 - Set up the Create Reroute Oppty Activity. See [“Rerouting an Opportunity” on page 481](#).
 - Set up the Get Manager Email. See [“Setting Up the Get Manager Email” on page 482](#).
- Load run-time events for the emails. See *Siebel Business Process Designer Administration Guide*.
- Generate the triggers. See *Siebel Business Process Designer Administration Guide*.
- Run the workflow monitoring agent. See *Siebel Business Process Designer Administration Guide*.

Setting Up the Communications Profile

You must specify the communications profile before using the notification workflows.

To set up the communications profile

- 1 Navigate to the Administration - Communications screen > Communications Drivers and Profiles view.
- 2 Select the record for the Internet SMTP/POP3 Server driver.

- 3 Click on the Profiles tab, and create a new profile. Name the profile *Opportunity Notification Profile*.
- 4 In the Profile Parameter Overrides list, enter records and values for the following fields:
 - From Address
 - SMTP Server

For more information about implementing and configuring communications integrations for your Siebel applications, including creating profiles for the Internet SMTP/POP3 Server driver, see *Siebel Communications Server Administration Guide*.

Activating the Opportunity Notification Workflow Processes and Policies

There are five different workflow processes that will generate automatic emails. All of these processes need to have the communication profile specified. See [“Setting Up the Communications Profile” on page 478](#).

- Opportunity Assigned Notification Process
- Opportunity Inactive Notification Process
- Opportunity Pending Notification Process
- Opportunity Lost Notification Process
- Opportunity Won Notification Process

The following procedure sets up this automatic notification process.

To set up the opportunity workflows

- See *Siebel Business Process Designer Administration Guide* for general instructions on how to set up workflows.
 - For each of the workflows listed above, make sure to:
 - Revise
 - Set the Communication Profile to Opportunity Notification Profile
 - Activate
 - Clear the Expiration field

Opportunity Assigned Notification Process

This workflow sends an email message to both the primary sales representative and the sales representative's direct manager when a new lead is assigned to a sales representative. The email provides the basic information about the opportunity, including the opportunity ID and account, the primary revenue amount, and the number of days allowed before the lead is withdrawn and rerouted. The sales representative is directed to the Opportunities screen for further details.

Opportunity Inactive Notification Process

This workflow sends out an email notice when the sales representative has accepted a lead by changing the Status field to Accept, but has not taken any action on the lead for 30 consecutive days. An email reminder is sent to both the sales representative and the sales representative's direct manager. The notice reminds the sales representative that if no action is taken on the lead within seven days, the lead will be withdrawn from the queue and rerouted.

The default time lapse between when the lead is accepted (or last worked on) and when the email is delivered is 30 days. This default can be modified by editing the Duration Days.

NOTE: Out-of-the-box reassignment of leads is executed manually. You may want to create a workflow that automatically reassigns the lead to a sales manager or administrator after a specified amount of time.

Opportunity Pending Notification Process

This workflow sends an email notice when the sales representative has not responded or taken action on the opportunity for five days. This occurs when the sales representative has not changed the Status field from pending to accept, reject, or reroute. The email is sent to both the primary sales representative and the sales representative's direct manager. The email reminds the sales representative to act on the lead or risk having the lead withdrawn from the queue.

To modify the time lapse between lead assignment and email delivery

- 1 Navigate to Administration - Business Process screen > Policies view.
- 2 Select Email Notification of Pending Oppty.
- 3 Verify that the policy is activated.
- 4 Select the policy and modify the Duration and Units fields.
- 5 Activate the workflow and run the Workflow Monitor Agent. See *Siebel Business Process Designer Administration Guide*.

Opportunity Lost Notification Process

This workflow sends an email message to both the primary sales representative and the sales representative's direct manager when an opportunity is closed with a loss. The status of the opportunity must change to *lost* before the email notice is generated. The email refers to the Opportunities screen and asks the sales representative to update the Reason field.

Opportunity Won Notification Process

This workflow sends an email message to both the primary sales representative and the sales representative's direct manager when an opportunity is closed with a win. The status of the opportunity must change to *win* before the email notice is generated. The email refers to the Opportunities screen and asks the sales representative to update the Reason field.

Rerouting an Opportunity

The Create Rerouted Oppty Activity workflow is executed when a sales representative receives a lead and changes the Status field to Reroute. The workflow creates a new Activity record with Type = Reroute for the designated sales operator. This informs the sales operator that a specific opportunity has been requested for rerouting. All reassigned opportunities are listed in the Activities view as rerouted activities.

NOTE: If a sales manager or sales administrator is responsible for rerouting leads, you can modify the workflow so that the Create Rerouted Oppty Activity is assigned to the sales manager or administrator. You can also create a workflow that reassigns the lead to a sales manager or administrator.

To set up the opportunity reroute activity

- Revise the Create Reroute Opportunity Activity workflow process, replacing the default with the login of the sales operator who will receive the activity. (Remember that the login is case-sensitive.)

Modifying Opportunity Workflows

An administrator can modify the opportunity workflows; the email language can be modified, the notification time can be changed, and lead notification restrictions can be set.

NOTE: The opportunity workflows are shipped as seed data. To modify a workflow, you should make a copy of the original workflow, and then modify the copy.

To modify the language of an opportunity workflow email

- In the Send Out Emails step, edit the Message Body input argument.

The text includes field placeholders for data from the opportunity record. These placeholders appear as "+ [Placeholder field] +".

To restrict conditions for delivery of emails

- 1 Navigate to the Administration - Business Process screen > Policies view.
- 2 Select one of the email notification policies:
 - Email Notification of Assigned Oppty
 - Email Notification of Inactive Oppty
 - Email Notification of Lost Oppty
 - Email Notification of Pending Oppty
 - Email Notification of Won Oppty
- 3 In the Conditions applet, select a condition, or create a new condition.

- 4 Click on the Operation and Value fields and modify the condition.

For example, to send email notifications for leads that have a high lead quality, create the following condition:

Condition Field = Opportunity Lead Quality

Operation = "="

Value = "1-excellent"

To stop sending email notifications to a sales representative's manager

- Edit the workflow so that there is a single connector between Start and End. (Delete all other arrows.)

Setting Up the Get Manager Email

This process identifies the manager of the sales representative so that the manager can receive a copy of the five email notifications that are delivered. Because the Get Manager Email process is part of the five notification processes, the Get Manager Email process must be activated for the other processes to function correctly.

An email is sent to the sales representative and the appropriate manager for each of the notification workflows.

Opportunity Audit Trail

The Opportunity Audit Trail allows users to track changes that have been made to the opportunity record. Any time a member of the opportunity sales team creates a new opportunity record, updates the opportunity, deletes data, or copies the opportunity, the action is tracked in the Opportunity Audit Trail view.

Initially, changes to the following fields are tracked:

- Revenue class
- Probability
- Stage
- Stage ID
- Status

For information on how to track more fields, see [Chapter 6, "Audit Trail."](#)

Setting Up Lead Sources for Opportunities

(Lead) sources for opportunities are created, modified, and deleted through the Lead Sources view of the Data Administration screen.

The following procedure describes how to add lead sources so that they can be associated with opportunities.

In addition, campaigns automatically appear as lead sources of type Marketing Campaign. For more information about Campaigns, see *Siebel Marketing User Guide*.

To create a lead source

- 1 Navigate to Opportunities screen > Lead Sources Administration view.
- 2 Create a new record and complete the necessary fields.

38 Opportunities (End User)

This chapter describes end user tasks related to opportunities. It includes the following topics:

- "About Opportunities" on page 485
- "Scenario for Opportunities" on page 486
- "Opportunities Processes and Procedures" on page 487
- "About Opportunities Lead Assignment" on page 488
- "About Lead Response" on page 488
- "About Lead Qualification, Sales Methods, and Stages" on page 489
- "Creating an Opportunity" on page 490
- "Changing the Primary Sales Team Member" on page 493
- "Monitoring Significant Opportunity Transactions" on page 494
- "Assessing an Opportunity" on page 494
- "Viewing Decision Issues for an Opportunity" on page 495
- "Associating a Contact with an Opportunity" on page 495
- "Activities Associated with an Opportunity" on page 496
- "Associating a Product with an Opportunity" on page 496
- "Creating a Quote from an Opportunity" on page 497
- "Creating an Organization Analysis" on page 498
- "Adding Attachments and Notes to Opportunities" on page 501
- "Opportunity Charts" on page 502
- "Generating Opportunity Reports" on page 504

About Opportunities

An opportunity is defined as a potential revenue-generating event. Opportunity-related information is recorded and tracked in the views associated with the Opportunities screen. This chapter describes how sales professionals can use the Opportunities screen to perform the following tasks:

- Receive and respond to new leads that are assigned to you
- Create new opportunities and enter related information such as accounts, contacts, activities, and products
- View, qualify, and update opportunities assigned to you and your sales team (if you are a manager)

- Track the status of an opportunity through the sales cycle from creation to closure
- Share information about the opportunity with sales team members
- Generate quotes, presentations, and other types of information needed to close the deal

Scenario for Opportunities

This scenario provides an example of how a sales representative works with leads and opportunities. Your company may follow a different process according to its business requirements.

Opportunity Lead Conversion

A company uses Siebel Marketing to develop a campaign as part of a new product introduction. During the campaign, a telemarketing agent uses Siebel Call Center to contact prospects associated with the campaign. During her conversations with prospects, the agent qualifies leads by determining whether each prospect is interested in the new product offering. When a prospect expresses interest in learning more about the new product, the agent creates a new lead.

Using Siebel Assignment Manager, the lead is automatically routed to the sales representative who is most qualified to work on the lead and whose schedule can accommodate the new assignment.

When the sales representative logs in to the Siebel Sales application, she sees the new lead in the Opportunities list on her home page. Drilling down on the lead takes the sales representative to the Opportunities screen. After reviewing details about the lead, such as the customer information, probability of closing, and the products that the customer is interested in purchasing, the sales representative decides to accept the lead by changing the Status field to Accept.

After the sales representative accepts the lead, she begins to work on the lead by assembling members of the sales team, conducting further research on the customer and its requirements, coordinating and recording activities, uploading agreements, and generating proposals and presentations for the customer. As the sales representative works through the sales cycle, she updates information about the sales stage and keeps private notes as well as notes that she shares with other members of the sales team. Eventually, the sales representative develops a quote from the Opportunities screen. When the customer accepts the quote, it is converted into an order.

NOTE: Siebel Marketing, Siebel Call Center, Siebel Sales, and Siebel Quotes are fully integrated, separately licensed product offerings. You need to license these products to access the views.

Opportunity Tracking

At a trade show, a sales representative meets a prospective customer who could be a lead for a new business opportunity. When the sales representative returns to the office, he discovers the company is listed in Siebel Sales as an account, but the person he met is not listed as a contact.

The sales representative proceeds to add the prospective customer as a contact, and then creates the opportunity. He then schedules meetings and creates associated activities, and enters other potential contacts associated with the opportunity.

As the sales process continues, the sales representative gathers and updates information about the account, its contacts, and the opportunity that he is pursuing. As the relationship grows, the sales representative can add, view, and share stored information and key knowledge with other members of the sales team.

Opportunity Generated Quote

A sales representative is assigned to the sales team for an opportunity. As the sales representative gathers product information about the customer requirements, she enters that information in the Siebel Sales application. After she presents to the customer, the customer indicates that the representative's company is on the short list for the deal, and that the representative should submit a quote.

The sales representative creates a quote automatically based on the information she has already entered into the Siebel Sales application. After she generates the quote, she synchronizes the quote information with the revenues associated with the opportunity. By making sure these numbers are in sync, the sales representative establishes that the data associated with her opportunity is current and that her forecasts are accurate.

Opportunities Processes and Procedures

When you are working with opportunities, you perform the following key tasks:

- **Create an opportunity.** For more information, see [“Creating an Opportunity” on page 490.](#)
- **Change the primary team member.** For more information, see [“Changing the Primary Sales Team Member” on page 493.](#)
- **Monitor transactions.** For more information, see [“Monitoring Significant Opportunity Transactions” on page 494.](#)
- **Assess opportunities.** For more information, see [“Assessing an Opportunity” on page 494.](#)
- **Manage decisions.** For more information, see [“Viewing Decision Issues for an Opportunity” on page 495.](#)
- **Add contacts.** For more information, see [“Associating a Contact with an Opportunity” on page 495.](#)
- **Add activities.** For more information, see [“Activities Associated with an Opportunity” on page 496.](#)
- **Associate products.** For more information, see [“Associating a Product with an Opportunity” on page 496.](#)
- **Create quotes.** For more information, see [“Creating a Quote from an Opportunity” on page 497.](#)
- **Performing an organization analysis.** For more information, see [“Creating an Organization Analysis” on page 498.](#)
- **Adding attachments, and notes.** For more information, see [“Adding Attachments and Notes to Opportunities” on page 501.](#)
- **Generate and viewing charts and reports.** For more information, see [“Opportunity Charts” on page 502](#) and [“Generating Opportunity Reports” on page 504.](#)

About Opportunities Lead Assignment

As a sales representative, you can view new leads in the Opportunities list on your home page, or you can navigate to the Opportunities screen to view new leads that you did not create but were assigned to you. There are a number of ways in which a lead might be assigned to you:

- A lead is generated through a campaign and automatically routed using Siebel Assignment Manager and predefined rules.
- A lead is entered into the system by an administrator and automatically routed using Siebel Assignment Manager and predefined rules.
- An opportunity is created by a sales manager or sales representative who adds you to the sales team.

In each of these scenarios, you are able to view the lead or opportunity because you have been added to the sales team, either as the primary on the sales team or as a sales team member. If you are receiving a lead for the first time and you are the primary on the sales team, the Status field in the More Info view is set to Pending by default. You can accept, reject, or reroute the lead by changing the value in the Status field.

If the administrator has activated the email notifications, predefined processes send email messages to you, alerting you of the following events.

- You have received a new lead and should accept, reject, or reroute the lead within seven days.
- You received a new lead five days ago and should accept, reject, or reroute the lead within two days.
- You have accepted a lead but have not worked on the lead in 30 days.
- You have won the sales opportunity and should enter the reason in the system.
- You have lost the sales opportunity and should enter the reason in the system.

The wording of the emails and the wait periods can be modified. Opportunity Workflows only sends email if the opportunity has revenue greater than \$50,000. For more information, see [Chapter 37, "Opportunities."](#)

About Lead Response

After you, as a sales representative, receive a lead, you can choose to accept, reject, or reroute the lead.

- **Rejecting the Lead.** You can reject a lead by changing the Status field to Reject in the More Info view. Enter the reason for rejecting the lead in the Reason field. The lead remains in your queue until it is reassigned by your manager.
- **Rerouting the Lead.** If you decide to reroute a lead by changing the Status field in the More Info form to Reroute, a Reroute activity automatically is created. Enter the reason for rerouting the lead in the Reason field. The lead remains in your queue until it is rerouted by your manager.
- **Accepting the Lead.** You can accept a lead by changing the Status field in the More Info form to Accept. Enter the reason for accepting the lead in the Reason field.

About Lead Qualification, Sales Methods, and Stages

When you, as a sales representative, accept a lead, you can begin to work on the lead in the Opportunities screen. The records in the Opportunities list include both leads and opportunities. Leads are defined as opportunities that have not yet been qualified.

Lead qualification status is indicated in the Sales Stage field. The list of values in the Sales Stage field varies depending on which sales method you are using.

A sales method is a formalized approach or methodology used during the sales process. A sales method can encompass all activities associated with the sales process, from prospecting to forecasting to closing deals. This approach allows sales representatives to use the method most appropriate for their opportunities.

The application administrator establishes values in your Siebel application that represent the sales methods and sales stages for your company. It is a recommended business practice to designate a default sales method in your Siebel application. This practice allows a sales method to be associated with each opportunity and aids in charting and reporting accuracy.

Sales methods can differ within a company. For instance, a sales method for managing a complex multimillion dollar opportunity can include 15 stages, while a sales method for a simple low-dollar opportunity may require only four stages.

Your application administrator creates and implements the sales stages that your company uses. For more information about creating or implementing sales methods, see [“Defining a Sales Methodology” on page 257](#).

[Table 93](#) shows sales methodologies (Accelerated, Default, Standard, Strategic Selling), and the associated sales stage for each methodology (for example, 01 - Prospecting). The table also shows if the record is a lead or is an opportunity at each sales stage.

Table 93. Sales Methods and Sales Stages

Accelerated	Default and Standard	Strategic	Lead or Opportunity
01 - Prospecting	01 - Prospecting	01 - Universe	Lead
	02 - Potential Lead	02 - Above	Lead
02 - Qualification	03 - Qualification	03 - In the Funnel	Opportunity
	04 - Opportunity	04 - Best Few	Opportunity
	05 - Building Vision		Opportunity
	06 - Short List		Opportunity
	07 - Selected		Opportunity

Table 93. Sales Methods and Sales Stages

Accelerated	Default and Standard	Strategic	Lead or Opportunity
03 - Closing	08 - Negotiation	05 - Won	Opportunity
	09 - Closed or Won		Opportunity
04 - Lost	09 - Closed or Lost	00 - Lost	Opportunity

Creating an Opportunity

You should create a new record each time you identify an opportunity.

NOTE: Each time a new opportunity record is created, a primary Revenue record is automatically created for the opportunity.

To create an opportunity

- 1 Navigate to the Opportunities screen > List view.
- 2 Create a new record.
- 3 Drill down on the record.
- 4 Click the More Info view tab.
- 5 Complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Best Case	Allows you to enter the currency amount the deal could generate in the best-case scenario. This amount is higher than the value in the Revenue field.
Channel	A list of values established by your company that defines the sales channel. Default values include Direct and Indirect.
Close Date	Allows you to enter the expected date on which the opportunity closes. The default date is the same as the Created Date. It is important to modify the date, if the opportunity closes on a different date, because this date is used in revenue forecasting.
Committed	A check box which, when selected, indicates there is a high probability that the deal will close, and that the deal should be included in your revenue forecast.
Cost	Expense associated with the opportunity.
Domestic Ultimate D-U-N-S	Displays the D-U-N-S number for the domestic ultimate, which is the highest member in the hierarchy for the same business entity within the same country. A case can be its own domestic ultimate.

Field	Comments
DUNS #	The Data Universal Numbering System (D-U-N-S) numeric serial number for a company. The D-U-N-S number is unique for each company.
Executive Priority	This check box can be used to flag a significant opportunity. Sales executives can query for high-priority opportunities for tracking purposes.
Expected value	Displays a currency value that is calculated based on the potential revenue field multiplied by the value in the probability field. A lower percentage in the probability field reduces the expected value that is included in your revenue forecast.
Global Ultimate DUNS	Displays the D-U-N-S number for the global ultimate, which is the highest member in the hierarchy for the same business entity worldwide.
Lead Partner	<p>The lead partner field is populated automatically when the source of the opportunity is a campaign with a lead partner.</p> <p>If you create an opportunity from a response, and the response had a campaign associated with it, the opportunity inherits the lead partner from the campaign.</p> <p>If you create a new opportunity and select a campaign as the source, the opportunity inherits the campaigns lead partner, if it has one.</p>
Lock Assignment	A check box which, when selected, locks the sales team assignment so that Siebel Assignment Manager does not alter the current opportunity assignment.
Margin	A calculated field that displays the revenue figure minus the cost.
Opportunity Currency	A list of values established by your company that allows you to specify the currency type associated with the opportunity. The selected value does not affect forecasting.
Organization	<p>A default value that displays the organization name associated with the person creating the opportunity. Your system administrator sets up organizations in your Siebel application.</p> <p>You can associate multiple organizations with an opportunity.</p>
Parent HQ DUNS	Displays the D-U-N-S number of the parent organization's HQ location, if this is a subsidiary record.
Partner Approval Status	A list of values established by your company that allows you to specify the approval status of the lead partner for the opportunity.
Primary	Displays the user ID of the primary sales team member. This value defaults to your user ID if you are creating a new opportunity.

Field	Comments
Probability %	The Probability reflects the percentage of confidence you have that the deal will close with the specified revenue on the specified close date. By default, the probability adjusts automatically based on the sales stage of the opportunity. You can manually override the probability value.
Reason	A list of values established by your company that allows you to specify a reason that the opportunity was accepted, rejected, rerouted, won, or lost.
Revenue	Allows you to enter the currency amount of the opportunity. If you are using the Products, Quotes or Revenue view tabs, you can make sure your summary revenues are calculated and are in sync. The amount entered affects forecasting.
Revenue Class	A list of values established by your company that allows you to define the quality of the expected revenue. For more information, see “About Revenue Class and Revenue Type” on page 493 .
Revenue Type	A list of values established by your company that allow you to define the kind and source of the expected revenue. For more information, see “About Revenue Class and Revenue Type” on page 493 .
Sales Method	A list of values established by your company that includes the sales methodologies. Default values include Strategic Selling, Accelerated Sales Process, Default Sales Methodology and Standard Sales Process.
Sales Stage	A list of values established by your company that allows you to specify the sales stages associated with the selected sales method.
Sales Team	<p>This list shows who is on the sales team for the opportunity. When you create an opportunity, you are automatically listed as the primary sales team member. You can add employees to the sales team by selecting them from the employee list. Only a manager or administrator can change or delete the primary sales team member.</p> <p>You can set a Priority flag for individual members of the sales team. If an opportunity is a priority for all team members, the Priority Flag is set in the Opportunity List and Explorer views.</p>
Source	A dialog box that allows you to associate the sources of the sales lead with the opportunity. Typical source values include specific events, campaigns, or conferences.
Source Type	A default value that displays the category of the primary source. For instance, a specific seminar that is the source of the opportunity is identified with a value of Seminar in this field.
Split Revenue	A system populated check box that indicates a split revenue record has been created.

Field	Comments
Territories	A default value based on the territories defined by your company. Your system administrator controls the territory assignment function set up by your sales manager.
Worst Case	Allows you to enter the currency amount the deal could generate in the worst-case scenario. This amount is lower than the value in the Revenue field.

About Revenue Class and Revenue Type

Revenue Class and Revenue Type fields appear on both the Opportunity and the Revenue forms. These two fields are the same fields in the database, and they are linked through a database join, which means changes made in the Opportunity form are reflected on the Revenue form and changes made in the Revenue form appear in the Opportunity form.

The Revenue Class and Revenue Type lists of values are based on the internal business process for each company. The standard values can be adapted to your business, or the lists of values changed by your application administrator to reflect the stages of your company's sales process and the manner in which your company recognizes revenue.

- **Revenue Class Field.** Your company can define the quality of the revenue at a given time by setting the list of values in the Revenue Class field to reflect the sales stages you use. Sample values are Pipeline, Upside, Expected, Committed, and Closed.
- **Revenue Type Field.** Your company may want to differentiate between kinds of revenues and their sources. For instance, your company may classify revenue by Software, Consulting, and Hardware categories, or by Booked versus Billed revenue, which are defined in the list of values. Defining revenue types allows you to query revenues or view charts sorted by the category of the revenue.

For more information, see *Siebel Forecasting Guide*.

Changing the Primary Sales Team Member

The administrator or manager of the primary sales representative can change the person assigned as the primary member of the sales team.

To change a primary team member

- 1 Navigate to the Opportunities screen > List view.
- 2 From the Show drop-down list, choose My Team's Opportunities.
- 3 In the Opportunities list, drill down on the opportunity.
- 4 Click the More Info view tab.
- 5 In the More Info form, click the select button in the Sales Team field.

- 6 In the Team Members dialog box, select the team member to assign and select the Primary check box.

NOTE: If you have access to the Data Administration screen, you can change a primary team member assignment there.

Monitoring Significant Opportunity Transactions

Sales executives can monitor significant opportunity transactions by querying for opportunities flagged as Executive Priority. These flagged opportunities can be tracked by the executive team regardless of the revenue or forecast commitment. Tracking high-priority opportunities helps the executive maintain the most accurate quarterly revenue forecast and plan involvement in the most promising opportunities.

To flag an opportunity as an executive priority

- 1 Navigate to the Opportunities screen > List view.
- 2 In the Opportunities list, select the opportunity.
- 3 In the Opportunities list, click the menu button and choose Columns Displayed.
- 4 In the Columns Displayed dialog box, move Executive Priority and Executive Priority Date from the list of Available Columns to the list of Selected Columns and click Save.

The fields appear in the record for the selected opportunity.

- 5 In the opportunity record, click the check box in the Executive Priority field.

The Executive Priority Date field automatically shows the current date after the Executive Priority flag is checked.

Assessing an Opportunity

An opportunity assessment helps you qualify opportunities and verify resource allocation. Using an assessment template, you can select values and attributes to assign a composite value to the opportunity.

NOTE: In some companies, your Siebel application automatically generates assessments, but if this process has not been automated, you can create assessments manually.

To assess an opportunity

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on the opportunity with which you want to associate the assessment.
- 3 Click the Assessments view tab, and create a new record.

- a** In the Template Name field, click the select button.
The Select Assessment Template dialog box appears.
- b** Select the template, and then click OK.
- c** Click the menu button, and then choose Save.
An explicit Save is required.

- 4** Click the Assessment Attribute subview tab, and then click the show more button.

A list of assessment attributes appears.

- 5** In the Value field, click the select button and choose the appropriate value for the attribute.
Repeat this step for each attribute in the list.

A composite assessment score for the opportunity appears as a percentage value in the parent Assessment list. This percentage compares the score you entered in the assessment attribute line items to the maximum possible score for the opportunity. You can use this percentage to qualify the opportunity.

Viewing Decision Issues for an Opportunity

Decision issues are specific areas of interest that can influence a prospect's buying decision during the sales cycle. These decision issues provide you with an opportunity to present the advantages of your solution to the customer.

You can track these decision issues using the Opportunity screen's Decision Issues view, and use this information to develop your sales strategy and address customer concerns. For more information, see [Chapter 43, "Decision Issues."](#)

Associating a Contact with an Opportunity

As you work with an opportunity, you want to maintain information about the contacts associated with the opportunity. For more information about contacts, see [Chapter 33, "Contacts."](#)

The Opportunity screen's Contacts view allows you to store and review contact-related information for an opportunity.

To associate a new contact with an opportunity

- 1** Navigate to the Opportunities screen > List view.
- 2** Drill down on the opportunity.
- 3** Click the Contacts view tab, and in the Contacts list click New.
- 4** In the new record, complete the fields.

To associate an existing contact with an opportunity

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on the opportunity.
- 3 Click the Contacts view tab, and in the Contacts list click Add.
- 4 In the Add Contacts dialog box, enter query criteria for the contact, and then click Go.
- 5 Select the contact or contacts you want to add, and then click OK.

NOTE: To select a sequence of contact records, hold down the SHIFT key and click the contact records. To select multiple contacts that are not in sequence, hold down the CTRL key and click the contact records.

Activities Associated with an Opportunity

The Opportunities screen's Activities view allows you to track activities at the opportunity level, maintain a calendar and to-do list for the opportunity, and delegate activities related to the opportunity to your sales team. For more information about Activity Plans and associated activities, see [Chapter 17, "Activities."](#)

Associating a Product with an Opportunity

Specific products can be associated with an opportunity. For example, if a customer is interested in purchasing a new software suite, this information can be specified in the Products view.

After the product is associated with the opportunity, you can drill down on the product to review additional information such as product features and prices.

Later, this data can be used when you are building a presentation, quote, or proposal based on the opportunity.

To associate a product with an opportunity

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on the opportunity.
- 3 Click the Products view tab.

- 4 Create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Covered Product	This field can be completed only if the product (specified in the Product field) is a service product.
Summary	<p>Use this field to indicate that the product is a summary product.</p> <p>For example, if the opportunity is for a computer system, check Summary for the computer system product, but not for the CPU, monitor, keyboard, and mouse products that make up the system.</p> <p>This Summary field also appears (read-only) in the Revenues screen > List view.</p>

Creating a Quote from an Opportunity

Using the Quotes view, you can automatically create and revise quotes for the opportunity. For more information on quotes and orders, see *Siebel Order Management Guide*.

To create a quote from an opportunity

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on the opportunity.
- 3 Click the Products view tab.
- 4 In the Products list click New, and then add a product.

For more information, see ["Associating a Product with an Opportunity" on page 496](#).

- 5 In the Product record, complete the fields.
 - a Enter the number of product units the customer is interested in purchasing
 - b In the Auto Quote field, select the check box to display a check mark.

- 6 Click the Quotes view tab, and then in the Quotes list, click Auto Quote.

A quote record is automatically created, with some fields completed and a status of In Progress.

If a price list is associated with the account, the Price List field is automatically completed. If no price list is associated, in the Price List field click the select button and choose a price list. For more information on price lists, see *Pricing Administration Guide*.

- 7 In the quote record, drill down on the hyperlink in the Name field.

You can change the system-generated name for a name that is more meaningful in the quote details form.

- 8 In the quote's Line Items list, add line items, and then click the menu button and choose Reprice. The Reprice function makes sure that the quote total reflects the prices from the price list, and multiplies those prices by the quantities that you enter in the products view.
- 9 In the Quote form, click the menu button and choose Update Opportunity, and then return to the Opportunity form. The Update Opportunity function verifies that the opportunity's revenue line items are in sync with the quote line items. Use the History icon or the thread bar to navigate back to the Opportunity form.

To update opportunity revenues

- 1 In the Opportunity list, drill down on the opportunity, and then click the Revenues view tab.
- 2 In the Revenues list choose List from the Revenues drop-down menu.
- 3 In the Revenues list, click the menu button and choose Update Opportunity. After this process is completed, the revenue amounts that appear in the Products, Revenues, and Quotes views are synchronized and the Opportunity's Revenue field displays a calculated sum of the individual revenue line items associated with the opportunity.

NOTE: Siebel Quotes is a separately licensed product offering. You cannot access the Quotes view tab if you have not licensed this product.

Creating an Organization Analysis

You can automatically create organization charts to help you analyze your key contacts and develop your relationship strategy to win the opportunity.

Siebel Sales automatically generates organization charts based on contacts associated with each opportunity. When you update contact information, your changes are reflected in the organization chart.

To add existing contacts to the organization analysis

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on the opportunity.
- 3 Click the Organization Analysis view tab.
- 4 In either the default Organization Analysis chart view or in the Contacts list (toggle view), click New. The Add Contacts dialog box appears.
- 5 Select one or more contacts to add, and then click OK.

NOTE: You can select sequential contacts by holding down the SHIFT key while selecting the contact records.

To create new contacts for the organization analysis

- 1** Navigate to the Opportunities screen > List view.
- 2** Drill down on the opportunity.
- 3** Click the Organization Analysis view tab.
- 4** In either the default Organization Analysis chart view or in the Contacts list (toggle view), click New.
- 5** In the Add Contacts dialog box, click New.
- 6** In the new contact record enter the contact information in the fields, and then click Save.

NOTE: If you create a new contact directly from the Organization Analysis chart view, then an explicit Save is required to update the chart.

The Level of Influence value determines the degree of shading that appears in the Contact node in the Organization Analysis chart. The following table details values and shading.

Value in Level of Influence Fields	Shading on Organization Chart
Low	None
Political Structure (Medium)	Light gray
Inner Circle (High)	Dark gray

You can update contact information from either the Opportunities screen or from the Contacts screen.

Using Drag and Drop to Depict Organization Hierarchy

From the Organization Analysis chart view you can drag and drop contacts to indicate professional relationships within the organization.

To create the hierarchy

- 1** Navigate to the Opportunities screen > List view.
- 2** Drill down on the opportunity for the Organization Analysis.
- 3** Click the Organization Analysis view tab.
- 4** Add or create contacts, as described in [“To add existing contacts to the organization analysis” on page 498](#) and [“To create new contacts for the organization analysis” on page 499](#).

In the Organization Analysis chart area the nodes (boxes) appear for each of the contacts you have analyzed and associated with the opportunity.

- 5** Select the contact node and drag it beneath the contact node that depicts the contact’s manager.
When you drop the contact node on its manager’s node, a formal line between the nodes appears, reflecting the reporting relationship.

- 6 Repeat [Step 5](#) for each contact until you have completed the organization chart.

NOTE: The reporting relationships are also stored in the Contacts list (toggle view). The Manager's Last Name and Manager's First name fields of the contact automatically populate based on the drag and drop actions. To expose this information in the contacts list, click the menu button, and then choose Columns Displayed.

Drawing Lines of Influence

You can also map the politics in the customer organization by identifying informal lines of influence between contacts. Mapping informal lines of influence helps you identify contacts who are not highly ranked (and are easier to access) but who have significant influence on key decision makers. Lines of Influence information is automatically updated in the Contacts screen's Relationships view. You can add Lines of Influence information in the Relationships view if you prefer.

To draw lines of influence

- 1 In the Organization Analysis chart area, select the contact node, and simultaneously hold down the CTRL key.
- 2 Drag and drop the selected contact on other contacts to draw the lines of influence.

The CTRL key must be depressed throughout this process in order for the informal line of influence to appear.

To delete lines of influence

- In the Organization Analysis chart area, select the line and press the DELETE key.

You may also right click the mouse in the Organization Chart area, and choose Edit > Delete from the menu.

Viewing and Printing the Organization Analysis

After you associate contacts with an opportunity and enter values for the manager, reports, associates and the influence level for each, you can view an organization chart of all your contacts.

To view the Organization Analysis chart

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on the opportunity.
- 3 Click the Organization Analysis view tab.

The Organization Analysis list of contacts appears.

- 4 From the drop-down list, choose Organization Analysis.

An organization chart appears with the contact information you entered.

Each contact appears in a hierarchy based on the influence level or managerial structure assigned to the contact.

NOTE: Double-click the contact node to navigate to the Contacts screen's Activities view to add follow-up activities for the contact.

To print an Organization Analysis chart

- 1 Navigate to the Opportunities screen > List view.

- 2 Drill down on the opportunity.

- 3 Click the Organization Analysis view tab.

The Organization Analysis list of contacts appears.

- 4 From the drop-down list, choose Organization Analysis.

- 5 Right click the mouse in the Organization Analysis chart workspace, and choose Print from the menu.

You can adjust the zoom level at which you want to print the Organization Chart. Large charts print across multiple pages.

Adding Attachments and Notes to Opportunities

The Attachments view allows you to associate relevant files such as requests for proposals, strategic information documents, and slide presentations that other sales team members can use as they work this opportunity. You can add private or public notes that are shared with members of the sales team, using the Notes view tab.

To add an attachment to an opportunity

- 1 Navigate to the Opportunities screen > List view.

- 2 Drill down on the opportunity.

- 3 Click the Attachments view tab.

- 4 In the Attachments list, click New.

- 5 In the new record, click the select button in the Attachment Name field, and in the Add Attachments dialog box, click Browse to navigate to the file.

- 6 In the Choose File dialog box, locate the file and then click Open.

The file name and path appears in the Add Attachments dialog box.

- 7 In the Add Attachments dialog box, click Add.
The Attachment name, size, type and modified fields are automatically completed for the record, and the Update File field is checked.
- 8 In the Comments field for the attachment record, enter a description of the attachment.

To add private and public notes to the opportunity

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on the opportunity.
- 3 Click the Notes view tab.
- 4 In the Notes list, choose Public or Private from the drop-down menu to specify a private note or one that is shared.
- 5 In the Notes list, click New, and complete the fields for the new record.
The Created By field is automatically completed with the creator's User ID.
 - a In the Type field, select the note type.
Examples of note types are legal, reference, and directions.
 - b In the Description field, enter the note text.

Opportunity Charts

Several charts are available that support analysis of opportunities data. The data can be depicted in a variety of formats such as pie graph, bar graph, and so on.

Table 94 describes each opportunity analysis chart.

Table 94. Opportunities Charts

Chart	Description
Activity Analysis	Displays the number of activity types for the selected record.
Current Opportunity Analysis	Displays a scatter diagram of the selected opportunity by revenue and probability. The bottom chart displays sales stage.
Lead Analysis	Displays the number of opportunities or revenue by organization or primary sales representative. The data is segmented by lead quality.
Lead Source Analysis	Displays the number of opportunities, revenue, or average revenue by time period. The data is segmented by lead source.
Lead Source Pipeline Analysis	Displays the number of opportunities by sales stage and lead source.
New Business Analysis	Displays the number of opportunities, revenue, or average revenue over a time period.

Table 94. Opportunities Charts

Chart	Description
Opportunity Analysis	Displays the number of opportunities by product, source, territory, and competitor.
Pipeline Analysis	Displays the number of opportunities or revenue by sales stage, organization, revenue size, or sales method.
Probability Cluster Analysis	Displays a scatter diagram of your opportunities by revenue and probability.
Rep Analysis	Displays the number of opportunities, revenue, or average revenue by sales representative. The data can be segmented by sales stage and win probability.
Revenue Analysis by Rep	Displays the number of opportunities and revenue by sales representative.
Sales Method Bar	Displays number of opportunity products or revenue by sales method. The data is segmented by sales stage.
Sales Pipeline Analysis	Displays the percentage of revenue quota and percentage of count quota.
Sales Pipeline Phases Analysis	Displays sales pipeline phases and the percentage of revenue quota or count quota achieved per phase.

Viewing the Opportunity Sales Pipeline Analysis Chart

The Sales Pipeline Analysis works by evaluating the total revenue and count of opportunities by a selected sales methodology and then evaluating the total against each applicable quota.

NOTE: The Sales Pipeline Analysis Chart considers only active Quota plans, regardless of duration.

To display sales pipeline analysis information

- 1 Navigate to the Opportunities screen > List view.
- 2 From the Show drop-down list, select an Opportunities list.
For example, you might choose All Opportunities.
- 3 In the Opportunities list, click Query
- 4 In the Opportunities form, query on a Sales Method, and then click Go.
- 5 Click the Charts view tab.
- 6 In the Charts list, select Sales Pipeline Analysis from the Show drop-down list.
- 7 From the secondary Show drop-down list, choose either % of Count Quota, or % of Revenue Quota, and then click Go.

NOTE: Pipeline charts cannot be copied by dragging (as pie and bar charts can).

Viewing the Sales Pipeline Phases Analysis Chart

The Sales Pipeline Phases chart provides an overall view of the revenue generated for opportunities in an organization. Sales phases are basic components used to group stages together into basic sales categories.

To view the sales pipeline phases analysis chart

- 1 Navigate to the Opportunities screen > List view.
- 2 From the Show drop-down list, select an Opportunities list.
- 3 In the Opportunities list, click Query.
- 4 In the opportunities form, query for a Sales Method, and then click Go.
- 5 Click the Charts view tab.
- 6 In the Charts list, select Sales Pipeline Phases Analysis from the Show drop-down list.
- 7 From the secondary Show drop-down list, choose either % of Count Quota, or % of Revenue Quota, and then click Go.

Generating Opportunity Reports

You also can generate reports of your opportunities data. Available reports include:

- Opportunities by Category
- Opportunities by Sales Rep
- Opportunity Summary
- Opportunity List
- Pipeline Report by Rep
- Smart Report - Opportunity Detail
- Opportunity Status
- Opportunity Marketing Events Summary

To generate an opportunity report

- 1 Navigate to the Opportunities screen > List view.
- 2 Select an opportunity.
- 3 Click the Reports button and select a report.

Configuring the Opportunities by Category Report

The Opportunities by Category report can be configured to sort by City, Close Date, Sales Cycle Stage, Source, Source Date, State, Territory, or ZIP Code.

To configure the Opportunities by Category report

- 1** Navigate to the Opportunities screen > List view.
- 2** Select an opportunity.
- 3** Click the Reports button and select the Opportunities by Categories report.
- 4** In the Opportunity Parameters dialog box, choose a sort parameter in the Sort By field, and then click Finish.

39 Households

Household information is closely related to information about contacts, and is similar to information about accounts. Other chapters in this guide provide more detailed information about how to use the Contacts and Accounts screens.

This chapter describes how call center agents can use the Households screen to record information about groups of individual consumers who interact with the agents' company. It includes the following topics:

- ["Household Contact Tracking" on page 507](#)
- ["Scenario for Households" on page 508](#)
- ["End-User Procedures for Households" on page 508](#)
- ["Adding a Household Record" on page 508](#)
- ["Adding Contacts to a Household" on page 510](#)
- ["Adding Activities to Household Records" on page 511](#)
- ["Storing and Viewing Information About Households" on page 512](#)
- ["Sending Household Information to an External System" on page 513](#)

Household Contact Tracking

A household is a collection of individual consumers who are economically affiliated and who share common purchasing or service interests. Individuals may or may not be related to one another and may belong to other households. Typically, a household shares the same residential address. Siebel Call Center allows an organization to address the complexity of dynamic households by tracking all household information through the appropriate household contact. If contacts leave a household to join another, their associated information moves with them.

The Households screen displays information about customer households. You can use the Households screen and its related views to work with the following kinds of information:

- Contacts (household members)
- Activities
- Attachments
- Service Requests
- Notes
- Assets
- Opportunities
- Agreements

The Household views summarize information that relates to all the individual contacts who are members of the household. For example, you might want to view a list of all the service requests from a particular household, regardless of which household member made the request.

The Household More Info view tab and the Household Contacts view tab allow editing, but other Household views are read-only. If you want to add activities, service requests, notes, attachments, assets, opportunities, and agreements, you must navigate to the Household Contact list and click the appropriate contact hyperlink to reach a view where you can enter the necessary information.

Scenario for Households

Call center agents commonly use the Households screen in a business-to-consumer setting. Viewing household information allows for cross-selling, upselling, and sell-through opportunities. Combined with Siebel Marketing and Analytics, the Households screen provides the basis for consumer segmentation and analysis.

The Households screen displays market segment information on the household as a whole, as well as a summary of information about the individual contacts who are household members. Call center agents use the Households screen to identify and capture demographic information about a household, and also to review assets, products, activities, and contact information associated with the household. This information helps the agent assess the customer's data and history to better meet the customer's needs.

End-User Procedures for Households

This section describes the following end-user procedures for working with the Households screen:

- [Adding a Household Record on page 508](#)
- [Adding Contacts to a Household on page 510](#)
- [Adding Activities to Household Records on page 511](#)
- [Storing and Viewing Information About Households on page 512](#)
- [Sending Household Information to an External System on page 513](#)

Adding a Household Record

Use the following procedure to add a household record.

To add a household

- 1** Navigate to the Households screen > List view.

- 2 In the list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Fields	Comments
Address	Automatically populated with the address of the primary household contact.
Category	Indicates the value of the household to your organization. Available values are Platinum, Gold, Silver, and Standard.
City	Automatically populated with the city where the primary household contact resides.
Created	Date and time the record was created. Automatically populated.
Created By	User ID of the person who created the record.
Head of Household	The main decision-maker for the household. Available values are all the contacts for the household.
Household #	Unique identifier for the household. Automatically populated.
Income	Total income from all members of the household.
Name	A name that identifies the household. Typically this is the last name of one or more contacts who are members of the household.
Organization	The organization that interacts with the household.
Revenue	Revenue your organization obtains from this household.
Segment	Indicates general economic class of the household, or home-ownership status. Typical values are White Collar, Blue Collar, Rural, Own Residence, and Renter.
Size	Total number of people in the household.
State	Automatically populated with the state where the primary household contact resides.
Status	The current stage in the customer interaction life cycle. Defaults to Active for a new household record.
Team	Employees assigned to work with this household. If a call center user is not a member of the household team, that user will not receive information about this household during Mobile Web Client synchronization.
Type	Types of people that make up the household. Typical values include Family - Children, Family - No children, Family - Senior Citizen, and Single.
Wealth	Estimated total wealth of the household.
Zip Code	Automatically populated with the zip code of the primary household contact.

Adding Contacts to a Household

Contacts are individuals associated with a household. Agents can specify one person in the household as the head of household and then identify the others as spouse, child, or dependent parent.

To add contacts to a household

- 1 Navigate to the Households screen > List view.
- 2 Drill down on the household to which the contacts will be added.
- 3 Click the Contacts view tab.
- 4 In the Contacts list, use one of the following methods to specify the contact you want to add:
 - To add an existing contact to the household, click Add, select the contact from the Add Contacts dialog box, and click OK.
 - To add a new contact to the household, click New.
- 5 Complete the fields for the record.

The following table describes some of the fields.

Field	Comments
Alias	Contact's nickname.
Date Entered	Date that the contact became a member of the household.
Date Exited	Date that the contact left the household.
Employee Flag	Indicates that the contact is an employee of your company.
Income	Contact's income.
Households	One or more households in which the contact is a member.
Primary	When selected, designates the current contact as the main decision-maker for the household.
Relationship	Indicates the role of the contact within the household.

To specify an address for the household contact

- 1 Navigate to the Households screen > List view.
- 2 Drill down on a household record.
- 3 Click the Contacts view tab.
- 4 In the Contacts list, select the contact and drill down on the hyperlink in the Last Name field.
The Contact form and an Activities list appears.

- 5 Click the Addresses view tab, and in the Addresses list, create a new record and complete the fields.
- 6 Click the thread bar to return to the Household Contacts view, and then scroll down to display the Household Contacts More Info form.
- 7 In the More Info form, click the select button in the Address field to display the Contact Addresses dialog box.
- 8 In the Contact Addresses dialog box, select the row and the Primary check box for the contact's main address, and then click OK.
- 9 In the More Info form, complete additional fields.

The following table describes some of the fields.

Field	Comments
Account	Business or organization associated with the contact.
Address	Contact's address or addresses. The procedure for entering addresses to be displayed in this field is described in Step 4 on page 510 .
Email	Contact's email address.
Site	Site of the account associated with the contact.

NOTE: In the Households screen, a contact's address is the residential or personal address. In the Contacts screen, the address displayed in the Contact form and the Contact More Info form is the address of the account associated with the contact. The Addresses view tab for the Contacts screen holds the list where a contact's other addresses can be specified. Household addresses can only be selected from these individual contact addresses.

Adding Activities to Household Records

Add activity records to household records to track appointments, meetings, email messages, and other tasks related to households. The following procedure describes how to add an activity from the Household screen. For more information about Activities, see [Chapter 17, "Activities."](#)

To add an activity for a household

- 1 Navigate to the Households screen > List view.
- 2 Drill down on the household for which the activity will be added.
- 3 Click the Contacts view tab.
- 4 In the Contacts list, select the contact, and then drill down on the Last Name hyperlink.

The Activities view for the Contacts screen appears.

- 5 In the Activities list, create a new record and complete the necessary fields.

The fields are described in [Chapter 17, “Activities.”](#)

Storing and Viewing Information About Households

The following types of information can be indirectly related to a household by associating the information with the contact record for any member of the household:

- Attachments
- Notes
- Opportunities
- Service Requests
- Agreements
- Assets

The Household screen's views that correspond to these types of information are read-only. The information must be stored and modified using Contact screen views.

To store additional information related to a household contact

- 1 Navigate to the Households screen > List view.
- 2 Drill down on a household record.
- 3 Click the Contacts view tab.
- 4 In the Contacts list, drill down on the Last Name hyperlink to display the Contacts screen.
- 5 Click the appropriate view tab for the type of information you want to add:
 - Attachments
 - Notes
 - Opportunities
 - Service Requests
 - Agreements
 - Assets
- 6 In the view tab list, create a new record and complete the necessary fields.

If the contact who is associated with Attachments, Notes, Opportunities, Service Requests, Agreements, or Assets leaves the household, the information stays accessible through the Household screen if Siebel Call Center users register the contact's departure by adding an exit date to the Household Contact record. If a user deletes the Household Contact record for the departing contact, the information associated with that contact is no longer associated with the contact's former household.

To view additional information related to a household

- 1 Navigate to the Households screen > List view.
- 2 Drill down on a household record.
- 3 Click the view tab for the type of information you want to view:
 - Attachments
 - Notes
 - Opportunities
 - Service Requests
 - Agreements
 - Assets

The corresponding list appears.

Sending Household Information to an External System

If the Siebel administrator has set up real-time household integration between Siebel Call Center and another system in your organization, agents can use the Update External System command to send new and modified household information from your Siebel application to the other system.

By default, in the Households screen, the Update External System command triggers the business process Synchronize Household ASI. This business process sends household information to the external system, waits for a response from the external system, and updates the Siebel database with the response.

The following procedure describes how to send information about a household from Siebel Call Center to another system. This procedure assumes that the Siebel administrator has completed the work necessary to enable real-time household integration through Application Service Interfaces (ASI). For information about ASI structures, see *Application Services Interface Reference*. For information about setting up ASIs, see [Chapter 32, "Integration Using ASIs."](#)

To send household and contact information to an external software system

- 1 Navigate to the Households screen > List view.
- 2 Drill down on a households record.

Follow the instructions in the procedure ["To add a household" on page 508](#) to create a new household record.
- 3 Click the Contacts view tab, and choose a contact from the list.

If household contacts have not yet been added, follow the instructions in ["To add contacts to a household" on page 510](#) to specify household contacts.

- 4** In the contact record, drill down on the hyperlink in the Last Name field.
The Contact form and an Activities list appears.
- 5** In the Contact form, click the menu button, and then choose Update External System.
You may observe a slight pause while the information is sent and the external system's response is received.
- 6** Click the thread bar to return to the Household form.
- 7** In the Household form, click the menu button, and then choose Update External System.
You may observe a slight pause while the information is sent and the external system's response is received.

40 References

This chapter describes how sales professionals can use the References screen to access accounts that can be designated as references, and to associate contacts, activities, profiles, and notes with each reference.

This chapter contains the following topics:

- [“Scenario for References” on page 515](#)
- [“Managing Accounts and References” on page 516](#)
- [“Designating an Account as a Reference” on page 516](#)
- [“Associating an Activity with a Reference” on page 516](#)
- [“Associating a Contact with a Reference” on page 517](#)
- [“Associating an Attachment with a Reference” on page 518](#)
- [“Adding a Reference Activity to the Calendar” on page 518](#)
- [“Adding a Note to a Reference” on page 519](#)
- [“Adding Profile Information to a Reference” on page 519](#)
- [“Searching for References” on page 519](#)
- [“Viewing Reference Assets and Profiles Charts” on page 520](#)

Scenario for References

This scenario provides an example of the business process performed by a sales representative using references to compete for new business. Your company may follow a different process according to its business requirements.

A sales representative is attempting to win a 2,500-seat software sales opportunity for his company. In a series of meetings with the prospect, the sales representative demonstrates his product line and submits a quote. The sales representative receives a call from the prospective customer requesting a chance to speak with existing software customers as a point of reference before agreeing to the terms of the quote.

The sales representative searches the list of references, and performs a query to find accounts that meet specific criteria. The accounts must be designated as referenceable, in the same industry as the prospective customer, and listed as maintenance in the sales stage.

The sales representative finds companies that meet the criteria. She selects a company for the reference, and telephones the primary representative to get permission to use the customer as a reference. The representative agrees and sets up a conference call to discuss the opportunity with the prospect.

Managing Accounts and References

The References screen provides you with customer reference information that you can use as a sales tool when managing sales, marketing, and public relations initiatives. As a sales team member, providing potential customers with a list of referenceable accounts adds immediate legitimacy to any sales situation and gives you a competitive advantage. You also can use the References screen to determine the best reference for a current initiative.

You can use the References list to search for accounts that are referenceable. A calendar view of reference activities is also available.

The following procedures describe how to manage accounts references using the references screen:

- [Designating an Account as a Reference on page 516](#)
- [Associating an Activity with a Reference on page 516](#)
- [Associating a Contact with a Reference on page 517](#)
- [Associating an Attachment with a Reference on page 518](#)
- [Adding a Reference Activity to the Calendar on page 518](#)
- [Adding a Note to a Reference on page 519](#)
- [Adding Profile Information to a Reference on page 519](#)
- [Searching for References on page 519](#)
- [Viewing Reference Assets and Profiles Charts on page 520](#)

Designating an Account as a Reference

You can mark an account as referenceable using the check box in the account record's Reference field. During the reference process, you can set the reference stages.

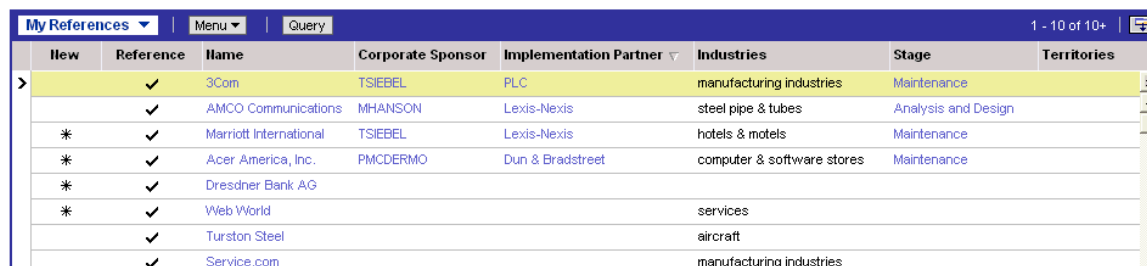
To designate an account as a reference

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on an account record.
- 3 Click the More Info view tab.
- 4 In the Account details form, select the Reference check box.

Associating an Activity with a Reference

In the Activities view, you can see each activity associated with an account. Activities associated with a reference appear in the Calendar view. See *Fundamentals* for more information on Calendar.

Figure 32 shows a sample References list. Reference record fields provide information on the primary representative, the corporate sponsor, and so on.



New	Reference	Name	Corporate Sponsor	Implementation Partner	Industries	Stage	Territories
>	✓	3Com	TSIEBEL	PLC	manufacturing industries	Maintenance	
	✓	AMCO Communications	MHANSON	Lexis-Nexis	steel pipe & tubes	Analysis and Design	
*	✓	Marriott International	TSIEBEL	Lexis-Nexis	hotels & motels	Maintenance	
*	✓	Acer America, Inc.	PMCDERMO	Dun & Bradstreet	computer & software stores	Maintenance	
*	✓	Dresdner Bank AG					
*	✓	Web World			services		
	✓	Turston Steel			aircraft		
	✓	Service.com			manufacturing industries		

Figure 32. References List

NOTE: Only these Activity Types appear in this view: Reference - Call, Reference - Testimonial, Reference - Visit.

To associate an activity with a reference

- 1 Navigate to the References screen > Reference List view.
- 2 Drill down on a reference record.
- 3 Click the Activities view tab.
- 4 In the Activities list, create a new record and complete the necessary fields.

For more information, see [Chapter 17, "Activities."](#)

Associating a Contact with a Reference

You can designate a specific contact within a referenceable account. This contact can provide you with reference information or the individual can be the point-of-contact for activities associated with the account.

To associate a contact with a reference

- 1 Navigate to the References screen > Reference List view.
- 2 Drill down on a reference record.
- 3 Click the Contacts view tab.
- 4 In the Contacts list, perform one of the following steps.
 - a Click Add to open the Add Contacts dialog box, and then select the contact from the list.
 - b Click New to add a new row to the Contacts list, and then complete the necessary fields for the contact.

Associating an Attachment with a Reference

The Attachments view lists attachments associated with a reference account. You can add new attachments or view attachments associated with the account. Reference Attachments include account attachments as well as reference attachments.

To associate an attachment with a reference

- 1 Navigate to the References screen > Reference List view.
- 2 Drill down on a reference record.
- 3 Click the Attachments view tab.
- 4 In the Attachments list, create a new record.
- 5 In the Attachment Name field, click the select button, and in the Add Attachment dialog box, click Browse.
- 6 In the Choose File dialog box, select the file, and then click Open.
- 7 In the Add Attachment dialog box, click Add.

Adding a Reference Activity to the Calendar

The Calendar view details all reference activities associated with the account. In the calendar, you can view, by month, the number of reference activities associated with the account. This view allows you to manage the number of initiatives for the account and determine if the customer is being contacted too often.

To add a calendar item for a reference

- 1 Navigate to the References screen > Reference List view.
- 2 Drill down on a reference record.
- 3 Click the Calendar view tab.
The reference form appears with the calendar.
- 4 In the Calendar view, click New.
- 5 In the Calendar Detail form, complete the necessary fields, and then click Save This One.

NOTE: Only these Activity Types appear in the Reference Calendar: Reference - Call, Reference - Testimonial, Reference - Visit .

Adding a Note to a Reference

The Reference screen's Notes view allows you to add notes to the selected reference account. Notes can be shared with others, and notes can be designated as private. Reference notes are visible in both the Account screen and the Reference screen. If you create a note in either the Accounts screen or the Reference screen, it is accessible in both views.

To add a note to a reference

- 1 Navigate to the References screen > Reference List view.
- 2 Drill down on a reference record.
- 3 Click the Notes view tab.
- 4 In the lower link bar, click Private Notes or Shared Notes.
- 5 In the Notes list, create a new record and complete the necessary fields.

Adding Profile Information to a Reference

The Profile view allows you to update the account with information about the assets owned by the account, and information about the service profile. The service profile is a list of all external products the account is using in its operating environment. For instance, if your company sells application software, you might add information about the server hardware and end-user operating system used in conjunction with your products.

To add profile information to a reference

- 1 Navigate to the References screen > Reference List view.
- 2 Drill down on a reference record.
- 3 Click the Profile view tab.
The Profile list and the Service Profile subviews appear.
- 4 In the Profile list, create a new record and complete the necessary fields.
- 5 In the Service Profile list, create a new record and complete the necessary fields.

Searching for References

Use the All References Read Only and All References Across Organizations Read Only lists to search for references applicable to your accounts. These views are read-only; you cannot modify information, and a contacts list is not available. To use the reference contact information, contact the reference owner, whose User ID appears in the Primary Rep field.

To search for references

- 1** Navigate to the References screen > Reference Read Only List view.
As an alternative, select All References Across Organizations Read Only view.
- 2** In the References list, click Query, enter criteria in the query form, and then click Go.
- 3** In the reference record, drill down on the name hyperlink in the Primary Rep field to view reference owner information.

Viewing Reference Assets and Profiles Charts

Reference charts provide a graphical analysis of referenced account assets and profiles. The Asset Analysis chart provides a graphical view of the assets, and the Profile Analysis chart provides a graphical representation of the profile information associated with all reference accounts. Both charts are read-only.

To view Assets and Profile Analysis charts

- 1** Navigate to the References screen.
- 2** From the link bar, choose Asset Analysis or Profile Analysis.
The Reference Assets or Reference Profile list appears with the analysis chart.
- 3** In the chart, select the type (3D, 2D) from the drop-down list, and then click Go.

41 Categories

Sales professionals can track information about accounts, opportunities, and contacts using the Categories screen and associated views. This chapter describes how to use predefined categories to sort and search for specific criteria, and enter information that defines a personal sales approach and style. The information can be shared with other members of the sales team or kept private.

NOTE: The categories discussed in this chapter are not the same as the categories associated with Catalog administration which are used primarily for access control. For information about this other kind of category, see the *Siebel eSales Administration Guide*.

This chapter includes the following topics:

- "Scenario for Categories" on page 521
- "Adding a Category" on page 522
- "Searching for a Category" on page 522

Scenario for Categories

This scenario provides an example of a business process performed by a sales representative using the Categories screen and views. Your company may follow a different process according to its business requirements.

A sales representative wants to track information to help manage relationships with current and potential customers. Categories, which can be designated as private or shared with the sales team, provide the sales representative with a way to organize information about an account, opportunity, or contact.

The sales representative can track the most active accounts by creating a category called Hot Accounts, and then select that category for each account that she wants to add to her active list.

The sales representative also can view a list of all the opportunities she has closed over a period of time. If she sets up a Closed category, she can see which opportunities she has closed during the previous year.

Sales professionals also can use categories to track personal information about contacts. For instance, a sales representative can record hobbies, such as golf or tennis, and designate that category for contacts she plans to invite to her company-sponsored sporting events. In addition, she can track family names or add contacts to a category called Holiday List that allows her to create a seasonal mailing list.

Adding a Category

You can add categories to accounts, contacts, and opportunities. The procedure that follows explains how to add a category for accounts. You can add a category for contacts or opportunities by navigating to the appropriate screen.

To add an account category

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on an account record for which you want to add a category.
- 3 Click the Categories view tab.
- 4 In the Categories list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Category	Choose an existing category or create a new one.
Category Rank	A value that defines the category. The rank can be any numeric value.
Private	<p>A check box which, when selected, restricts sales team members from seeing how you have categorized the account. When the check box is selected, the category is private.</p> <p>Clear the check box to designate the category as Public allowing access by team members.</p>
Value	The value assigned to the category. Create new values as required.

Searching for a Category

You can search for specific accounts, opportunities, and contacts using the categories you and your team have defined. The procedure that follows describes how to search for an account category. Use the same procedure for the Opportunities, Contacts, and Personal categories.

To search for an account category

- 1 Navigate to the Categories screen > Account Categories view.
- 2 In the Categories list, click Query.
- 3 In the Category form, click the select button in the Category field.
- 4 In the Pick Catalog dialog box, choose a category, and then click OK.
- 5 In the Categories query form, click Go.

42 Competitors

In competitive sales situations, it is imperative for the sales representative to have information about competitors to strengthen his sales strategy and differentiate his company's image and offerings.

This chapter describes how to use the Competitors screen to examine comparisons of your company and competitors, view comparative literature of your products and those of your competitors, and associate a competitor with an opportunity.

This chapter includes the following topics:

- [“Scenario for Competitors” on page 523](#)
- [“Associating a Competitor with an Opportunity” on page 523](#)
- [“Viewing Competitor Comparisons” on page 524](#)

Scenario for Competitors

This scenario provides an example of a business process performed by a sales representative using the competitors view. Your company may follow a different process according to its business requirements.

A sales representative logs into the Siebel Sales application and discovers a newly qualified opportunity. He navigates to the Competitors view to review the competition for the opportunity. One competitor is listed for the deal. The sales representative is not familiar with the company and drills down on the competitor name hyperlink to learn more.

In the Company Comparisons view, the representative can view a side-by-side comparison of his company and the competitor's company as well as comparison of products. He can access competitive intelligence documents compiled by his company about this competitor, and the literature items that the competitor has published.

A colleague in Telesales calls the sales representative and indicates that there is a new competitor trying to win the deal. The sales representative adds the new competitor to the opportunity to allow the sales team to research the new competition.

Associating a Competitor with an Opportunity

Associating a competitor with an opportunity notifies the sales team about the competition for the deal and provides the team with a link to the information it needs to deliver a consistent, winning sales strategy.

To associate a competitor with an opportunity

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on an opportunity record.
- 3 Click the Competitors view tab.
- 4 In the Competitors list, create a new record and complete the necessary fields.

TIP: Drill down on the hyperlink in the competitor Name field to navigate to the Competitors screen to obtain more information.

Some fields are described in the following table.

Field	Comments
Comments	A text field that allows you to record additional information about the competitor.
Name	Displays the competitor's company name as a hyperlink.
Primary	A check box which, when selected, indicates that the competitor is the primary rival for the deal.
Status	A list of values established by your company that allows you to specify the prospect's interest level in the competitor's offerings. Default values include Some Interest, Evaluation in Progress, Existing Relationship, and Not Satisfied.
Threat	A list of values established by your company that allows you to specify the value of the competitor's threat. Default values include 1-Low, 2-Medium, 3-High, 4-Very High.

Viewing Competitor Comparisons

In many sales situations it is necessary to discuss competitive information with a prospect. Using the Competitors screen, you can view comparisons about companies, products, and services, and also find literature to prepare for sales calls.

To view competitor comparisons

- 1 Navigate to the Competitors screen > Competitor List view.
- 2 Drill down on a competitor record.
- 3 Click the Company Comparisons view tab.

The Company Comparisons, Competitor's Literature, and Comparative Literature lists appear.

- 4 In the Competitor's Literature list, select the literature item you want to view, and then drill down on the hyperlink in the Name field.
- 5 In the Comparative Literature list, select the literature item you want to view, and then drill down on the hyperlink in the Name field.

43 Decision Issues

Decision issues are specific areas of interest that can influence a prospect's buying decision. Customers and prospective customers may ask questions and express concerns about the solutions you propose, and your company in general, during the sales cycle. Decision issues provide you with an opportunity to develop a sales strategy and address customer concerns.

This chapter describes how to use the Decision Issues view to associate customer questions and concerns with an opportunity. Decision issues are the criteria a prospective customer uses to evaluate a potential supplier and product before making a decision to buy.

This chapter includes the following topics:

- ["Scenario for Decision Issues" on page 525](#)
- ["Creating Decision Issues" on page 525](#)
- ["Associating Decision Issues with an Opportunity \(End User\)" on page 526](#)
- ["Adding Decision Issues Details \(End User\)" on page 526](#)

Scenario for Decision Issues

This scenario provides an example of a business process performed by a sales representative using decision issues. Your company may follow a different process according to its business requirements.

A sales representative logs into the Siebel Sales application and discovers a new opportunity for a software module his company sells. The 2,500-seat opportunity has been qualified by a colleague in the Telesales department, and the sales representative wants to move forward with the opportunity. The sales representative reviews the list of contacts, and then calls the main prospect to introduce himself and gather some initial requirements. Based on this conversation, the sales representative adds two new decision issues which are important to this prospect—customer references and search engines in the software.

Creating Decision Issues

Typically the administrator sets up the list of decision issues. End users associate these decisions issues with other records, but cannot edit the decision issue text.

To create a decision issue record

- 1 Navigate to the Decision Issues screen > Decision Issues Administration view.
- 2 Create a new record and complete the necessary fields.

Associating Decision Issues with an Opportunity (End User)

After you qualify an opportunity, you can associate the related decision issues with the opportunity and rank the decision issues in order of importance to the prospect.

To associate a decision issue with an opportunity

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on an opportunity record associated with the decision issue.
- 3 Click the Decision Issues view tab.
- 4 In the Decision Issues list, create a new record and complete the necessary fields.

NOTE: Your application administrator enters decision issue data that has been defined in your company. For more information, see your application administrator.

Adding Decision Issues Details (End User)

After associating a decision issue with an opportunity, drill down on the decision issue name hyperlink to access associated views. These views, shown in [Figure 33](#), allow you to enter details that help you position your company's offerings around the selected issue. By clicking a view tab you can specify related issues, associate literature, and attach files to the decision issue.

Name	Description	Local	Request	Size	File Type	Modified	Auto Update
> Customer Satisfaction	Executive Vice Pres	✓		84,551	pdf	8/20/2001 11:04:45	
MidMarket Customer		✓		42		6/27/2001 04:08:24	✓
MidMarket Customer		✓		42		6/27/2001 04:05:38	✓
MidMarket Customer		✓		42		6/27/2001 04:07:57	✓
MidMarket Customer		✓		42		6/27/2001 04:08:54	✓
MidMarket Customer	Customer success :	✓		47,981	pdf	9/11/2001 10:11:56	✓
MidMarket_Edition_C	Midmarket Referenc	✓		1,261,656	ppt	9/14/2001 07:18:09	✓

Figure 33. Decision Issues Details View

To add decision issue details

- 1 Create a Decision Issue associated with an opportunity as detailed in [“To associate a decision issue with an opportunity” on page 526](#).
- 2 In the Decision Issues list, drill down on the hyperlink in the Decision Issue field.
The selected decision issue read-only form appears with subview tabs, Related Issues, Literature, and Attachments, as shown in [Figure 33](#).

To add related issues

- 1 Click the Related Issues view tab, and then click Query.
- 2 In the Related Issues query form, enter the query information, and then click Go.

To associate literature with the decision issue

- 1 Click the Literature view tab, and then click Query.
- 2 In the Literature query form enter the query information, and then click Go.
Select the Auto Update check box if you want to update associated literature when source literature files are updated.

To associate attachments with the decision issue

- 1 Click the Attachments view tab, and then click Query.
- 2 In the query form, click the select button in the Attachment Name field.
- 3 In the Add Attachment dialog box, specify a file name or URL, and then click Add.
In the Add Attachment dialog box, click Browse to navigate to the file you want to attach.

44 Enterprise Selling Process

This chapter contains the following topics:

- [“About Enterprise Selling Process” on page 529](#)
- [“Using ESP Methodology to Manage Accounts” on page 530](#)
- [“Scenario for Enterprise Selling Process” on page 530](#)
- [“Process of Enterprise Selling” on page 531](#)
- [“Adding ESP Business Unit and Service Unit Information” on page 532](#)
- [“Adding ESP Business and Service Unit Offerings” on page 533](#)
- [“Conducting an ESP Organizational Analysis” on page 535](#)
- [“Charting the Organization’s Reporting Structure” on page 536](#)
- [“Adding Partners for ESP Analysis” on page 538](#)
- [“Viewing the BU/SU Offering Summary” on page 539](#)
- [“Adding ESP Objectives” on page 539](#)
- [“Adding ESP Account Plan Highlights” on page 540](#)
- [“Viewing an ESP Manager’s Review” on page 541](#)
- [“Generating ESP Account Plan and Account Map Reports” on page 541](#)

About Enterprise Selling Process

Sales professionals can use Siebel Enterprise Selling Process (ESP) methodology from Siebel MultiChannel Services to penetrate, cover, and grow large strategic accounts—especially global accounts. Enterprise Selling Process is a separately licensed module that integrates with the Siebel Sales application.

The ESP module helps sales professionals identify the customer's business drivers and initiatives, uncover opportunities in key business and service units, develop global account strategies, manage key executive and partner relationships, and coordinate team activities.

The ESP module is designed to support users who are already familiar with the ESP methodology, based on the learning programs offered by Siebel MultiChannel Services. Users should first complete an initial account analysis to select the units, opportunities, and partners, using the tools provided in the ESP workshop. After the analysis, the business units, opportunities, and partners are entered and tracked using the Siebel ESP module.

Using ESP Methodology to Manage Accounts

Siebel Enterprise Selling Process (ESP) software provides support for the Enterprise Selling Process methodology from Siebel MultiChannel Services. The software module allows account teams to better make use of the ESP account management methodology to penetrate, cover, and grow large strategic accounts— especially global accounts. Using the software, sales professionals can be more effective at identifying the customer's business drivers and initiatives, uncovering opportunities in key business and service units, developing global account strategies, managing key executive and partner relationships, and coordinating team activities.

The Siebel Enterprise Selling Process software module provides the following features:

- Support for the Enterprise Selling Process methodology
- An overview of Account Plan Highlights, such as the goal, the value proposition, and the critical success factors for driving business in the account
- A set of objectives for driving business in the account and an action plan for achieving each objective
- Analysis of the offerings that address each business and service unit's needs, along with the associated revenue from Installed Base, Current, and Potential Opportunities
- Automatic creation of an organization chart that visually shows an analysis of key players and their relationships
- Automatic creation of ESP reports including the Account Map and Account Plan

Scenario for Enterprise Selling Process

This scenario provides an example of the business process performed by a sales manager using the ESP methodology. Your company may follow a different process according to its business requirements.

An account manager has completed the ESP methodology workshop. At the end of the workshop, she develops a plan for her account. She plans to use the ESP software module to enter her account plan information to share with her team, and to track performance over the next several quarters against the plan.

The account manager begins by launching Siebel Sales and navigating to the Accounts screen. She selects the targeted account from the list of accounts, and then moves to the Enterprise Selling Process view to begin her account analysis.

First, the account manager enters the account's business and service units and key information about each unit such as the unit's culture, her company's level of relationship with the unit, and the strategy she plans to apply to the unit. This provides her team with important sales information about each unit that sales team members plan to contact.

Then, the account manager enters information about the potential, current, and installed base opportunities by offering for each unit. This information helps the team understand where they have coverage and penetration in each unit and with which offerings. After the account's units and opportunities are mapped, the account manager analyzes the organizational structure within the account. The account manager defines both the formal and informal organizational structures and determines who is important within the account and whom the team needs to spend more time with to close the identified opportunities.

The account manager continues by analyzing the partners involved with this account so she can identify and use partnership capabilities within the key business and service units. The manager enters her value proposition, goal, critical success factors and objectives for the account based on her analysis. She then enters activities that are necessary to meet each objective, and assigns objectives to the appropriate team member. This allows the account manager to coordinate with her team in a goal-oriented fashion.

When the account manager is ready to share her Account Plan, she runs the report and emails it to her team and manager. Her manager can also review the report online and enter her comments in the Manager's Review form.

Process of Enterprise Selling

The Enterprise Selling Process (ESP) module consists of eight views. Information provided in these views comprises the overall account plan. The ESP Account Plan and the ESP Account Map reports can be automatically generated from the ESP module.

The procedures associated with the eight ESP views describe how to use the Enterprise Selling Process module.

- 1 ["Adding ESP Business Unit and Service Unit Information" on page 532](#)
- 2 ["Adding ESP Business and Service Unit Offerings" on page 533](#)
- 3 ["Conducting an ESP Organizational Analysis" on page 535](#) and ["Charting the Organization's Reporting Structure" on page 536](#) (Organizational Analysis)
- 4 ["Adding Partners for ESP Analysis" on page 538](#)
- 5 ["Viewing the BU/SU Offering Summary" on page 539](#)
- 6 ["Adding ESP Objectives" on page 539](#)
- 7 ["Adding ESP Account Plan Highlights" on page 540](#)
- 8 ["Viewing an ESP Manager's Review" on page 541](#)
- 9 ["Generating ESP Account Plan and Account Map Reports" on page 541](#)

Adding ESP Business Unit and Service Unit Information

The Business Unit and Service Unit (BU/SU) Overview helps you segment the account into more manageable business and service units. Each business or service unit in your account has different characteristics that affect your ability to sell into the unit. This view helps you profile each unit to determine these characteristics. It also helps you to make decisions about where to apply your resources and how to successfully integrate into the organization.

To add BU/SU overview information

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on an account record.
- 3 Click the Enterprise Selling Process view tab.
- 4 In the lower link bar, click BU/SU Overview.
- 5 In the list, create a new record, enter a name for the business or service unit, and then complete the fields.

The following table describes the fields in the BU/SU Overview record.

Field values are discussed during methodology training, and are available as part of the methodology documentation.

Field	Comments
Culture	A list of values that defines the culture (sales environment and sales approach) favored by the business or service unit. Examples are Entrepreneurial, Individualistic, Bureaucratic, and Collaborative.
Strategy Type	A list of values that defines your strategy to penetrate, cover and grow the relationship with the business or service unit. The values are Create, Exit, Expand, Protect, and Pursue.
Initiatives	A text field that allows you describe the initiatives on which you plan to focus for the business or service unit. Example are improve ROI by 10% and increase customer satisfaction.
Level of Relationship	Your company's perception of its relationship with the business or service unit. Examples are Problem Solver, Trusted Advisor, and Credible Source.
Marketing	Enter information in this text field about an existing marketing campaign or new marketing campaign that you want to apply or develop for this business or service unit.

- 6 Repeat [Step 5](#) for each Business or Service Unit in the account.

NOTE: If you are using ESP to analyze an account that has associated child accounts, the child accounts automatically appear in the BU/SU Overview list.

Adding ESP Business and Service Unit Offerings

The Offerings view helps sales professionals to identify opportunities to sell their offerings (products and services) into key business or service units in the account. The sales professional can use this view to maintain a balance of current and future revenue in the account. It also helps to identify opportunities for greater account penetration.

To add offerings

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on an account record.
- 3 Click the Enterprise Selling Process view tab.
- 4 In the lower link bar, click BU/SU Overview.
- 5 In the Business/Service Unit field, drill down on the hyperlink of the unit to which you want to add offerings.

The name of the unit you drilled down on appears in the Account form at the top of the screen. The account type for this unit should be ESP BSU. The Show drop-down list automatically shows the Offerings view. To add offerings, the Account Type must be ESP BSU. When the Account Type is set to ESP BSU, the New button is inactive in the BU/SU Overview view and in the Objectives view. This behavior is controlled by the business component user property Parent Read Only Field.

6 In the Offerings list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Potential Oppty Name	A Potential Opportunity has long-term revenue implications and ties to the customer's business initiative. The opportunity may or may not occur and may be classified as unqualified. Click the select button in this field to add existing opportunities, or to create new opportunities.
Potential Oppty Revenue	The revenue classified as Potential that is associated with the opportunity.
Current Oppty Name	A Current Opportunity is in the sales cycle and has a significant associated revenue or market value. The opportunity can be the result of a new or installed business. Click the select button in this field to add existing opportunities, or to create new opportunities.
Current Oppty Revenue	The revenue classified as Current that is associated with the opportunity.
Install Base Name	<p>An Installed Base opportunity can be categorized in one or more of the following groups.</p> <ul style="list-style-type: none"> ■ Servicing and maintaining ■ Upgrades, add-ons ■ Contract extensions ■ Non-competitive <p>Click the select button in this field to add existing opportunities or to create new opportunities.</p>
Install Base Revenue	The revenue classified as Install Base that is associated with the opportunity.
Value to Customer	Choose a numeric value to indicate your assessment of how critical the initiative is to the enterprise's overall strategy.
Value to Us	<p>Choose a numeric value after evaluating the following factors.</p> <ul style="list-style-type: none"> ■ Short-term revenue potential ■ Future revenue potential ■ Profitability ■ Degree of risk ■ Strategic value

NOTE: You can enter the revenue associated with potential opportunities without creating a new opportunity in the database.

- 7 When you have finished identifying opportunities in the unit for your offerings, navigate back to the BU/SU Overview view, select a new unit, and repeat [Step 5](#) and [Step 6](#).

Conducting an ESP Organizational Analysis

Using the Organizational Analysis view, sales professionals can map the structure and politics of the customer's organization to build and expand the relationship with the customer. After completing additional assessments to identify the most influential people and how to use these relationships, sales professionals can automatically create formal and informal organizational charts that visually summarize their contact analyses.

To conduct an organizational analysis

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on an account record.
- 3 Click the Enterprise Selling Process view tab.

You can conduct an organizational analysis at the Account level or at the Business/Service Unit level.

- 4 Perform the following steps to conduct an Account-level Organizational Analysis.
 - a In the lower link bar, click Organizational Analysis.
The Organization Chart view appears, showing all contacts associated with the account.
 - b Proceed to [Step 6](#) of this procedure.
- 5 Perform the following steps to conduct a Business/Service Unit Organizational Analysis.
 - a In the BU/SU Overview list, drill down on the name hyperlink of the unit for which you are conducting an organizational analysis.
The name of the unit appears in the Account form at the top of the screen. The Show menu automatically changes to the Offerings view.
 - b In the lower link bar, click Organizational Analysis.
The Organization Chart view appears, showing all contacts associated with the unit.
 - c From the Show menu, choose Contacts (toggle).
All the contacts that have been created for this business or service unit appear.
 - d Proceed to [Step 6](#) of this procedure.

NOTE: In the Organizational Analysis view, you can toggle between the Organization Chart view and the Contacts list view. Contacts previously associated with the account or unit automatically appear in both views. The contacts shown in the Contacts list appear in the Organization Chart view.

- 6 In the Contacts list, create a new record and complete the necessary fields to associate an existing contact with the account or unit.

To create a new contact record, click New in the Add Contacts dialog box.

NOTE: You can also create contacts by clicking New on the Organization Chart toggle view. If you create a new contact from the Organization Chart, an explicit Save is required to return to the Organization Chart view.

- 7 In the Contacts list, analyze each contact based on the criteria taught in the ESP methodology training program.

The criteria includes Role, Your Status, Level of Influence, Adaptability to Change, and Coverage.

The Level of Influence value for the contact determines the degree of shading that appears in the Contact node in the Organization Chart. The following table describes the shading associated with the Level of Influence value.

Value in Level of Influence Field	Shading on Organization Chart
Low	None
Political Structure (Medium)	Light gray
Inner Circle (High)	Dark gray

- 8 In the Contacts list, use the drop-down list to toggle to the Organization Chart view. For more information, see [“Charting the Organization's Reporting Structure” on page 536](#).

Charting the Organization's Reporting Structure

The Organization Chart displays nodes (boxes) that contain information for each of the contacts you have analyzed and associated with the account or contact. [Figure 34](#) shows a contact node with associated information.

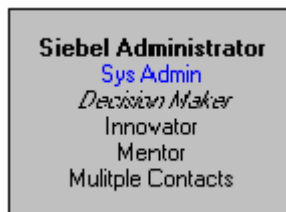


Figure 34. Contact Node

You can visually represent the formal hierarchy in the organization by creating the Organization Chart for the account or unit.

To represent a reporting structure

- 1 In the Organization Chart view, select the contact node and drag it beneath the node that represents the manager of the contact.

After you drop the contact node on the manager node, a line between the nodes appears, reflecting the reporting relationship.

- 2 Repeat this process for each contact until you have completed the organization chart.

NOTE: The reporting relationships are also stored in the Contacts list (toggle view). Information about the manager of the contact appears in the fields Manager Last Name, and Manager First Name. To expose this information in the list, click the menu button, and then select Columns Displayed.

To delete contacts from the organization chart

- 1 In the Organization Chart view, select the contact node, right click, and choose Edit > Delete from the menu.

You can also delete a contact by selecting the contact node, and then pressing the DELETE key.

- 2 To confirm the deletion, click OK.

When you delete a contact, the contact is removed from the contacts list as well as the organization chart.

Using the Organization Chart to Draw Lines of Influence

You can also map the political structure in the account or unit organization by identifying informal lines of influence for contacts. This feature helps you identify contacts who are not highly ranked (and are easier to access) but who have significant influence on key decision makers.

Lines of Influence information is automatically updated in the Relationships view of the Contacts screen. You can add lines of influence in the Relationships view if you prefer.

To draw a line of influence

- 1 In the Organization Chart view, select the contact, and then simultaneously hold down the CTRL key on your keyboard.
- 2 Select the contact node, and then drag and drop the contact node onto other contacts to draw the lines of influence.

The CTRL key must be depressed throughout this process for the informal line of influence to appear.

To delete lines of influence

- Select the line, and then press the DELETE key.

You can also select the line, right click the mouse, and then choose Edit > Delete from the menu.

Printing the Organization Chart

You can print the Organization chart for distribution to your sales team.

NOTE: The Organization Chart does not print in the Account Plan Report or Account Map Report. You must print it from the Organization Chart view using the right-click menu.

To print an organization chart

- 1 In the Organization Chart view, right-click your mouse.
- 2 From the menu, choose the Zoom level at which you want to print the chart.

Adding Partners for ESP Analysis

The Partners view helps you to analyze and execute key partnership strategies while identifying and using partnership capabilities across the enterprise. This view also helps you develop initiatives used to engage key partners.

To add a partner

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on an account record.
- 3 Click the Enterprise Selling Process view tab.
- 4 In the lower link bar, click BU/SU Overview.
- 5 In the list, drill down on the name hyperlink for the unit to which partners will be added.

The name of the unit appears in the Account form at the top of the screen. The Account Type must be ESP BSU to add partners to the unit.

The Offerings list appears below the Account form.

- 6 In the lower link bar, click Partners.
- 7 In the Partners view, create a new record and complete the necessary fields.

NOTE: Partners are stored as Accounts in the database. The Partner flag is checked in the Add Accounts dialog box.

- 8 Navigate back to the BU/SU Overview to add partners to another unit.
- 9 Select a new business or service unit, and repeat [Step 7](#).

To add a contact

- 1 In the Partners list, select the partner, and drill down on the hyperlink in the Name field.

The Accounts screen, Contacts view appears.

- 2 In the Contacts list, click Add to select an existing contact.

Click New to add and enter information on a new contact.

- 3 In the Add Contacts dialog box, select a contact, and then click OK.

NOTE: You can select multiple contacts by holding down the SHIFT key and selecting multiple contacts.

To add activities

- 1 In the Contacts list, drill down on the hyperlink in the Last Name field.

The Contacts detail form and Activities view appears.

- 2 In the Activities list, create a new record and complete the necessary fields.

If you select Calendar and Activities in the Display In field, you must specify a Start date and time for the record to appear in the Calendar.

To delegate the activity, click the select button in the Owner field, and from the Pick Assigned To dialog box, select the owner of the activity. For more information, see [Chapter 17, "Activities."](#)

Viewing the BU/SU Offering Summary

The BU/SU Offering Summary is a read-only view that allows you to see all the offerings (and associated opportunities) you have added to each business and service unit in the account.

NOTE: Verify that the account name in the Account form does not show one of your units. You must select the main account for which you are conducting the ESP analysis to see all the offerings by unit.

To view BU/SU offerings

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on an account record.
- 3 Click the Enterprise Selling Process view tab.
- 4 In the lower link bar, click BU/SU Offering Summary.

The offerings associated with each unit in the account appear. You can also see the potential, current, and installed base opportunities for each offering associated with each unit.

Adding ESP Objectives

The Objectives view helps the sales professional to develop an initial plan for the account. Sales professionals can create specific types of objectives (for example, Business Development, Revenue, and Cross-Account) for each unit or resource to improve strategic planning and account team coordination.

The defined objectives link to an Action Plan form that sales professionals can use to develop action plans to achieve each objective they set. Moreover, the sales professional can verify that the action plan is implemented, because the activities assigned in the Action Plan form automatically appear in the assignee's activities list.

To add objectives

- 1** Navigate to the Accounts screen > Accounts List view.
- 2** Drill down on an account record.
- 3** Click the Enterprise Selling Process view tab.
- 4** In the lower link bar, click Objectives.
- 5** In the list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Unit or Resource	The Unit or Resource for which you are creating the objective. Units can be a business or service unit, opportunities, offerings, or groups of units. Examples of Resource names are Marketing, Customer Satisfaction, or Partners.
Objective Type	The type of objective being defined. Choose from the three primary objective types, Cross Account, Revenue, and Business Development.
Objective	The objective for the unit or resource.
Strategy	A text entry field. Enter a statement that explains how the objective will be achieved.

- 6** Drill down on the Unit or Resource hyperlink.
- 7** In the Action Plan list, create a new record and complete the necessary fields.

The Objective details form appears with the Action Plan list.

The Actions you create in the Action Plan list appear in your Activities, Calendar, and To Do List, based on the Display In value you selected. To appear in the Calendar, the start date for the action must be entered.

Adding ESP Account Plan Highlights

The Account Plan Highlights view allows the sales professional to enter the achievement goals for the account. The sales professional can communicate the strategic plans for the account to the sales team and to sales management, using the Account Goal, Value Proposition, and Critical Success Factor fields.

- **Goal.** The account goal is a statement that describes the level of business you desire with the customer within the next few years. Express the goal, if possible, in terms of relationship and revenue.
- **Value Proposition.** The value proposition is a statement that describes your value to the customer. The value proposition should be written from the perspective of the customer.
- **Critical Success Factor.** Specific to the ESP Account Plan, critical success factors are the events or resources necessary to the success of your plan.

To add account plan highlights

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on an account record.
- 3 Click the Enterprise Selling Process view tab.
- 4 In the lower link bar, click Account Plan Highlights.
The Overview form and the Critical Success Factors form appear.
- 5 In the Overview form, enter statements in the Goal and Value Proposition fields.
- 6 In the Critical Success Factors form, enter a statement in the Critical Success Factors field.

Viewing an ESP Manager's Review

The sales manager uses the Manager's Review view to enter an assessment of the sales professional's ESP account plan. The manager can add comments in the Manager's Review, which includes the date of each review.

The sales representative and other nonmanagers have read-only access to this view.

To view a manager's review

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on an account record.
- 3 Click the Enterprise Selling Process view tab.
- 4 In the lower link bar, click Manager's Review.

Generating ESP Account Plan and Account Map Reports

You can automatically generate an Account Plan report and an Account Map report for your selected account. The reports can be printed or emailed.

To create a report

- 1** Navigate to the Accounts screen > Accounts List view.
- 2** Drill down on the account associated with the report.
- 3** Click the Enterprise Selling Process view tab.
- 4** Click the Reports button and select ESP Account Plan or ESP Account Map.

For more information on reports see *Fundamentals* and *Siebel Reports Administration Guide*.

45 Target Account Selling

This chapter describes how the Target Account Selling (TAS) module integrates with Siebel Sales to help sales professionals win deals. The TAS module provides automated support and coaching to help sales professionals in the following ways:

- Assess opportunities, relationships with key customer contacts, and their competitive position
- Develop competitive and relationship strategies to win the deal
- Execute the strategy and track progress against the action plan

The TAS opportunity management methodology is a separately licensed offering developed by Siebel MultiChannel Services.

This chapter includes the following topics:

- [“Using Target Account Selling to Manage Opportunities” on page 543](#)
- [“Scenario for Target Account Selling” on page 544](#)
- [“Process of Target Account Selling” on page 545](#)
- [“Completing a TAS Overview” on page 546](#)
- [“Assessing an Opportunity” on page 547](#)
- [“Developing Strategy with TAS Competitive Analysis” on page 550](#)
- [“Conducting an Organizational Analysis” on page 551](#)
- [“Developing a Relationship Strategy” on page 554](#)
- [“Adding Customer Milestones” on page 555](#)
- [“Viewing PRIME Activities” on page 556](#)
- [“Adding Notes” on page 557](#)
- [“Creating TAS Opportunity Plan and Initial Plan Reports” on page 558](#)

Using Target Account Selling to Manage Opportunities

The Target Account Selling module provides full support for the Target Account Selling (TAS) sales methodology from Siebel MultiChannel Services. Using the Target Account Selling methodology and the Target Account Selling module, sales professionals can assess opportunities, conduct organizational and competitive analysis, and develop and execute effective sales strategies.

The Siebel Target Account Selling software module provides the following features:

- Full support for the Target Account Selling methodology

- A TAS Coach to help sales professionals assess their opportunities, including Tips to reinforce key concepts in the TAS methodology
- A TAS Coach that recommends what competitive strategy to take, and identifies the pros and cons of the recommended strategy
- Automatic creation of the Organization Map that allows you to view both the formal hierarchy and lines of influence in the customer organization. This helps sales professionals develop relationship strategy
- Support in identifying and ranking the decision criteria of each contact
- Team planning to make sure that key Customer Milestones are addressed
- Automatic creation of the TAS Opportunity Plan. The report can be configured to print selected sections
- Automatic creation of the TAS Initial Plan
- The TAS Opportunity Plan template that generates an editable Microsoft Word file (available to customers who have the separately licensed Proposal Generator)

Scenario for Target Account Selling

This scenario provides an example of the business process performed by a sales manager using the Target Account Selling (TAS) methodology. Your company may follow a different process according to its business requirements.

A sales representative meets with a customer and discovers a new opportunity. The sales representative plans to use the Target Account Selling (TAS) methodology from Siebel MultiChannel Services (MCS) to develop a sales strategy for this new deal. TAS is supported by her Siebel Sales application, allowing the sales representative to analyze the opportunity and its multiple decision makers.

Opportunity Assessment

The sales representative selects the opportunity within Siebel Sales, and navigates to the Target Account Selling views to begin the process. She sees several views that she can use to profile and assess the opportunity, develop her value proposition and competitive strategy, and create a detailed action plan to achieve her goals.

She begins by developing an overview of the opportunity. She enters some high-level information, including a profile of the account and the opportunity. This information provides strategic insight that her sales team can use and helps her to connect the project to the customer's business drivers. The sales representative also enters details about her goal for the opportunity, the solution she is offering, and the business value this solution provides. She continues by entering a description of the compelling event that is causing the customer to act. This helps her to determine the customer's sense of urgency to close the deal. She concludes by summarizing her high-level strengths and weaknesses for the deal.

Now that she has a general overview of the opportunity, she begins to assess her position using the TAS criteria that Siebel MCS has developed from analyzing the best practices of top sales professionals. She also rates the position of her key competitors using these criteria. She uses the TAS Coach on the Assessments screen to help her complete the assessment. The assessment helps her qualify the opportunity and understand her company's position in the deal.

Competitive and Relationship Strategy Development

Next, the sales representative begins to analyze her competitors for the opportunity and to determine what strategy she should use to win the deal. She uses the TAS Coach, available from the Competitive Analysis screen, for competitive strategy recommendations.

She continues by analyzing the prospect's organization. She maps both the formal and informal structures so that she can be sure she is spending time with the right contacts. When she completes the analysis, she views the organizational chart that summarizes her assessment and identifies key players and relationships she can use to close the deal.

Now that she knows who to talk to, the sales representative begins to develop a relationship strategy. She enters the business and personal agenda, as well as key decision issues, for each contact. This preparation helps her to determine what message to deliver to each contact.

Strategy Execution

The sales representative is now prepared to develop her action plan to win the opportunity. First, she navigates to the Customer Milestones view to document key events or milestones in the customer's buying process. This view helps her plan the activities that she and her sales team should take to address the customer's requirements at each milestone. Then, she enters key action steps and resources needed and assigns the actions to members of her sales team. She can choose to have the activities appear in her calendar, activities, or to-do list, or in those of another assignee. She navigates to the PRIME Activities view where she can see all the activities she created to meet customer milestones, as well as add action items required to win the deal. She also makes some additional notes about the opportunity and makes the notes available for the entire team to view.

The sales representative's manager requests a copy of the TAS Opportunity Plan. The sales representative configures the report to display relevant sections of the Opportunity Plan, generates the report, and then emails it to her manager.

Process of Target Account Selling

Siebel Target Account Selling (TAS) consists of eight views that automate the steps in the TAS methodology. The TAS Initial Plan report and the TAS Opportunity Plan report can be generated from the TAS module.

The TAS Opportunity Plan template is available with Siebel Proposal Generator (a separately licensed module), which automatically creates the Opportunity Plan using Microsoft Word.

The procedures associated with the Target Account Selling views describe how to use the Target Account Selling module.

For more information on reports, see [“Creating TAS Opportunity Plan and Initial Plan Reports” on page 558](#).

- 1 [“Completing a TAS Overview” on page 546](#)
- 2 [“Assessing an Opportunity” on page 547](#)
- 3 [“Developing Strategy with TAS Competitive Analysis” on page 550](#)
- 4 [“Conducting an Organizational Analysis” on page 551](#).
- 5 [“Viewing PRIME Activities” on page 556](#) (for relationship strategy)
- 6 [“Adding Customer Milestones” on page 555](#)
- 7 [“Viewing PRIME Activities” on page 556](#) (for PRIME activities)
- 8 [“Adding Notes” on page 557](#)

Completing a TAS Overview

The Overview view provides a starting point that sales professionals can use to consolidate their observations about the account and opportunity and share strategic insights with their sales teams.

Using this view, sales professionals can profile their customers’ important business initiatives and requirements. In addition, sales professionals can summarize the strategic goal, value proposition, and overall position.

To complete a TAS overview

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on an opportunity record.
- 3 Click the Target Account Selling view tab.
- 4 In the first form, complete the necessary fields.

The following table describes the fields.

TIP: Position the pointer on the information icon to see information on the view.

Field	Comments
Customer’s Business Profile	Describes the customer's business conditions. Identify the customer's major lines of business, affiliations, products, and markets. Include information about recent mergers and acquisitions.
Customer’s Revenue	The customer's annual revenues or sales.
Fiscal Year End	The month and day in which the customer's 12-month accounting period ends.
Customer’s Profit	The customer's annual profit.

- 5 In the Overview form, complete the necessary fields.

The following table describes the fields.

Field	Comments
Opportunity Profile	Describes the customer's project or application. Identify the customer's business objectives for the project, the total cost and budget for the project, and how the project affects the customer's overall business.
Customer's Compelling Event	Describes what is driving the customer to make a decision or change the current situation. Identify the payback if the customer makes a change, or the consequences if they do not act. Note the specific date associated with the consequences or payback.
Critical Success Factors	Identifies actions you, the competition, and your customer must do for you to win this opportunity.
Our Strengths	Identifies business, organizational, and political issues that give your sales team an advantage in the deal.
Goal	Describes your desired, long-term position with the customer. Identify how a closer relationship with you advances the attainment of their business goals. Include the long-term gain for your business such as future or strategic value.
Our Solution	Describes the solution you plan to offer to the customer. Address how the solution works in the customer's environment and how it meets their compelling event. Include any alliances or business partner solutions required to make it operational for the customer.
Our Weaknesses	Identifies business, organizational, and political issues that could put your sales team at risk in the deal.
Our Unique Business Value	Describes your value proposition. Make sure it is specific to this customer, defines a measurable business result, and creates credibility by proving your ability to deliver. The value proposition should be confirmed with the customer, and differentiate you from your competitors.

NOTE: If this is a new opportunity, you must create a new record and associate it with an account before you can enter text in the Customer's Business Profile field. For more information, see [Chapter 37, "Opportunities."](#)

Assessing an Opportunity

Sales professionals can use the Assessments view to evaluate the opportunity using criteria developed by Siebel MultiChannel Services. Assessments must be completed before determining the best strategy. An assessment focuses on the following four key questions:

- 1 Is there an opportunity?

- 2 Can we compete?
- 3 Can we win?
- 4 Is it worth winning?

Sales professionals assess their organization's position and the position of their top competitors against these criteria. As the sales campaign progresses, sales professionals repeat this assessment and then compare the results to past assessments to evaluate and monitor their position at each sales stage.

The first few times an assessment is performed, use the TAS Coach to help evaluate and answer each set of assessment questions. After a number of assessments are performed and you are familiar with the criteria and methodology, use the Assessment form to rate the criteria.

To begin an assessment

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on an opportunity record.
- 3 Click the Target Account Selling view tab.
- 4 In the lower link bar, click Assessments.

The Assessments list includes all the assessments you and your sales team have performed to date. Use the Assessments list to compare opportunity assessments for your company and your competitors.

- 5 In the Assessments form, create a new record.
- 6 In the new record, the Assessment For field defaults to Our Company for self assessments. If you are assessing a competitor's position, specify the competitor.
- 7 In the Assessment form, click TAS Coach and complete the assessment criteria questions.

Using the TAS Coach

The Assessment TAS Coach, shown in Figure 35, uses Siebel SmartScripts technology to help sales professionals evaluate opportunities. The explorer pane expands to show the individual questions in each question set, and the form at right provides information on assessment considerations and rating selection.

The screenshot shows the Siebel SmartScripts interface for the TAS Coach. The top navigation bar includes tabs for Home, Opportunities, Accounts, Contacts, Calendar, Forecasts, Revenues, and SmartScripts. Below the navigation bar, there are links for SmartScripts and My Saved Sessions. The main area is divided into two panes. The left pane, titled 'Is there an opportunity?', contains a tree view of assessment questions: 1. Customer's Application or Project, 2. Customer's Business Profile, 3. Customer's Financial Condition, 4. Access to Funds + Yes / - No, 5. Compelling Event + Defined / Undefined, Can we compete?, Can we win?, and Is it worth winning?. The right pane, titled 'Coaching questions for TAS Opportunity Assessment', displays the selected question set 'Is there an opportunity?' with a 'Required Information' header. It lists three main sections: 1. Customer's Application or Project + Defined / - Undefined, 2. Customer's Business Profile + Strong / - Weak, and 3. Customer's Financial Condition + Strong / - Weak. Each section includes specific questions and a rating dropdown menu.

Figure 35. TAS Coach Screen

To perform an assessment using TAS Coach

- 1 Assess the position of each of the criteria in the Assessments list by selecting a plus (+), a minus (-), or a question mark (?) from the drop-down list.
- 2 Click Next to advance to the next set of criteria questions.
 - Click Previous to return to criteria you have already assessed.
 - Click Cancel to return to the Assessments view without saving the assessment.
 - If you want to pause in the middle of a TAS Coach assessment, and then return to the assessment at a later time, click Finish Later. The assessment does not appear in the Assessments list until it is completed.

Your assessment is saved in the SmartScripts screen's My Saved Session view. Use Site Map to navigate to the SmartScripts screen.

If you do not have enough information to answer the question, select the question mark (?).

- 3 When you have rated all criteria, click Finish to return to the Assessments list.

NOTE: You must click Finish to save the criteria ratings.

Developing Strategy with TAS Competitive Analysis

The Competitive Analysis view helps sales professionals to develop competitive strategy. For each competitor, the sales team can evaluate strengths and weaknesses and anticipate the competitor's strategy. The view also help the sales team to assess its own position against the competitor and to refine its strategy to win the deal.

Use the TAS Coach to help you establish your sales strategy. TAS Coach provides recommendations based on the information you enter.

NOTE: If you use the TAS Coach to refine your strategy, enter information in the Our Competitive Strategy field. If you are analyzing a competitor's strategy, enter the information in the Competitors list.

When you determine what your strategy will be, enter a summary in the Our Competitive Strategy text field in the Competitive Analysis view.

To add competitive analysis information

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on an opportunity record.
- 3 Click the Target Account Selling view tab.
- 4 In the lower link bar, click Competitive Analysis.
- 5 In the Competitors list, create a new record and complete the necessary fields.

After you have analyzed your competitors, you determine the strategy you will take in the deal. Enter your strategy, based on what you think the competitor will do, in the Our Competitive Strategy field.

Using the TAS Coach for Competitive Analysis

The TAS Coach can help you develop a competitive strategy after you have completed the TAS Assessment for your company and competitors. You can also answer TAS Coach questions from your competitors' perspective to help you anticipate the strategy that competitors are likely to take. You may need to refer to your assessment criteria ratings during a TAS Coach session, and may want to review or print the assessments before starting. See ["Creating TAS Opportunity Plan and Initial Plan Reports" on page 558](#).

To use the TAS Coach for competitive analysis

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on an opportunity record.
- 3 Click the Target Account Selling view tab.
- 4 In the lower link bar, click Competitive Analysis.

- 5 In the Competitive Strategy form, click TAS Coach.

The TAS Coach screen appears, as shown in the following figure, detailing strategy types such as Fragment, Frontal, and Disengage, and includes a description of how to use the TAS coach.



- 6 During the TAS Coach session, answer each question presented, and then click the Continue hyperlink to proceed to the next question.

During the session, an interim evaluation of each answer is provided, outlining the relevant issues that you must consider.

Click the Back hyperlink to return to a previous question.

At the conclusion of the session, TAS Coach recommends the type of strategy to take.

- 7 At the TAS Coach Recommends screen, drill down on the Click here for variations hyperlink for additional strategy options.
- 8 When you complete the TAS Coach session and review the TAS Coach recommendation, click the Back arrow to return to the Competitive Analysis view.
- 9 Enter the strategy you will take in the Our Competitive Strategy field.

Conducting an Organizational Analysis

Sales professionals can use the Organizational Analysis view to create formal and informal organizational charts that visually summarize their contact analyses.

The Organizational Analysis view toggles between a Contacts list and an Organization Map. Contacts previously associated with the opportunity automatically appear in both views. The contacts shown in the Contacts list appear in the Organization Map view.

The toggle control list is shown in [Figure 36](#). You can click New in either the Contacts list view or the Organization Map to create contact records. Position the pointer on the information icon to display information on the view.



Figure 36. Organizational Analysis View, Contacts List, and Organization Map Toggle

Regardless of which view you use to create or select contacts, analyze each contact based on the criteria taught in the Target Account Selling methodology training program. This criteria includes Buying Role, Your Status, Level of Influence, Adaptability to Change, and Coverage.

The Level of Influence that you assign to each contact determines the degree of shading that appears in the contact node in the Organization Map. [Table 95](#) explains the contact node shading for each value in the Level of Influence field.

Table 95. Level of Influence Shading for Contacts

Value in Level of Influence Field	Shading on Organization Chart
Low	None
Political Structure (Medium)	Light gray
Inner Circle (High)	Dark gray

You can also map the politics in the customer organization by identifying formal and informal lines of influence between contacts. Mapping informal lines of influence helps you identify contacts who may not be ranked highly (and are easier to access) but have significant influence on key decision makers.

To begin an organizational analysis

- 1** Navigate to the Opportunities screen > List view.
- 2** Drill down on an opportunity record.
- 3** Click the Target Account Selling view tab.
- 4** In the lower link bar, click Organizational Analysis.

The Organization Map view appears.

- 5** Add new contacts.

You can also add new contacts by choosing Contacts from the drop-down list and entering the contacts in the list.

To create the Organization Map

- 1 In the view drop-down list toggle, select Organization Map.

The organizational chart displays the nodes (boxes) containing information for each of the contacts you have analyzed and associated with the opportunity.

The following figure shows an example of a contact node (box) with the Level of Influence shading of dark gray. The node includes information about the contact, such as the contact's title and other contact analysis information (Decision Maker, Mentor).



You can visually represent the formal hierarchy in the organization by creating the Organization Map of key contacts in the deal.

- 2 Select the contact node and drop it on top of the contact node that represents the contact's manager.

When you drop the contact node on the manager node, a line appears between the nodes, reflecting the reporting relationship.

- 3 Repeat this procedure for each contact until you have completed the organization chart.

NOTE: The reporting relationships are also stored in the Contacts list (toggle view). The Manager Last Name and Manager First Name fields in the contact record are automatically populated. To expose this information in the contacts list, click the menu button, and then choose Columns Displayed.

To delete contacts on the Organization Map

- Right-click on the contact node and choose Edit > Delete from the menu.

NOTE: Contacts deleted from the organization map are no longer associated with the opportunity. However, the contact record still exists in your Contacts screen list.

To draw lines of influence

- 1 In the Organization Map, press the CTRL key and simultaneously select the contact.
- 2 Drag and drop the selected contact node on other contacts to draw the lines of influence.

The CTRL key must be depressed throughout this process for the informal line of influence to appear.

NOTE: This information is automatically updated in the Relationships view of the Contacts screen. You can indicate lines of influence in the Relationships view if you prefer.

To delete lines of influence on the Organization Map

- Right-click on the line and choose Edit > Delete from the menu.

To print the Organization Map

- 1 Right-click on the Organization Map and select Zoom from the menu.
- 2 Choose the Zoom level at which you want to print the chart.
- 3 Right-click the Organization Map again and choose Print from the menu.

The Organization Map prints at the selected zoom level. Large charts print across multiple pages.

NOTE: The Organization Map does not print in the Initial Plan Report or Opportunity Plan Report. You must print it from the Organization Map view using the right-click menu.

Developing a Relationship Strategy

Information captured in the Relationship Strategy view helps sales professionals develop a relationship strategy for each of the key players for an opportunity. The view allows sales teams to share their understanding of the business and personal decision issues for each contact.

To add relationship strategy information

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on an opportunity record.
- 3 Click the Target Account Selling view tab.
- 4 In the lower link bar, click Relationship Strategy.
- 5 In the list, create a new record.
- 6 From the Add Contacts dialog box, select the contact or contacts you want to add, and then click OK.

NOTE: All contacts added in the Organization Map automatically appear in the Contacts list, and all contacts added in the Contacts list appear in the Organization Map.

- 7 In the Relationship Strategy list, complete the Business Agenda, Personal Agenda and Relationship Strategy fields for each contact.

You only need to complete this information for key players in the organization, based on their role, level of influence, and rank.

- 8 Add decision criteria:
 - a In the Relationship Strategy list, select a contact.
 - b In the Decision Criteria list, create a new record and complete the necessary fields.

NOTE: The administrator may want to create a record called Custom that users can select from the list of decision criteria. This record can be used to track issues that are unique to the contact and do not already exist in the database.

Adding Customer Milestones

Milestones are formal steps in the customer's buying process. The Customer Milestones view helps sales professionals identify and track customer requirements that must be met as the sales cycle progresses. After the milestones are set, use the Our Activities list to target specific activities that need to be accomplished to meet each milestone. These activities might include formal presentations, product demonstrations, benchmarks, proposals, and other activities required to make the sale. Figure 37 shows the Customer Milestones list, and the activities associated with the selected milestone in the Our Activities subview list.

Overview Assessments Decision Criteria Customer Milestones Organizational Analysis Relationship		
Menu ▾ New Delete Query ⓘ		
Date	Event ▲	Description
3/8/2004 06:50:09 P	1-Request Offering(s)	Enter description of customer's milestone here.
➤ 3/8/2004 06:51:15 P	2-Evaluate Offering(s)	Enter description of customer's milestone here.
3/8/2004 06:51:50 P	3-Approve / Select	Enter description of customer's milestone here.
3/8/2004 06:52:17 P	4-Legal / Purchasing	Enter description of customer's milestone here.
3/8/2004 06:52:36 P	5-Implement	Enter description of customer's milestone here.

Our Activities Menu ▾ New Delete Query ⓘ		
Description	Type	Display In
Determine Critical Success Factors	Recommended Activity	Calendar and Activities
Complete Opportunity Assessment	Recommended Activity	Calendar and Activities
Prove our concept - present business case (ROI), demonstrate Our Solution	Recommended Activity	Calendar and Activities
Adjust and submit forecast	Recommended Activity	Calendar and Activities
➤ Complete Competitive Analysis and determine Competitive Strategy	Recommended Activity	Calendar and Activities

Figure 37. Customer Milestones View with Associated Activities

Milestones are similar to Activity Plan templates that are created with predefined activities. For example, the initial milestone, Request Offering, is associated with recommended activities to be performed by you and your sales team. These activities might include understanding the problem or opportunity, defining the customer's Compelling Event and confirming the budget, completing an opportunity assessment, and developing an organization map for the customer's business.

A sample of customer milestone types is included with the Siebel Sales application. Your administrator can change the milestones, based on your business needs. You and your sales team can create, edit and delete activities associated with the milestones that address the opportunity.

To add a milestone

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on an opportunity record.
- 3 Click the Target Account Selling view tab.
- 4 In the lower link bar, click Customer Milestones.

- 5 In the Customer Milestones list, create a new record.
The current date appears in the Date field.
- 6 In the Event field, select the type of event from the list.
A set of suggested activities appears in the Our Activities list. You must save the type of event for the activities to appear.
- 7 In the Description field, enter a description of the milestone event.
- 8 In the Customer Responsibility field, choose the customer contact who is the key contact and owner of the milestone event.

Repeat the procedure until you have entered all key milestone events. Review the recommended activities for each milestone before adding new milestones.

To add associated activities to each milestone

- 1 Follow the procedure ["To add a milestone" on page 555](#) to create a customer milestone.
- 2 In the Our Activities list, add a new activity record and complete the fields.
 - a In the Type field, choose the activity type from the list.
 - b In the Display In field, choose where you want the activity to appear.
Options are Activities Only, Calendar and Activities, and To Do and Activities. If you choose Calendar and Activity as the display method, you must enter a start date for the activity for it to appear in the calendar.
 - c In the Resources text field, describe the resources required to support the activity.
 - d If the activity will be delegated, for example, from a manager to a member of the sales team, click the hyperlink in the Owner field, and query for the new owner in the Employees list.
The default owner is the User ID of the activity creator.

Viewing PRIME Activities

The PRIME Activities view helps sales professionals develop the necessary action steps to execute the strategy and win the opportunity. The PRIME acronym underscores the initiatives that are used:

- Prove your value
- Retrieve missing information
- Insulate against competition
- Minimize your weaknesses
- Emphasize your strengths

These activities can be assigned with due dates to members of the sales team and automatically appear in individual calendars and activity lists. Use this view to update the entire sales team, and to measure progress while implementing the sales strategy.

All the activities created in the PRIME Activities view automatically appear in the Activities view associated with the opportunity. Your sales organization may wish to standardize on one of these views

Activities created in the Our Activities list in the Milestones view also appear in the PRIME Activities list, providing a method for tracking. (In the Customer Milestones list, you must select the milestone to see the associated activities.)

Using this view, you can create activities that are not specific to milestones, such as follow-up actions associated with assessments and the organizational analysis.

To add PRIME activities

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on an opportunity record.
- 3 Click the Target Account Selling view tab.
- 4 In the lower link bar, click PRIME Activities.
- 5 In the list, create a new record and complete the necessary fields.

Identify the actions and resources required to implement your strategy, and then select a member of your sales team who is responsible for the activity.

Adding Notes

The Notes view consolidates comments (for example, notes and directions) created by various members of the sales team. These can be marked for general viewing or can be kept private. The Notes view allows the sales team to aggregate and track observations about the opportunity throughout the sales process.

To add a note

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on an opportunity record.
- 3 Click the Notes view tab.
- 4 Select Public Notes or Private Notes tab at top right.
- 5 In the Notes view, create a new record.
The Date and Type are added to the record automatically.
- 6 Complete the Description field.

Creating TAS Opportunity Plan and Initial Plan Reports

You can automatically create reports to make it easier to review your TAS plans. These can be printed or emailed to share with your sales team. Available reports include the TAS Opportunity Plan and TAS Initial Plan reports. You can configure the Opportunity Plan report to print specific sections.

The TAS Opportunity Plan Report prints all the assessments completed for Our Company and all competitors on the three most recent dates. The TAS Initial Plan Report prints all the assessments completed for Our Company and all competitors on the one most recent date.

Using the separately licensed Proposals module, you can apply the TAS Proposal Template to generate an editable Microsoft Word document of the TAS Opportunity Plan Report.

To create a report

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on an opportunity record.
- 3 Click the Target Account Selling view tab.
- 4 Click the Reports button and select TAS Initial Plan or TAS Opportunity Plan.
 - To print specific sections of the Opportunity Plan report, click the check boxes associated with the sections in the Configure Opportunity Plan dialog box and click Finish.

46 Strategic Selling

This chapter describes how sales professionals can use Miller Heiman's Strategic Selling methodology within the Siebel Sales application to close new business. The Strategic Selling module is a separately licensed product. Using the Strategic Selling module, sales professionals can enter sales objectives, assess buying influences, understand their competitive position, and create an action plan to execute the competitive strategy. This information is available in a report, called the Blue Sheet.

This chapter includes the following topics:

- ["Using Strategic Selling to Support the Sales Process" on page 559](#)
- ["Scenario for Strategic Selling" on page 560](#)
- ["Process of Strategic Selling" on page 561](#)
- ["Meeting the Single Sales Objective" on page 561](#)
- ["Adding Buying Influences Information" on page 563](#)
- ["Adding Position Summary Information" on page 564](#)
- ["Adding Possible Actions" on page 564](#)
- ["Viewing and Adding Best Actions" on page 565](#)
- ["Creating a Blue Sheet Report" on page 566](#)

Using Strategic Selling to Support the Sales Process

The Strategic Selling software module in Siebel Sales provides full support for the Strategic Selling methodology from Miller Heiman. Sales professionals can reinforce and use the Strategic Selling sales process within Siebel Sales, applying the sales methodology and other sales tools to close new business.

Siebel Strategic Selling software provides the following features:

- Support for the Strategic Selling methodology (a separately licensed service available through Miller Heiman, Inc.)
- Assessment of the opportunity compared to the ideal criteria
- Analysis of key contacts and development of a relationship strategy
- Tools to improve your position based on your sales objective
- Support in developing an action plan to execute your sales strategy
- Automatic generation of a Blue Sheet report

Scenario for Strategic Selling

This scenario provides an example of the business process performed by a sales manager using Strategic Selling. Your company may follow a different process according to its business requirements.

A sales representative joins the sales team for a new opportunity. Before he makes any calls into the account, the sales representative plans to perform a Miller Heiman Strategic Selling analysis of the opportunity. The sales representative locates the opportunity in his opportunity list and then selects the Strategic Selling view tab.

Single Sales Objective

In the Single Sales Objective view, the sales representative reviews the information typically shown at the top of the Strategic Selling Blue Sheet. He gauges his general feeling about the opportunity. He notes that two fields have been carried over from the Siebel account form—the dollar volume of business that he is currently doing with the account and the amount that he plans to do with the account over the next year or more. These two fields are read-only.

The sales representative proceeds to assess his competitive position and determines the timing for his priorities. He selects the Strategic Selling Assessment template and evaluates the opportunity to determine how it compares against an ideal customer. Based on his evaluation, the opportunity is automatically scored.

Buying Influences

The sales representative then navigates to the Buying Influences view. Contacts associated with the opportunity automatically are shown in the view. He adds new contacts and assesses his relationship strategy with each of them. Each contact can play a variety of roles in the evaluation, and each buyer can have a reason for participating in the evaluation. The personal win and business results tell the sales representative and his team the benefits for his contact, and the ratings show how well the sales representative has covered all aspects of the opportunity. The sales representative then enters evidence to support his ratings.

Position Summary

In the Position Summary view, the sales representative completes a description of his company's strengths and weaknesses (red flags) in the deal. He also identifies information required to close this opportunity.

Possible and Best Actions

Now that he has set his Single Sales Objective and completed his customer and competitive analysis, the sales representative creates an action plan for his team to win this opportunity. He goes to the Possible Actions view and adds a list of possible actions generated during a collaborative session with his team. The actions the team will take are marked Best. These automatically appear in the Best Actions view where the sales representative assigns them to sales team members and marks the due date for each action. These activities automatically appear on the assignee's calendar, to-do list, or activities list, based on the choice in the Display In field for each activity. The sales representative can check this list at any time as the deal progresses to track the status of the activities.

Blue Sheet Report

After the sales representative has finished entering and updating his Strategic Selling information, he can generate a Blue Sheet report that he can print or email to share with his team.

Process of Strategic Selling

The Strategic Selling module consists of five views and a number of subviews. Information provided in these views comprises the Strategic Selling methodology. A Blue Sheet Report can be automatically generated from the Strategic Selling module.

The procedures associated with the Strategic Selling views describe how to use the Strategic Selling module.

- 1 ["Meeting the Single Sales Objective" on page 561](#)
- 2 ["Adding Buying Influences Information" on page 563](#)
- 3 ["Adding Position Summary Information" on page 564](#)
- 4 ["Adding Possible Actions" on page 564](#)
- 5 ["Viewing and Adding Best Actions" on page 565](#)
- 6 ["Creating a Blue Sheet Report" on page 566](#)

Meeting the Single Sales Objective

Siebel Strategic Selling helps sales professionals meet their sales objectives for the account. By assessing and testing their position, sales professionals can make sure their sales teams evaluate the probability for meeting the Single Sales Objective, as taught in the Miller Heiman Strategic Selling process. The software module also helps sales professionals analyze whether or not they are working on the right sales objective, or an objective where closing the deal meets both the customer's needs and the sales professionals' long-term goal for the account. Sales professionals can evaluate the opportunity compared to an Ideal Customer profile, providing an understanding of their position and underscoring the best strategy to take.

To assess your position

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on an opportunity record.
- 3 Click the Strategic Selling view tab.

The Strategic Selling Position form, Ideal Customer Assessment list, and Ideal Customer Criteria list appear with the Opportunity form.

- 4 In the form, complete the fields to identify the competition for the opportunity and assess your position.

The following table describes the fields in the Position form.

Field	Comments
Adequacy of Current Position	Select the value that best describes how you feel about your current position. Examples of values are Euphoria, Great, OK, Secure, Comfort, and Worry.
My Position vs. Competition	Select the value that describes your position compared to your key competitors. Examples of values include Only Alternative, Front Runner, Shared, and Zero.
Timing for Priorities	Select the value that describes the timing for your priorities. Examples are Urgent, Active, Work It In, and Later.

Assessment criteria are taught by Miller Heiman instructors in the Strategic Selling methodology workshop.

- 5 In the Ideal Customer Assessment list, create a new record.
- 6 Set the Template Name field to Ideal Customer Criteria and save the record.

An explicit Save is required for the assessment criteria to appear.

- 7 In the Ideal Customer Criteria list, select a value for each assessment criterion.

The opportunity assessment is automatically scored based on the selected values.

The Assessment Score and its percentage of the Max Score, defined in the Assessment template, appear in the Ideal Customer Assessment list.

The following illustration shows an Ideal Customer Assessment record, and the Ideal Customer Criteria list shows the criteria associated with the assessment.

Ideal Customer Assessment Menu ▾ New Delete Query Save						
Updated	Template Name	Name	Description	Assessment Score	Percent	Max Score
> 3/8/2004 07:14:31 PM	Ideal Customer Criteria	New Assessment	Contains ideal customer criteria for field sales	45	47.4 %	95

Ideal Customer Criteria Menu ▾ Query					
Order ▲	Attribute	Value	Comment	Weight	Score
> 1	Over 100 Million in Annual Revenues	100 - 300 Million	Great fit for us in terms of size	5	5
2	Sponsorship at the Executive Level	No	Find a sponsor or move on	5	-5
3	High adaptability to New Technology	Adaptable	They do this all the time	3	5
4	Centralized Operations	De-Centralized	Much easier sale for us	3	5
5	Purchase History with Our Company	Extensive	Three or more purchases	3	5

Adding Buying Influences Information

The Buying Influences view helps sales teams identify the role each contact plays and each contact's reason for participating in the project. The personal win and business results recorded in this view help the sales professional to understand the outcome benefit for the contact. By understanding the business and personal agendas of their contacts, sales professionals can form effective relationships and consider where to dedicate resources.

To add buying influence information

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on an opportunity record.
- 3 Click the Strategic Selling view tab.
- 4 In the lower link bar, click Buying Influences.
- 5 In the list, create a new record.
- 6 In the Add Contacts dialog box, select contacts you want to add.
To enter new contacts, click New in the Add Contacts dialog box.
- 7 In the Buying Influences list, complete the fields for the contact.

- a** Indicate the role of the contact by placing a check mark in each applicable field.
Fields include Economic Buyer, User Buyer, Technical Buyer, and Coach.
- b** Enter information in the Personal Win and Business Results fields for each contact.
- c** Select a Rating and Mode for each contact.
Examples of Rating are +2 Interested, and +4, Strongly Supportive. Examples of Mode are Growth, Trouble, and Overconfident.
- d** Enter your Evidence to Support Rating in the text field.

Adding Position Summary Information

The Position Summary view helps sales professionals identify Red Flags and Strengths to use in the opportunity. With this information, you can identify and track information needed to improve your competitive position.

To add position summary information

- 1** Navigate to the Opportunities screen > List view.
- 2** Drill down on an opportunity record.
- 3** Click the Strategic Selling view tab.
- 4** In the lower link bar, click Position Summary.
- 5** In the Position Summary form, complete the Strengths and Red Flag fields.
Strengths and Red Flags help you determine your strengths and weaknesses for closing this opportunity.
- 6** In the form, create a new record and complete the necessary fields:
 - Identify what information is needed.
 - Designate a source for the information in the What and From Whom fields.

NOTE: Records in the Information Needed list also appear in the Activities list for the opportunity. The Activity Type is Information Needed.

Adding Possible Actions

In the Possible Actions view, the sales team can brainstorm feasible actions for advancing an opportunity and then create an action plan based on Best Actions.

To add possible actions

- 1** Navigate to the Opportunities screen > List view.
- 2** Drill down on an opportunity record.

- 3 Click the Strategic Selling view tab.
- 4 In the lower link bar, click Possible Actions.
- 5 In the list, create a new record.
- 6 Select the check box in the Best field to mark this action as best.
All actions flagged as Best appear in the Best Actions view.
- 7 In the What field, enter a description of the action.
- 8 Repeat [Step 6](#) through [Step 7](#) to enter all the best actions your sales team can accomplish.

Viewing and Adding Best Actions

The Best Actions view presents the actions in the Possible Actions view that the sales team has selected as the best choices to advance the opportunities. This view helps keep the entire sales team on the same page by providing one location for action planning and logging status. You can assign best actions to people on your opportunity team and these actions appear in their activities list. It also helps teams monitor cumulative progress towards sales goals.

To add best actions

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on an opportunity record.
- 3 Click the Strategic Selling view tab.
- 4 In the lower link bar, click Best Actions.
The possible actions you previously selected as best automatically appear in the Best Actions list.
- 5 In the list, create a new record and complete the necessary fields.
Some fields are described in the following table.

Field	Comments
What	Enter the description of the action in the text field. This description appears in the Activities list for the Opportunity. You can set the Display field to display the best action in your Calendar and Activities lists, your To-Do and Activities lists, or Activities Only.
Who	The default is the user that created the Best Action. You can assign the action to another employee or person on your sales team.
Start	Automatically populated. An action must have a start date to appear in the Calendar.
Due	Click the Calendar control and choose the completion date for the action.

Field	Comments
Status	Indicate the status for an action by selecting it from the list of values.
Display	Indicate where you want the action to appear by selecting from the list of values. Options are Calendar and Activities, To-Do and Activities, and Activities Only. The default is Calendar and Activities.

Creating a Blue Sheet Report

The Blue Sheet uncovers and communicates key information at a glance. It helps to focus your team's attention on essential business and contact information. You can print the Blue Sheet or email it to your manager and team in report format or as an HTML document.

To create a Blue Sheet report

- 1 Navigate to the Opportunities screen > List view.
- 2 Drill down on the opportunity.
- 3 Click the Strategic Selling view tab.
- 4 Click the Reports button and select Blue Sheet.

For more information on creating reports, see *Siebel Reports Administration Guide*.

A

System Preferences

Table 96 lists the system preferences provided throughout your Siebel applications. For information about how to change system preferences, see [Chapter 4, “Ongoing Application Administration Tasks.”](#)

Table 96. System Preferences

Preference	Description
AAG Cobrand Id	Obsolete.
AAG Cobrand Password	Obsolete.
AAG Connection	Obsolete.
AAG Lit	Obsolete.
AAG Update Interval	Obsolete.
AAG URL	Obsolete.
Activity Hierarchy: Max Levels	The maximum number of levels for the Activity Hierarchy.
ActivityStatusToCloseVisit	<p>A visit activity cannot be closed unless all of its required child activities have a status value that matches one of the values in this system preference. (By default, an activity cannot be closed unless all required child activities have been done or canceled.)</p> <p>Default: 'Done','Cancelled'</p>
Alarm Manager Load Frequency	<p>Number of minutes the system waits before rechecking for alarms.</p> <p>Default: 60</p>
AllowOverReceipts	<p>If set to TRUE, the received quantity can be greater than the shipped quantity. Also, for an internal order, when the Process Receipt command is invoked, the pick ticket can be closed only when the received quantity is equal to or greater than the shipped quantity.</p> <p>For more information about shipping and receiving, see <i>Siebel Field Service Guide</i>.</p>
Always Show Message Bar Alerts	Obsolete.
AMS AMI Char Conversion	For AMS ACAPS integration: defines CharSetConversion for the EAI MQSeries AMI Transport business service, which communicates between the Siebel application and the ACAPS.
AMS AMI Policy Name	See <i>Siebel Finance Guide</i> .

Table 96. System Preferences

Preference	Description
AMS AMI Receiver Service Name	See <i>Siebel Finance Guide</i> .
AMS AMI Sender Service Name	See <i>Siebel Finance Guide</i> .
AMS RefData DB ODBC DataSource	For AMS ACAPS integration: defines the ODBC data source name for the AMS reference database.
AMS RefData DB Password	For AMS ACAPS integration: defines the password for the AMS reference database.
AMS RefData DB Table Owner	For AMS ACAPS integration: defines the table owner for the AMS reference database.
AMS RefData DB User Name	For AMS ACAPS integration: defines the user name for the AMS reference database.
Auto Mgr Calendar Access	<p>Allow employee's manager access to the employee's calendar, even if the employee does not explicitly give the manager access.</p> <p>NOTE: If multiple employees share a position, only the calendar of the primary employee is accessible.</p> <p>Default: True</p>
Company Name	See <i>Siebel Pharma Handheld Guide</i> .
CSM Logging	<p>Enables logging of merge transactions. Merge transactions are created when connected users combine or merge two or more business components such as accounts or opportunities into one.</p> <p>Information from this log can be used to relink orphaned records created when the merge process is crossed with an update process during a synchronization.</p> <p>This is only applicable if the installation uses Siebel Remote or Replication Manager.</p> <p>Default: False</p>
DB2: Default Opt Level	Default optimization level which defines the optimizing algorithm that DB2 will use to execute SQL statements.
DBX: Vis Rules per Statement 1	Number of visibility or routing rules checked per SQL statement processed by the Database Extract component for the first SQL statement with header information.
DBX: Vis Rules per Statement N	Number of visibility or routing rules checked per SQL statement processed by the Database Extract component for other SQL statements.

Table 96. System Preferences

Preference	Description
Default Campaign Source Code	Default campaign for Web offers used in Siebel eMarketing. All offers that are a part of the default campaign will appear in the Featured Offers applet in Siebel eMarketing.
Default EC Procedure	Obsolete.
Default MVG Exists Query	Siebel Industry Applications only: adds an EXISTS statement to every MVG field query. For more information, see <i>Siebel Developer's Reference</i> . Default: TRUE
Default Offer Code	Code to track the click path of a customer on the eMarketing Web site who does not select a specific offer.
Default Pricing Procedure	Obsolete.
Default Time Zone	Default time zone for all users of that database. When a user logs in, the Time Zone field of the User business component is checked. If it is empty, the Default Time Zone system preference is checked. Default: UTC
Docking:Transaction Logging	Enables docking transaction logging. For more information, see <i>Siebel Remote and Replication Manager Administration Guide</i> .
eAuc:AllowTimeStampAdvantage	Give an advantage to a bid based on when the bid was made. Default: True
eAuc:AsyncNoticeCalls	Invoke notice workflows through asynchronous request manager. Default: False
eAuc:AuctionURLRoot	The URL placed in email messages for auction events. Default: http://www.<yourDomain>.com
eAuc:AutoApproveBidder	Automatically approve a user's request to become a bidder. Default: True
eAuc:AutoApproveLister	Automatically approve a user's request to become a lister. Default: True
eAuc:AutobidToReservePrice	When a bid is placed, if it does not meet an auction's reserve price and the bid has an AutoBid amount, then automatically adjust the bid to come as close to or match the reserve price. Default: False

Table 96. System Preferences

Preference	Description
eAuc:BidIncrementMultiple	A floating point number that determines the minimum monetary unit increment (or decrement) for bids. Default: 0.01
eAuc:BidIncrMultipleTolerance	A floating point number between 0 and 0.005 which specifies the allowed deviation from an exact multiple of the eAuc:BidIncrementMultiple property. This provides accommodation for math rounding errors that could result if the BidIncrementMultiple is set to certain problematic number values (such as 0.17). Default: 0.005
eAuc:BidTimeTieBreakOption	Preference specified as either 1, 2, or 3: <ul style="list-style-type: none"> ■ If 1, then users who have prior winning bids have their follow-up bids timestamped to the time of the prior winning bid. ■ If 2, then users who have placed any prior bid have their follow-up bids timestamped to the time of the prior bid. ■ If 3, new and replacement bids and AutoBids are timestamped when placed Default: 1
eAuc:DynamicCloseEnabled	Allow extending an auction past its posted end time according to its dynamic close properties.
eAuc:DynamicCloseMaxDelay	The maximum number of minutes an auction's end time can be delayed because of dynamic close extensions. (Works in conjunction with eAuc:DynamicCloseEnabled set to True.) Default: 60
eAuc:EnforceExactBidIncrement	Enforce bids to be exact multiples of an auction's bid increment (or decrement). Default: True
eAuc:MaxMoneyValueAccepted	The maximum monetary value accepted for an auction's starting price, an auction's bid increment (or decrement), a bid, or a lister fee. Default: 10000000000
eAuc:MaxRatingsPerSale	The number of times a user is allowed to rate another user per auction. This property applies to both bidders and listers. Default: 2

Table 96. System Preferences

Preference	Description
eAuc:MaxThirdPartyListingDays	The maximum number of days between a third-party auction's start and end times. Default: 14
eAuc:Notice Wf-Auction Alert	Name of workflow process used to notify user that an Auction Alert has triggered. Default: eAuction Alert Notice
eAuc:Notice Wf-Autobid	Name of workflow process used to notify user that they have successfully registered to participate in auctions. Default: eAuction Autobid Notice
eAuc:Notice Wf-Bid	Name of workflow process used to notify Bidder that they have placed an acceptable bid. Default: eAuction Bid Notice
eAuc:Notice Wf-ListerBidAccept	Name of workflow process used to notify Lister that a Bid has been placed on one of their Items. Default: eAuction Bid Accepted Notice
eAuc:Notice Wf-ListerClose	Name of workflow process used to notify Lister that their Auction has closed. Default: eAuction Lister Close Notice
eAuc:Notice Wf-ListerInvoiced	Name of workflow process used to notify Lister that their Auction has been invoiced. Default: eAuction Lister Invoiced Notice
eAuc:Notice Wf-Outbid	Name of workflow process used to notify Bidder that they have been outbid. Default: eAuction Outbid Notice
eAuc:Notice Wf-PartialOutbid	Name of workflow process used to notify Bidder that they have been outbid on some number of items. Default: eAuction Partially Outbid Notice
eAuc:Notice Wf-UserStatus	Name of workflow process used to notify User of their status. Default: eAuction User Status Notice
eAuc:Notice Wf-UserWelcome	Name of workflow process used to notify User that they have been accepted into an auction. Default: eAuction User Welcome Notice

Table 96. System Preferences

Preference	Description
eAuc:Notice Wf-Winner	Name of workflow process used to notify Bidder that they have won. Default: eAuction Win Notice
Email Personalization Format	Specifies the default email personalization format for sending offers in email marketing. Example: /shared/Marketing/Example List Formats/Email Personalization - Contacts - Transaction database only example
Entitlement: Pricing Dates	If False or NULL, date verification is skipped when entitlement pricing terms are checked in the Verify Entitlement process. (Similar to the Entitlement: Verify Dates system preference except that one applies to entitlement pricing terms and the other to entitlement service terms.)
Entitlement: Verify Consumer	See <i>Siebel Field Service Guide</i> .
Entitlement: Verify Dates	See <i>Siebel Field Service Guide</i> .
Entitlement: Verify Product	See <i>Siebel Field Service Guide</i> .
ETL Alignment Version	See <i>Siebel Data Warehouse Installation and Administration Guide</i> .
ETL Analysis End ETL Analysis Start ETL Date Format	ETL Date format indicates the way dates need to be interpreted. The other two parameters mention the date range for which the Exchange Rates will be adjusted. This does not indicate that only the data created within this range will be extracted. Select the earliest date for the Analysis Start Date—that is, when the transactions may have begun. In addition to considering the created and modified dates, consider other relevant dates such as order date. Setting this to an early value such as 19700101 (January 1, 1970) does not affect the processing time. A similar logic applies for choosing Analysis End Date. Note that the values need to be entered in the format defined by ETL Date Format. Default Analysis End: 20101231 Default Analysis Start: 19940101 Default Date Format: YYYYMMDD
ETL Base Exchange Currency	Currency in which all the financial data will be converted. While the OLTP supports transactions in many different currencies, the data in the OLAP is converted to a single currency for analysis purposes. The Exchange rates are derived from the Exchange Rates table in the OLTP. Default: USD

Table 96. System Preferences

Preference	Description
ETL Default Continent	Value for any address that does not have Continent defined. Set this to a value, which will be used if the value of Continent is not defined in the OLTP. Default: North America
ETL Default Country	Value for any address that does not have the Country defined. Set this to a value, which will be used if the value of Country is not defined in the OLTP. Default: USA
ETL Default Currency	Value for currency code that will be used if the currency code for a specific financial transaction is not set. Default: USA
ETL Default Language	Language code used when language translation occurs when looking up the List of Values table. Default: ENU
ETL LOV Maximum Value ETL LOV Minimum Value	In some fields, bucketing of values happens. Instead of saying the number of employees at an account is 45, 96, the values can be bucketed to 0-50, 50-100 and so on. In the List of Values, if the minimum and maximum values are not specified, the values of these parameters will be used. Defaults: 9999999999 and 0
ETL Unknown Exchange Rate	Value used when an exchange rate for a currency to the Datamart Default Currency is undefined in the OLTP. Default: 1
FINSeBanking Bill Pay Campaign	A user property for these applets: <ul style="list-style-type: none"> ■ FINS eBanking Bill Pay Home Campaign Applet ■ FINS eBanking Announcements Applet (Bill Pay) ■ FINS eBanking Special Offers Applet (Bill Pay) When this system preference is set to a campaign name, these applets only display offers for that campaign.
FINSeBanking Campaign	A user property for these applets: <ul style="list-style-type: none"> ■ FINS eBanking Announcements Applet ■ FINS eBanking Home Campaign Applet When this system preference is set to a campaign name, these applets only display offers for that campaign.

Table 96. System Preferences

Preference	Description
FINSeEnrollment Campaign	A user property for the FINS eEnrollment Announcement List Applet. When this system preference is set to a campaign name, the applet only displays Web-Announcements offers for that campaign.
FINSeSales Campaign	<p>A user property for these applets:</p> <ul style="list-style-type: none"> ■ FINS Let Us Help You Applet (eSales) ■ FINS Whats New In Your Life Applet (eSales) ■ FINS eAdvisor Special Offers Applet <p>When this system preference is set to a campaign name, these applets only display offers for that campaign.</p>
Forecast: Auto-Forecast	Creates subordinates' forecasts to be used in a rollup forecast, if the subordinates have not created forecasts themselves.
Forecast: Use Server Task	Send forecast processing requests to the Siebel Server for batch processing. If the value is False, requests are processed locally.
FSAssetSwap SubComponents	If set to TRUE, the subcomponent assets of the source asset are shifted to the target asset when an activity part tracker transaction is committed.
FSDB:Override Service Region	Maximum monetary value accepted in Auction Item, Bid, and Fee currency fields.
INSeService Campaign	A user property for the FINS FSW Announcements Applet. When this system preference is set to a campaign name, the applet only displays Web-Announcements offers for that campaign.
INSeService Discount Campaign	A user property for the FINS FSW Health Discount Announcements Applet. When this system preference is set to a campaign name, the applet only displays Web-Announcements offers for that campaign.
Internal DUNS Number	Your company's DUNS number.
LOGMGR:Vis Rules per Statement	Set to 50 by default. For implementations that use any database other than Oracle, you should change this value to 20.
Lots For Disperse Only	See <i>Siebel Life Sciences Guide</i> .
MRG:Docking Timestamp Source	See <i>Siebel Remote and Replication Manager Administration Guide</i> .
MRG:Inter Table Conflict Res	See <i>Siebel Remote and Replication Manager Administration Guide</i> .

Table 96. System Preferences

Preference	Description
MRG: Inter Table Merge Rule	See <i>Siebel Remote and Replication Manager Administration Guide</i> .
MRG: System Conflict Resolution	See <i>Siebel Remote and Replication Manager Administration Guide</i> .
MRG: Txns per Commit	See <i>Siebel Remote and Replication Manager Administration Guide</i> .
MRG: User Friendly Notification	See <i>Siebel Remote and Replication Manager Administration Guide</i> .
Quick Print Application	A user property to determine the application used by quick print. Allowed values are: HTML and EXCEL. This system preference can be overridden by the Quick Print Application user preference.
Quick Print Output Format	Set to HTML, CSV, or Tab, as appropriate for the quick print application that you are using.
ReadOnlyOrderStatus	<p>If the status of an order matches one of the values in this system preference, then the order becomes read-only when invoiced.</p> <p>Default: 'Booked', 'Billed'</p>
SalesHierarchy:UseServerTask	If set to TRUE, the Sales Hierarchy operation runs as a server task.
Samples Lots Enabled	See <i>Siebel Life Sciences Guide</i> .
Satmetrix Key Value	A string provided by Satmetrix to customers of Siebel Satmetrix Surveys. Required for generating encrypted tokens that are part of URLs for displaying survey reports.
Sch:Break Time Id	<p>Specifies the Row ID of the work type to be used when calculating the schedule cost where activities contain breaks. The default value is -1.</p> <p>To find the Row ID, navigate to the Application Administration screen > Work Type Administration view, select the record, choose About Record from the Help menu, and note the Row # value.</p>
Sch: Default Constraint Set	<p>Specifies the Row ID of the constraint set to be used where no constraint set is associated with the service region loaded. The default value is -1.</p> <p>To find the Row ID, navigate to the Scheduling Administration screen > Constraint Sets view, select the record, select About Record from the Help menu and note the Row # value.</p>

Table 96. System Preferences

Preference	Description
Sch:Default Cost Function	<p>Specifies the Row ID of the cost function to be used where no cost function is associated with the service region loaded. The default value is -1.</p> <p>To find the Row ID, navigate to the Scheduling Administration screen > Cost Functions view, select the record, select About Record from the Help menu and note the Row # value.</p>
Sch:Default Parameter Set	<p>Specifies the Row ID of the parameter set to be used where no cost function is associated with the service region loaded. The default value is -1.</p> <p>To find the Row ID, navigate to the Scheduling Administration screen > Parameter Sets view, select the record, select About Record from the Help menu and note the Row # value.</p>
Sch:Default Time Window	<p>Specifies the Row ID of the time window to be used where no cost function is associated with the service region loaded. The default value is -1.</p> <p>To find the Row ID, navigate to the Scheduling Administration screen > Time Window view, select the record, select About Record from the Help menu and note the Row # value.</p>
SecThickClientExtAuthent	See <i>Security Guide for Siebel eBusiness Applications</i> .
SM WebIntelligence Server	The URL that points to the Web Intelligence server that serves up reports for Siebel Analytics.
SqlStyle	Indicate which SQL statements are to be used with this implementation—Oracle, Microsoft SQL Server, Informix, or Sybase. Case-sensitive.
SSASqlErrRsItsDiscarded	This message is displayed to the user when there are more rows than can be returned. For more information, see <i>Implementing Siebel eBusiness Applications on DB2 UDB for z/OS and OS/390</i> .
SubSqlStyle	An SQLStyle that falls within a family of similar database products.
Syndicated Data	<p>Set to Y to allow syndexp.exe to generate the syndicated data files on the Siebel Server.</p> <p>Syndicated data is only used in the Life Sciences application.</p>
Target Lists	Obsolete.

Table 96. System Preferences

Preference	Description
Technical Support (Alt. 1)	<p>Specifies the telephone numbers to display in the Siebel Technical Support dialog box. Update this number to match your internal help desk number. The alternate numbers (Alt. 1 and Alt. 2) provide expansion for pager numbers and email addresses.</p> <p>Set a value to None to leave it blank in the dialog box.</p>
Technical Support (Alt. 2)	<p>Specifies the telephone numbers to display in the Siebel Technical Support dialog box. Update this number to match your internal help desk number. The alternate numbers (Alt. 1 and Alt. 2) provide expansion for pager numbers and email addresses.</p> <p>Set a value to None to leave it blank in the dialog box.</p>
Technical Support (FAX)	<p>Specifies the fax number to display in the Siebel Technical Support dialog box. Update this number to match your internal help desk fax number.</p> <p>Set a value to None to leave it blank in the dialog box.</p>
Technical Support (URL)	<p>Specifies the support URL to display in the Siebel Technical Support dialog box. Update this URL to match your internal help desk Web address.</p> <p>Set a value to None to leave it blank in the dialog box.</p>
Technical Support (Voice)	<p>Specifies the voice number to display in the Siebel Technical Support dialog box. Update this number to match your internal help desk number.</p> <p>Set a value to None to leave it blank in the dialog box.</p>
Training: EAI HTTP Password	Specifies the password for the user name given in the Training: EAI HTTP User Name system preference.
Training: EAI HTTP Server	<p>Specifies the server that AICC/SCORM-compatible content uses for eAI communication.</p> <p>If set to:</p> <ul style="list-style-type: none"> ■ default, then the URL of the current Siebel Server is used (For example, if the Siebel URL is <code>http://siebel server/erm_enu</code>, the EAI URL is <code>http://siebel server/eai_enu</code>.) ■ defaultsecure, then the URL of the secure Siebel Server is used ■ An explicit URL, this URL must be a complete beginning of a URL, for example, <code>http://theeai server/eai_enu</code>

Table 96. System Preferences

Preference	Description
Training: EAI HTTP User Name	<p>Specifies the Siebel login ID for eAI requests by the AICC/SCORM-compatible content.</p> <p>CAUTION: Because the AICC and SCORM standards require this user name and the accompanying password to be used in a non-secure manner, choose a user name and a password that do not have access to any other part of the Siebel application.</p>
Training: Lesson Adapter URL	<p>Specifies the path to the lesson adapter HTML file, which is used by SCORM-compatible content.</p> <p>This default value is typically satisfactory. This is a relative URL and is relative to the current URL of the Siebel application.</p> <p>For example, if this system preference is set to <code>lms/LmsLessonAdapter.html</code> and the current Siebel URL is <code>http://siebel/erm_enu</code>, the URL launched for the lesson adapter is <code>http://siebel/erm_enu/lms/LmsLessonAdapter.html</code>.</p> <p>Default: <code>LMS/LmsLessonAdapter.html</code></p>
Training: Lesson Security	<p>Allowed values: PIN (the default) and blank</p> <p>Specifies the method of lesson security used to validate eAI requests from AICC/SCORM-compatible lesson content.</p> <p>If set to PIN, the launched AICC lesson is supplied a PIN number that it must use to interact with the Siebel application.</p>
Universal Time Coordinated	<p>Turns on global time zone support for the entire system. Set this preference to TRUE to enable global time zone support. The default setting is TRUE.</p> <p>NOTE: This is a one-time setting. Once you have turned on global time zone support in a production environment, you should not turn it off.</p> <p>If you intend to operate your deployment with the Global Time Zone feature enabled, you must also set the operating system of your database servers to UTC time, or its equivalent. Failure to set the OS to UTC when the UTC parameter is set to TRUE will result in asynchronous server request errors.</p> <p>For more information on enabling Global Time Zone, see <i>Global Deployment Guide</i>. Although enabling this feature is optional, it is strongly recommended that you operate your production environment with Global Time Zone enabled.</p>
UsageTracking Enabled	<p>See “Setting System Preferences for Usage Collection” on page 243.</p>

Table 96. System Preferences

Preference	Description
UsageTracking Log Time Period	See “Setting System Preferences for Usage Collection” on page 243.
UsageTracking LogFile Dir	See “Setting System Preferences for Usage Collection” on page 243.
UsageTracking LogFile Encoding	See “Setting System Preferences for Usage Collection” on page 243.
UsageTracking LogFile Format	See “Setting System Preferences for Usage Collection” on page 243.
UsageTracking Sess Cache Size	See “Setting System Preferences for Usage Collection” on page 243.
User Group	The User Group grantee for database access privileges. It is used in the DDL Sync step in Siebel Tools where the schema for the application is defined.

B

Content Center Reference

This appendix provides detailed information on two subjects:

- [Prebuilt Content Objects for Content Center on page 581](#)
- [Content Project Business Service on page 593](#)

Prebuilt Content Objects for Content Center

Each Content Object is based on a business object that was derived from an existing business object by removing unnecessary fields. You can modify these content objects according to your business needs.

[Table 97](#) lists each content object, the primary business object on which it is based, and its primary business component.

Table 97. Prebuilt Content Objects

Content Object	Business Object	Primary Business Component
Catalog Content Object	Product Catalog (Content Management)	Product Catalog
Catalog Category Content Object	Catalog Category (Content Management)	Catalog Category Admin
ContentBase Content Asset Content Object	ContentBase Asset EAI	ContentBase Asset (Content Management)
ContentBase Content Set Content Object	ContentBase Content Set EAI	ContentBase Content Set (Content Management)
ContentBase Content Type Content Object	ContentBase Content Type EAI	ContentBase Content Type (Content Management)
ERM Group News Item Content Object	ERM Group News Item EAI	ERM Group News Item EAI
Literature Content Object	Admin Sales Tool (Content Management)	Admin Sales Tool
Microsite Management Page Content Object	ePortal MM Page EAI	ePortal MM Page EAI

Table 97. Prebuilt Content Objects

Content Object	Business Object	Primary Business Component
Microsite Management Page Item Content Object	ePortal MM Page Item EAI	ePortal MM Page Item EAI
Price List Content Object	Price List (Content Management)	Price List
Product Content Object	Product Admin Definition (Content Management)	Internal Product
Product Class Content Object	XA Authoring Object	XA Class
Product Feature Content Object	Product Feature (Content Management)	Product Feature
Product Line Content Object	Admin Product Line (Content Management)	Admin Product Line
Resolution Item Content Object	Resolution Item	SR Resolution Item
Solution Content Object	Solution	Solution
Volume Discount Content Object	Volume Discount (Content Management)	Volume Discount

The tables below describe the data that is transferred for each business component that is included in the content object.

Catalog Content Object

Catalog is a prebuilt content object based on the business object Product Catalog (Content Management). [Table 98](#) lists the business components for the prebuilt content object Catalog.

Table 98. Prebuilt Content Object: Catalog

Business Components	Transferred Data	Links
Product Catalog	Catalog Information	Primary
Product Catalog Translation	Language Translations of Catalog Information	Product Catalog/Product Catalog Translation

Catalog Category Content Object

Catalog Category is a prebuilt content object based on the business object Catalog Category. [Table 99](#) lists the business components for the prebuilt content object Catalog Category.

Table 99. Prebuilt Content Object: Catalog Category

Business Components	Transferred Data	Links
Catalog Category	Catalog Category	Primary
Catalog Subcategory	Association relationships	Catalog Category/Catalog Subcategory
Internal Product	Association relationships	Catalog Category/Internal Product

ContentBase Content Asset Content Object

ContentBase Content Asset is a prebuilt content object based on the business object ContentBase Asset EAI. [Table 100](#) lists the business components for the prebuilt content object Content Asset.

Table 100. Prebuilt Content Object: ContentBase Content Asset

Business Components	Transferred Data	Links
ContentBase Asset (Content Management)	ContentBase Asset identity	Primary
ContentBase Asset (Content Management)_Access Group	ContentBase Access Group relationship	
ContentBase Asset (Content Management)_Current Version	ContentBase Asset current version identification	
ContentBase Version (Content Management)	Asset revision information	ContentBase Asset (Content Management)/ContentBase Version (Content Management)
ContentBase Data (Content Management)	Content stored in database repository	ContentBase Version (Content Management)/ContentBase Data (Content Management)
ContentBase Namespace Aliases (Content Management)	XML namespace information	ContentBase Version (Content Management)/ContentBase Namespace Aliases (Content Management)

Table 100. Prebuilt Content Object: ContentBase Content Asset

Business Components	Transferred Data	Links
ContentBase Version File Attachment (Content Management)	Content stored in file system	ContentBase Version (Content Management)/ContentBase Version File Attachment (Content Management)
ContentBase Version for Version Children	Asset version interrelations	ContentBase Asset (Content Management)/ContentBase Version for Version Children
ContentBase Ref (Content Management)	Links to other assets	ContentBase Version for Version Children/ContentBase Ref (Content Management)

ContentBase Content Set Content Object

ContentBase Content Set is a prebuilt content object based on the business object ContentBase Content Set EAI. [Table 101](#) lists the business components for the prebuilt content object ContentBase Content Set.

Table 101. Prebuilt Content Object: ContentBase Content Set

Business Components	Transferred Data	Links
ContentBase Content Set (Content Management)	Set identity	Primary
ContentBase Content Set (Content Management)_Pr. Asset	Home page identification	
ContentBase Asset (Content Management)	Asset identity	ContentBase Content Set (Content Management)/ContentBase Asset (Content Management)
ContentBase Asset (Content Management)_Access Group	ContentBase Access Group relationship	
ContentBase Asset (Content Management)_Current Version	ContentBase Asset current version identification	
ContentBase Version (Content Management)	Asset revision information	ContentBase Asset (Content Management)/ContentBase Version (Content Management)

Table 101. Prebuilt Content Object: ContentBase Content Set

Business Components	Transferred Data	Links
ContentBase Data (Content Management)	Content stored in database repository	ContentBase Version (Content Management)/ContentBase Data (Content Management)
ContentBase Namespace Aliases (Content Management)	XML namespace information	ContentBase Version (Content Management)/ContentBase Namespace Aliases (Content Management)
ContentBase Version File Attachment (Content Management)	Content stored in file system	ContentBase Version (Content Management)/ContentBase Version File Attachment (Content Management)
ContentBase Version for Version Children	Asset version interrelations	ContentBase Content Set (Content Management)/ContentBase Version for Version Children
ContentBase Ref (Content Management)	Links to other assets	ContentBase Version for Version Children/ContentBase Ref (Content Management)

ContentBase Content Type Content Object

ContentBase Content Type is a prebuilt content object based on the business object ContentBase Content Type EAI. [Table 102](#) lists the business components for the prebuilt content object ContentBase Content Type.

Table 102. Prebuilt Content Object: ContentBase Content Type

Business Components	Transferred Data	Links
ContentBase Content Type (Content Management)	ContentBase Asset data type	Primary
ContentBase DocType (Content Management)	SGML document type	ContentBase Content Type (Content Management)/ContentBase DocType (Content Management)
ContentBase Namespace (Content Management)	XML namespace information	ContentBase Content Type (Content Management)/ContentBase Namespace (Content Management)
ContentBase NS Node Type (Content Management)	Namespace node information	ContentBase Namespace (Content Management)/ContentBase NS Node Type (Content Management)

ERM Group News Item Content Object

ERM Group News Item is a prebuilt content object based on the business object ERM Group News Item EAI. [Table 103](#) lists the business components for the prebuilt content object ERM Group News Item.

Table 103. Prebuilt Content Object: ERM Group News Item

Business Components	Transferred Data	Links
ERM Group News Item EAI	News Item identity, content references	Primary
ERM Group News Content Path EAI	Publication stages for news item	ERM Group News Item EAI/ERM Group News Content Path EAI
ERM Group News Content Path Stages EAI	Publication stage details	ERM Group News Content Path EAI/ERM Group News Content Path Stages EAI
ERM Group News Position EAI	Publication approvers for news item	ERM Group News Content Path EAI/ERM Group News Position EAI
Access Group	Contentbase Asset access groups	ContentBase Asset (Content Management)/Access Group
ERM Group News Access Group Member EAI	Group News access group information	Access Group/ERM Group News Access Group Member EAI
ContentBase Content Set (Content Management)	Set identity	ERM Group News Item EAI/ContentBase Content Set (Content Management)
ContentBase Content Set (Content Management)_Pr. Asset	Home page identification	
ContentBase Asset (Content Management)	Asset identity	ContentBase Content Set (Content Management)/ContentBase Asset (Content Management)
ContentBase Asset (Content Management)_Access Group	ContentBase Access Group relationship	
ContentBase Asset (Content Management)_Current Version	ContentBase Asset current version identification	
ContentBase Version (Content Management)	Asset revision information	ContentBase Asset (Content Management)/ContentBase Version (Content Management)

Table 103. Prebuilt Content Object: ERM Group News Item

Business Components	Transferred Data	Links
ContentBase Data (Content Management)	Content stored in database repository	ContentBase Version (Content Management)/ContentBase Data (Content Management)
ContentBase Namespace Aliases (Content Management)	XML namespace information	ContentBase Version (Content Management)/ContentBase Namespace Aliases (Content Management)
ContentBase Version File Attachment (Content Management)	Content stored in file system	ContentBase Version (Content Management)/ContentBase Version File Attachment (Content Management)
ContentBase Version for Version Children	Asset version interrelations	ContentBase Content Set (Content Management)/ContentBase Version for Version Children
ContentBase Ref (Content Management)	Links to other assets	ContentBase Version for Version Children/ContentBase Ref (Content Management)

Literature Content Object

Literature is a prebuilt content object based on the business object Admin Sales Tool. [Table 104](#) lists the business components for the prebuilt content object Literature.

Table 104. Prebuilt Content Object: Literature

Business Components	Transferred Data	Links
Admin Sales Tool	Literature record and associated files	Primary
Literature Item	Detailed relationships	Admin Sales Tool/Literature Item
Literature Component Item	Association relationships	Literature Item/Literature Component Item - Admin

Microsite Management Page Content Object

Microsite Management Page is a prebuilt content object based on the business object ePortal MM Page EAI. [Table 105](#) lists the business components for the prebuilt content object Microsite Management Page.

Views associated with this content object are:

- Add/Edit - ePortal MM Page Administration

■ Preview - ePortal MM Page Designer View

Table 105. Prebuilt Content Object: Microsite Management Page

Business Components	Transferred Data	Links
EPortal MM Page EAI	Page identity	Primary
ePortal MM Page Section EAI	Page layout information	ePortal MM Page EAI/ePortal MM Page Section EAI
ePortal MM Page Item EAI	Page Item display information	ePortal MM Page Section EAI/ePortal MM Page Item EAI
ContentBase Content Set (Content Management)	Set identity	ePortal MM Page EAI/ContentBase Content Set (Content Management)
ContentBase Content Set (Content Management)_Pr. Asset	Home page identification	
ContentBase Asset (Content Management)	Asset identity	ContentBase Content Set (Content Management)/ContentBase Asset (Content Management)
ContentBase Asset (Content Management)_Access Group	ContentBase Access Group relationship	
ContentBase Asset (Content Management)_Current Version	ContentBase Asset current version identification	
ContentBase Version (Content Management)	Asset revision information	ContentBase Asset (Content Management)/ContentBase Version (Content Management)
ContentBase Data (Content Management)	Content stored in database repository	ContentBase Version (Content Management)/ContentBase Data (Content Management)
ContentBase Namespace Aliases (Content Management)	XML namespace information	ContentBase Version (Content Management)/ContentBase Namespace Aliases (Content Management)
ContentBase Version File Attachment (Content Management)	Content stored in file system	ContentBase Version (Content Management)/ContentBase Version File Attachment (Content Management)

Table 105. Prebuilt Content Object: Microsite Management Page

Business Components	Transferred Data	Links
ContentBase Version for Version Children	Asset version interrelations	ContentBase Content Set (Content Management)/ContentBase Version for Version Children
ContentBase Ref (Content Management)	Links to other assets	ContentBase Version for Version Children/ContentBase Ref (Content Management)

Microsite Management Page Item Content Object

Microsite Management Page Item is a prebuilt content object based on the business object ePortal MM Page Item EAI. [Table 106](#) lists the business components for the prebuilt content object Microsite Management Page Item.

Views associated with this content object are:

- Add/Edit - ePortal MM Page Administration
- Preview - ePortal MM Page Designer View

Table 106. Prebuilt Content Object: Microsite Management Page Item

Business Components	Transferred Data	Links
ePortal MM Page Item EAI	Page Item display information and asset link	Primary
ContentBase Asset (Content Management)	Asset identity	ePortal MM Page Item EAI/ContentBase Asset (Content Management)
ContentBase Asset (Content Management)_Access Group	ContentBase Access Group relationship	
ContentBase Asset (Content Management)_Current Version	ContentBase Asset current version identification	
ContentBase Version (Content Management)	Asset revision information	ContentBase Asset (Content Management)/ContentBase Version (Content Management)
ContentBase Data (Content Management)	Content stored in database repository	ContentBase Version (Content Management)/ContentBase Data (Content Management)

Table 106. Prebuilt Content Object: Microsite Management Page Item

Business Components	Transferred Data	Links
ContentBase Namespace Aliases (Content Management)	XML namespace information	ContentBase Version (Content Management)/ContentBase Namespace Aliases (Content Management)
ContentBase Version File Attachment (Content Management)	Content stored in file system	ContentBase Version (Content Management)/ContentBase Version File Attachment (Content Management)
ContentBase Version for Version Children	Asset version interrelations	ContentBase Asset (Content Management)/ContentBase Version for Version Children
ContentBase Ref (Content Management)	Links to other assets	ContentBase Version for Version Children/ContentBase Ref (Content Management)

Price List Content Object

Price List is a prebuilt content object based on the business object Price List. [Table 107](#) lists the business components for the prebuilt content object Price List.

Table 107. Prebuilt Content Object: Price List

Business Components	Transferred Data	Links
Price List	Price List Association relationships to Organizations	Primary

Product Content Object

Product is a prebuilt content object based on the business object Product Admin Definition. [Table 108](#) lists the business components for the prebuilt content object Product.

Table 108. Prebuilt Content Object: Product

Business Components	Transferred Data	Links
Internal Product	Internal Product	Primary
Admin Product Definition (Content Management)	Association relationships Defined in the intersection table: Rank column; Value column	Internal Product/Admin Product Comparison - Admin (Content Management)

Table 108. Prebuilt Content Object: Product

Business Components	Transferred Data	Links
Component Product	Association relationships Defined in the intersection table: Relation Type	Internal Product/Component Product - Admin
FS Inventory Options	Association relationships	Internal Product/FS Inventory Options
FS Product Measurement Characteristics	Association relationships	Internal Product/FS Product Measurement Characteristics
Internal Product Sales Tool	Association relationships	Internal Product/Internal Product Sales Tool - Admin
Key Feature	Association relationships	Internal Product/Key Feature - Admin
Price List	Association relationships Defined in the intersection table: some columns	Internal Product/Price List - Admin

Product Class Content Object

Product Class is a prebuilt content object based on the business object XA Authoring Object.

[Table 109](#) lists the business components for the prebuilt content object Product Class.

Table 109. Prebuilt Content Object: Product Class

Business Components	Transferred Data	Links
XA Class	Product Class	Primary
XA Class Translation	Product Class Language Translations	XA Class/XA Class Translation
XA Attribute	Product Class Child Attributes	XA Class/XA Attribute
XA Attribute Translation	Product Class Child Attribute Language Translations	XA Attribute/XA Attribute Translation

Product Feature Content Object

Product Feature is a prebuilt content object based on the business object Product Feature (Content Management). [Table 110](#) lists the business components for the prebuilt content object Product Feature.

Table 110. Prebuilt Content Object: Product Feature

Business Components	Transferred Data	Links
Product Feature	Product Feature	Primary
Product Feature_Product Line	Association of Features to Product Line	N/A

Product Line Content Object

Product Line is a prebuilt content object based on the business object Admin Product Line (Content Management). [Table 111](#) lists the business components for the prebuilt content object Product Line.

Table 111. Prebuilt Content Object: Product Line

Business Components	Transferred Data	Links
Admin Product Line	Product Line	Primary
Admin Product Line_Position	Association to Position	N/A

Resolution Item Content Object

Resolution Item is a prebuilt content object based on the business object Resolution Item. [Table 112](#) lists the business components for the prebuilt content object Resolution Item.

Table 112. Prebuilt Content Object: Resolution Item

Business Components	Transferred Data	Links
SR Resolution Item	Resolution Item	Primary
Solution	Association relationships	SR Resolution Item/Solution

Solution Content Object

Solution is a prebuilt content object based on the business object Solution. [Table 113](#) lists the business components for the prebuilt content object Solution.

Table 113. Prebuilt Content Object: Solution

Business Components	Transferred Data	Links
Solution	Solution	Primary
Related Solution	Association relationships	Solution/Related Solution
SR Resolution Item	Association relationships	Solution/SR Resolution Item

Volume Discount Content Object

Volume Discount is a prebuilt content object based on the business object Volume Discount. [Table 114](#) lists the business components for the prebuilt content object Volume Discount.

Table 114. Prebuilt Content Object: Volume Discount

Business Components	Transferred Data	Links
Volume Discount	Volume Discount	Primary
Volume Discount Item	Detailed relationships	Volume Discount/Volume Discount Item - Admin (This link has no restriction on insert/update.)
Price List	Association relationships Defined in the intersection table: some columns	Internal Product/Price List - Admin

Content Project Business Service

The Content Project business service allows clients to perform various operations on Siebel Content Projects. Business service scripts, workflow-driven services, and business components can call the Content Project business service methods to manipulate Content Projects. It can be used to start and publish a content project and to add, delete, and update a content project or a content item.

AddContentItem Method

This method adds a content item to the specified project. First it searches the project in the Content Project business component, and then it searches content type name, pick applet, picklist name, and source field name in the Content Type business component.

Table 115 lists the arguments for the AddContentItem method.

Table 115. Arguments for the AddContentItem Method

Argument	Type	Description	Required
ProjectId	Input	The project ID to add a content item	X
ItemName	Input	The item name to add	X
ItemAction	Input	The action for item to perform	X
ItemDescription	Input	The description for the item	
ItemTypeId	Input	Type ID for the item	X
ItemReference	Input	The reference for the item	
ItemId	Output	The item ID for the added item	

AddProject Method

This method creates a new content project.

Table 116 lists the arguments for the AddProject method.

Table 116. Arguments for the AddProject Method

Argument	Type	Description	Required
ProjName	Input	The project name to create	X
ProjectDescription	Input	The description for the project	
ProjectOwnerId	Input	The owner ID for the project	
ProjectPlanPublicationDate	Input	The planning publication date for the project	
ProjectPublicationWorkflowId	Input	The publication workflow ID for the project	
ProjectId	Output	The project ID for the created project	

Export Method

If Connect String is not empty, this method exports the project from the staging environment to the production environment. If Connect String is empty and Export Directory is not empty, the method exports the project to the export directory. The method fails if both Connect String and Export Directory are empty.

Table 117 lists the arguments for the Export method.

Table 117. Arguments for the Export Method

Argument	Type	Description	Required
Content Project Id	Input	The project ID to export	X
Connect String	Input	Connect string to export	
Export Directory	Input	The directory to export	

Import Method

This method imports a project which has been exported using Export method.

Table 118 lists the arguments for the Import method.

Table 118. Arguments for the Import Method

Argument	Type	Description	Required
Content Project Id	Input	The project ID to import into	X
Export Directory	Input	The directory containing the export project	

PublishProject Method

This method publishes the project by calling the methods RequestPublish and Publish of Content Project business component. If SynchronousIndicator="N", the method calls the RequestPublish method. Otherwise, it calls the Publish method.

Table 119 lists the arguments for the PublishProject method.

Table 119. Arguments for the PublishProject Method

Argument	Type	Description	Required
ProjectId	Input	The project ID to publish	X
SynchronousIndicator	Input	Indicator for sync (Y or N; default is Y)	

RemoveContentItem Method

This method removes a content item. If ItemId is provided, ProjectId and ItemName are not necessary. Otherwise, ProjectId and ItemName are required.

Table 120 lists the arguments for the RemoveContentItem method.

Table 120. Arguments for the RemoveContentItem Method

Argument	Type	Description
ProjectId	Input	The project ID from which the content item is removed
ItemName	Input	The item name to remove
ItemId	Input	The item ID to remove

RemoveProject Method

This method removes a content project.

Table 121 lists the arguments for the RemoveProject method.

Table 121. Arguments for the RemoveProject Method

Argument	Type	Description	Required
ProjectId	Input	The project ID to remove	X

StartProject Method

This method starts the project by calling the methods RequestStartProject and StartProject of the Content Project business component. If SynchronousIndicator = "N", the method calls the RequestStartProject method. Otherwise, the method calls the StartProject method.

Table 122 lists the arguments for the StartProject method.

Table 122. Arguments for the StartProject Method

Argument	Type	Description	Required
ProjectId	Input	The project ID to start	X
SynchronousIndicator	Input	Indicator for sync (Y or N; default is Y)	

UpdateContentItem Method

This method updates a content item. If ItemId is provided, ProjectId and ItemName are not necessary and the item name can be updated. Otherwise, ProjectId and ItemName are required. If ItemTypeId is provided, the method searches content type name, pick applet, picklist name, and source field name in Content Type business component.

Table 123 lists the arguments for the UpdateContentItem method.

Table 123. Arguments for the UpdateContentItem Method

Argument	Type	Description
ProjectId	Input	The project ID where update the content item
ItemName	Input	The item name to update
ItemId	Input	The item ID to update
ItemAction	Input	The action for item to update
ItemDescription	Input	The description to update
ItemTypeId	Input	Type ID to update
ItemReference	Input	The reference to update
ItemStatus	Input	The item status to update

UpdateProject Method

This method updates a content project.

Table 124 lists the arguments for the UpdateProject method.

Table 124. Arguments for the UpdateProject Method

Argument	Type	Description	Required
ProjectId	Input	The project ID for updating	X
ProjName	Input	The project name to update	
ProjectDescription	Input	The description to update	
ProjectOwnerId	Input	The owner ID to update	
ProjectPlanPublicationDate	Input	The planning publication date to update	
ProjectPublicationWorkflowId	Input	The publication workflow ID to update	

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